Retirement System Operational Specialist

CLASS TITLE	CLASS CODE	SALARY GROUP	SALARY RANGE
RETIREMENT SYSTEM OPERATIONAL SPECIALIST I	2940	B15	$38,976 - $58,045
RETIREMENT SYSTEM OPERATIONAL SPECIALIST II	2941	B17	$42,976 - $64,469
RETIREMENT SYSTEM OPERATIONAL SPECIALIST III	2942	B19	$48,244 - $76,028

GENERAL DESCRIPTION

Performs technical and administrative retirement or benefits operations work involving processing transactions and maintaining retirement records; verifying benefits eligibility; and reviewing account transactions.

DISTINGUISHING CHARACTERISTICS

The Retirement System Operational Specialist job classification series focuses on the technical and administrative aspects of retirement systems operations. It is intended for employees who are primarily responsible for processing retirement transactions, maintaining and verifying member records, and ensuring data accuracy within the retirement system. In contrast, the Retirement System Benefits Specialist job classification series is centered on member-facing support and program administration. It is intended for employees who provide direct counseling to members regarding benefits options, eligibility, and program requirements; assist with retirement planning, and ensure compliance with applicable laws and regulations.

EXAMPLES OF WORK PERFORMED

Processes documents and approves retirement- and benefit-related actions.

Researches and verifies member account information.

Certifies documents for account changes and updates.

Administers member and agency communication in paper and electronic format.

Researches and responds to member requests and inquiries.

Receives and verifies warrants for mailing.

Analyzes electronic documentation and uploads it in the system.

Maintains records, files, and reports.

Reviews applications for benefits and related legal documents for compliance, accuracy, and completeness.

Assists members with retirement options and procedures.

Provides support to division.

Performs related work as assigned.

DESCRIPTION OF LEVELS

Examples of work and descriptions are meant to progress through the levels. For example, an employee at level III may also perform work listed within the previous levels.

***Note**: Factors that may distinguish between journey and senior levels include the degree of independence in performing the work; the complexity of the work; the scope of responsibility; and the employee's related work experience, and education. Employees at the journey levels (levels I and II) may independently perform the full range of work identified within current or previous levels and may assist others performing work of greater complexity. Senior-level employees may serve in a lead role, perform the full range of work identified in the preceding levels, and may coordinate or oversee that work for others.*

RETIREMENT SYSTEM OPERATIONAL SPECIALIST I: Performs entry-level to routine (journey-level) technical and administrative retirement or benefits operations work. Works under close supervision, with minimal latitude for the use of initiative and independent judgment.

RETIREMENT SYSTEM OPERATIONAL SPECIALIST II: Performs complex (journey-level) technical and administrative retirement or benefits operations work. Works under general supervision, with limited latitude for the use of initiative and independent judgment. Employees at this level may work more independently than those at the previous level and may routinely assist other staff in performing work of greater complexity. Employees at this level may:

- Review, edit, and reconcile member benefits accounts; and resolve discrepancies in notifications, written correspondence, and service certifications.
- Develop and maintain system for tracking correspondence.
- Facilitate urgent requests or inquiries.

RETIREMENT SYSTEM OPERATIONAL SPECIALIST III: Performs highly complex (senior-level) technical and administrative retirement or benefits operations work. Works under limited supervision, with considerable latitude for the use of initiative and independent judgment. Employees at this level may:

- Audit accounts.
- Evaluate the authenticity of records and certifications.
- Participate in program planning, system testing, development of procedures, and policy changes.
- Provide guidance on laws, rules, and procedures governing employee retirement and benefits programs.
- Determine trends and resolve operational inefficiencies.

- Review benefits documentation to ensure compliance with agency and legal requirements.

GENERAL QUALIFICATION GUIDELINES

EXPERIENCE AND EDUCATION

Agencies have the discretion to identify the general or specialized experience, education, or certifications required for positions and may tailor qualification requirements to specifically meet the agency's business needs. Agencies may substitute experience, education, military service, apprenticeships, and relevant credentials for one another, if appropriate and allowed by statute.

KNOWLEDGE, SKILLS, AND ABILITIES

For all levels

- Knowledge of mathematics and of retirement or benefits laws, policies, rules, and procedures.
- Skill in the use of a computer and applicable software.
- Ability to interpret employee benefits and retirement program rules, to maintain accurate records, to recognize and solve problems, to perform mathematical calculations, to reconcile financial data, and to communicate effectively.

Additional for Retirement System Operational Specialist III

- Ability to oversee the work of others.