



NEW: Submitted:  
07/01/2019 05/14/2019

JOB TITLE:	CLERK RETIREMENT
DIVISION	FINANCIAL SERVICES
SALARY SCHEDULE/GRADE:	IA, GRADE 7
WORK YEAR:	AS APPROVED BY THE BOARD
FLSA STATUS:	NON-EXEMPT
JOB CLASS CODE:	8689
BARGAINING UNIT:	CLAB

**SCOPE OF RESPONSIBILITIES**

Responsible for completing all phases of Kentucky Teacher Retirement Systems (KTRS) reporting by the required deadlines. Provides customer service and guidance to employees regarding retirement related questions. Assists with testing and implementing system programs. Assumes responsibility as liaison between the Payroll Department, Human Resources, KTRS and employees. Works under general supervision using a wide range of procedures.

**PERFORMANCE RESPONSIBILITIES & EVALUATION CRITERIA**

- Assumes responsibility for all phases of assigned KTRS and CERS retirement reporting and insures compliance with eligibility requirements
- Assumes responsibility for completing documents associated with retirement including KTRS and CERS forms, reports and out-of-state verifications/certifications
- Coordinates the completion of KTRS and CERS retirement applications with the Benefits Department, KTRS and employee; completes assigned sections by required deadlines; monitors applications and submits necessary adjustments after final payroll processing
- Reviews all Benefits Retirement Worksheets and associated 401K, 403B and 457 deferrals for accuracy; coordinates retirement pay-out processing with the Benefits Department and Payroll staff
- Completes in-depth payroll research to verify earnings and retirement withholding history; completes required CERS and KTRS reporting and adjustments ; remits payment for omitted contributions
- Reviews payroll warrant summary totals and insures KTRS deduction totals are reasonable and withheld on scheduled pay dates
- Assumes responsibility for completing and remitting the CERS Monthly Packet and CERS Annual Report by the required deadlines
- Assists with completing the KTRS end of year reconciliation by the required deadlines
- Assumes responsibility for completing required training and maintaining proficiency in the district HR/Payroll systems as well as the systems mandated by the Retirement Systems
- Prepares and submits supplemental payroll related to deduction refunds
- Assumes responsibility as liaison between the Payroll Department, Benefits Department, KTRS and employees to coordinate requests related to retirement
- Assists with planning and developing procedure documentation
- Completes all trainings and other compliance requirements as assigned and by the designated deadline
- Performs other duties as assigned by designated supervisor

**PHYSICAL DEMANDS**

The work is primarily sedentary. The work requires the use of hands for simple grasping and fine manipulations. The work at times requires bending, squatting, reaching, with the ability to lift, carry, push or pull light weights.

MINIMUM QUALIFICATIONS
High School Diploma or G.E.D.
Two (2) years payroll or bookkeeping experience
Ability to maintain accurate records and meet established deadlines
Ability to work well in a team environment
Ability to communicate in a professional effective manner

DESIRABLE QUALIFICATIONS
Two (2) years Human Resources or Benefits experience
Experience in Kentucky school financial systems and reporting
Experience in a diverse workplace