

RETIREMENT PROGRAM SPECIALIST

DEFINITION

Under general supervision, to perform technical work in connection with the Orange County Employees Retirement System; to interpret statutes, regulations, and policies for retirement members and beneficiaries, and to do other work as required.

CLASS CHARACTERISTICS

This class in the Retirement Program Specialist series is characterized by specialized knowledge of retirement benefits, state and federal regulations and its requirement to apply this knowledge in the counseling of members and beneficiaries and the computation of the various retirement benefits.

EXAMPLES OF DUTIES

1. Counsels members and/or beneficiaries on benefit options, service retirement, disability and death benefits, deferral of benefits, withdrawals and reciprocal provisions; insures that available options are used to members best benefits in light of system requirements.
2. Calculates and/or verifies retirement, disability, death and deferred benefits and refunds; maintains and verifies active and retired member retirement accounts including member status, employee contributions, rate schedules, interest rates and service factors; verifies eligibility and calculates contribution rate changes.
3. Coordinates reciprocal benefits with other retirement systems.
4. Place qualified recipients on retirement payroll, removes recipients from the payroll following death or other disqualifications for benefit payments.
5. Speaks before groups of members to explain plan benefits and provide pre-retirement benefit information.
6. Prepares a variety of information, records, reports and correspondence; process a variety of detailed and technical forms and files in accordance with a variety of benefit laws, rules and regulations.

MINIMUM QUALIFICATIONS

Knowledge of

Retirement, benefit, insurance or personnel practices and procedures.

Data Base management systems.

Communication techniques required for transmitting information including direct interviews, directing group discussions, preparation of oral and written reports.

Federal and State laws and regulations that impact the retirement system and retirement benefits.

Ability to

Understand, interpret and apply laws, statutes, rules and regulations pertaining to the retirement benefits system.

Communicate clearly and effectively at all organizational levels and in situations requiring tact and sensitivity.

Distinguish between the various levels and types of benefits provide by the plan.

Develop and maintain effective oral and written communications with a variety of agencies and individuals.

Plan and organize a multi-faceted workload; coordinate activities with appropriate staff and department sections.

Prepare and present written and oral information in a clear concise and accurate manner.

Experience/Education

Four years of experience which demonstrates the application of those knowledges and abilities listed as minimum qualifications; two years of which must be technical level experience in a retirement, insurance, or government benefit program, or in a personnel system which involves retirement benefit experience.

College level education or training directly related to such work may be substituted for up to one year of the required experience at the rate of three semester units equaling one month experience and one hour of training equaling one hour of experience.

College level education beyond the bachelor degree which is directly related to the position may be substituted for up to an additional year of required experience at the rate of three semester units equaling one month of experience. Certification as an Employee Benefits Specialist (CEBS) may be substituted for up to an additional year of the required experience.

Physical Characteristics

Body mobility to stand, walk, stoop, kneel, squat, and to work with hands and arms above shoulder level to retrieve case files and mobility to sit for prolonged periods while in meetings with clients; manual dexterity to hand write information and to use keyboard to enter information into computer system and operate office equipment; strength to lift and carry case files up to 10 lbs. and to pull open and push closed file cabinet drawers; vision sufficient to read standard text and computer screen; hear and speak well enough to communicate with others in person and on the phone.

Environmental Conditions

Will be required to work in an office setting.