



State of Oregon Position Description

Company: Department of Administrative Services
Organization: Financial Business Systems - DAS
Service Type:

SECTION 1. POSITION INFORMATION

Job Profile Title:	Operations & Policy Analyst 1	Job Profile ID:	0870
Business Title:	Retirement Services Assistant (Unfilled)	Position ID:	000000045875
Employee Name:		Company ID:	10700
Representation:	OAS	Budget Auth No:	1198440
Location:	Salem DAS Executive Building		
Supervisor:	Fabiola Flores (Accounting Administrator 1)		
Position:			
Time Type:	Full Time		
FLSA:	Non Exempt		
Exempt Reason:			
Overtime Eligible:	Yes		
Employee Type:	Permanent		

SECTION 2. JOB DESCRIPTION SUMMARY

Describe the program in which this position exists. Include program purpose, who is affected, size, and scope. Include relationship to agency mission.

The Oregon Department of Administrative Services (DAS) is dedicated to enhancing the efficient and effective use of state resources. Our mission is to support government operations through the delivery of essential services and centralized infrastructure. DAS plays a critical role in helping state agencies and policymakers achieve their goals, benefiting Oregonians across the state. Together we:

- Provide centralized government infrastructure services such as purchasing, risk management, facilities management, surplus property, and motor fleet operations.
- Establish statewide policies, conduct performance reviews, and ensure agency compliance.
- Lead the implementation of statewide performance measurement programs to drive continuous improvement.
- Support workforce development and training for state employees to foster a skilled, adaptable team.
- Manage personnel systems that encourage fair, responsive, and cost-effective human resource practices.
- Deliver objective, credible management information and analysis to policymakers for informed decision-making.
- Operate statewide financial and administrative systems to ensure accountability and transparency.

We strive to provide the foundation and leadership needed for effective government, partnering with agencies, partners and Oregonians to serve the people of Oregon.

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Department of Administrative Services ("DAS") is the central administrative agency that leads state government to implement the policy and budget decisions of the Governor and Oregon Legislature. Employing an enterprise-wide perspective, DAS serves state government by developing and upholding accountability standards to ensure productive and efficient use of state government's financial, human and information resources.

DAS provides a stable management infrastructure and essential business services including technology, financial, procurement, publishing/distribution, human resources and facility asset management. These services support and enable state and local government agencies to carry out their missions, benefiting all Oregonians.

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The Office of the Chief Financial Officer (CFO) is responsible for enterprise-wide fiscal planning and policy leadership. The CFO provides guidance, training, and direction to ensure fiscal integrity and consistency across state agencies. The Office routinely represents the Governor with other elected officials, political subdivisions, other states, and investment houses. Specific policy sections within the Office include Budget Policy (BAM), Statewide Audit and Budget Reporting (SABRS), Capital Finance and Planning, and the Office of the State Controller.

The Centralized PERS (CPERS) unit resides within the Office of the State Controller. This unit is responsible to administer, report and ensure that state agency employee PERS information is accurate and state employee retirement data is correctly posted to PERS member accounts. This unit works to research, analyze, audit and correct complex state employee data which spans decades of information, crosses multiple operational systems, and includes application and interpretation of PERS specific legislation and policy parameters which differ from traditional state agency policies. This unit serves as the subject matter experts on Oregon's 55,000 state agency PERS records; this unit provides expertise and guidance to PERS on state agency PERS records and legislation that impacts state agency employees. This unit is the liaison between PERS and state agencies for all communications relating to the building of PERS member accounts for all active and inactive state employees.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

This position acts as a liaison between state agencies, Public Employee Retirement System (PERS) staff and employees to resolve retirement account discrepancies and ensure consistent administration of retirement accounts for more than 55,000 current State of Oregon employees, terminated employees and retirees. This includes analysis and evaluation of information from HR and Payroll systems, and an understanding of how the systems interface and what can cause errors and/or discrepancies. This position researches employee records and determines corrective actions necessary to allow suspended records to post and ensures employee retirement accounts are accurate and consistent across all state agencies. This position provides guidance, administrative, analytical and technical advice and support in implementation and ongoing administration of the statewide PERS pension plan and other special project assignments.

SECTION 3. JOB DESCRIPTION

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "essential" (E) or "Non-Essential" (NE) function.

