

# DISTRICT SCHOOL BOARD OF PASCO COUNTY

## JOB DESCRIPTION

### Retirement Services Representative

<b>Department:</b> Human Resources and Educator Quality	<b>Job Code:</b> TBD
<b>FLSA:</b> <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt	<b>Salary Schedule:</b> 70N
<b>Reports To:</b> Retirement Services Coordinator	<b>Work Days:</b> 245
<b>Board Approved Date:</b> March 5, 2019	<b>Work Hours:</b> 7.5 hrs./day

**JOB GOAL:** Under general supervision, responsible for performing specialized, complex duties related to the administration of the District's retirement plans. This includes assisting employees regarding available retirement options, including 403(b) voluntary retirement plans, retiree group health plans, and retirement plans available through the Florida Retirement System (FRS).

#### ESSENTIAL DUTIES & RESPONSIBILITIES:

*The following statements of duties and responsibilities are intended to describe the general nature and level of work being performed by individuals assigned to this position. These statements are not intended to be an exhaustive list of all duties and responsibilities required of all personnel within this position.*

1. Act as a liaison between (FRS) and the district to assist employees regarding retirement services.
2. Prepare retirement services communications and educational materials for employees/retirees.
3. Determine retirement eligibility and guide employees through the retirement process.
4. Provide retirement counseling one-to-one and/or facilitate group sessions.
5. Respond to participants' inquiries and coordinate with outside agencies to provide information as necessary.
6. Accurately set up, maintain, and audit retiree benefit and retirement plan records; and maintain related system information as necessary to ensure proper administration of retirement plans and retiree health benefits.
7. Assist with resolution of benefit or retirement plan related issues.
8. Provide input and assist with creation, modification, and implementation of retirement services processes to improve department efficiency and better serve stakeholder needs.
9. Coordinate the workflow and procedures between retirement services and other departments including third party administrators.
10. Perform other duties as assigned.

#### MINIMUM REQUIREMENTS:

*Requirements are representative of minimum levels of knowledge, skills and/or abilities. To perform this job successfully, the incumbent will possess the abilities or aptitudes to perform each duty successfully. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.*

#### KNOWLEDGE, SKILLS & ABILITIES:

- Substantial knowledge of state and 403(b) retirement plans
- Basic knowledge of Medicare and social security programs
- Ability to work independently and in a team-oriented environment
- Operating knowledge of computer programs, including email, word processing, spreadsheets, and databases
- Ability to communicate effectively with a variety of audiences, orally and in writing, including electronic media
- Ability to organize, prioritize, manage, and carry out duties efficiently and within established timeframes
- Ability to establish and maintain collaborative working relationships with all stakeholders

#### EDUCATION, TRAINING & EXPERIENCE:

- Associate's degree or equivalent (2 years of college coursework)
  - 2 years of related experience
- OR**
- Any equivalent combination of education and experience which provides the required knowledge, skills, and abilities to perform the essential duties and responsibilities of the position

**CERTIFICATES, LICENSES, & REGISTRATIONS:** None.

#### PREFERRED QUALIFICATIONS:

- Bachelor's degree or equivalent
- 3 years of related experience

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**SUPERVISORY RESPONSIBILITY:** None

**PHYSICAL REQUIREMENTS** *(Describes physical conditions of this position):*

<input checked="" type="checkbox"/>	Sedentary Work	Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently to lift, carry, push, pull or move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
<input type="checkbox"/>	Light Work	Exerting up to 20 pounds of force occasionally and/or up to 10 pounds of force frequently. If the use of arm and / or leg controls requires exertion of forces greater than that for sedentary work and the worker sits most of the time, the job is rated as Light Work.
<input type="checkbox"/>	Medium Work	Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently and/or up to 10 pounds of force constantly to move objects.
<input type="checkbox"/>	Heavy Work	Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
<input type="checkbox"/>	Very Heavy Work	Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

**PHYSICAL ACTIVITY:**

*(Physical activities of the job are listed below and are with or without accommodations for disabilities for this position. Frequency of each applicable activity is noted according to the following: R = Regularly; F = Frequently; O = Occasionally, S = Seldom)*

