



CLASS TITLE | RETIREMENT SERVICES ASSISTANT

PAY GRADE: AT-28 | www.cityoftulsa.org/pay

Class Code: 2617

Effective Date : 02/12/2020

****THIS CLASSIFICATION INCLUDES PAY INCREASE OPPORTUNITIES - OUTLINED BELOW****

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: Must meet one of the following options or an equivalent combination of training and experience per Personnel Policies and Procedures, Section 100:

- (a) Graduation from high school or possession of a General Educational Development Certificate (GED); **and,**
- (b) Six (6) years of experience relevant to the essential tasks listed in this job description, **including,**
- (c) Two (2) years of experience in a Human Resources or Accounting office *preferred*

PAY INCREASE OPPORTUNITY

Employee will be eligible for a one step increase upon completion of thirty (30) accredited college hours **and** one (1) year of employment in the position.



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Knowledge, Abilities and Skills:

Knowledge of:

- 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
- Considerable knowledge of computer software and database systems

Ability to:

- 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 benefits programs, including retirement plans
- Ability to function in a high-volume work environment
- Ability to understand and influence the behavior of internal and external customers 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 License.

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

EEO Code: N-02

Group: Clerical and Administrative

Series: Human Resources Management