

SAN DIEGO COUNTY OFFICE OF EDUCATION
Personnel Commission

CLASS TITLE: DEFERRED COMPENSATION PROGRAM CLERK

DEFINITION:

Under general supervision, performs difficult and specialized clerical duties in the preparation and processing of a variety of reports, forms and records for program participants and member districts; maintains complex records and files; and assists the Deferred Compensation Program Manager in the performance of more complex tasks.

REPRESENTATIVE DUTIES:

ESSENTIAL FUNCTIONS:

Prepares, maintains and reviews a variety of reports, forms and records pertaining to FBC 457/403b, ARS 3121 plan, incentive plan/golden handshake, 401a program.

Maintains program participants and member district records on a computerized record keeping system.

Posts information to control records where judgment must be exercised in the selection of data.

Prepares special and periodic reports which involved compiling materials and data from a number of sources.

Responds to questions and provides information to plan participants and member districts requiring the interpretation of policies, procedures, rules and regulations.

Creates charts, graphs and other presentation materials.

NON-ESSENTIAL FUNCTIONS:

Performs related duties as assigned.

CREDENTIALS, CERTIFICATES, LICENSES OR OTHER REQUIREMENTS:

None

EDUCATION AND EXPERIENCE:

Any combination of education, training or experience demonstrating possession of the knowledge and abilities detailed below. An example of typical qualifying experience would include: completion of training or college-level course work in business, public administration or related field, and two years of increasingly responsible experience in the maintenance and preparation of financial, statistical or retirement records, including the use of microcomputers and related software and spreadsheet applications. Experience with Deferred Compensation Program and/or public employee retirement systems is highly desirable.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Modern office-clerical practices and procedures

ABILITY TO:

Operate a computer and a variety of related software, including spreadsheet and database applications

Type accurately at a rate of speed sufficient for successful job performance

Verify and compile numeric data

Perform computational tasks accurately

Prepare reports, correspondence and forms

Maintain complex filing and record keeping systems

Communicate orally and in writing

Follow oral and written instructions

Conduct basic research

Interpret and explain policies, procedures, rules and regulations

Maintain effective relationships with those contacted in the course of work

Work effectively independently and as part of a team with minimum supervision

Organize and prioritize work

Exercise appropriate judgment in making decisions

Maintain confidentiality of information

Demonstrate attendance sufficient to complete the duties of the position as required

Complete routine tasks thoroughly, accurately and with attention to detail

WORKING CONDITIONS & PHYSICAL ABILITIES:

Duties are typically performed in an office setting.

Must be able to hear and speak to exchange information; see to perform assigned duties; sit and/or stand for extended periods of time; possess dexterity of hands and fingers to operate a computer and other office equipment; kneel, bend at the waist, and reach overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lift light objects.

Established: 06/05

Revised: 5/13