

**STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION**

**TRUST FUNDS SPECIALIST
CLASSIFICATION SERIES**

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to present and future professional positions located at the Department of Employee Trust Funds which function as Trust Funds Specialists. This classification specification is not intended to identify every duty that may be assigned to positions but is intended to serve as a framework for classification decision making in this occupational area.

Classification decisions must be based on the “best fit” of the duties within the existing classification structure. The “best fit” is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the classification concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards, or factors; statements of inclusion and exclusion; license or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification series encompasses professional positions located at the Department of Employee Trust Funds that require specialized knowledge of the benefit programs administered by the agency. Positions allocated to this classification series spend the majority of their time providing complex and detailed benefit information, advice, and counsel to program participants and/or their dependents; performing adjudication activities and related case management of disability benefits involving complex medical issues and medical records; developing and presenting specialized benefits program training to participants, employers, and/or the general public, and/or leading the work of other benefits staff.

C. Exclusions

Excluded from this classification series are the following types of positions:

1. Positions which do not meet the statutory definition of professional employee, as defined in s. 111.81(15), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.

2. Positions which meet the statutory definitions of supervisor and/or management, as defined in s. 111.81(19) and (13), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
 3. Positions which are not located at the Department of Employee Trust Funds.
 4. Positions which perform paraprofessional benefit program work for a majority of the time and are more appropriately classified as Trust Funds Assistant 1, 2, or 3.
 5. All other positions which are more appropriately identified by other classification specifications.
- D. Entrance Into and Progression Through This Classification Series

Employees enter positions within this classification series by competitive examination. Competitive examination is required for advancement to the Trust Funds Specialist leadworker or field representative allocations.

II. DEFINITIONS

TRUST FUNDS SPECIALIST

This is the entry level for positions responsible for providing complex and detailed benefit information primarily to program participants and their dependents or beneficiaries. Positions either function as disability specialists or benefit specialists. The majority of time is spent providing face-to-face retirement planning sessions, responding to telephone inquiries and/or responding to written inquiries.

This includes analyzing records to determine benefit eligibility, calculating benefit estimates, and effectively communicating benefit options via telephone conversations, face-to-face meetings, and in writing. Positions at this level must develop in-depth knowledge of the Wisconsin Statutes and Administrative Codes relating to the benefits administered by Employee Trust Funds. Work is performed under close progressing to limited supervision.

TRUST FUNDS SPECIALIST – OBJECTIVE

This is the objective level for benefit specialists who provide complex and detailed benefit information primarily to program participants and their dependents or beneficiaries. Positions at this level have gained in-depth knowledge of the various benefits administered by the Department to determine the appropriate course of action and to provide detailed information so that participants can make informed decisions on their benefit options. This involves research and resolution of complex inquiries by analyzing and interpreting Wisconsin Statutes, Administrative Code, and departmental policies and procedures. Work is performed under general supervision.

TRUST FUNDS SPECIALIST – ADVANCED

Positions at the advanced level function as: (1) a group retirement presenter and field representative developing and providing a wide variety of benefit information services primarily to participants and other interested parties. When position is not involved in group or field presentations, the position is providing complex and detailed information to participants in the office as described in the objective allocation above; (2) a Media site webcast developer and presenter for benefit presentations; (3) the leadworker in a section who provides technical and or administrative assistance to the section's

supervisor, including the development and delivery of staff training; or (4) an advanced specialist who has developed extensive knowledge and in-depth proficiency in resolution of the most complex and precedent-setting problems including policy. Employees at this level frequently participate in development of benefit policy and provide input on administrative rules. Work is performed under general supervision.

III. QUALIFICATIONS

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

IV. ADMINISTRATIVE INFORMATION

This classification series was created effective August 13, 1989, and announced in Bulletin CC-202, in order to describe positions which perform professional benefit program work which requires a specialized knowledge of the benefit programs administered by the Department of Employee Trust Funds. This classification series was modified effective June 4, 2000, and announced in Bulletin CLR/SC-114, in order to recognize the increased complexity of the agency's benefit programs and to reformat the specification.

This classification series was collapsed and created effective May 18, 2003 and announced in Bulletin MRS-SC-158 as a result of the WPEC Broadbanding and Class Collapsing Study.

This classification series was modified effective April 2, 2006 and announced in Bulletin OSER-0091-MRS-SC to reflect the change in the class title of the Trust Funds Specialist 3 to Trust Funds Specialist Advanced and the modification of the job duties performed at both the objective and advanced levels.

This classification series was modified effective October 12, 2008 and announced in Bulletin OSER-0224-MRS-SC to reflect the addition of the Trust Funds Specialist – Objective level within the series.

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