



## JOB INFORMATION

Job Code:	117041
Job Title:	Retirement Plan Coordinator
FLSA Status:	Non-Exempt
Supervisory:	
Job Family:	Employee Benefits
Job Family Group:	Human Resources
Management Level:	7 Individual Contributor

## JOB SUMMARY

Supports management of the retirement enrollment processes, reviewing paperwork submitted by employees, processing retirement transactions and bank directives, and updating participant records. Participates in supporting audits of data entry or other retirement processes.

## JOB QUALIFICATIONS:

### Education

Req	Pref	Degree	Field of Study
X		Bachelor's degree	
	X	Bachelor's degree	

### Additional Education

*Check here if experience may substitute for some of the above education.*

Combined experience/education as substitute for minimum education

### Work Experience

Req	Pref	Work Experience	Experience Level
X		3 years	
	X	5 years	

### Additional Work Experience

*Check here if education may substitute for some of the above work experience.*

Combined experience/education as substitute for minimum work experience

### Knowledge, Skills and Abilities

Req	Pref	Functional Skills
		Demonstrated experience with retirement benefits and transactions.
		Knowledge of administrative and clerical procedures.
		Ability to work proactively independently and as part of a team.
		Ability to provide support and guidance as needed on projects.
		Ability to exercise discretion with confidential information.

## Knowledge, Skills and Abilities

Req	Pref	Functional Skills
		Proficiency with Microsoft Office.
		Excellent written and oral communication skills.

## Other Job Factors

## JOB ACCOUNTABILITIES

	% Time	Essential	Marginal	N/A
Assists in daily operations related to employee retirement enrollment. Processes bank directives and retirement transactions for legacy retirement plans (e.g., 401[k], 403[b], defined benefit). Maintains organized documentation for future reference and retrieval. Supports the retirement team by performing accurate and timely enrollment transactions. Conducts audits of retirement data entry or other processes. Updates case management entries and participant records, as requested and in a timely manner.				
Maintains open lines of communication with university employees that have questions on retirement enrollment. Provides friendly and helpful guidance when contacting employees with paperwork issues to be addressed before processing. Displays professionalism, discretion, and courtesy in discussing sensitive matters. Communicates with team members openly and transparently to maintain efficiency, resolve challenges, and socialize current progress. Communicates with stakeholders as needed to ensure accurate data reporting and tracking.				
Solicits and responds to constructive feedback from peers and managers. Maintains currency with plan rules and federal regulations to ensure uninterrupted retirement enrollment compliance. Shares improvements to processes and procedures with the broader team.				
Supports research efforts as needed to gain clarity on enrollment transactions. Analyzes data to produce clear reports as needed. Escalates questions to appropriate team members. Demonstrates fairness, impartiality, and integrity in decision making.				
Builds and maintains strong relationships with customers, partners, and stakeholders to ensure consistency and quality of materials communicated. Contributes to an inclusive environment, building and maintaining strong cross-functional relationships and a deep understanding of organizational and university cultures. Upholds the principles of the USC Code of Ethics. Demonstrates alignment to strategic plans of the organization and university through words, actions and ideas.				

## Other Requirements

<i>Essential:</i>	<i>Emergency Response/Recovery</i>	<i>Essential:</i>	<i>Mandated Reporter</i>
	In the event of an emergency, the employee holding this position is required to “report to duty” in accordance with the university’s Emergency Operations Plan and/or the employee’s department’s emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.		A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC’s policy at: <a href="https://policy.usc.edu/mandated-reporters/">https://policy.usc.edu/mandated-reporters/</a>
<i>Campus Security Authority (CSA)</i>			<i>Essential:</i>
By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC’s policy at: <a href="https://dps.usc.edu/alerts/clery/">https://dps.usc.edu/alerts/clery/</a>			

## ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

\_\_\_\_\_  
Print Employee Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Manager Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.