POSITION DESCRIPTION

TITLE: Benefits-Retirement Specialist
LOCATION: Administrative Service Center (ASC)
REPORTS TO: Assistant Manager, Payroll & Benefits
DEPARTMENT: Benefits

SUMMARY STATEMENT:
Under the general supervision of the Assistant Manager for Payroll & Benefits, the Benefits-Retirement Specialist is responsible to communicate benefit and retirement options to all employees.

ESSENTIAL FUNCTIONS:
1. Communicate effectively with staff and the general public in person, via telephone and in writing, in regard to benefit and retirement options.
2. Prepare, process, and input data pertinent to retirement and benefits.
3. Maintain death benefit information and communicate with beneficiaries.
4. Prepare and audit monthly various billings.
5. Respond to and research inquiries for District personnel.
6. Monitor, process, analyze and research data for the Flex Plans for monthly, quarterly, and year-end reporting.
7. Process Tax-Sheltered Annuities as well as staff communication.
8. Monitor and disperse benefit forms and supplies as needed.
9. Prepare reports as necessary for payroll, District departments, union, and other external entities.
10. Assist in the preparation and maintenance of the benefit pooling reports, including domestic partner and spousal pooling and communicating to the bargaining groups.
11. Process the Deferred Compensation Program 403b (DCP) as well as staff communication.

OTHER RESPONSIBILITIES:
1. Perform other related duties as assigned.

PHYSICAL DEMANDS REQUIRED:
- Hearing (66-100%)
- Speaking (66-100%)
- Vision (66-100%)
- Sitting (66-100%)
- Standing (33-66%)
- Walking (Up to 33%)
- Writing (66-100%)
- Kneeling (Up to 33%)
- Reaching (Up to 33%)
- Bending/Stooping (Up to 33%)
- Pushing/Pulling (Up to 33%)
- Lifting/Carrying Up to 50 lbs. (Up to 33%)
- Use of hands and/or arms for repetitive motion (66-100%)

MENTAL DEMANDS REQUIRED:
- Reading Documents (66-100%)
- Verbal Communication (66-100%)
- Reasoning (66-100%)
- Math (66-100%)
- Constant Interruptions (66-100%)
- Problem Solving (33-66%)
- Customer Contact (66-100%)
- Written Communication (33-66%)
- Detailed Work (66-100%)
- Multiple Concurrent Tasks (66-100%)
- Confidentiality (66-100%)

Percentages of requirements of physical and mental tasks are only an estimate. Reasonable accommodations for persons with a disability will be considered in order for them to perform the essential functions of the job.

(66-100%) = Continuously
(33-66%) = Frequently
(Up to 33%) = Occasionally

TOOLS AND EQUIPMENT NECESSARY:
Computer, typewriter, 10-key calculator, telephone, microfilm reader printer, printer, copy machines, FAX machine, and all other tools and equipment necessary to perform the essential functions as listed above.
MINIMUM QUALIFICATIONS:
(Testing may be required.)
1. Typing/keyboarding of 50 wpm.
2. A minimum of two years of experience in a related field, or equivalent training.
3. Demonstrated ability to perform on the computer, including heavy on-line data entry, using Windows environment and related applications.
4. Demonstrated proficiency in Excel.
5. Demonstrated ability to operate the office equipment as listed in the tools and equipment area above.
6. Demonstrated ability to perform tasks accurately and in accordance with established guidelines.
7. Demonstrated ability to handle multiple priorities at one time.
8. Must possess a good math aptitude.
9. Demonstrated ability to communicate effectively, using proper grammar, spelling, and punctuation both verbally and in writing.
10. Demonstrated ability to problem solve.
11. General understanding of basic accounting principles preferred.
12. Must be self-motivated toward assigned duties, work well under pressure and possess the ability to work under stress with continuous interruptions in a positive manner.
13. Knowledge or willingness to learn on-line computer systems, including the Department of Retirement (DRS) and Washington School Information Processing Cooperative (WSIPC) software.
14. Demonstrated ability to maintain confidentiality of sensitive information.
15. Demonstrated ability to establish and maintain positive relationships with others as part of a team.

Notice of Nondiscrimination:
Evergreen Public Schools does not discriminate in any programs or activities on the basis of sex, race, creed, religion, color, national origin, age, veteran or military status, sexual orientation, gender expression or identity, disability, or the use of a trained dog guide or service animal and provides equal access to the Boy Scouts and other designated youth groups. The following employees have been designated to handle questions and complaints of alleged discrimination:

<table>
<thead>
<tr>
<th>Title IX Coordinator</th>
<th>Section 504/ADA Coordinator</th>
<th>Civil Rights Compliance Coordinator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cale Piland</td>
<td>Holly Long</td>
<td>Tracy Thompson</td>
</tr>
<tr>
<td>13501 NE 28th Street</td>
<td>13501 NE 28th Street</td>
<td>Director Human Resources</td>
</tr>
<tr>
<td>P.O. Box 8910</td>
<td>P.O. Box 8910</td>
<td>13501 NE 28th Street</td>
</tr>
<tr>
<td>Vancouver, WA 98668-8910</td>
<td>Vancouver, WA 98668-8910</td>
<td>P.O. Box 8910</td>
</tr>
<tr>
<td>Telephone: (360) 604-4431</td>
<td>Telephone: (360) 604-6711</td>
<td>Telephone: (360) 604-4010</td>
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260-261 Days Per Year (Includes Holidays)
8 Hrs. Per Day

Revised Date: 01/18/2019
Classification: Non-represented
Display on Web? Yes

Benefits-Retirement Specialist