

JOB DESCRIPTION
San Diego County Office of Education

DEFERRED COMPENSATION PROGRAM TECHNICIAN

Purpose Statement:

Under general supervision, the Deferred Compensation Program Technician performs difficult and specialized clerical and technical duties in the preparation and processing of a variety of reports, forms and records for program participants and member districts; maintains complex records and files; and assists the Deferred Compensation Program Manager in the performance of more complex tasks.

Diversity Statement:

Because each person is born with inherent worth and dignity, and because equitable access and opportunity are essential to a just, educated society, SDCOE employee commitments include being respectful of differences and diverse perspectives, and being accountable for one's actions and the resulting impact.

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.

Essential Functions:

- Prepares, maintains, and reviews a variety of reports, forms and records pertaining to FBC 457/403(b), ARS 3121, retirement incentive, 401(a) and other retirement plans.
- Maintains program participants and member district records on a computerized record keeping system.
- Serves as key point of contact for third party administration systems and relieves supervisor of routine customer service needs and lower-level problem resolution requiring sound judgment.
- Posts information to control records where judgment must be exercised in the selection of data.
- Prepares special and periodic reports which involves compiling materials and data from a number of sources.
- Serves as liaison between plan participants, payroll staff and third-party administrators to ensure accuracy of payroll contributions.
- Conducts onboarding and ensures all appropriate documentation is obtained for IRS compliance and all distributions are accounted for.
- Responds to questions and concerns and provides information to plan participants and member districts requiring the interpretation of policies, procedures, rules, and regulations.
- Prepares a wide variety of materials (e.g., PowerPoints, charts, fliers, seminar information,

spreadsheets, reports, and financial programs, etc.) for the purpose of documenting activities and issues, meeting compliance requirements, and/or providing supporting materials for requested actions.

- Schedules meetings and appointments; maintains calendars.
- Meets strict deadlines as established by various retirement plans and overall program protocols.

Other Functions:

- Performs other related duties as assigned for the purpose of ensuring the efficient and effective functioning of the work unit.

Job Requirements: Minimum Qualifications:

Knowledge and Abilities

KNOWLEDGE OF:

Retirement systems;

Computerized spreadsheets;

Online management information systems;

Modern office clerical practices and procedures.

ABILITY TO:

Operate a computer and a variety of related software, including spreadsheet and database applications;

Type accurately at a rate of speed sufficient for successful job performance;

Verify and compile numeric data;

Perform computational tasks accurately;

Prepare reports, correspondence and forms;

Maintain complex filing and record keeping systems;

Communicate orally and in writing;

Follow oral and written instructions;

Conduct basic research;

Interpret and explain policies, procedures, rules and regulations;

Maintain effective relationships with those contacted in the course of work;

Work effectively independently and as part of a team with minimum supervision;

Organize and prioritize work;

Exercise appropriate judgment in making decisions;

Maintain confidentiality of information;

Work in a frequently fast-paced office environment;

Demonstrate attendance sufficient to complete the duties of the position as required;

Complete routine tasks thoroughly, accurately and with attention to detail.

Working Environment:

ENVIRONMENT:

Duties are typically performed in an office setting.

May be designated in an alternate work setting using computer-based equipment to perform duties.

PHYSICAL ABILITIES:

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. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

Education and Experience:

Education: High school diploma or equivalent;

Experience: A combination of education, training, or experience equivalent to two (2) years of increasingly responsible experience in the maintenance and preparation of financial, statistical or retirement records, including the use of microcomputers and related software and spreadsheet applications. Experience with Deferred Compensation Program and/or public employee retirement systems is highly desirable.

Equivalency: A combination of education and experience equivalent to two years of increasingly responsible experience in the maintenance and preparation of financial, statistical or retirement records, including the use of microcomputers and related software and spreadsheet applications.

Required Testing

N/A

Certificates, Licenses, Credentials

N/A

Continuing Educ./Training

N/A

Clearances

- Criminal Justice Fingerprint/Background Clearance
- Physical Exam including drug screen
- Tuberculosis Clearance

FLSA Status: Non-Exempt

Salary Grade Classified Support Grade 048

Personnel Commission Approved: June 22, 2005

Revised: 05/2013; 09/2019; 06/2023