

New York State Department of Civil Service
DIVISION OF CLASSIFICATION & COMPENSATION

Occ. Code 2279100

Retirement Systems Information Representative 1, Grade 18	2279100
Retirement Systems Information Representative 2, Grade 20	2279200
Retirement Systems Information Representative 3, Grade 23	2279300

Brief Description of Class Series

Retirement Systems Information Representatives disseminate retirement information to individual members of the New York State and Local Retirement Systems and the New York State Teachers' Retirement System, their beneficiaries, their employers, and the employee or retiree organizations that represent their interests. They resolve issues and answer questions from members and retirees at the Systems' headquarters in Albany or at field consultation sites or regional centers throughout New York State.

Positions in this title series are only classified at the New York State Office of the State Comptroller, and the New York State Teachers' Retirement System.

Distinguishing Characteristics

Retirement Systems Information Representative 1: entry-level; conducts consultations with members; develops informational materials; participates in or conducts seminars; and responds to inquiries from employers and active or retired members.

Retirement Systems Information Representative 2: first supervisory level; supervises and mentors Retirement Systems Information Representatives 1 and clerical staff; guides program and process improvements.

Retirement Systems Information Representative 3: second-level supervisor; at OSC, manages a New York State and Local Retirement Systems Regional Information Office, and supervises Retirement Systems Information Representatives, and clerical staff; at Teachers' Retirement System, have broad supervisory and cross-functional responsibilities at headquarters in Albany.

Related Classes

Employees Retirement System Examiners (ERSE) process and maintain member, retiree, and employer applications and information in the New York State and

Local Retirement System. The positions prepare, understand, and interpret Retirement System written materials and benefit calculations, and communicate benefit information to system members.

Teachers' Retirement Examiners determine membership eligibility and calculate benefit amounts paid to Teachers' Retirement System members and claimants.

Illustrative Tasks

Retirement Systems Information Representative 1: provides information on retirement plans, policies, and procedures, in person or in response to incoming telephone inquiries; provides consultation services in person and over the phone; plans and conducts seminars for employers or members of the retirement system; develops retirement information booklets, brochures, and newsletters; gathers information to use in the development of training materials for employers; assists employers with reporting requirement questions, including file development, step-by-step training, and coaching; provides feedback to supervisors on suggestions received from system members, pensioners, and employers; researches proposed legislation; assists staff with escalated calls; and may supervise call center staff.

Retirement Systems Information Representative 2: develops plans to reach specific members of employer and employee groups on retirement topics; provides information for presentations, publications, and videos that are used to disseminate retirement information; schedules and delivers presentations for employers and employees regarding retirement services; conducts individual consultations at System headquarters, field sites, and conventions; supervises Retirement Systems Information Representatives 1 and clerical staff; reviews phone calls, written correspondence, presentations, and appointments for quality assurance; handles escalated calls or inquiries; supervises staff assigned to the call center and handles escalated calls; develops and administers training for employees; provides technical oversight, guidance and mentoring on the application of retirement law for more complex retirement matters; and assists in the development and implementation of electronic applications and other innovative techniques to improve the delivery of information to members.

Retirement Systems Information Representative 3: at OSC, oversees a New York State and Local Retirement Systems' Regional Information Center; supervises lower-level Information Representatives assigned to the region; identifies staffing and equipment necessary to maintain the Center; acts as the Retirement Systems' agent in dealing with building superintendents, rental agents, and building support staff; assists in preparing budget; organizes and conducts seminars and recommends programs targeted for employees within an assigned region; applies current retirement law and procedures as they relate to communications with members; and travels within the region to provide needed services at public and private facilities. Positions at the New York State Teachers' Retirement System manage and coordinate in-house consultations, video consultations, field consultations, benefit presentations, and all Call

Center activity; perform complex problem resolution; resolve staffing issues in light of competing and changing priorities; and conduct periodic meetings to discuss and resolve difficult individual retirement cases.

Minimum Qualifications

Retirement Systems Information Representative 1

Open Competitive: bachelor's degree and completion of a two-year traineeship.

Retirement Systems Information Representative 2

Promotion: one year of service as a Retirement Systems Information Representative 1.

Retirement Systems Information Representative 3

Promotion: One year of service as a Retirement Systems Information Representative 1 or 2.

Note: Classification Standards illustrate the nature, extent, and scope of duties and responsibilities of the classes they describe. Standards cannot and do not include all the work that might be appropriately performed by a class. The minimum qualifications above are those required for appointment at the time the Classification Standard was written. Please contact the Division of Staffing Services for current information on minimum requirements for appointment or examination.

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