



Orange County Department of Education
Human Resources Department
Classified Class Specification

Class Code: 3110
Date Adopted: 7/1/2024

FLSA Status: Nonexempt
Union Representation: Represented

Senior Retirement Technician

GENERAL PURPOSE

Under general supervision, audits, reconciles, and processes payroll data for retirement system reporting; answers questions and assists school districts' payroll and human resources staff with retirement contributions and reporting; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

Senior Retirement Technician is a journey-level technical class in the retirement services unit, responsible for executing tasks necessary for OCDE to provide state retirement systems with required data and funding for Department and client districts' staff. To perform the duties assigned to this class, an incumbent must have specialized knowledge of the state Teachers Retirement System (STRS) and/or the Public Employees Retirement System (CalPERS) contribution and data reporting processes/rules, as well as applicable elements of the California Education Code.

ESSENTIAL DUTIES AND RESPONSIBILITIES

This position description is intended to describe the general nature and level of work being performed by an employee assigned to this position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

1. For specific assigned school districts, performs the preparation of monthly retirement report data that is submitted to either CalSTRS or CalPERS state offices; audit, assess, and balance payroll reports on retirement contributions in accordance with applicable codes, rules, and policies and procedures; meet mandated timelines and report submission deadlines; and maintain control records.
2. Process teachers'/administrators' elections into CalSTRS and/or classified employee elections into CalPERS; and provide liaison between state retirement system offices and school districts/employees regarding issues such as membership, service credits, buybacks, refunds, retiree medical, exceptions, transfers, separation, and other retirement-related matters.
3. Prepare appropriate fund transfers, deposits, abatements, and assigned summary reports for STRS or CalPERS retirement plans; and balance transfers and direct remittance payments.
4. Provide customer service and assist assigned districts' employees with retirement systems problem resolution; make payroll adjustments as needed; answer school district and employee questions and correspondence; research and resolve problems; and monitor member status transactions for all employees in assigned school districts.
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QUALIFICATIONS

Knowledge of:

1. Practices and reporting/recordkeeping requirements of public agency retirement systems; and California statutes, codes and regulations pertaining to the administration of STRS and CalPERS.
2. Practices and procedures of accounting and business mathematics.
3. Data processing systems utilized for OCDE payroll and retirement systems.
4. Principles and practices of sound business communication.
5. Data gathering and analysis techniques.

Ability and Skill to:

1. Understand, interpret, explain, and apply laws, rules and regulations pertaining to STRS and CalPERS and their data and payment submission requirements.
2. Audit, analyze, interpret, balance, and process voluminous and complex data accurately and by deadline; and prepare and present statistical analyses.
3. Understand and utilize the technology and software provided by STRS and CalPERS.
4. Analyze and solve problems and discrepancies in retirement report data.
5. Communicate clearly and effectively, both orally and in writing; prepare clear, concise, and comprehensive correspondence, reports, and other written materials.
6. Deal with sensitive and difficult situations.
7. Establish and maintain effective working relationships with OCDE and districts' management, administrators, staff, retirement system representatives, and others encountered in the course of work.
8. Must demonstrate attendance sufficient to complete the duties of the position as required.

Education, Training, and Experience:

A typical way of obtaining the knowledge, skills, and abilities outlined above is graduation from high school or a high school equivalency test and two (2) years' experience in an accounting or human resources function in a California public education system organization; or an equivalent combination of training and experience.

PHYSICAL AND MENTAL DEMANDS

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

Physical Demands

Employees must be able to perform the essential functions of the position with or without accommodation. Employees in this classification perform deskwork for extended periods; read written and electronic materials; communicate clearly with those contacted through the course of work (typically in person, on the phone, and via email); and access and operate all required equipment for job duties. The position may include occasional need to traverse uneven surfaces. May move items weighing up to 20 pounds.

Mental Demands

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret information; analyze and solve administrative problems; use mathematical reasoning; make observations; learn and apply new information or skills; perform detailed work; work on multiple, concurrent tasks often with frequent interruptions; work under deadlines and meet productivity requirements; and interact successfully with various groups of people encountered in the course of work.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The employee works under typical office conditions, and the noise level is usually quiet.