

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 to:

Oklahoma Public Employees Retirement System  
ATTN: Human Resources  
5801 N. Broadway Ext., Suite 400  
Oklahoma City, Oklahoma 73118

The OPERS employment application is available online at: <http://www.opers.ok.gov/jobs>

All positions at OPERS are located at 5801 N. Broadway Ext., Suite 400, Oklahoma City, OK 73118. Please mail or hand-deliver your application and other required documents during regular business hours, Monday-Friday, 8:00 a.m. to 5:00 p.m. Applications must be received in this office by the application deadline.

Application Deadline: June 30, 2014, by 5:00 p.m.  
Job Title: Retirement Benefit Analyst  
Number of Vacancies: 1  
Hiring Rate: \$35,163 annually

**Essential Functions:** This position is responsible for processing enrollment applications, member services mail and file preparation, calculating benefit estimates, disability benefits, withdrawal requests, repayment of withdrawn contributions, eligibility and cost calculations for temporary total disability, and accounting of service credit. All benefit calculations must be accurate and prepared in accordance with the procedures determined by the agency. 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- Determines eligibility and calculates repayment of withdrawn contributions for reinstatement of previous service credit.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 to notify 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.

#### Knowledge, Skills, and Abilities

The knowledge, skills and abilities required for this position include 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. Ability to communicate effectively; and, to determine when specific laws should be applied to certain types of benefits, withdrawals, rollovers, and disbursements is required. Ability to analyze appropriate records and determine authorized benefits; and to counsel members regarding various benefits and credits is required.

#### 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. 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.

#### Physical Requirements

The physical requirements of this position include 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.