R	Sitting	Resting with the body supported by the buttocks or thighs.
F	Standing	Assuming an upright position on the feet particularly for sustained periods of time.
O	Walking	Moving about on foot to accomplish tasks, particularly for long distances.
S	Climbing	Ascending or descending ladders, stairs, scaffolding, ramps, poles, etc. using feet and legs and/or hands and arms.
S	Balancing	Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.
S	Bending	Lowering the body forward from the waist.
S	Stooping	Bending body downward and forward by bending spine at the waist through the use of the lower extremities and back muscles.
S	Kneeling	Bending legs at knee to come to a rest on knee or knees.
S	Crouching	Bending the body downward and forward by bending leg and spine.
S	Crawling	Moving about on hands and knees or hands and feet
F	Twisting	Moving body from the waist using a turning motion.
R	Reaching	Extending hand(s) and arm(s) in any direction
O	Pushing	Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.
O	Pulling	Using upper extremities to drag, haul or tug objects in a sustained motion.
O	Lifting	Raising objects from a lower to a higher position or moving objects horizontally from position- to-position through the use of the upper extremities and back muscles.
R	Finger Dexterity	Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole hand or arm.
O	Grasping	Applying pressure to an object with the fingers and palm.
O	Feeling	Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of fingertips
R	Repetitive	Substantial and continuous movements of the wrists, hands, and/or fingers.

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	Motions	
R	Talking	Expressing or exchanging ideas by means of the spoken word. Those activities in which detailed or important spoken instructions must be conveyed accurately, loudly or quickly.
R	Hearing Acuity	The ability of perceive speech and other environmental sounds at normal loudness levels.
R	Visual Acuity	The power to see at a level which allows reading of numbers and text, operations of equipment inspection of machines, etc.

### WORKING CONDITIONS:

*(Conditions the worker will be subject to in this position with or without accommodations for disabilities. Indicate all that apply to the position with an "X". Please note that there can be more than one condition.)*

<input type="checkbox"/>	Outdoors	The worker is subject to outside environmental conditions. There is not effective protection from weather conditions such as wind, moisture, sunlight, extreme temperature changes, etc.
<input type="checkbox"/>	Indoors	The worker is subject to inside environmental conditions. There is protection from weather conditions but not necessarily from temperature changes.
<input checked="" type="checkbox"/>	Indoors and Outdoors	The worker is subject to both environmental conditions. Activities occur inside and outside.
<input type="checkbox"/>	Cold	The worker is subject to extreme cold. Temperatures are below 32 degrees for periods of more than one hour.
<input type="checkbox"/>	Heat	The worker is subject to extreme heat. Temperatures are above 100 degrees for periods of more than one hour.
<input type="checkbox"/>	Noise	The worker is subject to noise. There is sufficient noise to cause the worker to shout in order to be heard above the ambient noise level.
<input type="checkbox"/>	Vibration	The worker is subject to vibration. There is exposure to oscillating movements of the extremities or whole body.
<input type="checkbox"/>	Hazards	The worker is subject to hazards. This includes a variety of physical conditions, such as proximity to moving mechanical parts, electrical current, working on scaffolding and high places and exposure to high heat or chemicals.
<input type="checkbox"/>	Atmospheric Conditions	The worker is subject to atmospheric conditions. One or more of the following conditions affect the respiratory systems or the skin: fumes, odors, mists, gases or poor ventilation.
<input type="checkbox"/>	Oils	The worker is subject to oils. There is air and/or skin exposure to oils and other cutting fluids.
<input type="checkbox"/>	Respirator	The worker is required to wear a respirator.
<input type="checkbox"/>	None	The worker is not substantially exposed to adverse environmental conditions (such as in typical office or administrative work).
<input type="checkbox"/>	Other	

### MACHINES, TOOLS, EQUIPMENT:

*(Machines, tools, equipment, electronic devices, vehicles, etc., used in this position.)*

General office equipment, including personal computers, fax machines, copiers, telephones, etc.

*Pasco County School District will provide reasonable accommodations to qualified individuals with disabilities to allow them to perform the essential functions of the job when such individuals request an accommodation.*