

COUNTY OF SONOMA - JOB DEMANDS ANALYSIS

JOB CLASSIFICATION: Retirement Benefits Services Manager
DEPARTMENT: Retirement
PHYSICAL DEMAND STRENGTH RATING: Sedentary

DATE COMPLETED: 01/30/2025
DIVISION: Member Services

INSTRUCTIONS TO MEDICAL PROVIDERS COMPLETING THIS FORM:

Please use the “Medical Provider Use Only” columns to the right of each section and the “Medical Provider’s Comments & Signature” Section on the signature page to provide work restrictions by indicating whether there is some portion of each function that the employee can perform; designating whether each restriction is temporary or permanent; and, if restriction is temporary, stipulating the expected duration of work restriction(s). To finalize the form, please provide the name of the employee evaluated and additional comments, as appropriate, then sign and date where indicated.

FREQUENCY RATING:

Frequency	Percentage of time per shift	Repetition (# times per shift)	8 Hr Shift	9 Hr Shift	10 Hr Shift	12 Hr Shift
Never/Not Required (N)	n/a	n/a	n/a	n/a	n/a	n/a
Occasionally (O)	1 - 33%	1 – 100	0 - 2.5	0 – 3	0 - 3.5	0 – 4
Frequently (F)	34 - 66%	100 – 500	2.5 - 5.5	3 – 6	3.5 - 7	4 – 8
Continuously (C)	67 - 100%	500+	5.5 – 8	6 – 9	7 - 10	8 - 12

PART 1 - JOB DUTIES/FUNCTIONS:

A. Job Duty/Function	B. Job Duty #	C. Freq Rating	D. Equipment or tools used to perform (Describe)	E. Specialized Expertise, License, Certification Required? (Describe)	F. Essential or Non- Essential	Medical Provider Use Only: For each job duty/function, indicate in this column “Can Perform”, is “Temporarily Restricted” from performing, or is “Permanently Restricted” from performing.
While performing the following duties the employee(s) in this position work in a typical office setting, sitting for long periods of time and routinely using office equipment such as computers, phones, and photocopiers.						
Work may be outside of standard business hours, based on operational need.	1	O			E	

A. Job Duty/Function	B. Job Duty #	C. Freq Rating	D. Equipment or tools used to perform (Describe)	E. Specialized Expertise, License, Certification Required? (Describe)	F. Essential or Non- Essential	Medical Provider Use Only: For each job duty/function, indicate in this column "Can Perform", is "Temporarily Restricted" from performing, or is "Permanently Restricted" from performing.
Exercises direct supervision over SCERA's Member Services unit, including assigned internal staff and vendors; Plans, organizes and assigns work, providing both oral and written direction as appropriate. Ensures goals are met; provides excellent customer service, evaluates reviews and monitors staff and vendor activities. Takes appropriate personnel related action in conjunction with Human Resources staff; participates in hiring interviews and decisions; disciplinary actions and other personnel activities; provides technical direction to staff and assists in resolving problems. utilizes appropriate discretion and assures compliance with County policy and federal and state laws in matters of employee relations, EEO and ADA,	2	C	Computer, phone		E	
Collaborates, helps to plan in organizing, and coordinating the control of records for active and retired members of the Retirement Association; compiles financial and actuarial data necessary for the administration of the Retirement System; maintains liaison with County departments, special districts and agencies that are members of the Retirement System.	3	O	Computer, phone		E	
Interprets and implements provisions of the County Employees Retirement Law of 1937; reviews new legislation for its operational impact; clarifies retirement law interpretations with system Counsel; ensures that all aspects of benefit operations are in compliance with Federal, State, County, Retirement Board and departmental regulations, laws, policies and procedures. Attend educational conferences and trainings.	4	O	Computer, phone		E	
Receives and processes all applications for normal and disability retirement. Interviews and advises all applicants as to their retirement options and coordinates with payroll clerks and administrators in affected departments.	5	O	Computer, phone		E	

