



Job Profile

ERS Job Title: Retirement Specialist II

Division: Financial Management

Internal Job Profile Summary

With minimal supervision, reviews, evaluates, and processes employer pension related transactions including payments, reconciliations, adjustments and retiree return to work reporting. Analyst works with management on projects, reviews employer exception reports and system modules to resolve employer balancing issues and member sub account exceptions. Incumbent is responsible for responding to customers including Human Resources and Payroll staff.

Job Responsibilities & Performance Standards

- Monitors and follows up with assigned employers to ensure timely reporting of monthly reports, contributions, and demographic and rehired retiree data
- Allocates employer cash receipts and works with IT to resolve invalid data submissions
- Reconciles monthly employer reports, data files and cash receipts
- Creates monthly invoices for deficiencies or overpayments
- Assists employers with invoice reconciliations
- Reviews and corrects account exceptions and posts monthly service and contributions
- Responds to requests from employer Human Resources and Payroll staff to include employer responsibilities, web reporting issues, and/or membership eligibility
- Handles internal requests from Member Services regarding all employer related accounting transactions
- Maintains an accurate employer contact data base

Technical Competencies Required for Job

Plan Provisions	<ul style="list-style-type: none"> ▪ Understands the complexities of plan eligibility and independently performs job responsibilities
Computer/Technical Capability	<ul style="list-style-type: none"> ▪ Proficient use of the pension software and web modules
	<ul style="list-style-type: none"> ▪ Proficient use of MS Office software
	<ul style="list-style-type: none"> ▪ Assists with writing business rules for pension and web modules
	<ul style="list-style-type: none"> ▪ Understands system processes and data flow
FMD Processes	<ul style="list-style-type: none"> ▪ Proficient with core FMD processes: <ul style="list-style-type: none"> ⇒ Employer Reporting Flow ⇒ Knowledge of data conditions ⇒ Knowledge of edits ⇒ Ability to reconcile Employer Reports

Statewide Core Behavioral Competencies Required for Job

Proficient Level Competencies	
<p>Detailed knowledge, understanding, and application of the competency required to be successful in the job; Ability to handle non-routine problems and situations; Requires minimal guidance or supervision / works independently; Consistently demonstrates success in the competency; Capable of assisting others in the application of the competency.</p>	
Accountability	<p>Accepts full responsibility for self and contribution as a team member; displays honesty and truthfulness; confronts problems quickly; displays a strong commitment to organizational success and inspires others to commit to goals; demonstrates a commitment to delivering on his/her public duty and presenting oneself as a credible representative of the Agency and State to maintain the public's trust</p>
Customer Service	<p>Understands that all State employees have external and/or internal customers that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service</p>
Results Orientation	<p>Consistently delivers required business results; sets and achieves achievable, yet aggressive, goals; consistently complies with quality standards and meets deadlines; maintains focus on Agency and State goals</p>
Teamwork and Cooperation	<p>Cooperates with others to accomplish common goals; works with employees within and across his/her department to achieve shared goals; treats others with dignity and respect and maintains a friendly demeanor; values the contribution of others</p>
Basic Level Competencies	
<p>Basic understanding or knowledge needed for the job; Basic understanding and knowledge sufficient enough to handle routine tasks; Requires some guidance or supervision when applying the competency; Understands and can discuss terminology and concepts related to the competency.</p>	
Judgment and Decision Making	<p>Analyzes problems by evaluating available information and resources; develops effective, viable solutions to problems which can help drive the effectiveness of the department and/or State of Georgia</p>

Additional Behavioral Competencies Required for Job

Proficient Level Competencies	
Detailed knowledge, understanding, and application of the competency required to be successful in the job; Ability to handle non-routine problems and situations; Requires minimal guidance or supervision / works independently; Consistently demonstrates success in the competency; Capable of assisting others in the application of the competency.	
Communication	Respectfully listens to others to gain a full understanding of issues; comprehends written material; presents information in a clear and concise manner orally and in writing to ensure others understand his/her ideas; appropriately adapts his/her message, style, and tone to accommodate a variety of audiences
Basic Level Competencies	
Basic understanding or knowledge needed for the job; Basic understanding and knowledge sufficient enough to handle routine tasks; Requires some guidance or supervision when applying the competency; Understands and can discuss terminology and concepts related to the competency.	
Flexibility	Adapts to change and different ways of doing things quickly and positively; does not shy away from addressing setbacks or ambiguity; deals effectively with a variety of people and situations; appropriately adapts one's thinking or approach as the situation changes
Initiative	Proactively identifies ways to contribute to the State's goals and missions; achieves results without needing reminders from others; identifies and takes action to address problems and opportunities
Cultural Awareness	Demonstrates an open-minded approach to understanding people regardless of their gender, age, race, national origin, religion, ethnicity, disability status, or other characteristics; treats all people fairly and consistently; effectively works with people from diverse backgrounds by treating them with dignity and respect
Ethical Behavior & Integrity	Upholds the highest personal and business standards, demonstrates honesty, is able to maintain the trust of others; does not jeopardize business relationships for personal gain; able to maintain confidential information.
Conflict Management	Addresses conflicts by focusing on the issues at hand to develop effective solutions when disputes or disagreements occur; helps others resolve conflicts by providing impartial mediation when needed
Negotiation and Influence	Effectively represents his/her position on issues to gain support and buy-in from others; generates multiple alternatives to a problem to meet the needs of other stakeholders; works to achieve win-win outcomes that others can accept; appropriately utilizes settlement strategies, such as compromise

*Additional competency required for job but not included in the State's predefined competency list.

Statewide Entry Qualifications

Bachelor's degree in a business, accounting or finance from an accredited college or university
OR One year of experience required at the lower level Retirement Specialist I or position equivalent.

ERS Preferred Qualifications

Bachelor's degree in Business, Accounting OR Quantitative Analysis and Two years related experience in public/multi-employer pension funds on contributions/receivable side or administration OR Six years related experience.

ERS Career Development Levels

- Retirement Specialist III
- Retirement Specialist Supervisor

Work Environment

This is a general office environment consisting of cubicle desk space. Ambient room temperatures, lighting and traditional office equipment are provided as found in a typical office environment.

Physical Demands

Individuals working in this job are required to multi-task while seated. This includes answering phones calls, research information and type using computers throughout the workday; may require walking primarily on a level surface for periodic periods through-out the day; reaching above shoulder heights, below the waist or lifting as required to file documents or store materials throughout the work day; also may include lifting up to 25 pounds for files, computer printouts on occasion.