



## BENEFIT PROGRAM SPECIALIST (CalPERS)

**Department:** California Public Employees' Retirement System

**Exam Code:** 9PACC

**Exam Type:** Departmental Open

**Location Spot:** Sacramento

### CLASSIFICATION DETAILS

#### Benefit Program Specialist (CalPERS)

- Range A: \$2,988.00 - \$3,740.00 per month
- Range B: \$3,211.00 - \$4,015.00 per month
- Range C: \$3,457.00 - \$4,333.00 per month

View the [classification specification](#) for the Benefit Program Specialist classification.

### CUT OFF DATE

**June 1, 2021**

**September 30, 2021**

**December 30, 2021**

**NOTE:** The exam unit will accept your request continuously throughout the year, however, the request received will be processed 30-days before the next administration.

### FILING INSTRUCTIONS

#### Final Filing Date:

Applications will be accepted on a continuous basis. (See the "Cut Off Dates" Section)

#### Who May Apply:

All applicants who meet the education and/or experience requirements as stated on this exam bulletin will be accepted into the examination for the administration cut-off date.

#### How to Apply:

Applicants must submit a signed [State Examination Application STD. 678](#) with any educational documents, if applicable, to the mailing address provided below. Completed applications with all required documents must be received or postmarked **by one of the cut-off dates**.

Applications are available through the internet at <https://jobs.ca.gov/pdf/STD678.pdf>

and may be delivered in person or by mail. Incomplete applications will not be accepted. Applications must include: "to" and "from" dates (month/day/year), hours worked, civil service class title(s), for all work experience and exam code. Resumes will not be accepted in lieu of a State Application (STD 678). Applications received without the required documents will result in rejection from this examination. Applications may be personally delivered between the hours of 8:00 a.m. and 5:00 p.m., Monday through Friday (except State holidays), to CalPERS Human Resources.

Applications postmarked or personally delivered after the cut-off date will be held and processed in the next exam administration. (Please see the "Cut Off Dates" Section)

**FILE-IN-PERSON/CERTIFIED MAIL:**

CalPERS  
Human Resources Division  
Exam Services Unit  
400 P Street, Room 3260, LPN  
Sacramento, CA 95811

**MAILING ADDRESS:**

CalPERS  
Human Resources Division  
Exam Services Unit  
P.O. Box 942718  
Sacramento, CA 94229-2718

**EMAIL:**

[HRSD Exam Svcs@CalPERS.CA.GOV](mailto:HRSD_Exam_Svcs@CalPERS.CA.GOV)

Your request form must be electronically signed if you wish to submit by email

**Special Testing:** If you require assistance or alternative testing arrangements due to a disability, please contact the testing department listed in the Contact Information section of this bulletin.

## POSITION DESCRIPTION

This is the entry, first working, and full journey level for the series. Initially, under close supervision, incumbents receive training and learn benefit programs, complete simple benefit calculations, and provide assistance to higher-level specialists. Incumbents continue to learn and perform a variety of technical duties involving the explanation and interpretation of regulations, policies, and benefits to members. Incumbents may complete the less complex benefit calculations, provide technical information to members concerning membership qualifications and benefits, provide technical information to employers, review technical documents for accuracy and completeness, and provide technical assistance to higher-level staff.

As skills are developed, incumbents perform more difficult and complex tasks associated with retirement calculations, interviewing members, and explaining and interpreting regulations, policies, and benefits. Incumbents are also responsible for expediting cases requiring special actions for timely payment of benefits; advising employers on membership qualifications and reports of contributions; preparing reports, correspondence, charts, and graphs; providing training to less experienced staff; contacting staff at various levels in other State and local public agencies, school officials, and members by telephone, personal contact, electronic media, or correspondence. Incumbents receive general supervision and the consequence of errors is significant. **All positions are located in Sacramento.**

## MINIMUM QUALIFICATIONS

All applicants must meet the education and/or experience requirements as stated on this examination announcement. Qualifying experience may be combined on a proportionate basis if the requirements stated below include more than one pattern and are distinguished as Either I, or II, or III, etc. For example, candidates who possess qualifying experience amounting to 50% of the required time of Pattern I, and additional examination as meeting 100% of the overall experience requirement.

