

JOB TITLE: CalSTRS Benefits Counselor

DESCRIPTION OF BASIC FUNCTION AND RESPONSIBILITY

Provides benefits counseling services to members for retirement, survivor, and disability programs.

JOB REQUIREMENTS AND QUALIFICATIONS

- High school diploma or G.E.D. equivalent.
- Possession of a valid California driver's license.
- One year of successful service in a position requiring knowledge, understanding, interpretation, and application of rules and procedures of CalSTRS desired.
- Ability to understand, interpret, and apply California State Teacher's Retirement System laws, policies, procedures, and member information.
- Knowledge of and familiarity with CalSTRS manuals, forms, and publications.
- Ability to speak in public.
- Ability to interview and counsel members.
- Skills to operate a computer.

EXAMPLES OF DUTIES

- Conducts individual, confidential interviews with CalSTRS members, beneficiaries, and benefit recipients, and provides accurate, clear, and concise written and oral explanations of information.
- Computes and explains benefits and the pertinent CalSTRS policies, procedures, and related service credit records, as those matters relate to an individual member's need and salary.
- Conducts workshops providing information about membership, benefits, and services available from CalSTRS.
- Compiles and submits reports in a timely manner.

- Attends initial and periodic training and informational meetings conducted by CalSTRS personnel and/or follow-up Benefits Counselor training.
- Schedules, coordinates, and provides workshops and interviews.
- Operates as a CalSTRS pension benefit resource for county and district superintendents upon their request.
- Conducts pension benefit workshops for CalSTRS members as needed.
- Contacts county and district superintendents or their representatives to schedule certificated employee interviews and workshops.
- Gathers pertinent member information prior to member interviews using microfiche, print, and data screen information.

SUPERVISION RECEIVED

Employees in this classification receive limited supervision within a framework of overall objectives.

SUPERVISION EXERCISED

None

PHYSICAL ACTIVITY REQUIREMENTS

Work Position (Percentage of Time):

Standing(15%) Walking(15%) Sitting(70%)

Body Movement (Frequency):

None (0) Limited (1) Occasional (2) Frequent (3) Very Frequent (4)

Lifting – lbs. (0-40) Lifting (2) Bending (3)

Pushing and/or Reaching Kneeling or

Pulling Loads (1) Overhead (2) Squatting (3)

Climbing Stairs (2) Climbing Ladders (0)