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**RETIREMENT TECHNICIAN**

**Definition:**

To perform technical accounting functions in the preparation and maintenance of federal and State reports and records related to retirement; ensure accurate employee payments, contributions and service credits are made; to process retirement transactions and ensure accuracy of related payroll calculations; to assist with payroll; to prepare related financial reports and to perform related duties as assigned.

**Distinguishing Characteristics:**

This class is characterized as a senior journey level requiring a specialized body of knowledge and is responsible for preparation of a complete cycle of reports requiring the application of technical terminology, organizational knowledge, and understanding of laws, policies, and procedures. Work is governed by a wide variety of established policies, procedures, and State and federal laws and regulations. The Retirement Technician is required to exercise independent judgment and determine steps necessary to resolve problems on a more frequent basis than either the Payroll Technician or the Account Technician II.

**Supervision Exercised and Received:**

Employees in this classification receive minimal supervision from a manager of fiscal services or a higher level position within a framework of standard policies and procedures.

**Examples of Duties and Responsibilities:**

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

- Prepares a variety of federal and state reports related to retirement and related payroll transactions; processes and verifies accuracy of various retirement and/or payroll transactions, such as wage garnishments;
- Creates and maintains complex spreadsheets;
- Maintains direct and close communication with State retirement agencies, the County Office, internal and external districts served, charter schools, district employees, retirees, families and the public;
- Maintains accurate retirement records for County Office, districts served, District employees and retirees; ensures retirement records and files meet State and federal requirements, including correctly interpreting and applying relevant education codes and retirement system laws and regulations;
- Compiles, reviews, calculates, verifies and audits retirement and payroll transactions; researches and resolves detailed problems and issues related to retirement and related payroll transactions;
- Processes and audits STRS and/or PERS membership applications and other retirement related documents such as notices of employment, golden handshake awards, reduced workload programs, exemptions, refunds, rollovers, changes of status, beneficiary and death notifications, separations, adjustment notifications and retirement applications; determines retirement eligibility;
- May reconcile and prepare reports and transfers for all districts served; processes and generates warrants, transfers and payments, and deposits monies; evaluates service credits and earnings;
- Makes necessary retirement adjustments;
- Maintains permanent file system for appropriate materials;
- Prepares worksheets, calculates totals, reconciles and balances retirement contributions to payroll registers and general ledger accounts; calculates employer and employee contributions;
- Audits district payroll printouts for correct retirement coding and other information; ensures accuracy of related payroll calculations; identifies errors and makes corrections;
- Inputs data into computer; generates necessary reports and correspondence using current equipment such as a calculator, copier, fax machine, typewriter, computer and assigned software;
- Prepares summary payroll reports; issues warrant for payment to PERS and/or STRS; prepares, process and maintains payroll tax information and data as assigned;
- Acts as an information resource to school district employees, members and others regarding retirement program and related payroll processes, procedures, transactions, adjustments and corrections; responds to retirement questions; notifies districts of new information and regulation changes, and provides resources regarding the retirement programs;

- Establishes and maintains a variety of computer files, including spreadsheets, databases, letters, notices and others;
- Organizes and conducts employee reporting workshops; trains and provides work direction and guidance to other employees; assigns work duties and reviews the work of others;
- Researches information and compiles special reports as directed; composes and replies to various correspondence;
- Prioritizes workload in response to established timelines;
- Performs related duties as assigned.

**Employment Standards:**

Knowledge of:

- General double-entry bookkeeping principles and procedures as they related to assigned area(s) of responsibility;
- Methods, procedures and terminology used in technical accounting work;
- Data processing as it relates to financial record-keeping;
- Payroll and personnel transactions related to retirement systems;
- Appropriate laws, codes, regulations, requirements, and standards pertaining to payroll and retirement issues;
- Office methods, practices and procedures, including financial record-keeping;
- Oral and written communication skills;
- Interpersonal skills using tact, patience and courtesy;
- Standard English usage, spelling, grammar, and punctuation;
- Standard office machines, including computers;
- Mathematical calculations;
- Safe work practices.

Ability to:

- Respond promptly to requests of internal and external clients; provide needed information, assistance, research, training, materials, and resources;
- Plan, organize and prioritize own work to meet deadlines and accomplish tasks within established timelines, including maintaining accurate records and files;
- Maintain orderly work environment and perform tasks in a prescribed and safe manner;
- Establish and maintain cooperative working relationships with those contacted during performance of job duties, i.e. State agencies, districts, district employees, and retirees;
- Maintain and improve professional skills and knowledge;
- Be flexible and receptive to change;
- Understand and apply principles, techniques and procedures required for effective job performance; apply and interpret pertinent laws, codes, and regulations related to the retirement program;
- Prepares a variety of federal and state reports related to retirement and related payroll transactions;
- Understand and carry out both oral and written instructions in an independent manner;
- Compare numbers and detect errors efficiently;
- Operate current equipment including a computer and assigned software, including complex spreadsheets, databases, and other financial record-keeping systems;
- Reconcile differences within established record-keeping systems and related transactions;
- Quickly identify problem areas or situations, evaluate causes and take appropriate action to resolve problems.

### Computer Skills:

- Advanced Database skills, such as the ability to sort and retrieve records; create layouts and reports; create and print mailing labels; perform mail merge for form letters; add, edit and delete fields and records; work with relational databases to create reports and lists;
- Advanced spreadsheet skills, including the ability to insert formulas and mathematical calculations; create workbooks; use multiple worksheets; format and print worksheets; sort lists; create graphs and charts;
- Intermediate email skills, including the ability to send and open a file attachment;
- Internet usage, including the ability to access and navigate SCOE's home page, conduct searches on relevant topics, communicate with retirement agencies, and use appropriate and professional conduct;
- Basic Word Processing skills, such as the ability to create, edit, spell check, save, and print a new or existing document, and simple character and paragraph formatting.

### Education and Experience:

Any combination of education and experience that would likely provide the knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

#### Education:

- Formal or informal education or training that ensures the ability to read and write at a level necessary for successful job performance.
- One year of college-level course work in accounting or financial record-keeping.

#### Experience:

- Three years of increasingly responsible experience in the review or maintenance of payroll, financial or statistical records for school related functions.
- Payroll experience in a school setting is highly desirable.

### Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

- Positions in this classification work indoors and sit for long periods of time.
- The position requires daily oral communication in person and on the telephone, and frequent written communication.
- Requires speaking and hearing ability sufficient to hear over phone and carry on routine conversations.
- The work involves operating a computer, calculator, copier, and other equipment, and involves repetitive arm and hand movement.
- Requires hand-eye-arm and finger dexterity to use a personal computer keyboard, ten-key, and other common office equipment.
- Entering data by touch requires the ability to hear computer alarms for errors.
- Forms and copies are color coded, requiring the ability to distinguish among colors.
- Requires visual acuity sufficient to recognize people, words, and numbers.
- Lifting twenty (20) pounds on an occasional basis and in excess of twenty (20) pounds with assistance.
- Must have normal (20/20) vision, corrected or uncorrected.

### Other Requirements:

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by SCOE, prior to employment.
- TB testing will be required upon employment.
- Must pass a pre-employment physical (if applicable).
- May be required to obtain first aid and CPR certificates within the first 6-12 months of employment.
- May be required to drive with or without students; some positions may require a current California driver license, proof of insurance, and possible participation in the DMV Pull Notice Program once employed.