

Oklahoma Public Employees Retirement System
Vacancy Notice: Retirement Benefit Analyst (unclassified)

OPERS is accepting applications for the position of Retirement Benefit Analyst. To apply, submit your resume **and** an OPERS employment application (available at www.opers.ok.gov/jobs) using one of the following:

Email: dbyrd@opers.ok.gov (include in the subject line "RBA Search")
Fax: (405) 848-5967
US Mail: Oklahoma Public Employees Retirement System
ATTN: Human Resources
5801 Broadway Ext., Suite 400
Oklahoma City, Oklahoma 73118

All OPERS positions are located at 5801 Broadway Ext., Suite 200, Oklahoma City, OK 73118. Regular business hours are 8:00 a.m. until 5:00 p.m., Monday through Friday.

To be considered, the required application materials must be received by the application deadline.

Application Deadline: Friday, May 15, 2015, by 5:00 p.m.
Job Title: Retirement Benefit Analyst
Number of Vacancies: 1
Hiring Rate: \$37,976 annually

Essential Functions: The essential functions of this position include, but are not limited to, the following:

- Calculates service credit, vested benefits, benefit estimates, and disability benefits. Determines the correct salary calculation and benefit formula for members.
- Receives and processes withdrawal requests. Verifies service credit and prepares vested benefit offer if eligible. Schedules withdrawal payment dates. Determines eligibility for rollover of contributions. Responds to member inquiries and follows up in writing. Responds to inquiries from financial institutions when needed regarding withdrawal payments or rollovers.
- Determines eligibility and calculates repayment of withdrawn contributions for reinstatement of previous service credit.
- Determines eligibility and calculates cost to the member and the employer to purchase service lost while on temporary total disability.
- Prepares and mails estimates and letters to members and others. Works with Accounting personnel to create and send invoices for withdrawal repayments and service purchases.
- Determines the correct amounts for refunds.
- Determines cost for delinquent or erroneous employer and employee contributions.
- Processes enrollment applications, reviews for accuracy and eligibility to participate. Searches retirement records to determine status of enrollees, and notifies appropriate personnel of the return of inactive members to active membership.
- Processes member requests. Reviews incoming mail to establish nature of inquiry. Prepares files for calculation by analysts in active member services by ordering, printing ledgers and requesting microfilm as needed.

- Ensures member files contain the appropriate documentation to complete benefit calculations and, when missing, requests the information from member or member's employer. Ensures appropriate documentation is made in the member's file regarding requests and responses.
- Responds to telephone inquiries. Counsels members in person and replies to correspondence from members regarding various benefits and credits.
- All Retirement Benefit Analysts in the agency are expected to assist in other areas of the agency in the event of a backlog of work or special assignments.

Knowledge, Skills, and Abilities: Knowledge of current computer software, office systems and equipment, of basic arithmetic; and of clerical accounting methods, procedures and terminology, plus knowledge of state laws, guidelines, rules and regulations relating to retirement system procedures and methods. Must be able to communicate effectively and to determine when specific laws should be applied to certain types of benefits, withdrawals, rollovers, and disbursements. Must be able to analyze appropriate records, determine authorized benefits, and counsel members regarding various benefits and credits.

Education and Experience: Three years of technical bookkeeping, accounting, auditing, claims adjusting, eligibility determination or reviewing and analyzing requests for determination of retirement benefits or other related benefits; or an equivalent combination of education and experience, substituting thirty semester hours of college coursework for each year of the required experience. This position requires excellent customer service and communication skills.

Physical Requirements: Working on a computer terminal and keyboard, numeric and alpha filing, operating a calculator, copier, fax machine, and communicating verbally in person and telephone, in writing, and through electronic means. This position may require long periods of time communicating with participants, employers, and others in person, on the telephone and through e-mail.