

Click one of these links to see the Job Description for that class:

Job Code	Title
A17802	Retirement Specialist I
A17803	Retirement Specialist II
V17820	Retirement Plan Manager

RETIREMENT SERIES

Job Family

DESCRIPTION OF OCCUPATIONAL WORK

This position is responsible for administering, explaining, and managing retirement and pension benefits for employees within the Nebraska retirement system. Positions in this series ensure accurate processing of retirement transactions, provide education and counseling on retirement options, and oversee compliance with applicable laws, policies, and procedures.

RETIREMENT SPECIALIST I

A17802

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

Under general supervision, counsels members of the retirement systems, calculates and estimates annuity benefits according to the Nebraska Retirement Statutes; prepares correspondence and operates word processing equipment; performs related work as assigned.

This class is the first level in the Retirement Specialist series and is a single entry and full performance level. The Retirement Specialist I is distinguished from the Retirement Specialist II level by the absence of lead worker responsibilities.

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.)

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 plan rules 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 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.

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

At least one year of coursework, training, and/or experience in office support functions, including providing customer service, and/or experience providing service to recipients about benefit plan guidelines. Any equivalent combination of education and experience will be considered.

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RETIREMENT SPECIALIST II

A17803

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

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.

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 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 year of experience as a Retirement Specialist or working in a similar capacity calculating benefits and providing customer service to benefit recipients about retirement plan guidelines AND experience leading others. Any equivalent combination of education and experience will be considered.

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RETIREMENT PLAN MANAGER

V17820

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

Under administrative direction performs professional, administrative work involving managing the daily operations of the administration of retirement plan benefits; supervises the Retirement Specialists and support staff involved in the processing of retirement benefits and refunds; coordinates the operations of a unit with other supervisors and agency personnel; provides information and resolves problems pertinent to retirement plan benefits procedures and statutes; monitors various reports to assure the timely and accurate processing of retirement correspondence and statistics; plans, organizes, and directs, the operations of all retirement plans; performs related work as assigned.

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.)

Establishes operational priorities, and coordinates these priorities with other units to ensure objectives and standards are attained and are consistent with overall agency goals develops and implements policies and procedures; Plans, organizes, and coordinates all work assignment for a unit.

Advises staff members and persons outside the agency on matters pertaining to fiscal, administrative, and program issues through written and verbal interpretations of the unit's policies, procedures and laws. Investigates problems and recommends corrective actions such as procedural changes, forms revision, shifts in work distribution, and changes in organizational structure to increase the efficiency and effectiveness of the unit.

Formulates budgetary proposals in order to request additional staff, material and equipment for the unit.

Attends meetings and conferences with other staff members and outside agency staff to give advice and relay information relative to assigned retirement plan.

Reviews and compares the work performance and products of subordinate Retirement Specialists with established standards to determine employee production levels and training needs and to recommend appropriate personnel actions such as promotions, disciplinary actions, status changes, separations, and grievance dispositions to agency management. Interviews applicants for employment.

Monitors all correspondence for particular retirement plan(s).

Confers with unit staff to discuss various projects and answer questions regarding complex benefit issues.

Drafts correspondence to affected plan members regarding legislative or administrative changes. Provides input and drafts changes in legislation affecting unit's retirement statutes.

Assists in the development, review and revision of necessary bid proposal specifications for contract negotiation.

Evaluates computer operations to initiate modifications to the system, data entry source documents, screen formats and data entry procedures and provide input to agency management on computer operations.

Supervises the processing of refunds, remittances, adjustments and corrections on members accounts.

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

Knowledge of: office management principles; methods and procedures; data entry operations and equipment; record keeping practices; administrative report preparation practices; retirement laws. accounting methods.

Ability to: communicate effectively with subordinate and agency management staff; interact with government officials and the public to establish and maintain working relationships; advise and guide representatives of other agencies; develop unit goals and objectives establish performance goals; set work priorities; interact with the public and agency staff in a professional manner; work under pressure; recognize and correct errors; 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.)

Five years combined training, education and/or experience in office management or supervisory practices, retirement benefit principles and laws, and retirement benefit administration. Any equivalent combination of education and experience will be considered.

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SPECIAL NOTES APPLICABLE TO ALL LEVELS:

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).

Established: 02/89

Note: Classification-specification is subject to change. Please refer to the Nebraska State Personnel Job Specification website at <https://das.nebraska.gov/personnel/classcomp/jobspecs/jobspecs.html> to ensure this represents the most current copy of the description.

The following is a summary of changes made to this class specification.

Section	Change Description	Effective Date
Last revised on 09/2010	Moved to new format	07/2025
Minimum Qualifications	Slight revisions	10/2025