

**NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY
THE HUMAN RESOURCES DIRECTOR**

The following actions are being posted in accordance with Civil Service Rule 109. In the absence of a protest addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

Posting No: 30
Fiscal Year: 2022/2023
Posted Date: 06/29/2023
Reposted Date: N/A

AMEND THE FOLLOWING JOB SPECIFICATION(S):
(Job specification(s) attached)

| Item # | Job Code | Title |
|--------|----------|-------------------------|
| 1 | 1209 | Benefits Technician |
| 2 | 1813 | Senior Benefits Analyst |

RETITLE AND AMEND THE FOLLOWING JOB CODE(S):
(Job specification(s) attached)

| Item # | Job Code | Former Title | New Title |
|--------|----------|------------------------------|--------------------|
| 1 | 1812 | Assistant Retirement Analyst | Retirement Analyst |

Protests on an item should be addressed to the Human Resources Director and can be submitted by mail to the City and County of San Francisco, Department of Human Resources, 1 South Van Ness Ave, 4th Floor, San Francisco, CA 94103 or by email to DHR.ClassificationActionPostings@sfgov.org. All protests must be received in writing no later than close of business seven (7) calendar days from the posting date, and must include the posting and item number(s), the basis on which the protest is submitted and identify the affected parties.

Copies of this notice may be obtained from the Department of Human Resources or from the website at: <http://sfdhr.org/index.aspx?page=109>. Copies of Civil Service Rule 109 may be obtained from the Department of Human Resources, the office of the Civil Service Commission at 25 Van Ness Ave, Suite 720, San Francisco, CA 94102 or from the website at: [Rule 109 Position Classification and Related Rules | Civil Service Commission](#).

cc: All Employee Organizations
All Departmental Personnel Officers
DHR – Class and Comp Unit
DHR – Client Services Unit
DHR – Employee Relations Unit
DHR – Recruitment and Assessment Unit
DHR – Client Services Operations
Carol Isen, DHR
Sandra Eng, CSC
Erik Rapoport, SFERS
Theresa Kao, Controller/ Budget Division
E-File

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Benefits Technician
Job Code: 1209**

DEFINITION

Under immediate supervision, performs technical and clerical work in employee benefits for the City's Health Service System, Retirement System, or Workers' Compensation Program and performs related duties as required. Essential functions include: providing support services to analysts or adjusters in processing claims and benefit entitlements; providing general information to City employees regarding benefits; communicating with employees and representatives from various departments and outside agencies; researching and reconciling records and accounts; making adjustments and performing database maintenance; reviewing, completing and processing a variety of membership forms and medical claims; performing various calculations; completing standard form letters; and maintaining reports, logs and records.

DISTINGUISHING FEATURES

Class 1209 Benefits Technician is the entry-level class of the Employee Benefits series performing technical and administrative support and research. This class is distinguished from the 1210 Benefits Analyst in that the latter is a professional journey level class responsible for performing complex analytical duties in benefits administration.

SUPERVISION EXERCISED

None.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Provides support services to analysts or adjuster in processing claims and benefit entitlements.
2. Provides general information to City employees regarding retirement benefits, health and dental benefits, or worker's compensation benefits.
3. Researches records and accounts for prior membership, premium history, account discrepancies, requested information, buybacks, withdrawal status, payment history, prior claims, overpayments, underpayments, injury information, and adjustments in database.
4. Makes adjustments, and creates, updates, inputs, and maintains information in the computer software files or in the database.
5. Reviews, completes, and processes a variety of membership forms, medical claims, and medical only (worker's compensation) claims.
6. Conducts research on claims to determine appropriate rates to use for payment and refers claims needing further attention to an analyst or claim examiner.
7. Performs various calculations to support the determination of retirement, health services, or worker's compensation benefits.

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**Title: Benefits Technician
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8. Communicates with employees, dependents, human resources, and payroll personnel within citywide departments, representatives from outside agencies, medical practitioners, lawyers, and other professionals.
9. Responds to routine vendor and claimant tracer inquiries on unpaid medical invoices and medical only claims.
10. Completes standard form letters, and maintains reports, logs, and records.
11. Acts as a verifier to check work performed by another technician at the end of the day.
12. Performs related duties and responsibilities as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of: basic technical knowledge of employee benefits programs such as pension plans, worker's compensation, labor code, and medical terminology.

