



**State of Oregon
Public Employees Retirement System
Position Description**

Position Information

Employee Name: Vacant

Position No: 0137130

Class Title: Office Specialist 2

Class No: C0104

Working Title: Data Services Support
Specialist

Agency No: 45900

Section Title: Data Services (DS)

Budget Auth. No: 000231770

Rep. Code: OA

Established Date: 7/1/1991

Work Location: Tualatin OR

PD Revised Date: 5/01/2017

Position: Permanent / Full time

**FLSA
Classification:** Non-Exempt

**Eligible for
Overtime:** Yes

PERS Mission Statement

We serve the people of Oregon by administering public employee benefit trusts to pay the right person, the right benefit, at the right time.

Program Information

Describe the program in which this position exists.

Operations Division

The Operations Division is responsible for providing accurate information and timely customer services to PERS members, including comprehensive retirement plan information and assistance, issue resolution; providing accurate information and timely services to PERS employers including employer education, reporting assistance, compliance, overdue data, and contribution collection and validation; intake and processing of all benefit applications and stand-alone forms before and after retirement; initiating benefit estimates and processing purchases; determining eligibility for withdrawal; approving and denying disability applications; determining beneficiaries for pre- and post-retirement death benefits; reviewing court orders for compliance; calculating, maintaining, and ending all service retirement, disability, divorce, and death benefits for the PERS, OPSRP and IAP retirement programs.

0 %

Position Purpose

Describe the primary purpose of this position.

OS2 Data Services Support Specialist

Manage the accuracy and timely processing of membership related documents to assure the accuracy and timely handling of individual membership accounts, and to provide information to PERS members and to PERS member employers. Act as support to the Data Services Section. 0 %

Core Competencies

Title and Definition

Integrity: 0 %
Inspires trust through transparency and ethical, sound judgment.

Service-Focus: 0 %
Works together to meet the needs of others with dependability, professionalism, and respect.

Accountability: 0 %
Takes ownership for our decisions, actions, and outcomes.

Description of Duties

Title and Definition % of Time

E - Manage the accurate and timely processing of workflows, work items and forms

- Receive, send, manipulate workflows and employer work items for applications, employer documentation and member documents for retirement, death, divorce, withdrawals, data verification.
- Review forms for accuracy, compliance with PERS law and completeness.
- Audit employee and employer records for accuracy and validity of information provided.
- Add/adjust/reject information contained in member record on ORION & other tools, document reason for action.
- Identify and request missing information & or documentation. 35 %
- Request and review official member records to identify and determine special handling needs.
- Analyze anomalies to determine appropriate course of action and referral to senior staff when appropriate.
- Maintain and adjust records as requested.
- Make complete and accurate computer entries.
- Validate hard copy data to computer entries for accuracy.
- Reconcile on-line data errors.
- Document actions for member or employer records.
- Review computer reports for follow-up actions and processing accuracy.

E - Provide administrative and clerical support

- Prioritize activities, review or screen mail or reports, file and track incoming work entry projects.
- Distribution projects. 35 %
- Meeting scribe and report writing.
- Establish and maintain filing systems.
- Ensure records are microfilmed.
- Accurately enter data in agency systems.

E - Communication & Correspondence

- Provide information and assistance to a variety of customers such as PERS members, employers, and PERS staff by phone, in person, by video conference, and in writing.
- Explain basic program requirements and eligibility. 20 %
- Type correspondence and memoranda.
- Direct customers to informational pamphlets and brochures and web enabled to appropriate web sites.
- Send routine or boilerplate letters with accurate information and meeting established service levels.

N/E - Other duties as assigned.

- Maintain weekly statistical reports of activities. Complete other reports as assigned.
- Coordinate activities with other employees or sections of the agency or external customers. 10 %
- Actively problem solve to improve controls, workflow, work scheduling, or efficiency improvement.
- Provide informational presentations or training to other agency staff.
- Other duties as assigned.