### Either I

**Experience:** In the California state service, 12 months of experience in a class at a level of responsibility not less than that of an Office Assistant (Range A).

### Or II

**Experience:** Nine (9) months of experience as a seasonal clerk or equivalent working for the California Public Employees' Retirement System in a retirement, member services, health benefits, or field services setting. **And**

**Education:** Either equivalent to completion of the 12th grade or completion of a business school curriculum; or completion of a structured work experience training program. (One year of general clerical/office work experience may be substituted for the required education).

### Or III

**Experience:** One year of experience which must include responsibility for client-customer service contact involving the interpretation or explanation of policies, regulations or procedures, and/or resolving or adjusting customer accounts. This experience may have been gained in a governmental or private sector setting, for example, in an insurance office, financial institution, customer service center, or title company.

*(Academic education above the 12th grade may be substituted for one year of the required general experience on the basis of one year of general education being equivalent to six months of experience).*

**NOTE:** Your application will be rejected if you do not provide a copy of the required educational document transcript/degree which shows the completed college requirement at the time of filing the application.

**NOTE:** Your signature on your application indicates that you have read, understood, and possess the basic qualifications required.

## DEFINITION OF TERMS IN MINIMUM QUALIFICATIONS

The words “**duties of a class with a level of responsibility**” means that the applicant must have State civil service experience of appropriate type and length in a class at the same or higher level of responsibility as the class specified.

## EXAMINATION SCOPE

**This examination will consist of a written test, multiple choice, weighted 100%.**

This examination consists of the following components:

In addition to evaluating applicants' relative knowledge, skills, and ability, as demonstrated by quality and breadth of education and/or experience, emphasis in each exam component will be measuring competitively, relative job demands, and each applicant's:

### Knowledge of:

1. Rules, regulations, organization, and procedures of CalPERS.
2. Current office methods, technologies, and equipment.
3. Knowledge of the grammar, spelling, and punctuation of modern English usage.
4. Principles of mathematics.

### Ability to:

1. Perform less technical and administrative work.
2. Interpret, apply, and explain provisions of governmental rules, appropriate sections of the laws, regulations, and departmental procedures and policies.
3. Follow and give directions.
4. Evaluate situations quickly and accurately and take appropriate action.
5. Perform mathematical calculations with speed and accuracy.
6. Learn to utilize personal computer and software application in the performance of work.
7. Accurately and quickly enter data into a computerized database.
8. Read and write English at a level required for successful job performance.
9. Use tact and good judgment in communicating with the public and staff in person, over the telephone, in correspondence, or electronic mail.

## SPECIAL PERSONAL CHARACTERISTICS

Demonstrated capacity for good work habits such as punctuality, nearness, and dependability; willingness to do routine or detailed work in order to learn the practical application of laws, regulations, and policies; the ability to make successful progress in a prescribed training program; willingness and ability to accept increasing responsibility; and a customer service orientation.

## ELIGIBLE LIST INFORMATION

This Departmental open eligible list for the **BENEFIT PROGRAM SPECIALIST** classification will be established for **California Public Employees' Retirement System (CalPERS)**.

The names of **successful** competitors will be merged onto the eligible list in order of final score regardless of exam date. Eligibility expires **twelve (12) months** after the list established date. Applicants must then retake the examination to reestablish eligibility. **CalPERS vacant positions are located are in Sacramento.**

## VETERANS' PREFERENCE

Veterans' Preference will be granted for this examination. In accordance with Government Codes 18973.1 and 18973.5, whenever any veteran, or widow or widower of a veteran achieves a passing score on an open examination, he or she shall be ranked in the top rank of the resulting eligible list.

