TOWN OF NEEDHAM Date 4-2-02

ADMINISTRATIVE ASSISTANT

Retirement Board TS-3

DEFINITION

Under general supervision of the Administrative Specialist, serves as staff member responsible for processing memberships, transfers, buybacks and refunds of member account balances; maintains membership records and provides related customer service; and provides secretarial assistance to the Needham Retirement Board.

ESSENTIAL FUNCTIONS

Provides assistance to internal and external customers of the Board, including members of the public, staff of the Town, board and committee members, etc. Greets visitors, answers phones, explains office procedures, and responds to questions within level of expertise and authorization, referring more complex issues to technical, professional or management staff. Issues may include:

1. Explanations of program benefits.
2. Assistance in completing applications.
3. Explanation of payroll deductions.
4. General information regarding refunds and buybacks.

- Processes new memberships, including explanation of benefits and deductions, assistance with applications, reviewing applications for completion, related data entry, and follow through on requests to transfer balances and creditable service from other retirement systems.

- Processes refunds and buybacks. Researches records; determines eligibility; calculates amounts due; prepares related correspondence, forms and spreadsheets for approval; enters related data into system; verifies accuracy of records; and monitors buyback through payroll deductions.

- Processes payroll deductions, including data entry and reconciliation with payroll totals.

- Maintains member files; prepares correspondence and reports related to membership data and changes.

- Recommends, develops and maintains new spreadsheet applications for on-going office operations and special project analyses.

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- Performs additional duties in the absence of the Administrative Specialist, including recording of financial activities in the general ledger and generation of monthly trial balances.

- Provides secretarial support to the Retirement Board, including typing of monthly Board agenda and meeting minutes.

- Performs other related duties as assigned.

MINIMUM QUALIFICATIONS

Skills, Knowledge and Abilities

- Knowledge of standard office procedures, practices, forms, and equipment.

- Ability to learn and understand concepts related to public retirement programs.
- Ability to prepare routine to complex correspondence and reports utilizing computerized office applications, such as word processing, spreadsheets, etc.
- Ability to understand, learn interpret and explain policies and procedures and to apply such guidelines appropriately to different situations.
- Ability to interact effectively and tactfully with a wide variety of individuals including management personnel, other department staff, outside professionals and members of the public.
- Ability to communicate clearly and concisely with others, both verbally and in writing.
- Ability to prioritize multiple tasks and deal effectively with interruptions.
- Ability to perform detailed work accurately and efficiently within strict deadlines.

Education and Experience
Duties require knowledge of office administration, secretarial practices, and automated office systems and procedures equivalent to bookkeeping training and 2-3 years of related experience.

SUPERVISORY RESPONSIBILITY
None

PHYSICAL ELEMENTS

- Standard office environment, subject to normal variations in temperature, noise, etc.
- Intermittent standing to assist customers in the office.
- Frequent interruptions to assist customers in the office or on the phone.
- May spend extended periods at terminal, on telephone, or operating other office machines, requiring eye-hand coordination and finger dexterity.
- Regular lifting and carrying of files, documents, records, etc.