Ability or Skill to: perform accurate calculations following a prescribed format; problem solve to identify problems and make routine adjustments; research to gather meaningful information and perform routine analysis; speak and write in a clear, concise, and understandable manner to answer benefits questions; and establish and maintain effective working relationships, and assist in a polite, courteous manner.

MINIMUM QUALIFICATIONS

These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

- ~~1. Completion of two (2) years college-level course work; AND~~
- ~~2. One (1) year of verifiable clerical or technical experience administering employee benefits programs including: researching records, claims adjudication, database maintenance, reviewing forms, performing calculations, and responding to general inquiries; AND~~
- ~~3. Proficiency in the use of computers to perform word processing and to perform data entry/retrieval.~~

Substitution:

Additional **Verifiable clerical or technical** experience as described above **administering employee benefits programs including: researching records, claims adjudication, database maintenance, reviewing forms, performing calculations, and responding to general inquiries** may be substituted for the required education on a year-for-year basis. Thirty (30) semester units/forty-five (45) quarter units equal one year of experience.

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**Title: Benefits Technician
Job Code: 1209**

SUPPLEMENTAL INFORMATION

PROMOTIVE LINES

ORIGINATION DATE: November 17, 1994

AMENDED DATE: September 29, 2000; June 25, 2000; ~~XX/XX/XXXX~~

REASON FOR AMENDMENT: *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN SFMTA

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

Title: Assistant Retirement Analyst
Job Code: 1812

DEFINITION

Under general supervision, performs professional benefits work for the San Francisco City and County Employees' Retirement System and performs related duties as required. Computes and verifies the computation of employees' retirement and death benefits. Assists in establishing procedures relative to payment of retirement benefits. Monitors and conducts the research and analysis of retirement records to determine benefits payable.

DISTINGUISHING FEATURES

This is the entrance level classification in the Retirement Analyst series. However, employees are not hired as trainees. Positions in this job code are distinguished from positions in the next higher job code of 1813 Senior Benefits Analyst in that the latter has supervisory responsibility for a staff of professional and clerical personnel in addition to performing highly technical and complex retirement benefit calculations.

SUPERVISION EXERCISED

None. Employees in this class may give instructions to benefits technicians or clerical staff in the course of performing analysis of benefits programs but they do not have full supervisory responsibility for staff.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Calculates service credits for service, vesting and disability retirements. Computes retirement benefit payable to a retiree and determines the retirement benefit adjustments under appropriate survivor benefit plans. Verifies calculations of death benefits.
2. Compiles data for revising retirement contribution rates. Assists in establishing procedures to conform with changes in legislation governing retirement and death benefit payments.
3. May direct the activities of subordinate staff engaged in compiling service credit data from payroll and personnel records.
4. Provides information to Retirement System members and retirees on various retirement benefit matters, including maintenance of records of beneficiaries, benefit taxation requirements, and tax withholding procedures. Initiates inquiries to ascertain status of local retirees.
5. Counsels active and retired members on retirement benefits in person, in writing or over the telephone. Enrolls new employees in system membership and explains benefit entitlements and options. Interviews and counsels active members who are retiring and completes the retirement application package.
6. Performs related duties as required.

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Title: Assistant Retirement Analyst
Job Code: 1812

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of: Administration of employee pension programs; calculation of retirement benefit payments and adjustments under appropriate survivor benefit programs; counseling techniques appropriate to retirement systems; City Charter sections, Administrative Code sections and ordinances related to pension benefit programs.

Ability or Skill to: Interpret complex written materials; read and interpret pension regulations and guidelines; analyze numerical data and perform calculations following an established formula; communicate clearly and concisely orally and in writing, directly to individuals as well as publicly to groups of members; disseminate and obtain accurate, detailed information; establish and maintain positive and harmonious working relationships with those contacted in the course of work; learn and use a computerized data system; understand and follow oral and written instructions; make accurate numerical calculations; conduct effective interviews; set priorities and organize work in order to accomplish assigned tasks; deal tactfully and courteously with department representatives, members of government agencies, and retirees.

MINIMUM QUALIFICATIONS

These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Possession of a baccalaureate degree from an accredited college or university, preferably in economics, finance, accounting, statistics, business administration, human resources, psychology, sociology, public administration or a related field.

Experience:

One year of experience in the administration of employee benefit programs, including counseling clients, performing calculations, researching client information, and using computers to analyze and/or obtain data. Must include proficiency in the use of computers to perform word processing, prepare spreadsheets and perform data entry/retrieval.

