

**DRAFT  
RETIREMENT SPECIALIST  
PROPOSED RANGE A-100**

**DEFINITION:**

Under general supervision, performs a variety of specialized complex, technical, and professional duties involved in the preparation, analysis, audit, reconciliation, and dissemination of retirement information; prepares and distributes payroll and health insurance premium billings and collects remittances; maintains and audits College financial accounts and records and assists in the preparation of financial reports, summaries, and analyses; coordinates with staff in the Human Resources Department and outside health insurance providers. Provides customer service to current and former staff, students, and vendors.

**SUPERVISION RECEIVED AND EXERCISED**

Receives direct supervision and work assignments from the Director, Payroll. Exercises no direct supervision of staff. Provides functional and technical direction, training, and support to staff.

**CLASS CHARACTERISTICS**

This is a journey-level and specialized class that performs a variety of professional and technical duties in support of the District's payroll, retirement, and benefits systems. Incumbents are responsible for the overall preparation of the reporting and payment of retirement contributions to multiple agencies in an accurate and timely manner; preparation and distribution of payroll vendor payments and retired employee health insurance premium billings. Incumbents are expected to possess accounting and recordkeeping procedures, and spreadsheet and word processing software and work. This class is distinguished from the Fiscal Specialist classification by the specialized subject matter and is distinguished from the Coordinator, Payroll classification by having a more narrow focus on accounting and retirement reporting duties while the other provides higher level support to the Director, Payroll.

**EXAMPLES OF ESSENTIAL FUNCTIONS (Illustrative Only)**

1. Prepares and reconciles vendor payments for employee deductions, prepares payroll registers, transmits backup data to vendors, and submits remittance requests to Accounts Payable.
2. Prepares and reconciles employee retirement reports to multiple agencies including, but not limited to CalSTRS (California State Teachers' Retirement System) and CalPERS (California Public Employees' Retirement System).
3. Reconciles payroll liability accounts and resolves discrepancies in a timely manner. Provides account analyses upon request.
4. Receives billing logs from outside vendors; checks for accuracy and completeness; reconciles statements and accounts of vendors and retirees routinely; makes corrections or refers to responsible party for corrections.
5. Processes monthly billings to retired employees to collect health insurance premiums.
6. Tracks amounts billed, amounts received, and follows up on outstanding payments.
7. Ensures newly hired and promoted employees are enrolled timely and accurately in the appropriate retirement system.
8. Receives and makes changes to employee tax-sheltered annuity deduction amounts.
9. Provides general information related to retirement benefits to employees.
10. Assists with requests to withdraw funds from retirement accounts for current and former employees.

11. Assists with requests to purchase retirement system service credit and other retirement related forms for current and former employees.
12. May serve as support assisting persons with general payroll and retirement related questions.

## **QUALIFICATIONS**

### **Knowledge of:**

1. Payroll and retirement reporting and payment requirements of various State and Federal agencies and benefit providers.
2. Computerized accounting and finance systems, and computer software and systems related to payroll processes.
3. Computer applications related to work, including word processing, database, and spreadsheet software.
4. Terminology and practices of financial and accounting document processing.
5. Principles and practices of business arithmetic, data collection, record-keeping, and report preparation.
6. Experience working with Enterprise Application Systems.
7. Proficiency with spreadsheet and database software.
8. Experience creating reports and queries.
9. Privacy standards and regulations (such as HIPPA and FERPA).
10. Principles, practices, and methods of operating computers and peripheral equipment.
11. Modern office practices, methods, and computer equipment and applications related to the work.
12. English usage, grammar, spelling, vocabulary, and punctuation.
13. Techniques for providing a high level of customer service by effectively dealing with the public, vendors, students, and District staff, including individuals of various ages, disabilities, socio-economic and ethnic groups.
14. Knowledge of retirement regulations is desirable.

### **Skills and Abilities to:**

1. Analyze and evaluate financial data related to functions and operations.
2. Analyze situations accurately and adopt effective course of action.
3. Plan, organize, and complete assignments with minimal amount of detailed instruction.
4. Develop and maintain procedural materials related to job functions as requested.
5. Maintain confidentiality of sensitive personal information of current and former employees and related family members.
6. Develop and implement recommendations regarding work procedures.
7. Plan, organize and prioritize work tasks and manage assigned projects; meet established deadlines.
8. Interpret, apply, explain, and ensure compliance with applicable District standards, policies, procedures, rules and regulations related to assigned area of responsibility.
9. Compose clear and concise correspondence and reports.
10. Understand and follow oral and written instructions.
11. Establish and maintain a variety of filing, record keeping, and tracking systems.
12. Operate modern office equipment including computer equipment and specialized software applications.
13. Organize own work, set priorities, and meet critical time deadlines.
14. Use English effectively to communicate in person, over the telephone, and in writing.
15. Understand scope of authority in making independent decisions.
16. Review situations accurately and determine appropriate course of action using judgment according to established policies and procedures.

17. Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*Any combination of training and experience which would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

Equivalent to an Associate's degree from a regionally accredited college in accounting, finance, or a related field, and four (4) years of increasingly responsible experience in processing financial documents, maintaining financial, accounting, or statistical records. A Bachelor's degree from a regionally accredited college or university in one of the above-mentioned fields is desirable.

**Licenses and Certifications:**

Possession of, or ability to obtain, a valid California Driver's Licenses by time of appointment.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 20 pounds.

**ENVIRONMENTAL ELEMENTS**

Incumbents work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees occasionally work in the field and are exposed to loud noise levels, inclement weather conditions, confining workspace, chemicals, electrical and/or mechanical hazards, and hazardous physical substances and fumes. Incumbents may interact with staff, students, and/or public and private representatives, and contractors in interpreting and enforcing departmental policies and procedures.