

COMMONWEALTH OF PENNSYLVANIA  
invites applications for:



## Retirement Technician Trainee (Up to 2)

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**SALARY:** \$33,663.00 - \$50,230.00 Annually

**JOB TYPE:** Civil Service Permanent Full-Time

**DEPARTMENT:** State Employees' Retirement System

**LOCATION:** Dauphin County

**OPENING DATE:** 07/23/18

**CLOSING DATE:** 08/06/18 11:59 PM

**JOB CODE:** 09551

**POSITION NUMBER:** 00056801,00084857

**UNION:** AFSCME Master Agreement

**BARGAINING UNIT:** A1

**PAY GROUP:** ST04

**BUREAU/DIVISION CODE:** 2310

**BUREAU/DIVISION:** Benefit Determination Division

**WORKSITE ADDRESS:** 30 North Third Street

**CITY:** Harrisburg, PA

**ZIP CODE:** 17101

**CONTACT NAME:** Jim Ditty

**CONTACT PHONE:** 717.237.0395

**CONTACT EMAIL:** jameditty@pa.gov

### THE POSITION:



### GENERAL INFORMATION

This opportunity has been posted to both the internal job postings [page](#) and the commonwealth's main employment [page](#). If you are a current or former commonwealth employee, you may want to apply to both the internal posting (bid) and external posting (civil service list).

**Positions:** Up to 2 positions (#00056801 and #00084857) may be filled from this posting.

**Work Hours:** 8:00 am – 4:30 pm with one-hour meal period

**Supervisor:** Gwen Vares, Retirement Technician Supervisor

### **POSITION PURPOSE**

This position exists in support of SERS' mission to provide benefits and services through sound administration, and to do so as quickly and accurately as possible. This is accomplished by processing and verifying retirements, death benefits, and related transactions.

### **DESCRIPTION OF WORK:**

#### **ESSENTIAL FUNCTIONS**

- Process/verify retirements, death benefits, and related transactions
- Perform/verify basic mathematical calculations (add, subtract, divide, multiply) using a computer/spreadsheet/adding machine/calculator
- Compile and evaluate information
- Enter data, scan documents to, and upload information to SERIS and DAWPM
- Operate and use office equipment – e.g. computer, telephone, multifunction machine, copier, fax, scanner, fiche viewer, etc.
- Organize, file, and maintain information both electronically and in hardcopy
- Use job-required software, applications, systems, and sites – e.g. Outlook, Word, Excel, SAP, DAWPM, SERIS, PASSHE portal, legacy systems (PET), etc.
- Adapt to fluctuating workloads and priorities
- Communicate clearly and effectively both oral and written and maintain effective working relationships

#### **RESPONSIBILITIES**

NOTE: An individual working at the Retirement Technician Trainee level will participate in a one-year training program to learn position responsibilities. After successful completion of the training program, the employee will be promoted to Retirement Technician and become fully responsible for the duties listed below.

Review the following for accuracy, completeness, and compliance with predetermined procedural and legal guidelines.

- retirement annuity applications and documents
- annuitant death benefit documents
- annuitant installment payments
- annuitant excess earnings calculations
- annuitant social security integration refund requests

Research the member's history with SERS through SERIS, SAP, legacy screens (PET), DAWPM, and other appropriate sources, to determine entitlement eligibility for retirement or death benefit. Determine if the information being used to calculate service is current, complete, and correct.

Review records to ensure system data is consistent with historical documents from the member's work history as it applies to the benefit calculation. Research the member's earnings, service, contribution, interest, and/or annuity payment history.

Gather necessary background information from the member, employer-representatives, and/or survivor as needed.

Provide corrected data as needed in order to reconcile the processing system's record with the research results, so the benefit calculation will be correct.

Determine the appropriate method(s) – SERIS, manual calculation, worksheets, ect. – to use to make an efficient and accurate payment to the retiring member, beneficiary, or survivor annuitant.

Enter data to SERIS for payment processing.

Apply agency debts, arrears liabilities, and/or salary claims to the member's retirement account or death benefit as needed.

Establish installment payments for Option 4 withdrawals as needed, and provide related required minimum distribution calculations and correspondence when applicable.

Perform calculations and adjustments to determine appropriate retirement benefits, disability retirement benefits, and death benefits.

Prepare and store documentation appropriate to the transaction being completed.

