

COMMONWEALTH OF PENNSYLVANIA
invites applications for:



**SERS Retirement Counselor Trainee or SERS
Retirement Counselor (2 Positions)**

The Commonwealth of Pennsylvania is proud to be an equal opportunity employer supporting workplace diversity.

SALARY: \$41,956.00 - \$63,785.00 Annually
JOB TYPE: Civil Service Permanent Full-Time
DEPARTMENT: State Employees' Retirement System
LOCATION: Dauphin County
OPENING DATE: 12/21/17
CLOSING DATE: 01/04/18 11:59 PM
JOB CODE: 09501 and 09502
POSITION NUMBER: 00145113 and 00145115
UNION: Management
BARGAINING UNIT: A3
PAY GROUP: ST06
BUREAU/DIVISION CODE: 2270
BUREAU/DIVISION: Harrisburg Regional Counseling Center
WORKSITE ADDRESS: 30 North Third Street
CITY: Harrisburg, PA
ZIP CODE: 17101
CONTACT NAME: Katie Mathews
CONTACT PHONE: 717.783.8085
CONTACT EMAIL: kmathews@pa.gov

THE POSITION:



GENERAL INFORMATION

- **Positions:** Up to two positions (00145113 and 00145115) may be filled from this posting.
- **Work schedule:** 8:00 a.m. - 4:30 p.m.

- **Supervisor:** Joseph Fleming, SERS Regional Manager

The pay scale group for a SERS RETIREMENT COUNSELOR TRAINEE is ST06 (\$41,956-\$63,785). All applicants, except as noted, will be evaluated and considered for appointment at the trainee level.

The pay scale group for a SERS RETIREMENT COUNSELOR is ST07 (\$47,883-\$72,822). SERS is limiting appointment at the working level to current or former SERS Retirement Counselors.

POSITION PURPOSE

To provide counseling services for SERS members residing in the area of the assigned regional office.

DESCRIPTION OF WORK:

ESSENTIAL FUNCTIONS

1. Provide info/assistance to members
2. Calc est retirement benefits for members
3. Give 1on1 counseling to retiring members
4. Conduct informal counseling programs
5. Help employees buy creditable services
6. Investigate employee/employer appeals
7. Serve as resource speaker when required
8. Travel to central/other regional offices
9. Conduct agency visits

RESPONSIBILITIES

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

Performs one-on-one counseling for retiring members regarding SERS retirement benefits and options.

Provides information and assistance to members as requested.

Calculates estimates of retirement benefits for members of the State Employees' Retirement System.

Plans and conducts visitations with members and/or state agencies for the purpose of providing counseling services, which includes traveling throughout the field office service region.

Assists members in the completion of disability retirement or vesting forms. Monitors the accuracy and completeness of retirement forms/packages.

Coordinate, schedule and conduct informational counseling programs as directed or needed. These programs include: pre-retirement seminars, question and answer sessions, new member briefings, vestee seminars and presentation of the SERS information program and general information about the Retired Employee Health Program (REHP). Coordinate with non-SERS speakers for program participation.

Counsels non-vested members as to the effect of withdrawing their contributions and assists in completing proper forms.

Counsels members on purchase of service including preparation of paperwork and explanation of purchase options.

Serves as liaison with Public School Employees' Retirement System for multiple service members.

Verify member's eligibility for coverage in the Retired Employees' Health Program (REHP) and assist with enrollment.

Perform clerical duties, as necessary, to ensure effective coverage of counseling center operations.

Serve as a resource speaker representing the State Employees' Retirement System.

Comply with agency policies regarding transaction reporting

Perform related duties as required.

DECISION MAKING

This position is afforded great independence under normal operations. Work is assigned through normal operations, except for assignments which are generated by the Regional Manager. Standards are developed by the Regional Manager in conjunction with the Director, Bureau of Member Services. Standards are reviewed semi-annually and adjustments are made accordingly. Work is also reviewed semi-annually and adjustments are made accordingly.

REQUIRED EXPERIENCE, TRAINING & ELIGIBILITY:

MINIMUM EXPERIENCE AND TRAINING

You must meet the minimum experience and training for the job title which are:

SERS Retirement Counselor Trainee: Four years of experience in a staff support position assisting with personnel administration, financial management or public relations work in a pension or retirement system or related occupational area; OR a Bachelor's Degree in Communications, Human Resources, Business Administration, Business Management, Psychology, Labor Relations or a related area; OR any equivalent combination of experience and training which includes at least three years of experience in a staff support position assisting with personnel administration, financial management or public relations work in a pension or retirement system or related occupational area, supplemented by 18 credit hours in communications, human resources, business administration, psychology, labor relations or related course work.

Certification as a Certified Employee Benefit Specialist such as issued by the International Foundation of Employee Benefit Plans is acceptable for one year of the required experience.

Certification as a Certified Financial Planner such as issued by the Central PA Society, Institute of Certified Financial Planners is acceptable for two years of the required experience.

SERS Retirement Counselor: Successful completion of a twelve month formalized training program as a SERS Retirement Counselor Trainee.

PA RESIDENCY

Pennsylvania residency 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:

1. Civil Service Lists
2. Transfer
3. Reassignment
4. Reinstatement
5. Voluntary Demotion
6. Promotion Without Exam (PWOE)
 - You must have or have held regular civil service status in one of the following classifications:
 - Human Resource Assistant 2
 - Retirement Technician
 - Administrative Assistant 1
 - Fiscal Technician Supervisory
 - Fiscal Technician
 - Unemployment Compensation Tax Technician

- 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.

Reminder: SERS is limiting appointment at the working level to current or former SERS Retirement Counselors. All others will be evaluated at the trainee level.

APPLY

The following materials must be submitted with the online application.

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

Applicants should apply online. Visit 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.

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

Position #I-2017-09347 & I-2017-09350
SERS RETIREMENT COUNSELOR TRAINEE OR SERS
RETIREMENT COUNSELOR (2 POSITIONS)
KM

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

jobs@pa.gov

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