

Position Description - Unclassified

- To record the essential functions of the position
- To record special requirements
- To record required knowledge and skills to perform the duties of the position
- To record special working conditions
- To aid in recruitment and selection
- To establish Management's expectations
- To provide a base for managing performance

Position Status:

Position Title		Position Number
Retirement Coordinator		E99906
Appointment (9mos. / 12 mos. / Other)	Contract Period (from / to)	Department / Division
12 Mos.	07/01 – 06/30	Human Resources
Position Type (FT/PT)	FLSA	
FT	Exempt	
Reports to	Reports to Position Number	
Associate Director HR	E99864	
Incumbent	University ID #	
TBD	TBD	

Program Information:

<p>A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.</p> <p>The mission of Human Resources is to partner with campus to help create and promote a human-centered organizational culture anchored in diversity, equity, inclusion, and respect.</p> <p>HR develops, implements, and administers a wide range of programs within guidelines provided by the State of Oregon, the Oregon Public Universities and the University Administration. These programs will assure the best use of, and service to, the institution's current and future workforce. Human Resources supports the institution's goals by providing the best possible services in the areas of personnel, payroll, and benefits.</p>
<p>B. Describe the purpose of this position and how it functions within this program.</p> <p>The Retirement Coordinator administers the WOU retirement program and performs duties for the function of payroll. This position is responsible for all aspects of the PERS, ORP, optional retirement plans and counseling for the university as well as payroll functions including unclassified payroll leave administration, and the creation of manual payroll checks. The Retirement Coordinator will work with all units on campus to ensure compliance with state and federal laws. The employee will aid in the university's commitments to diversity, equity, and inclusion and as well as striving toward becoming a Hispanic Serving Institution. The employee will deal with interruptions on a continual basis and must possess skills to work with a variety of individuals and situations. This position will work with units to ensure their objectives align with the university's strategic plan.</p>

Position Information and Qualifications:

A. Description of Duties/Responsibilities – List the major duties assigned to the position. Note percentage of time each listed duty is performed to total 100%. Indicate “E” = Essential, “R” = Revised

Percent of Time	Duties
50%	<p>Retirement Coordination</p> <ul style="list-style-type: none"> • Coordinate retirement educational opportunities • PERS/ORP - Responsibility for monitoring PERS and ORP eligibility and notification to employees. • Coordinate outside vendor or expert educational opportunities regarding PERS/ORP related issues. Input appropriate codes into Banner dependent upon retirement choices. • Monitor and update PERS EDX system monthly. Ensure proper posting of records and research and correct all errors. • Monitor Timelines for Compliance- Notification of retirement eligibility, and retiree subsidy program eligibility for compliance to required timelines. These timelines are weekly, monthly and yearly basis depending on the governing regulations. • Banner - Enter, new or revised employee retirement information into BANNER. • Tax Deferred Programs - Coordinate information to faculty and staff regarding tax deferred programs. This may be by coordinating seminars done by the H.R. staff, or outside vendors. • Liaison - Acts as liaison to PERS, OPURP, Deferred Compensation representatives and other vendors. • Monitor the arrival and departure of employees. Ensuring the termination of employees in PERS and the Banner systems. • Interpret policies, rules, procedures, state and federal statues and Collective Bargaining Agreements. Advise managers and employees about policies; keeps current on legal developments and HR trends. Identify and recommend changes to existing policies or the establishment of new policies based on the university need, revised regulations, case law, and collective bargaining agreements. • Keep up to date on any changes that may occur to State or Federal Leave laws, implementing changes when necessary • Create and host employee and supervisor trainings • Meet with Employees to provide Retirement counseling
35%	<p>Payroll Support</p> <ul style="list-style-type: none"> • Responsible for reviewing employee leave reports to ensure employees who need to be taking leave have filed appropriate documentation • Work with supervisors to ensure accurate leave reporting • Unclassified and Faculty Sick Leave Tracking • Assist Payroll Manager with transition to Web Time-Entry, reviewing and updating supervisor information, time-keeping methods, or other leave entry and tracking • Review Web-time for unclassified employees (Maintain spreadsheet during transition) • Back up to create payroll checks when requested by supervisor • Assist with compensation and labor relations as they relate to administration of payroll