Verify submitted paperwork, earnings data, service data, contributions and interest data, calculation method(s) used, data entry, calculation results, and documentation.

Prepare verified transactions for audit by Department of Treasury.

Respect confidentiality of members, annuitants, and beneficiaries in regard to personal, financial, and other information.

Communicate by telephone or in writing with members and/or their authorized representatives, SERS' Field Office and Central Office personnel, beneficiaries, authorized financial institutions, and authorized attorneys regarding the status of benefit payments and procedural or technical information relating to payment of benefits.

Performs related duties as required.

## **DECISION MAKING**

Work is performed under the general guidance of a supervisor. Employee is responsible for selecting cases of varying difficulty levels from work queues and managing personal workload to meet expectations of processing quantity and quality. Employee is expected to apply judgment and problem-solving skills, referencing appropriate job aids, processes, and policies, to complete cases, all of which differ slightly from one another.

Employee reviews member accounts and reconciles existing data to historical information found in member files. Employee identifies accounts requiring corrections and forwards these actions to a different work unit for processing.

Employee verifies processing actions completed by a coworker to identify discrepancies between personal calculations and those of the coworker. Employee collaborates with coworker - referencing information in job aids, processes, policies, and systems - to resolve differences. When employee and coworker are unable to resolve a discrepancy, the issue is escalated to the supervisor for resolution.

NOTE: An individual at the Retirement Technician Trainee level works under the close direction of the supervisor. Retirement Technician Trainees are expected to demonstrate continued progress and mastery of concepts and perform tasks with increasing independence as the training year progresses.

## **REQUIRED EXPERIENCE, TRAINING & ELIGIBILITY:**

### **MINIMUM EXPERIENCE AND TRAINING**

You must meet the minimum experience and training for the job title.

Three years of experience in advanced clerical or technical work which includes or is supplemented by either one year of experience applying basic computer skills and techniques or three (3) credits in computer basics and techniques; **or** Associate Degree that includes or is supplemented by three (3) credits of computer basics and techniques; **or** Any equivalent combination of education, experience, and training which includes one year of advanced clerical or technical work applying basic computer skills and techniques or three (3) credits of computer basics and techniques.

### **PA RESIDENCY**

Pennsylvania residence is required.

### **RECRUITMENT METHODS**

You must be eligible for selection in accordance with civil service rules. Applicants must meet one of the following methods to be considered for this vacancy.

- Civil Service Lists
- Transfer
- Reassignment
- Voluntary Demotion
- Reinstatement
- Promotion Without Exam (PWOE)
  - Promotion provisions are subject to the collective bargaining agreement or memorandum of understanding.

- o You must have or have held regular civil service status in one of the following classifications:
  - Clerk 2 (00120)
  - Clerk Typist 2 (00220)
  - Clerk Stenographer 2 (00420)
  - Data Analyst 1 (01310)
- o You must meet meritorious service criteria defined as (a) the absence of any discipline above the level of written reprimand during the 12 months preceding the closing date of this posting, and (b) the last due overall regular or probationary performance evaluation was satisfactory or higher.
- o You must meet seniority criteria defined as a minimum of one year in the next lower class(es) by the posting close date.

## APPLY

The following material must be submitted with the online application.

- Resume
- Employee performance review: most recent regular or probationary review or indicate that one is not available
- Letter (voluntary demotion only): indicate you will accept the appropriate reduction in pay

Applicants should apply online. Visit [www.employment.pa.gov](http://www.employment.pa.gov). Click on the Open Jobs tile. From the Menu in the upper left corner of the screen, select the PA Internal Job Postings link. Open the relevant job announcement and from within the announcement, click the green Apply button. Use the point of contact listed above if you are unable to apply online and require assistance with an alternate application method.

**Failure to comply with the above application requirements will eliminate you from consideration for this position.** Please use the contact information provided for assistance.

You can [track the status](#) of current SERS openings from the Jobs page of the SERS website.

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APPLICATIONS MAY BE FILED ONLINE AT:  
<http://www.employment.pa.gov>

Position #2018-20081  
RETIREMENT TECHNICIAN TRAINEE (UP TO 2)  
JD

OUR OFFICE IS LOCATED AT:  
613 North Street  
Harrisburg, PA 17120

[jobs@pa.gov](mailto:jobs@pa.gov)

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