

SAN DIEGO COUNTY OFFICE OF EDUCATION
Personnel Commission

CLASS TITLE: RETIREMENT TECHNICIAN, Grade 52

DEFINITION:

Under general direction, the Retirement Technician performs complex accounting work in the computation, recording, monitoring, paying, and reporting of payroll and retirement data; leads the work of a section engaged in the establishment and maintenance of records and reporting systems for employees of county school districts who are members of the State Teachers' Retirement System (STRS), the Public Employees' Retirement System (PERS), and subject to Social Security and/or Medicare taxes. The Technician performs a variety of specialized and technical duties to ensure district employee and employer deductions for STRS, PERS, and/or Social Security and Medicare taxes are paid and reported in an accurate and timely manner, and serves as a resource to retirement staff.

REPRESENTATIVE DUTIES:

This position description is intended to describe the general nature and level of work being performed by the employee assigned to the position. This description is not an exhaustive list of all duties, responsibilities, knowledge, skills, abilities, and working conditions associated with the position. Incumbents may be required to perform any combination of these duties. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

ESSENTIAL FUNCTIONS:

Applies complex laws, rules, regulations, policies, and procedures related to payroll accounting and taxes, calculation of retirement contributions, maintenance of retirement records, and provides explanations for compliance to retirement staff at the County Office and San Diego County school districts.

Calculates, tabulates, and balances various payroll queries and reports for monthly payroll for all county school districts to ensure accurate and timely payment and reporting deductions to STRS, PERS, and Social Security and Medicare taxes.

Monitors, reviews, verifies, and performs a variety of difficult and specialized payroll and accounting transactions, calculations, and reports to ensure compliance with local, state, and federal laws, codes, regulations, and guidelines related to retirement reporting.

Reviews, analyzes, posts and reconciles payments/deposits, related financial transactions, and performs monthly balancing reconciliation for the Retirement Unit's trust accounts at the County Office and the County Treasury.

Researches and prepares payroll, financial, retirement reporting, tax statements, analyses, projections, reports, schedules, and tables for county school districts and reporting agencies, including but not limited to, the master STRS file, master PERS file, 941, W-2, and W-3.

Calculates and posts payroll adjustments, including subject wage entries, payroll taxes, retirement deductions/refunds, year-end adjustments, and other related adjustments.

Confers and coordinates with internal departments and external agencies on payroll matters to ensure timely and accurate calculations and reporting.

Conducts research, analyzes data, and provides input on recommendations to improve payroll accounting systems, reporting systems, and related policies and procedures.

Assists school districts in the design and implementation of special retirement benefit programs.

Assists in the design and implementation of specialized automated recordkeeping and reporting systems.

Informs, assists, advises, and responds to queries from internal and external clients on payroll functions, calculation of retirement contributions, maintenance of retirement records, payroll procedures for FICA status, laws, rules, and regulations.

Provides technical leadership, direction, and training to County Office and school district staff involved in the calculation of retirement contributions, maintenance of retirement records, and preparation of payroll data reports to State and Federal retirement systems.

NON-ESSENTIAL FUNCTIONS:

Performs related duties as assigned.

CREDENTIALS, CERTIFICATES, LICENSES OR OTHER REQUIREMENTS:

Certified Payroll Professional (CPP) or Fundamental Payroll Certification (FPC) is preferred.

EDUCATION AND EXPERIENCE:

A combination of training and experience equivalent to: two (2) years of progressively responsible experience in a California public school environment involving payroll, financial accounting, and/or retirement report responsibilities, requiring use of a large, computerized payroll system as a regular part of the assignment. Previous experience with other government agencies is highly desirable.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Principles of federal and state statutes, codes, laws, regulations, bargaining labor agreements related to payroll and retirement processing, calculations, and reporting requirements.

Principles, practices and procedures of payroll, financial, statistical, and personnel processing, recordkeeping and data processing.

Generally accepted accounting principles, methods and practices.

Principles and practices of integrated systems.

Principles, practices, and equipment for records retention and organization for physical and electronic document management.

Computer equipment and software related to payroll, financial and statistical recordkeeping as well as spreadsheet, database and word processing software.

ABILITY TO:

Prepare clear and accurate financial statements and reports to agencies.

Operate a variety of standard office equipment, including a 10 key by touch.

Perform arithmetic computations.

Compile and verify statistical data.

Conduct research and analysis of payroll data.

Read, understand, interpret and apply laws, rules and regulations.

Recognize and audit for discrepancies and misleads in payroll information and reporting.

Apply deductive and inductive reasoning and logic to draw conclusions, summaries and recommendations.

Establish and maintain complex and accurate recordkeeping systems.

Create, merge, upload and download computerized files.

Make decisions on procedural matters using good judgment within the scope of established policy.

Exercise tact and confidentiality in dealing with clients and data.

Establish and maintain effective working relationships with those contacted in the course of work.

WORKING CONDITIONS & PHYSICAL ABILITIES:

Duties are typically performed in an office setting.

Must be able to hear and speak to exchange information; see to perform assigned duties; sit or stand for extended periods of time; possess dexterity of hands and fingers to operate computer and other office equipment; kneel, bend at the waist, and reach overhead, above the shoulders and horizontally, to retrieve and store files; lift light objects.

Established	Revised	Approved by Personnel Commission	FLSA Status	Salary Range
1986	7/99, 6/05; 3/18	02/19/2014	Exempt	Classified Support Grade 52