

RETIREMENT BENEFITS TECHNICIAN

DEFINITION

Under general supervision, to perform difficult and responsible technical support functions for the Benefits Program of the Orange County's Employees Retirement Office System; and to do other work as required.

CLASS CHARACTERISTICS

This class differs from classes in the Retirement Program Specialist series in that the latter are primarily involved in determining retirement options available to members/beneficiaries and counseling them regarding these options, whereas incumbents in this class perform various benefit processing duties.

EXAMPLES OF DUTIES

1. Prepares confirmation of retirement dates, types of retirements available and estimate of future retirement benefits; verifies and/or changes beneficiary information, and researches pension benefits for Retirement Program Specialists.
2. Researches data for refunds as the result of tier changes, or members contribution rate changes.
3. Researches data for purchase of service credit such as Extra Help, previous service, and military service.
4. Communicates with County Departments and outside agencies regarding members status.
5. Responsible for all aspects of electronic fund transfer of retiree payroll.
6. Enter changes-deductions, withholding and address changes, etc., to the retiree payroll computer system.

MINIMUM QUALIFICATIONS

Thorough Knowledge of

Modern office practices and procedures, including filing methods and systems and the operation of office equipment.

Principles of writing and grammar, including correct spelling and proper word usage, punctuation and sentence structure.

Ability to

Perform difficult technical work requiring independent judgment, accuracy and speed.

Understand, interpret and apply complex retirement procedures, regulations and directions in order to process or to verify the accuracy of information or documents.

Identify and extract information from a variety of sources; uses a high degree of discretion in determining the appropriate method and specific steps for processing work.

Prepare clear and comprehensive reports and keep difficult records.

Learn to operate and use a variety of electronic and automated office equipment and computer software programs.

Use a County-approved means of transportation to travel among County facilities may be required for some assignments.

Experience

Three years of experience which would have developed the knowledge and abilities listed above.

One year of the required experience may be substituted by one of the following. (1) Completion of 18 semester or 27 quarter units in office practices, business education or a closely related field from a recognized college, or (2) completion of 360 hours of training from a recognized occupational training program in office practices, business education or a closely related field.

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