10%	<ul style="list-style-type: none"> • Creates manual checks for Back Pay Worksheets. Alerts Payroll Manager when checks are ready to be audited and printed. • Creates and deletes manual checks for Overpayment calculations. Sends screenshots of manual check to Payroll Manager for processing of Overpayment. • Creates manual checks for payroll advances, ACH Returns, and as need via request by Payroll Manager. • Audits creation and feed of manual check in PERS <p>Benefits Support</p> <ul style="list-style-type: none"> • Serve as backup to Benefits Coordinator • Assist Associate Director and Supervisors in managing employee relations, disputes, and grievances as they relate to employee leave issues
5%	<p>Other Duties</p> <ul style="list-style-type: none"> • Other projects as assigned

B. Required Qualifications

List any certificates, licenses, academic degrees, or experience required to perform the duties of this position. Indicate if a combination of education and experience is acceptable.

- A Bachelor’s Degree or equivalent
- Five years of progressive experience in office administration
- Excellent computer skills, including a high degree of proficiency in Microsoft Word, Excel, Outlook, and PowerPoint
- Professionalism in communication
- Must be proficient with MS Word, Excel spreadsheets, and Adobe.
- Must be detail-oriented
- Must be able to work with set deadlines and set priorities
- Must be able to exercise initiative and judgment to accomplish assignments under general supervision.

C. Preferred Qualifications

Describe preferred education, experience, skills, licenses, certificates, and other qualifications for this position.

- Bachelor’s Degree in Human Resources or related field
- Prior experience in working in a post-secondary setting
- Experience working in a Human Resources office or other confidential setting
- Bilingual, especially Spanish or ASL
- SHRM or HRCI Certification
- Experience with BANNER and web-based applications preferred

D. Knowledge Areas

List the major areas of knowledge that are required to perform the duties of this position.

- USSE Policies and Procedures
- WOU Policies and Procedures
- State of Oregon rules and regulations as it relates to retirement
- Federal employment rules and regulations as it relates to retirement
- WOU's Affirmative Action and Discrimination Policies

Budget Authority:

Indicate the level of the position's responsibility for the development, control, and monitoring of budget. Indicate the size of the budget. Check all that apply.

	Develops, monitors*, and controls* <i>*Monitor means to review and approve expenses; control means to authorize budget transfer at the department level</i>	\$
	Delegated authority to monitor budget	\$
X	Limited approval authority for purchase	\$5000
	Purchase only with higher level approval	\$

Supervisory Authority:

If this position has the authority to act or effectively recommend action affecting employees in the following areas, check all that apply.

	Hire		Assign Work
	Transfer		Recommend salary adjustments
	Discipline		Approve requests (i.e. leave)
	Dismiss		Respond to complaints/grievances
	Layoff		Conduct performance assessments
	Promote		Give Direction

Positions Supervised:

Type	# of Employees	Total FTE
Teaching faculty		
Classified staff		
Unclassified staff		
Student Employees (average per term)		

Other (specify)		
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Decision Making Authority:

Describe the breadth and scope of decision-making authority and discretion the position has to formulate, implement, evaluate, approve and/or modify department and/or university policy, procedures, and/or programs. Describe the type of review and/or approval required by a higher level.

Additional Information:

List any additional information that would help describe the nature of the position.

- Due to the nature of this office, a high level of confidentiality is essential
- Willingness to be flexible in work arrangement when needed

Acknowledgement:

Employee Printed Name	Employee Signature / Date
Supervisor Printed Name	Supervisor Signature / Date
Reviewer (VP / Director)	Reviewer Signature / Date
Appointing Authority	Appointing Authority Signature / Date

HR USE ONLY:

Received by		Date	
Position Class # (Ex. UF101)	Employee Class	Job Location	Appointment Percent
CUPA-HR# / Title	NOC Code	Category Code	SOC Code
Actions Taken			
	NBAPBUD / NBAPOSN		
	NBAJOBS		
	PEAFAC		
	Electronically Filed		