

RETIREMENT AND DEDUCTIONS ANALYST

DEFINITION

Performs a variety of analytical tasks related to payroll deduction operations and the payroll retirement system CalPERS, PARS, CalSTRS, 403(b) and 457(b).

TYPICAL DUTIES

Analyzes retirement payroll deduction operations, forms, records, reports, workflow, and work distribution for the purpose of developing more efficient systems.

Identifies problems in assignments, benefits, deductions, adjustments and corrections, and report preparation; and makes recommendations for problem prevention and resolution.

Plans, projects, and reports data relative to the efficiency of retirement and benefits payroll deduction's portion of the accounting system, which may involve establishing or recommending new procedures or instructions.

Reviews and interprets laws, rules, collective bargaining agreements, and policies and procedures, and recommends changes to conform to legislation that has been enacted.

Provides support, direction, and training to personnel in implementing changes.

Confers with and obtains information from the California State Teachers' Retirement System, California Public Employees' Retirement System, and Public Agency Retirement System and 403(b)/457(b) vendors to resolve problems or implement changes.

Serves as a subject matter expert and advises District programmers in computerizing payroll deduction and retirement procedures.

Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS AMONG RELATED CLASSES

A Retirement and Deductions Analyst assists a Benefits Manager in coordinating the activities relative to retirement and deferred compensation deductions; and analyzes deduction operations and the retirement system and procedures.

A Benefits Manager oversees the day-to-day operations of all areas in the Health Benefits Branch, including health insurance, open enrollment, life insurance, flex spending accounts, retirement benefits, and payroll and personnel issues affecting health benefits.

An Associate Payroll Operations Analyst assists in the analysis of the payroll system and procedures used for all aspects of payroll processing in order to anticipate and resolve problems and improve payroll services.

SUPERVISION

General supervision is received from a Benefits Manager. Technical supervision may be exercised over work performed by an Insurance Representative III and unit supervisors in implementing changes in retirement and benefits deduction procedures.

CLASS QUALIFICATIONS

Knowledge of:

Procedures involved in payroll processing, including personnel assignments, time reporting, deduction control, and payroll accounting 457(b)/403(b) plans, deferred compensation plans
Rules, regulations, and provisions of the California State Teachers' Retirement System, California Public Employees' Retirement System, Public Agency Retirement System, and other applicable State laws
Federal, State, and District rules and regulations relative to salaries, deductions, and employee benefits
Capabilities of computer applications and hardware in the management of payroll systems
Time-reporting and payroll deductions
Current accounting principles and procedures
Uses of computers in accounting functions
Training and orientation methods

Ability to:

Perceive problems in the payroll deduction retirement system and develop procedures to implement changes
Analyze, apply, and explain complex laws, rules, and regulations
Compile and analyze data and prepare clear and concise reports
Exercise good judgment and tact
Learn and apply complex formulas used in computing benefit amounts
Express technical concepts and communicate and work effectively with a wide variety of District and non-District employees, both individually and in groups
Work independently
Effectively utilize computer equipment and software

ENTRANCE QUALIFICATIONS

Education:

Graduation from a recognized college or university, preferably including courses in public, business or personnel administration. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

Experience:

Two years of experience with a public agency of at least 2500 employees at a technical-clerical level in central payroll or personnel processing with responsibilities in such areas as retirement systems, deductions, personnel assignments, accounting, grievance processing, computer programming, or systems analysis.

This class description is not a complete statement of essential functions, responsibilities, or requirements. Requirements are representative of the minimum level of knowledge, skill, and/or abilities. Management retains the discretion to add or change typical duties of the position at any time.

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