

CLASS TITLE: RETIREMENT SERVICES ASSISTANT

PURPOSE OF THE CLASSIFICATION: Under general supervision is responsible for providing administrative assistance for the Human Resources (HR) Department, Retirement Services group, assisting with administrative or clerical work in support of City of Tulsa retirement plans; and performs other related assigned duties.

ESSENTIAL TASKS:

- Calculates retirement benefits and prepares related reports including monthly payments, refunds and statements
- Describes retirement benefits in personal meetings, email, and orientation sessions
- Answers questions by phone and email from retirees and employees regarding payments, statements, forms, insurance, calculator, and retirement options and calculations
- Prepares retiree document requests as needed, including benefit verification letters, tax forms, change of address, and change of beneficiaries
- Coordinates, prepares, and participates in employee seminars and orientations related to retirement plans and benefits and attends training as required regarding retirement plans and fiduciary standards
- Monitors and maintains various files, computer reports, records, forms, and manuals; keeping detailed records for personnel administration purposes
- Assists with the processing of monthly retiree payroll
- Attends committee, board or authority meetings and records, transcribes and distributes minutes
- Assists employees and the public with questions utilizing the City Personnel Policies and Procedures Manual, Title 28 and other retirement related information, providing customers with the highest quality services possible
- Provides management with administrative assistance in the processing of retirement actions for employees
- Must report to work on a regular and timely basis

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential tasks.

QUALIFICATIONS:

Training and Experience: Graduation from high school or possession of a General Educational Development Certificate (GED) and six (6) years of increasingly responsible office or administrative experience including two (2) years of experience in a Human Resources or Accounting office preferred; or an equivalent combination of training and experience per Personnel Policies and Procedures, Section 128. Employee will be eligible for a one step increase upon completion of thirty (30) accredited college hours and one (1) year employment in the position.

Knowledge, Abilities and Skills: General knowledge of the methods, practices, techniques, and fiduciary standards used in the administration of comprehensive retirement programs; basic knowledge of accounting procedures and practices; and considerable knowledge of computer software and database systems. Ability to communicate effectively verbally and in writing; ability to work independently and multi-task; ability to make complex mathematical calculations; ability to plan, implement and coordinate benefit programs, including retirement plans; ability to function in a high volume work environment; and the ability to understand and influence the behavior of others within the organization, customers or the public in order to achieve job objectives and cause action or understanding.

Physical Requirements: Physical requirements include arm and hand dexterity enough to use a keyboard and telephone; occasional lifting and carrying up to 20 pounds; may be subject to standing, walking, sitting, reaching, bending and handling; and vision, speech and hearing sufficient to perform the essential tasks.

Licenses and Certificates: Possession of a valid Oklahoma Class "D" Driver's License.

WORKING ENVIRONMENT: Working environment is primarily indoors in an office setting.

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Class Code: 2617

EEO Code: N-02

Pay Code: AT-28

Group: Clerical and Administrative

Series: Human Resources Management

Effective Date: February 12, 2020