

FUNCTIONAL TITLE: Administrative Associate –
Transfers, Refunds and Enrollments Unit
LOCATION: Massachusetts Teachers’ Retirement System
500 Rutherford Avenue, Suite 210, Charlestown, MA 02129
STARTING SALARY: \$45,000
APPLICATION POSTING: Friday, January 5, 2024 (applicants considered on a rolling basis)

The Massachusetts Teachers’ Retirement System (MTRS) is the pension plan for the Commonwealth’s public school educators. The plan provides retirement, disability, and survivor benefits to more than 71,000 recipients and maintains and services retirement accounts for over 102,000 active members and 35,000 inactive members.

Our agency mission is to ensure that members of the MTRS achieve and maintain a successful and secure retirement through responsible benefits administration, financial integrity and the provision of outstanding services.

GENERAL STATEMENT OF DUTIES:

Under the general supervision of the Director and Assistant Director of the Transfers, Refunds and Enrollments Unit (“TREU”), the Administrative Associate serves all members of the MTRS as part of the team responsible for all aspects of member account maintenance including, but not limited to enrollments, transfers-in/out, incorrect assessment backlog resolution, account refunds, and required minimum distributions under the Internal Revenue Code.

The Administrative Associate will provide the following duties:

- Serves as contact support for MTRS membership and other Massachusetts contributory retirement systems in matters involving the processing of transfers of funds between the MTRS and other retirement systems.
- Retrieves voicemail from the TREU general line and ensures proper follow-up with the appropriate staff member.
- Monitors TREU e-mail in-boxes, acknowledges receipt of inquiries and forwards e-mails to the appropriate staff member for completion.
- Maintains spreadsheets of various workloads owned by TREU.
- Coordinates with the MTRS’s Contact Center unit regarding the imaging and creation of member files.
- Prepares acknowledgment correspondence confirming receipt of member and other retirement board requests.
- Assists with the maintenance and recording of changes/updates in members’ files and in their MyTRS account (i.e., updating addresses and other demographic information, adding comments, closing workflows).
- Provides assistance in recognizing potential incorrect assessments and directing the cases for additional research.

- Assists with data entry and member account correction projects, as needed.
- Assists with processing of manual enrollment forms and new member enrollment requests.
- Participates in group meetings and training programs, as assigned.
- Performs other administrative duties as required or as needed

QUALIFICATIONS REQUIRED:

- Minimum of high school diploma, or GED.
- Excellent organizational skills, flexible, and able to handle a multitude of tasks.
- Desire to work in an environment committed to teamwork and quality service.
- Ability to communicate effectively and professionally with co-workers, members, and the public.
- Ability to follow instructions and function both independently and as a member of a team.
- Ability to maintain harmonious relationships with the members, employers, and MTRS staff.
- Commitment to competent, compassionate, and quality service at all times.
- Business experience with Microsoft Excel, Word, and PowerPoint required.
- Experience with member/customer/client databases required.

EXPECTED HOURS OF WORK

Hours of work are Monday through Friday, 9 AM to 5 PM (30-minute lunch), or 8:45 AM to 5 PM (45-minute lunch). New hires are required to report to the office five days per week for their first 90 calendar days of employment. Thereafter, hybrid telework arrangements, with the possibility of one to two days of telework per week, are determined based on operational and staffing needs.

APPLICATION PROCESS

Interested applicants must apply online through *MassCareers* at:

<https://massanf.taleo.net/careersection/ex/jobsearch.ftl?ftlcompclass=LoginComponent>

Applicants are required to submit a cover letter and résumé to Robert Fabino, Director of Human Resources and Legal Affairs, within the MassCareers portal. The cover letter must address why the applicant's background and training would make him or her a good fit for the position of Administrative Associate with the MTRS. (See MTRS website for background at www.mass.gov/mtrs) Applicants who do not submit a cover letter will not be considered. Selected applicants will be invited to take a test designed to evaluate their basic writing, math and computer skills.

The MTRS is an equal opportunity employer.