



**Orange County Department of Education
Human Resources Department
Classified Class Specification**

**Class Code: 3110
Date Adopted: July 1, 2018
Date Revised: May 4, 2016**

**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

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

1. For specific assigned school districts, performs the preparation of monthly retirement report data that is submitted to either STRS or CalPERS state offices; audits, assesses and balances payroll reports on retirement contributions in accordance with applicable codes, rules and policies/procedures; meets mandated timelines and report submission deadlines; maintains control records.
2. Processes teacher's/administrators elections into STRS and/or classified employee elections into CalPERS; provides 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. Prepares appropriate fund transfers, deposits, abatements, and assigned summary reports for STRS or CalPERS retirement plans; balances transfers and directs remittance payments.
4. Provides customer service and assists assigned districts' employees with retirement systems problem resolution; makes payroll adjustments as needed; answers school district and employee questions and correspondence; researches and resolves problems.
5. Monitors member status transactions for all employees in assigned school districts.

QUALIFICATIONS

Knowledge of:

1. Practices and reporting/recordkeeping requirements of public agency retirement systems; 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 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; prepare and present statistical analyses.
3. Understand and utilize 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.
6. Prepare clear, concise and comprehensive correspondence, reports, and other written materials.
7. Deal with sensitive and difficult situations.
8. Establish and maintain effective working relationships with OCDE and districts' management, administrators, staff, retirement system representatives, and others encountered in the course of work.
9. 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 high school equivalency test, and at least two years of administrative/technical 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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, employees are regularly required to sit, walk and stand; talk or hear, both in person and by telephone; use hands repetitively to finger, handle, feel or operate computers and standard office equipment; reach with hands and arms from the waist to at or above shoulder level; bend, stoop, push, pull, grasp, squat, kneel, and twist to open file cabinet drawers, and lift up to 20 pounds from ground, waist and chest level. Travel over uneven terrain that may include gravel or dirt, carry materials on stairs; some locations may have stairs and will not have elevators.

Physical Demands (cont.)

Specific vision abilities required by this job include close vision, color vision and the ability to adjust focus.

Mental Demands

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret detailed and complicated data, information and documents; analyze and solve problems; use math and mathematical reasoning; perform highly detailed work on multiple, concurrent tasks with constant interruptions under intensive deadlines; and interact with managers, employees, retirement plan administrators and others encountered in the course of work.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the 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.