License and Certification:

Substitution:

Additional direct experience with an employee pension plan (preferably a defined benefit plan) may be substituted for the education on a year for year basis for up to two years of the education requirement (two years = 60 semester units).

SUPPLEMENTAL INFORMATION

Essential duties require the following physical skills and work environment:

The work environment is an office setting with extensive direct public contact and use of computers to research information, compose correspondence and reports, and perform data entry.

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Title: ~~Assistant~~ Retirement Analyst
Job Code: 1812

PROMOTIVE LINES

ORIGINATION DATE: 9/8/80

AMENDED DATE: 9/1/00; XX/XX/XXXX

REASON FOR AMENDMENT: *To accurately reflect the current tasks, knowledge, skills & abilities, and minimum qualifications.*

BUSINESS UNIT(S): COMMN

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Senior Benefits Analyst
Job Code: 1813**

DEFINITION

Under direction, the 1813 Senior Benefits Analyst performs complex and difficult professional benefits work for the City's Health, Dental, Disability and Flexible Spending Account and Voluntary Benefit programs or the City's Retirement Program and the Deferred Compensation Plan; and plans, implements and oversees special projects in an assigned benefit program. The Senior Benefits Analyst is the advanced journey-level in the employee benefits series.

DISTINGUISHING FEATURES

Class 1813 Senior Benefit Analyst is distinguished from the 1814 Benefits Supervisor in that the former may be assigned to special projects or to supervise professional journey level staff, while the latter is responsible for supervising a major program section.

SUPERVISION EXERCISED

When assigned to the supervision of professional and technical benefits staff, an incumbent in this class functions as the first-line supervisor.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. May supervise a staff of benefits technicians, clerks and professional benefits analysts engaged in health, dental and disability insurance activities or pension program activities, such as calculating benefits, membership counseling services, membership enrollment and termination, and medical claim processing.
2. May plan, implement and oversee special projects within an assigned unit.
3. Reviews and investigates more complex and difficult cases of an assigned program area.
4. Develops training material and trains and orients new employees in work procedures, public relations, and departmental procedures and policies.
5. Provides guidance to staff in answering questions or making eligibility determinations on the more difficult and controversial retirement benefits or health claims.
6. Reviews and implements operational procedures; reviews and implements legislative changes relative to the benefit program; apply existing City Charter and Administrative Code provisions related to the assigned benefit program.
7. Compiles and evaluates statistical and other data to prepare various reports.
8. Contacts City departments, employees, employee representatives, other government agencies and various private entities to furnish and/or obtain information on specialized employee benefit matters.

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**Title: Senior Benefits Analyst
Job Code: 1813**

KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of: administration of employee benefit programs, including pension or health, disability and dental programs; federal and state laws and trends applicable to health or pension employee benefit programs; benefit calculations; investigative techniques; benefits counseling techniques; medical and legal terminology, where applicable; City Charter, Administrative Code and ordinances related to health or pension benefit programs.

Ability or Skill to: supervise and evaluate professional, technical and clerical benefits staff; read and interpret pension or health service regulations and guidelines; analyze numerical data; communicate clearly and concisely orally and in writing, directly to individuals as well as publicly to groups of members; disseminate and obtain accurate, detailed information; establish and maintain positive and harmonious working relationships with those contacted in the course of work; learn and use a computerized data system; understand and follow oral and written instructions; make accurate numerical calculations; apply the principles and methods for employee health or pension benefits; conduct effective interviews; set priorities and organize work in order to accomplish assigned tasks; provide effective coaching and feedback to staff.

MINIMUM QUALIFICATIONS

These minimum qualifications establish the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Possession of a baccalaureate degree from an accredited college or university.

Experience:

Two (2) years of professional experience in administering an employee benefit program.

License and Certification:

Substitution:

Additional qualifying work experience may substitute for ~~up to two years of~~ the required education on a year for year basis (30 semester/ 45 quarter units equals one year).

SUPPLEMENTAL INFORMATION

The work environment is an office setting with extensive direct public contact.

PROMOTIVE LINES

From: 1812 Assistant Retirement Analyst; 1210 Benefit Analyst;

ORIGINATION DATE: 9/8/1980

AMENDED DATE: 4/21/1995; 11/15/18

**CITY AND COUNTY OF SAN FRANCISCO
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**Title: Senior Benefits Analyst
Job Code: 1813**

REASON FOR AMENDMENT: *To accurately reflect the current tasks, knowledge, skills & abilities,
and minimum qualifications.*

BUSINESS UNIT(S): COMMN SFMTA SFCCD