

COMMONWEALTH OF PENNSYLVANIA
invites applications for:



SERS Retirement Counselor Trainee

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

SALARY: \$43,012.00 - \$65,389.00 Annually

JOB TYPE: Civil Service Permanent Full-Time

DEPARTMENT: State Employees' Retirement System

LOCATION: Centre County

OPENING DATE: 06/21/18

CLOSING DATE: 07/06/18 11:59 PM

JOB CODE: 09501

POSITION NUMBER: 00145104

UNION: Management

BARGAINING UNIT: A3

PAY GROUP: ST06

BUREAU/DIVISION CODE: 2260

BUREAU/DIVISION: State College Regional Counseling Center

WORKSITE ADDRESS: 2525 Green Tech Drive

WORKSITE ADDRESS: Suite AA

CITY: State College, PA

ZIP CODE: 16803

CONTACT NAME: Jim Ditty

CONTACT PHONE: 717.237.0395

CONTACT EMAIL: jameditty@pa.gov

THE POSITION:



GENERAL INFORMATION

Work Hours: 8:00 a.m. – 4:30 p.m. with one-hour meal period

Supervisor: Jennifer Perry, SERS Regional Manger

Salary: Stated salary range is as of July 1, 2018

POSITION PURPOSE

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

DESCRIPTION OF WORK:

ESSENTIAL FUNCTIONS

- Provide information/assistance to members
- Calculates estimates of retirement benefits for members
- Give one on one counseling to retiring members
- Conduct informal counseling programs
- Help employees buy creditable services
- Investigate employee/employer appeals
- Serve as resource speaker when required
- Travel to central/other regional offices
- 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 program, 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.

NOTE: An individual at the SERS Retirement Counselor Trainee level works under the close direction of the supervisor. SERS Retirement Counselor 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.

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.

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
- Reinstatement
- Promotion Without Exam (PWOE)
 - Promotion provisions are not 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:
 - Human Resource Assistant 2 (05630)
 - Retirement Technician (09552)
 - Administrative Assistant 1 (08210)
 - Fiscal Technician Supervisory (00730)
 - Fiscal Technician (00720)
 - Unemployment Compensation Tax Technician (06704)
 - 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. 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-2018-18570
SERS RETIREMENT COUNSELOR TRAINEE
JD

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

jobs@pa.gov

An Equal Opportunity Employer
