

Effective Date: August 13, 1989
Modified Effective: May 21, 2000
Modified Effective: April 3, 2005
Modified Effective: May 6, 2012

**STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION**

**TRUST FUNDS ASSISTANT
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 paraprofessional positions located at the Department of Employee Trust Funds which function as Trust Funds Assistants. This classification specification is not intended to identify every duty which 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 positions located at the Department of Employee Trust Funds which perform paraprofessional work which requires specialized knowledge of the benefit programs administered by the agency. Positions allocated to this classification series spend the majority of their time analyzing, reviewing, and processing records and forms to determine benefit eligibility under statutory provisions; providing direction to employers and members (or their representatives) about benefit eligibility and coverage issues; and computing and determining benefit payments.

C. Exclusions

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

1. Positions which meet the statutory definitions of professional employee, supervisor, and management, as defined in s. 111.81(15), (19), and (13), Wis. Stats.
2. Positions which are not located at the Department of Employee Trust Funds.
3. Positions which perform professional benefit program work for a majority of the time and are more appropriately classified as Trust Funds Specialist.

4. All other positions which are more appropriately identified by other classification specifications.

D. Entrance Into and Progression Through This Series

Employees enter positions in this classification series by competition. Progression to the objective level is through reclassification, as the employee attains the specified training, education, or experience required to satisfactorily perform the work.

II. DEFINITIONS

TRUST FUNDS ASSISTANT 1

This is entry level paraprofessional employee benefit work at the Department of Employee Trust Funds. Positions allocated to this level perform a variety of progressively more difficult and complex duties which are intended to develop the necessary knowledge, skills, and abilities to progress to the next level. Work at this level is performed under close progressing to limited supervision.

TRUST FUNDS ASSISTANT 2

Positions at this level perform either:

(1) Full performance work under general supervision where the majority of the duties are paraprofessional in nature but are more limited in scope or complexity than those found at the next level. Examples of duties at this level include updating the Transaction Control System; the initial processing of death benefits; maintaining the appointment calendar and responding to general inquiries from participants. Work is performed under general supervision.

(2) Developmental level work where the work leads to full performance at the Trust Funds Assistant 3 level. Work is performed under close progressing to limited supervision.

TRUST FUNDS ASSISTANT 3

This is full performance level for most positions in this series. Examples of duties at this level include: performing complex retirement benefit computations; resolving complex retirement coverage or earnings issues; reviewing and processing retirement and insurance applications and/or insurance and retirement reports from employers; and reviewing beneficiary designations. Duties involve ongoing interpretations of statutes, rules, contracts, and policies, including old retirement laws, to determine the appropriate benefit. 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 paraprofessional work which requires specialized knowledge of the benefit programs administered by the Department of Employee Trust Funds. The classification

Trust Funds Assistant 1-3

specifications were modified effective May 21, 2000, and announced in Bulletin CLR/SC-112, in order to recognize the increased complexity of the agency's benefit programs and to re-format the specification.

This classification series was modified effective April 3, 2005 and announced in Bulletin OSER-0061-MRS-SC in order to reflect an expansion of the complex issues to also include insurance benefits. As a result, positions performing such work will have the opportunity to progress to the 3 level.

This classification series was modified effective May 6, 2012 and announced in Bulletin OSER-0305-MRS/SC as the result of a Personnel Management Classification Mini Survey in order to reflect an expansion of the complexity of the duties. Also as a result of the survey, the Trust Funds Assistant 1, 2 and 3 classifications are being upgraded one pay range to 02-12, 02-13 and 02-14.

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