

COMMONWEALTH OF PENNSYLVANIA  
invites applications for:



## Retirement Technician Trainee

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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:** 00201588

**UNION:** AFSCME Master Agreement

**BARGAINING UNIT:** A1

**PAY GROUP:** ST04

**BUREAU/DIVISION CODE:** 2200

**BUREAU/DIVISION:** Bureau of Member Services

**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).

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

**Supervisor:** Cindy Semic, Retirement Technician Supervisor

## **POSITION PURPOSE**

This position performs technical duties in support of the Retired Employee Health Program (REHP) with an emphasis on upholding the agency's guiding principle of focusing on customer service. This position performs functions in support of REHP-covered employers under the governor's jurisdiction as well as completing healthcare deductions for non-REHP-covered employers which are the PA Senate, PA House of Representatives, Judiciary, PA State System of Higher Education (PASSHE), Delaware River Port Authority (DRPA), PA State Police, and PA Turnpike Commission.

This position is responsible for establishing and ongoing maintenance of retirement health insurance accounts in accordance with REHP provisions. This position provides detailed information via the State Employee Retirement Information System (SERIS) to establish an accurate retiree healthcare record for ongoing demographic and financial maintenance. Account maintenance includes, but is not limited to processing enrollments and changes and calculating and adjusting healthcare deductions.

This position is responsible for communicating detailed and comprehensive retirement health benefits information to commonwealth employers, SERS' personnel, annuitants, dependents, and survivor spouses.

The position serves as a liaison for the resolution of health insurance coverage and health insurance premium issues between annuitants, dependents, survivor spouses, the Governor's Office of Administration (OA), and the Pennsylvania Employee Benefit Trust Fund (PEBTF).

## **DESCRIPTION OF WORK:**

### **ESSENTIAL FUNCTIONS**

- Provide accurate information to establish retiree healthcare profile in SERIS
- Process REHP enrollments & changes
- Perform basic math (add, subtract, divide, multiply) to calculate healthcare deductions, debts, & refunds using computer, spreadsheet, calculator
- Provide comprehensive health coverage information & communicate effectively – verbally and in writing
- Serve as a liaison between interested parties for the resolution of health insurance coverage & health insurance premium issues
- Compile REHP data
- Organize, file, & maintain information both electronically & in hardcopy
- Use job-required equipment, software, applications, systems, & sites – e.g. computer, phone, fax, scanner, printer, PEBTF portal, DAWPM, SERIS, etc
- Adapt to fluctuating workloads & priorities

### **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.

Advises REHP members on the provisions, rules, and regulations governing REHP coverage and costs. Also responds to inquiries about the impact of Medicare enrollment on REHP coverage and costs.

Provides technical advice and guidance to members and counselors in verifying various requirements for REHP and completion of REHP initial enrollment forms in connection with the open enrollment process, coverage change, and ACT 183 (survivor spouse) forms.

Determines ongoing REHP eligibility, including eligibility of domestic partners, discontinued disability, Medicare requirements, and survivor spouses.

Monitors the accuracy and completeness of REHP forms prior to dissemination to the PEBTF.

Processes retired member coverage changes.

Verifies member health insurance profiles on the health insurance screen of the State Employee Retirement Information System (SERIS) including member share of premium deductions to ensure correct application through systems.

Calculates insurance premiums, debts, and refunds for health insurance coverage and adjusts deductions from members' annuity checks accordingly. Reports changes to agency, PEBTF, treasury auditors, and

SERS-Office of Finance and Administration.

Assists in the resolution of retroactive adjustments resulting from collective bargaining agreement changes.

Calculates retroactive adjustments necessary to balance monthly healthcare accounts.

Provides survivor spouses with information necessary to enable them to make a decision on continuing REHP coverage after a retiree's death. Reviews and approves survivor spouse continuation applications for coverage to include establishing and modifying premium deductions and billing information.

Reviews health insurance enrollment forms for Medicare-eligible selection and processes accordingly.

Conducts audits of data and information to reconcile profiles of members between SERS and outside entities, such as PEBTF.

Serves as liaison with the PEBTF, the benefits and financial divisions of the Senate, State System of Higher Education (SSHE), House of Representatives, Delaware River Port Authority (DRPA), Turnpike Commission, PA State Police and the Judiciary.

Responds, verbally and in writing, to inquiries from individual members, legislature, members of the General Assembly constituents, and external entities.

Answers questions from the public, health care administrators, and legislative representatives on policies and procedures of REHP.

Attends meetings with PEBTF and the Office of Administration when necessary.

Reviews records to determine impacted population when policy modifications are considered or implemented.

Compiles statistical data and reports requested by the OA.

Identifies problems in coverage and resolution procedures.

Disseminates REHP information to the field office staff and counselors on a case-by-case basis.

Collaborates with regional office personnel on REHP-related matters and paperwork since inquiries and forms often first reach SERS through the regional offices.

Conducts detailed research on a case-by-case basis using internal information resources as well as external providers for resolution of coverage issues or claims disputes. Establishes appropriate financial arrangements and provides detailed explanations to all parties including the affected member.

Verifies accurate entry of health plan coverage codes when updated on SERIS reference tables.

Assists in the content and editing of current REHP information and spotlight articles on the SERS internet site.

Assists with training on health insurance topics for SERS personnel. Topics include ongoing retiree eligibility requirements, forms processing, standards, and accuracy.

Creates job aids, reference materials, and other tools for knowledge capture, to improve efficiencies, to mitigate errors, and to address new healthcare mandates.

Performs related duties as required.

## **DECISION MAKING**

Work is performed under the general guidance of a supervisor. Employee is expected to apply judgment and problem-solving skills, referencing appropriate job aids, processes, and policies to complete assignments. Employee monitors ongoing healthcare eligibility and the appropriate action needed to process and resolve healthcare issues on a case-by-case basis.

Day-to-day REHP tasks are performed independently. Employee seeks guidance from supervisor for unique or sensitive issues, ensuring that the supervisor has adequate background information on the issue.

The employee regularly interacts with annuitants, dependents, survivor spouses, employers, SERS'

personnel, the OA, and the PEBTF to provide information, respond to inquiries, and resolve coverage and insurance premium issues.

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.
  - 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)
  - 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.
  - 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 #2018-18763  
RETIREMENT TECHNICIAN TRAINEE  
JD

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

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

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