

DUTY STATEMENT

		EFFECTIVE DATE
BRANCH Benefits & Services		POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 435 - 5157 - 905
DIVISION/UNIT Disability & Survivor Benefits/ Survivor Benefits Production		CLASS TITLE Analyst I
INCUMBENT NAME Vacant		WORKING TITLE Survivor Benefits Production Analyst
CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship.		
Under the supervision of the Supervisor I, the Analyst I in Survivor Benefits performs a wide range of analytical duties while managing their own caseload of average difficulty and escalated cases to ensure the accurate and timely processing of benefits.		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.	
30%	ESSENTIAL FUNCTIONS Manage a personal caseload of SB cases while analyzing and solving problems. Verify, validate, and initiate ongoing monthly benefit payments to members, beneficiaries and payees. Record and track documents received. Review incoming documents and obtain additional information and/or documents when needed in a timely manner. Organize and prioritize all work and maintain the inventory database to ensure benefits are paid timely and appropriately. Gather, analyze data and draw logical conclusions to make sound decisions on cases. Respond to escalated issues with accurate and updated information while interpreting and applying the provisions of the Teachers' Retirement Law, and California State Teachers' Retirement System (CalSTRS) rules and policies. Provide support for all aspects of SB case processing from notification of death to payment authorization.	
25%	Serve as the primary resource to members, beneficiaries and/or their representatives during the benefit determination process. Maintain timely, professional, and consistent communication during the benefit determination process by phone, in writing, and/or in-person. Determine, interpret and provide clear explanations, both verbally and in writing, regarding CalSTRS laws and statutes and/or probate codes. Work in collaboration with other benefit areas and business areas outside the division. Effectively express facts and ideas in a group setting. Provide information to members and beneficiaries regarding SB issues either by phone, in writing, and/or in-person.	
25%	Research, review, and analyze facts to provide recommendations regarding benefits. Utilize the data to anticipate problems, difficulties, and consequences of change. Prepare reports, legal fact sheets and issue papers when needed. Document processes, procedures, and job aids.	
15%	Assist in the training of other SB caseworkers with regards to case management, payables, receivables, and other case processing issues. Assist and guide other SB caseworkers by providing viable recommendations regarding issues.	
5%	MARGINAL FUNCTIONS Testify at administrative hearings regarding survivor benefits issues.	
COMPETENCIES <u>Core Competencies.</u> All employees are responsible for understanding and demonstrating CalSTRS' core competencies: • Adaptability/Flexibility • Communication • Customer/Client Focus		

- Teamwork
- Work Standards/Quality Orientation

Classification Competencies. All employees are expected to understand and demonstrate their position's CalSTRS class competencies located in the [Competency Guide](#) on Central.

CONDUCT AND ATTENDANCE EXPECTATIONS

- Communicate effectively with individuals from varied experiences, perspectives and backgrounds
- Deal with individuals in a tactful, congenial, personable manner
- Must maintain consistent and regular attendance
- Adhere to CalSTRS policies and procedures
- Support and model CalSTRS Core Values

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Prolonged periods of standing or sitting
- Work in a high-rise building, in an open space environment
- Ability to use a computer several hours a day
- Ability to move up to 15 pounds
- Occasional overnight in state travel

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e. Sexual Harassment, EEO, etc.).

To be reviewed and signed by the supervisor and employee:

SUPERVISOR'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

EMPLOYEE'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT
- I AM ABLE TO PERFORM THE ESSENTIAL FUNCTIONS LISTED WITH OR WITHOUT REASONABLE ACCOMMODATION
- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED