



# COMMONWEALTH OF KENTUCKY JOB CLASS SPECIFICATION

## RETIREMENT SYSTEM COUNSELOR IV

Job Number: 21001304

Job Code: 37770V250816

Job Group: 3700 - INDUSTRIAL COMPENSATION & INSP

Job Established: 09/01/2016

Job Revised: 08/16/2025

Grade: 15 Salary (MIN - MID):

\$24,863-\$37,295 - Hourly

\$4,040.24-\$6,060.44 - 37.5 Hr. Monthly Salary

\$4,309.60-\$6,464.48 - 40 Hr. Monthly Salary

Special Entrance Rate:

NONE

NONE

NONE

### PROBATIONARY PERIOD:

This job has an initial and promotional probationary period of 6 months, except as provided in KRS 18A.111.

**CHARACTERISTICS OF THE JOB:** *Characteristics of a job are general statements indicating the level of responsibility and discretion of positions in that job classification. These are not intended to be an exhaustive list.*

Provides technical consultative services, within a specialized program area, to members, beneficiaries, and participating employers of the retirement systems while ensuring compliance with applicable federal and state laws and regulations. Performs duties such as processing complex account audits, benefit calculations, health insurance requests, and employment verifications. Resolves issues and provides expert testimony; and performs other duties as required.

### MINIMUM REQUIREMENTS:

#### **EDUCATION:**

Graduate of a college or university with a bachelor's degree.

#### **EXPERIENCE, TRAINING, OR SKILLS:**

Three years of retirement benefits experience.

#### **Substitute EDUCATION for EXPERIENCE:**

NONE

#### **Substitute EXPERIENCE for EDUCATION:**

Additional experience in public or business administration, accounting, wage and/or claims reporting, investigations or auditing will substitute for the education requirement on a year-for-year basis. Administrative and/or clerical experience in Kentucky Public Pensions Authority will substitute for the required education on a year-for-year basis.

#### **SPECIAL REQUIREMENTS (AGE, LICENSURE, REGULATION, ETC.):**

NONE

**EXAMPLES OF DUTIES OR RESPONSIBILITIES OF THE JOB CLASSIFICATION:** *Examples of duties or responsibilities are not to be construed as describing what the duties or responsibilities of any position shall be and are not to be construed as limiting the appointing authority's ability to assign, or otherwise alter the duties and responsibilities of a position. This is not intended to be an exhaustive list.*

Provides consultative services to members, beneficiaries, and participating employers of the retirement systems within a specialized program area. Resolves complex discrepancies. Interprets and communicates laws and procedures. Works directly with vendors in the resolution of issues and guides stakeholders on retirement benefits. Performs technical duties requiring extensive knowledge of current and past statutes, policies, and procedures in the application of the laws and regulations of a state-administered retirement system for participating agencies, staff, and members. Performs final audits of retired member accounts and determines adjustments in monthly retirement allowances. Coordinates retirement programs with state agencies or private vendors such as insurance companies that provide services to members. Audits agency and member records and adjusts records and benefits based on the audit, correcting salary, service, and contribution records ensuring compliance with laws governing retirement coverage. Provides technical assistance to consultants and counselors on cases involving the application of state and federal regulations and laws. Performs specialized consultative services to members of the retirement system staff. Reviews and personally handles the most complex accounts involving the application of special statutory provisions and reciprocity between state administered retirement systems. Provides assistance to retirement program managers including personnel, scheduling, and training. Recommends changes in processing and providing training as well as procedural improvements and changes in informational materials. Drafts and maintains procedures manuals for staff. Trains staff in all aspects of retirement benefits including the interpretation and application of retirement laws, regulations, and procedures. Assists on special projects. Researches and solves problems involving participation or service credit which requires review of employment and earning records and interpretation of current and past retirement laws. Reviews and responds to members and others by composing letters requiring detailed knowledge of statutes, policies, and regulations to members, beneficiaries, and state and local officials. Explains retirement system programs to non-participating agencies and their employees. Provides counseling services in the central office and at designated sites to members and beneficiaries concerning service retirement, disability retirement, medical insurance coverage, survivor benefits, and account management. Assists in determining impact of new retirement laws and assists in the implementation of changes. Prepares statistical and narrative reports and answers questionnaires from public and private agencies. Participates in and addresses pre-retirement conferences. Collects delinquent contributions from agencies and members. Receives, reviews, and processes applications for service retirement, disability retirement, survivor benefits, death benefits, and health insurance. Checks direct deposits and tax withholding forms, as well as address changes. Calculates and processes complex adjustment to retirement accounts. Checks cases and work prepared by other employees. Balances and processes payroll updates. Processes health insurance refunds from companies and handles/resolves complex insurance issues. Processes complex benefit calculation requests, account audits, health insurance enrollments and discrepancies, and pre and post-retirement audits. Corrects records in error. Processes max disability determinations and prepares affidavits for hearings. Responsible for ensuring accuracy of complex retirement calculations, health insurance calculations, payroll transactions and records through quality control process. Resolves complex retirement account issues, audits records, ensures compliance with statutes, and provides expert testimony on benefits policies. Recommends process and procedure improvements, provides guidance to lower-level counselors, trains stakeholders, and performs outreach and business interface system testing.

**UNIQUE PHYSICAL REQUIREMENTS:**

Any unique physical requirements necessary to perform the duties of a specific position will be listed on the individual position description, if applicable.

**TYPICAL WORKING CONDITIONS:** *Incumbents in the job will typically perform their job duties under these conditions.*

Work is typically performed in an office setting. Occasional travel may be required.

**ADDITIONAL REQUIREMENTS:**

Upon employment, employees in this job classification may be required to maintain a valid driver's license and may be required to drive a licensed vehicle. This status may be necessary for the length of time in this job classification. If this is necessary, it will be listed in the specific position description for the position at issue. Applicants and employees in this job classification may be required to submit to a drug- screening test and background check. Applicants and employees in positions which perform job duties that may require contact with offenders in the custody or supervision of the Department of Corrections or with youth in the care, custody, or supervision of the Department of Juvenile Justice must meet qualifications pursuant to the federal Prison Rape Elimination Act, 28 C.F.R.115.17 and 115.317.

*The Commonwealth of Kentucky does not discriminate on the basis of race, color, sex, disability, age, national origin, religion, sexual orientation, gender identity or expression, pregnancy or related medical condition, marital or familial status, ancestry, political affiliation, genetic information, or veteran status in accordance with state and federal laws.*