75% - R - E Employee Information Tracking/Coordination/Research

Coordinate and track the receipt and processing of information requests from PERS and employer agencies related to state employees' retirement service credits, contribution eligibility, and reported information, contacting the employer agency to follow up on requests as needed. Research employee employment and payroll history using the Position and Personnel Database (PPDB), Workday HR System, Oregon State Payroll Application (OSPA), Workday Payroll and PERS EDX system to determine corrective actions necessary to allow suspended records to post, and to ensure employees' retirement accounts are managed with consistency and accuracy across all state agencies in compliance with statute, policies and rules regarding PERS data and reporting. This involves thorough analysis of multiple systems, how the systems interface, identifying what causes suspended PERS records and what can be done to mitigate suspended records.

Review records and work with state agency HR and Payroll managers, technical staff, and PERS staff to make changes in the respective system(s) to correct or revise employee data. Advises agency staff on data processing errors and corrective action needed

for data to report correctly. Coordinate collection of LWOP information from agencies, pull reports, analyze data, and coordinate with PERS to manually enter LWOP segments in EDX. This requires accurate analysis of data and entries as it can result in loss of service, directly impacting employee retirement contributions and eligibility. Coordinate with PERS and agencies to process forms and record entries in EDX related to Uniformed Services Employment and Reemployment Rights Act (USERRA) claims. Process and send IAP Voluntary Contribution memos to agencies to ensure that deductions in the payroll system match the invoicing on EDX for each employee that elects this additional contribution. Assist with invoicing agencies, remailing annual statements and annual coordination of updating agency contacts. Organize and maintain agency and employee electronic files containing documentation of all actions and correspondence related to retirement data collection and reporting. Process all documentation through electronic storage program and attach to employee records for ease of research by analyst staff.

25% - R - E Member Account Requests

Research, review, and determine corrective action in response to requests from PERS, agencies and employees to resolve specific issues regarding data integrity that could affect or has affected the employee's payment of benefits. Issues encountered may involve retirement eligibility; benefit estimates; disabilities; re-employment into active service for retirees; loss of membership; individual account plan appeals; withdrawals; settlements/arbitrations; seasonal employment; service history. These are member account issues that the employee, state agency staff or PERS staff have been unable to resolve and are elevated to CPERS. Although this position will be assigned the less complex agencies to support, it has a direct impact on employee retirement contributions and eligibility.

Process any additional work arising out of member account requests, such as wage job class code changes or refunds to ineligible employees who purchased additional police and fire units. Develop new procedures and/or processes related to position workload to ensure an efficient flow of work, information, and delivery of Unit services. Provide detailed information and appropriate documentation through research and analysis of more complex member account issues to the OPA2 and/or OPA3 for further assistance in determining and/or recommending appropriate course of action. Manage the Centralized PERS Services Team mailbox as a unit for tracking and managing all requests received. Provide backup to other Financial Business Systems administrative staff as needed. Complete special assignments. Perform other duties as assigned.

100 %

SECTION 4. WORKING CONDITIONS

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

This position involves frequent contact with executives, management, and staff both internal and external to the organization. It requires working with a variety of people and situations, which requires the incumbent to exercise diplomacy. Confidentiality of information must be maintained at all times. This position requires the ability to work on multiple tasks simultaneously, sometimes within short time frames, and interface effectively with business partners. It requires maintenance of tight deadlines and close coordination of a large number of tasks. Often travel to meetings is required with some travel to trainings. There can be frequent interruptions, demanding timeframes, and non-traditional working hours. At times, weekend and evening work is required to meet customer demands and department deadlines. This position requires significant use of a computer and video-conferencing. Where an employee's duties can be successfully performed away from their central workplace, an employee is eligible for remote work, upon agency approval.

This position is suitable for remote work options.

There may be times that a position or an individual must be located full-time, on-site, within traditional business hours. Times when on-site presence can be required include but are not limited to training, performance, business alignment, accommodations, or resource availability.

To be eligible for remote work, staff must have a home workspace that meets all applicable technology, security and safety requirements including the ability to provide protection of confidential information. Staff are responsible for obtaining an appropriate broadband internet connection for working remotely.

Staff working remote shall:

- Meet all responsibilities and perform all duties as if their role was performed in a traditional work setting.
- Comply with all agency policies, guidelines, and management directives.
- Maintain a professional demeanor in the performance of all duties.
- Meet and maintain performance expectations.
- Be available each week during established work hours, as determined by the business need.