Veterans status is verified by the California Department of Human Resources (CalHR). Information on this program and [Veterans' Preference Application](#) (Std. form 1093) is available [online](#). Additional information on veteran benefits is available at the Department of Veterans Affairs.

## CAREER CREDIT

Career Credits **will not** be granted in this examination.

## EXAMINATION INFORMATION

This examination will consist of a written test, multiple choice, weighted 100%. To obtain a position on the eligible list, a minimum rating of 70% must be attained.

**Written Test Date:** Accepted applicants will receive a notice by mail approximately three weeks prior to the exam date with pertinent exam information.

**Once you have taken the written examination, you may not retake it for 12 months.**

## CONTACT INFORMATION

If you have any questions concerning this examination bulletin, including provision of reasonable accommodation for this testing process, please contact:

California Public Employees' Retirement System  
Exams Service Unit  
400 P Street, Room 3260, LPN  
Sacramento, CA 95811

**Email:** HRSD, Exam Services [HRSD\\_Exam\\_Svcs@CalPERS.CA.GOV](mailto:HRSD_Exam_Svcs@CalPERS.CA.GOV) or

**Phone:** (916) 795-2444

California Relay Service: (7-1-1)

Telecommunications Device for the Deaf (TTY) (916) 654-6336

TTY is a telecommunications device that is reachable only from phones equipped with a TTY device.

## PREPARING FOR THE EXAMINATION

Here is a list of suggested resources to have available prior to taking the exam.

**Employment History:** Employment dates, job titles, organization names and addresses, names of supervisors or persons who can verify your job responsibilities, and phone numbers of persons listed above.

**Education:** School names and addresses, degrees earned, dates attended, courses taken (verifiable on a transcript), persons or office who can verify education, and phone numbers of persons or offices listed above.

**Training:** Class titles, certifications received, names of persons who can verify your training, and phone numbers of persons listed above.

## **EQUAL OPPORTUNITY EMPLOYER**

The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right of family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding, and related medical conditions), and sexual orientation.

## **DRUG-FREE STATEMENT**

It is an objective of the State of California to achieve a drug-free State work place. Any applicant for State employment will be expected to behave in accordance with this objective, because the use of illegal drugs is inconsistent with the law of the State, the rules governing civil service, and the special trust placed in public servants.

## **GENERAL INFORMATION**

Examination and/or Employment Application (STD 678) forms are available at the California Department of Human Resources, local offices of the Employment Development Department, and through your [CalCareer Account](#).

**If you meet the requirements** stated on this examination bulletin, you may take this examination, which is competitive. Possession of the entrance requirements does not assure a place on the eligible list. Your performance in the examination described in this bulletin will be rated against a predetermined job-related rating, and all applicants who pass will be ranked according to their score.

**The California Public Employees' Retirement System (CalPERS)** reserves the right to revise the examination plan to better meet the needs of the service, if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service laws and rules and all applicants will be notified.

**Criminal Record Clearance Information:** Upon employment, California Public Employees' Retirement System positions are subject to fingerprinting and a criminal record check requirement. This check will be completed by the Department of Justice. Applicants will be notified during the hiring process if the position is affected by the criminal record clearance procedure. The criminal record clearance is a condition of employment in positions affected by this procedure.

**General Qualifications:** Applicants must possess essential personal qualifications including integrity, initiative, dependability, good judgement, the ability to work cooperatively with others, and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation

may be made of employment records and personal history and fingerprinting may be required.

**Eligible Lists:** Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) servicewide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

**High School Equivalence:** Equivalence to completion of the 12<sup>th</sup> grade may be demonstrated in any one of the following ways: 1) passing the General Education Development (GED) Test; 2) completion of 12 semester units of college-level work; 3) certification from the State Department of Education, a local school board, or high school authorities that the competitor is considered to have education equivalent to graduation from high school; or 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis.

**Revised 7/2020**