



Kansas City Police Employees' Retirement Systems

Title: Benefits Specialist

Reports to: Benefits Supervisor

Summary of Position:

Will participate and assist in all aspects of membership transactions for active and retired members of the Police and Civilian Employees' Retirement Systems, including accurate maintenance of all related records. Must be able to progressively assume additional responsibilities in the management of member transactions and related records through demonstrated proficiency.

Essential Duties and Responsibilities:

1. Under minimal supervision, the Benefits Specialist must develop a thorough working knowledge of all retirement system benefits administration aspects, including:
 - Participation, member contributions, creditable service, vesting, refunds, benefit eligibility, retirement options, and optional and survivor benefits.
 - Provide customer assistance to retirement system members, both active and retired, by phone, email, virtually, and in person. Assist members in updating their personal and/or beneficiary information, including address changes, tax withholding changes, or direct deposit information.
 - Assist active members with requests for pension estimates, service purchase quotes, and optional benefit calculations, including PLOPs.
2. Conduct one-on-one counseling to active and retired members during the following:
 - The separation and/or retirement process by providing information, assisting with completing paperwork, and obtaining required documents.
 - Responsible for working with survivors of deceased members to determine benefit eligibility and calculations, assist with completing paperwork, and obtain required documents.
 - Responsible for continuous and frequent follow-up on all pending transactions (refunds, retirements, and deaths) to ensure that processing is completed promptly and according to schedules.
 - Assist in preparing worksheets necessary for processing benefit payment transactions, including refunds, retirements, and death benefits.

3. Responsible for data entry of all benefit payment transactions with the goal of attaining 100% accuracy.
4. Assist in maintaining retirement system databases and files, both electronic and hard copy.
5. Assist in reviewing annual tax reporting information related to benefit payments. When appropriate, provide tax-reporting assistance to retirement system members.
6. Assist in preparing and maintaining data and records related to active and retired members used by actuaries for annual GASB 67 & 68 statements, annual valuations, and experience studies.
7. Assist in crafting member communications, managing social media and web presence, and utilizing technical skills for report preparation.
8. Assist in preparing worksheets, financial reports, and work papers necessary for use and interpretation by coworkers, retirement system members and trustees, actuaries, and independent auditors.
9. Conduct in-house and job-site retirement benefit educational seminars.

This job description is not all-inclusive. The Benefits Specialist will provide support and/or serve as backup to other staff members as necessary and will perform other duties as requested.

Job Qualifications and Abilities:

- Each staff member is expected to treat retirement system coworkers and members respectfully and actively contribute to a professional, cooperative, and hospitable office environment.
- Considerable knowledge of principles and practices of governmental accounting, automated accounting systems, personal computers, and general office software applications.
- Ability to Communicate complex information both orally and in writing. Apply professional accounting and actuarial principles, knowledge, and skills to maintain fiscal and accounting records.
- Must have exceptional time management skills, meet deadlines, and coordinate workflow.
- Must be highly motivated and able to perform individually and as a team without constant supervision.
- Understand the organization and operations of the Fund and outside agencies as necessary to assume assigned responsibilities
- Interpret and explain the Fund's Administrative Rules, policies, and procedures.
- Identify and respond to member issues, concerns, and needs. Ability to recognize when escalation to supervisor is required.
- Comfortable and experienced in public speaking and seminar presentation
- Pension administration system or human resources/payroll experience is a plus.

Education: Graduation from an accredited four-year college or university with major coursework in human resources, business administration, accounting, or finance.

Experience: A minimum of two (2) years of professional experience with large-volume payroll, human resources, employee benefits, or pension administration is preferred.

Equipment and Software Directly Used: Networked personal computer with peripherals, fax machine, copy machine, and telephone: Microsoft Office software and other web-based systems.

Working Environment / Physical Activities: Office environment; exposure to computer screens; working closely with others. Essential and other important responsibilities and duties require maintaining the physical condition necessary for sitting for prolonged periods, lifting and carrying a minimum of 20 pounds, standing, reaching, bending, and kneeling.