DAS is committed to diversity. Diversity efforts reinforce respectful treatment of others in the workplace. These efforts focus on identifying ways to work better together, reducing conflict by increasing understanding, improving collaboration, fostering teamwork, and increasing productivity and quality of services delivered by DAS. You are responsible to promote and foster a diverse and discrimination/harassment-free workplace; establish and maintain professional and collaborative working relationships with all contacts; contribute to a positive, respectful and productive work environment.

Working in a team-oriented environment requires participative decision making and cooperative interactions among staff and management. This includes maintaining regular and punctual attendance; performing all duties in a safe manner; and complying with all policies and procedures.

SECTION 5. GUIDELINES

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

- Oregon Revised Statutes
- Department of Administrative Services Rules
- Public Employees Retirement System Rules
- Statewide Policies
- Compensation Plans
- Collective Bargaining Agreements
- System technical and user manuals
- Software technical and user manuals
- Centralized PERS Services Procedures

How are these guidelines used?

These guidelines are used to ensure compliance with laws, rules, policies and federal regulations governing PERS data and reporting. They are also used as the basis for discussions regarding interpretation of laws, rules and policies as they pertain to PERS reporting issues.

SECTION 6. WORK CONTACTS

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

Who	How	Purpose	How Often?
DAS personnel from other divisions	In Person, by mail, email or telephone	Give and receive information, schedule meetings	Daily
Enterprise Goods and Services Division staff	In Person, by mail, email or telephone	Give and receive information	Daily
General Public	In Person, by mail, email or telephone	Give and receive information	As Needed
PERS Membership Services staff	In Person, by mail, email or telephone	Give and receive information, ask questions, clarify issues	Daily
State agency human resources and payroll staff	In Person, by mail, email or telephone	Give and receive information	Daily

SECTION 7. POSITION RELATED DECISION MAKING

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

Decides what corrective action to take in Workday and/or EDX to correct member account issues. Decides how records should be coded in Workday and EDX. Decides who to involve in discussions regarding specific member account issues and general issues involving PERS reporting processes and system coding.

Decisions regarding the system coding and procedures used for PERS reporting ensure proper documentation and identification of records.

Decisions made by the person in this position regularly affect employee retirement eligibility, member benefit amounts, and member account accuracy. Poor or wrong decisions can result in negative impacts to member retirement eligibility and/or benefits as well as agency budgets, and damage working relationships with state agencies and PERS.

SECTION 8. REVIEW OF WORK

Job Profile	Position ID	How	How Often	Purpose of Review
Accounting Administrator 1	0150006	In Person	Quarterly	Performance Expectations and Goal setting check Ins
Acct Admin 1	0150006	In Person, by mail, email or telephone	Daily	To assure accuracy, timeliness and consistency with rules, policies, and procedures.

SECTION 9. OVERSIGHT

What are the oversight activities for this position?

SECTION 10. ADDITIONAL POSITION RELATED INFORMATION

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

This position is subject to a criminal records check, which may require fingerprints. If you are offered employment, the offer will be contingent upon the outcome of a criminal records check (FBI). Any history of criminal activity will be reviewed and could result in the withdrawal of the offer or termination of employment.

You are responsible to promote and foster a diverse and discrimination/harassment-free workplace; establish and maintain professional and collaborative working relationships with all contacts; contribute to a positive, respectful and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures. Working in a team oriented environment requires participative decision making and cooperative interactions among staff and management. You are to be aware of Affirmative Action and the department's Diversity strategies and goals.

Additional skills, abilities and requirements:

This position requires:

- intermediate knowledge and understanding of state human resources, payroll and/or PERS functions and information systems as they relate to processing of state employee personnel, payroll and retirement account transactions;
- general knowledge of state laws, rules, and policies related to the state's pension program and their impact on state government employees and PERS reporting;
- basic knowledge and understanding of information technology as it relates to processing of state employee personnel, payroll and retirement account transactions.

SECTION 11. BUDGET AUTHORITY

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

Operating Area	Biennial Amount	Fund Type
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SECTION 12. ORGANIZATIONAL CHART

See Organizational Chart (attach copy or view within Workday).

SECTION 13. SIGNATURES

Employee	Date
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Manager	Date
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Appointing Authority	Date
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