

DESCRIPTION: Under limited supervision, counsels members of the retirement system; calculates and estimates annuity benefits according to the Nebraska Retirement Statutes; prepares correspondence and operates word processing equipment; provides work guidance to other Retirement Specialists and/or office support staff as a lead worker; performs related work as required.

DISTINGUISHING CHARACTERISTICS: (A position is assigned to this class based on the scope and level of work performed as outlined below.)

This class represents the third and highest level in the three-class Retirement Specialist series. This class is distinguished from the Retirement Specialist I class by responsibility as a lead worker in addition to working at full performance, while the Retirement Specialist I class does not work in a lead worker capacity.

EXAMPLES OF WORK: (A position may not be assigned all the duties listed, nor do the listed examples include all the duties that may be assigned.)

Gives work assignments to co-workers, in accordance with established work flow requirements, and assist supervisory/management staff in the timely accomplishment of work.

Monitors and reports on the work performance of co-workers to determine overall conformity to established time tables and quality standards and to document and communicate employee production levels and training needs.

Performs duties of the manager in his/her absence.

Handles more difficult problems in assigned functions.

Relieves manager of administrative duties when possible.

Processes applications for retirement and family survivor benefits by evaluating and calculating estimates under applicable statutes.

Counsels members for pre- and post-retirement planning, retirement benefits and beneficiaries.

Examines benefit application for compliance with internal procedures, and verifies salary and service information of members with authorized agents of the Nebraska Retirement System.

Operates word processing equipment to correspond with members.

Interprets state statutes and laws affecting various retirement plans.

Conducts research of member records.

Answers written or oral requests regarding retirement plans and regulations.

Proofreads , corrects, and edits rough draft, final copy and corrected material to ensure grammatical, spelling, typographical, capitalization and punctuation errors are identified and corrected into compliance with standardized formats.

Sorts file records materials and documents to facilitate further processing and updating as required by established policies and procedures.

KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED: (These are needed at entry level to perform the work assigned.)

Knowledge of: office procedures; basic math; English grammar, spelling, punctuation, and composition for purposes of recognizing and correcting errors in correspondence.

Skill in: Typing ability sufficient to type at a rate of 40 words a minute (net).

Ability to: operate office equipment; communicate effectively; understand and apply instructions; file and retrieve records using an established filing system; proofread and detect errors in a final product; interact with the public and agency staff in a professional manner; work under pressure, organize and assign work assignments; monitor work, communicate effectively.

MINIMUM QUALIFICATIONS: (Applicants will be screened for possession of these qualifications. Applicants who need accommodation in the selection process should request this in advance.)

One or more years of coursework, training and/or experience in office support/secretarial support functions including typing duties AND one years experience as a Retirement Specialist ~~Trainee~~ or working in a similar capacity calculating benefits and providing customer service to benefit recipients about retirement plan guidelines AND experience leading others.

SPECIAL NOTES:

State agencies are responsible to evaluate each of their positions to determine their individual overtime eligibility status as required by the Fair Labor Standards Act (FLSA).