SENIOR RETIREMENT PROGRAM SPECIALIST

DEFINITION

Under general supervision, for the Orange County Employees Retirement System researches, resolves and processes the most complex and difficult benefit claims and inquiries; and to do other work as required.

CLASS CHARACTERISTICS

This class is the professional level of the Retirement Program Specialist series. Incumbents are required to have an in-depth knowledge of the legal, organizational and financial areas underlying employee benefit plans.

EXAMPLES OF DUTIES

1. Interprets and explains to members and beneficiaries the County Employees Retirement Law of 1937 as well as other laws and regulations relating to retirement; interprets and explains alternate benefit programs, i.e., long-term employer based disability, service connected disability, deferred compensation and alternate contribution accounts.

2. Researches and evaluates retirement benefits in order to advise members and beneficiaries of their options.

3. Communicates with various groups and organizations regarding the retirement systems regulations and benefits; represents the office with employee groups, actuaries, and local, state and federal agencies.

4. Reviews and processes the most complex members and beneficiaries services, disability and deferred retirement benefits.

5. Researches and responds to the more complex inquiries and claims either verbally or in writing; takes corrective action as required.

6. Assists in the production of the retiree's payroll and processing of withdrawals.

7. Assists in producing, analyzing, and verifying the accuracy of actuarial data systems reports.

MINIMUM QUALIFICATIONS

Thorough Knowledge of

Employee benefit principles and concepts.

Legal, organizational and financial information underlying employee benefit plans.

Retirement, benefit, insurance and personnel practices and procedures.

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

Knowledge of

Data Base management systems.

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

Various public and private retirement and benefit systems.

Ability to

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

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

Explain how and why the Orange County Retirement System is designed and managed.

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.

Use a personal computer to chart and graph retirement data for use in various retirement communication programs and publications.

Perform actuarial data verification.

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.

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