



Retirement System Assistant

Class Code	FLSA Status	EEO Category	Represented Status	Salary Grade	Effective Date	Resolution #	Pages
041	Non-exempt	6-Administrative Support	AFSCME	3	7/14/99	1096	1 of 2

DEFINITION: Under general supervision, performs a variety of clerical and administrative tasks in support of the District's retirement program.

DISTINGUISHING CHARACTERISTICS: Incumbents in this class perform a variety of clerical and administrative tasks in support of the District's retirement program, apply considerable interpersonal skills in responding to requests for information about retirement benefits, perform preliminary pension calculations, and may participate in retirement planning and education workshops.

EXAMPLES OF DUTIES/ FUNCTIONS: Duties/functions may include, but not be limited to the following:

Reviews work histories to identify qualifying periods to be included in retirement benefit calculations.

Responds orally and in writing to telephone, written, and walk-in inquires from current and potential retirees regarding retirement issues, and investigates and resolves a variety of retirement related issues.

Prepares and/or reviews the accuracy of the retirees payroll.

Provides general information and assistance to employees completing their retirement applications.

Prepares and distributes informational materials to retirees and potential retirees and may participate in retirement planning and education workshops.

Performs clerical and administrative functions of the office including answering phones and maintaining paper and computerized files and databases.

Inputs data and creates and/or modifies spreadsheets and data collection templates.

Prepares and distributes memoranda, letters, agenda, and related documents and reports.

Performs related duties as required.

MINIMUM QUALIFICATIONS:

Knowledge Of: Business math (+/-x%); standard business software including spreadsheets and word processing programs; business English usage; and, the principles of paper based and computerized record keeping. Knowledge of retirement pension systems; retirement planning, benefit administration processes and procedures is desirable.

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Ability To: Review and analyze work histories; perform retirement benefit calculations; investigate and resolve retirement related issues; communicate information in a clear, concise, and effective manner; communicate effectively with retirees, employees, and the public, both orally and in writing, maintain paper and computerized records, files and databases; operate standard office machines; create and modify spreadsheets and templates; and type accurately on a keyboard.

Education/Training: Equivalent to completion of an Associates Degree from an accredited college with course work in business, accounting, public administration, sociology or a related field.

Experience: Equivalent to two (2) years of experience in an employee benefit, payroll, accounting, human resources, retirement program administration environment, or a related field.

License/Certification: None.