Physical Requirements - Working Conditions

Describe any on-going working conditions. Include any physical, sensory and environmental demands. State the frequency of exposure to these conditions.

Standard office equipment/supplies. Regular and timely attendance is an essential function required to meet the demands of this job and to provide necessary services.

OS2 Data Services Support Specialist

Air-conditioned office; non-smoking; subject to interruptions; occasionally necessary to deal with irate people. Ability to multi task and meet deadlines and ability to communicate in a variety of different media-public speaking, in meetings, on phone, e-mail, and letters. 0 %

Guidelines

List any established guidelines used in the position, such as state or federal laws or regulations, policies, manuals or desk procedures.

Agency Policies and Procedures
Business Rules and Policy Papers
Desk Procedures
EDX Manual
Employer Manual
Internal Revenue Code (IRC)
IT Best Practices (I.E. "RUP" and other standards)
On-line Member Handbook
Oregon Accounting Manual (OAM)
Oregon Administrative Rules (OAR)
Oregon Revised Statutes (ORS)
PERS brochures and publications
PERS Health Insurance Guide

PERS Style Guide
 Service Retirement Application/Pre-retirement Guide
 State of Oregon Policies and Procedures
 System of Record Operating Manuals (jClarety)
 Web sites (PERS, State of Oregon, Employer, Member, etc.)

How are these guidelines used to perform the job?

All the above-listed references are used to ensure entitlement to benefits, to make determinations and to assure uniformity in the information given.

Work Contacts

With whom, outside of co-workers in this work unit, must this position regularly come in contact?

Who	How	Purpose	How Often
Members, Employers, Public	phone, correspondence	give and receive information	daily
PERS staff	in person, phone, e-mail, video conferencing	give and receive information	daily

Position Related Decision Making

Describe the typical decisions of this position. Explain the direct effect of these decisions.

OS2 Data Services Support Specialist

Decision-making regarding eligibility for PERS' membership and rights of that membership. An incorrect decision can result in non-participation by an eligible employee, or can result in member reliance on faulty premise.

0 %

Review of Work

Who reviews the work of the position?

Mgr Classification	How	How Often	Purpose
X7002	Audit	daily, as necessary	to ensure efficiency and accuracy in accordance with agency policies and values, procedures, and laws.

Additional Position-Related Information

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

This position requires excellence in the following: communication and organizational skills, interpersonal relations; working independently; oral and written communication; familiarity with modern office equipment and computer technology. Must maintain complete confidentiality while performing job duties.

SPECIAL REQUIREMENTS: List any special mandatory recruiting requirements for this position:
 Employees will be subject to a computerized criminal history background investigation. Adverse

background data may be grounds for immediate disqualification.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Physical Demands - General Activities

(N)ot Required - 0%
(I)ntermittent - 1 - 5%
(O)ccasional - 6 - 33%
(F)requently - 34 - 66%
(C)ontinuous - 67 - 100%

Lifting <10 lbs
Lifting >11-25 lbs
Lifting >26-50 lbs
Lifting >50 lbs

	% of Time	Notes
Sitting	C	Desk/Office
Standing	N	
Walking	O	Carpet/Short distances
Climbing/Balancing	N	
Reaching - with arms and hands	N	
Stooping/Kneeling/Crouching/Crawling	N	
Talking	O	
Hearing	C	
Lifting	I	<10 lbs Files/Papers
Vision - close, peripheral, depth, ability to adjust focus	F	

Organizational Chart

To view a copy of a current organizational chart, click [here](#).

Employee Statement of Understanding

I have read and understand the position description for my position. I am able to perform all of the essential functions of this position.

I agree to comply with the agency's compliance policies and all laws, rules, regulations and standards of conduct relating to my position. As an employee, I understand my duty to report any suspected violations of the law or the standards of conduct to my immediate supervisor.

As an employee, I will strive to uphold the mission and vision of the organization. All employees are required to adhere to the values in all their interactions with citizens and fellow employees.