

EMPLOYEE RETIREMENT SPECIALIST

Class Code	OT Status	EEO Category	Represented Status	Salary Grade	Effective Date	Status	Pages
	Non-Exempt	Clerical/Secretarial	PEU Local 1	62	07/01/2017	Classified	1 of 2

DEFINITION

To coordinate the day-to-day administration of districtwide employee retirement programs; to process retirement actions for districtwide classified, management and academic staff; and to act as a key resource in the college district for employee retirement related processes and questions.

SUPERVISION RECEIVED AND EXERCISED

- Receives supervision from a departmental supervisor or manager.
- May receive technical or functional supervision from higher-level departmental personnel.
- May provide training and direction to other assigned staff.

EXAMPLES OF DUTIES

Duties may include, but are not limited to, the following:

- Processes retirement actions for districtwide classified, management and academic staff.
- Acts as a key resource for employee retirement related processes and questions; resolves issues on retirement matters.
- Researches and analyzes confidential, mandated payroll retirement pension plans.
- Investigates and resolves problems related to retirement system deductions.
- Processes retirement membership enrollments and all health and welfare retirement benefit-related documents.
- Prepares and transmits assigned monthly retirement system reports for State Teachers' Retirement System (STRS) and Public Employees' Retirement System (PERS).
- Verifies and tracks monthly payments for employees purchasing prior service credit.
- Enrolls new employees in the appropriate retirement system.
- Prepares correspondence and reports to the appropriate government benefit division.
- Uploads reports to STRS and PERS databases from District computer system after finalization.
- Provides customer service pertaining to retirement issues; interprets and explains relevant laws, regulations, contract rules and/or policies.
- Provides direction and assistance to the payroll staff on retirement input and auditing procedures.
- Maintains detailed and accurate retirement records and files.
- Runs routine and specialized queries on financial and statistical data; conducts analyses and prepares reports on relevant payroll/retirement information.
- Audits all retirement paperwork for proper completion and supporting documentation; verifies employee eligibility.
- Conducts meetings with terminating, retiring or benefit-eligible employees and/or their dependents to inform them of their right to retirement pension.
- Coordinates with the District Human Resources Department to develop processes related to retirement; resolves discrepancies, complaints and escalations.
- Performs related duties as assigned.



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MINIMUM QUALIFICATIONS

Knowledge of:

- Relevant federal, state and local laws governing retirement, including the California Education Code.
- Rules and Regulations pertaining to Federal and State retirement programs.
- Modern software applications (Microsoft Office Suite, payroll related systems, etc.).
- Processes for handling, processing and posting payroll.
- Basic accounting and statistical payroll analysis.
- Time and attendance in the workplace.
- Union collective bargaining agreements.

Skill/Ability to:

- Coordinate retirement programs for a community college district.
- Keyboard with accuracy.
- Communicate effectively, both orally and in writing.
- Resolve problems and demonstrate good client/customer service skills.
- Apply payroll principles and procedures in the work performed.
- Research and analyze data and draw sound conclusions.
- Prepare clear, complete and concise reports.
- Interpret, apply and explain District rules and regulations.
- Perform mathematical calculations accurately.
- Understand and carry out both oral and written instructions in an independent manner.
- Establish and maintain cooperative work relationships with those contacted in the performance of required duties.
- Demonstrate understanding of, sensitivity to, and respect for the diverse academic, socio-economic, race, ethnicity, gender identity, sexual orientation, age, mental or physical disability, and religious background of all students, faculty and staff, and with all individuals encountered in the performance of required duties.

EXPERIENCE AND TRAINING

- Two (2) years of experience administering State or Federal retirement programs.

EDUCATION/LICENSE OR CERTIFICATE

- Possession of an Associate degree from an accredited college with course work in business, accounting, finance or a related field, or the equivalent.

Adopted: 07/01/17