



City of Phoenix RETIREMENT ASSISTANT

JOB CODE 05370

Effective Date: 09/06

DISTINGUISHING FEATURES OF THE CLASS:

The fundamental reason this classification exists is to provide assistance to active employees and retirees and administrative staff support in the field of retirement and pensions. Work involves independent decision making on problems encountered within a defined activity area. The employee plans and organizes the work flow utilizing departmental rules, regulations, and procedures. Work is performed under the general direction of an Administrative Assistant or section head, who evaluates performance based upon results.

ESSENTIAL FUNCTIONS:

- Answers questions and provides information to employees and retirees in person, by telephone, and in writing, in accordance with established departmental policies and regulations regarding the financial impact of the requirements and provisions of retirement benefit programs;
- Reconciles salary and service credit issues, resolving any conflicts with both internal and external agents;
- Composes, responds to, and audits a variety of correspondence reports;
- Calculates pension, disability, survivor, and refund benefits, accounting for any previous service credits and/or costs with associated pension funds;
- Interprets and makes decisions in accordance with laws, regulations, and policies;
- Keeps detailed and accurate records;
- Develops, presents, and assesses individual and group presentations related to retirement;
- Reviews and interprets documents for completeness, accuracy, and implications for relevant pension benefits;
- Monitors and compares data to determine compliance with prescribed operating standards;
- Maintains regular and reliable attendance.
- Demonstrates superior seamless customer service, integrity, and commitment to innovation, efficiency, and fiscally responsible activity.

Required Knowledge, Skills and Abilities:

Knowledge of:



City of Phoenix

- Principles and practices of office management.
- Department goals, objectives, policies, and procedures.

Ability to:

- Communicate orally with customers, clients, and the public using a telephone, in a face-to-face, one-to-one setting, and in a group setting in the English language.
- Comprehend and make inferences from material written in the English language.
- Produce written documents with clearly organized thoughts using proper sentence construction, punctuation, and grammar.
- Work under pressure (i.e., handling significant problems and tasks which come up simultaneously and/or unexpectedly and approaching deadlines).
- Operate keyboard devices such as calculators, PC, and CRT.
- Establish priorities for own workload based upon such factors as need for immediate action, work objectives and schedules.
- Exercise independent initiative and judgment.
- Work cooperatively with other employees and the public.
- Learn job-related material primarily through oral instruction and observation to effectively perform job duties. This learning takes place mainly in an on-the-job training setting.

Additional Requirements:

- Some positions will require the performance of other essential and marginal functions depending upon work location, assignment, or shift.

ACCEPTABLE EXPERIENCE AND TRAINING:

Four years of progressively responsible clerical experience of which one year must be at the paraprofessional level in the area of benefits, retirement and/or pensions or a bachelor's degree in public or business administration or a related field. Other combinations of experience and education that meet the minimum requirements may be substituted.