A. Job Duty/Function	B. Job Duty #	C. Freq Rating	D. Equipment or tools used to perform (Describe)	E. Specialized Expertise, License, Certification Required? (Describe)	F. Essential or Non- Essential	Medical Provider Use Only: For each job duty/function, indicate in this column "Can Perform", is "Temporarily Restricted" from performing, or is "Permanently Restricted" from performing.
Supervises and administers the processing of disability retirements with the applicant, department, medical professionals, attorneys and medical advisors; prepares confidential booklet for the Board of Retirement and the Disability Committee which contains all employee records and medical information; coordinates all appeals with system Counsel and the Retirement Disability Committee; attends all meetings of the Retirement Disability Committee, and prepares the agenda and minutes. Attend Retirement Board and advises on the status of disability retirements.	6	O	Computer, phone		E	
Prepares reports on the status of disability processing and statistics on the disability program. Periodically reviews the status of employees on disability retirements and coordinates the re-examination when necessary.	7	O	Computer, phone		E	
Assists in developing and implementing policies and procedures for the Member Services division of the Retirement Division; monitors and audits all work procedures and practices relating to retirement benefits administration; assesses operational effectiveness and recommends changes when necessary; receives and supervises responses to appeals and service complaints; provides improved service levels.	8	O	Computer, phone		E	
Calculates and processes benefits and allowance for service, disability, death, and deferred retirement; analyzes and interprets court orders concerning civil, probate, juvenile, spousal or community property issues and supervises the administration of such orders.	9	O	Computer, phone		E	
Provides information to and advises employees regarding service retirement; member outreach, procedures for applying for retirement and various optional benefit plans; prepares estimates of retirement benefits for employees; explains retirement system laws, retirement rates, death benefits and disability retirement provisions to members; deals directly with active and retired members and their legal representatives on difficult or sensitive retirement issues.	10	O	Computer, phone		E	

A. Job Duty/Function	B. Job Duty #	C. Freq Rating	D. Equipment or tools used to perform (Describe)	E. Specialized Expertise, License, Certification Required? (Describe)	F. Essential or Non- Essential	Medical Provider Use Only: For each job duty/function, indicate in this column "Can Perform", is "Temporarily Restricted" from performing, or is "Permanently Restricted" from performing.
Processes and coordinates forms and activities required for disability retirement, including interviewing employees to gather information regarding disability claims; serves as the retirement division contact regarding disability retirement for others such as doctors, attorneys and staff from other County departments; reviews, assesses, and assembles documentation of disability retirement applications including the necessary medical and legal documents to be presented to the Disability Committee.	11	O	Computer, phone		E	
Develops and maintains statistical systems to provide information on benefit payment and service levels; prepares reports and correspondence.	12	O	Computer, phone		E	
Assists in planning and implementing information programs for members; makes presentations for new employees' orientation and pre-retirement workshops regarding the retirement system; proactive departmental outreach; represents the Retirement System on inter-agency committees and project teams; develops text for brochures, handbooks and standard letters regarding benefit programs	13	O	Computer, phone		E	

PART 2: PHYSICAL DEMANDS

Activity	Examples of Duties/Functions Requiring Activity	FREQUENCY RATING Never, Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY: Permanently Restricted
1 Sitting	1-13	Constant			
2 Walking	1-13	Occasional			
3 Running	n/a	Never			
4 Standing	1-13	Occasional			
5 Bending-Neck	1-13	Frequent			
6 Bending-Waist	3,6, 13	Occasional			
7 Squatting	3	Occasional			
8 Climbing	3	Occasional			
9 Kneeling	3	Occasional			
10 Crawling	n/a	Never			
11 Twisting (neck)	1-13	Frequent			
12 Twisting (waist)	n/a	Never			
13 Repetitive Hand Use	1-13	Frequent			
14 Simple Grasping-Right Hand	1-13	Frequent			
15 Simple Grasping-Left Hand	1-13	Frequent			
16 Power Grasping-Right Hand	n/a	Never			
17 Power Grasping-Left Hand	n/a	Never			
18 Fine Manipulation-Right Hand	1-13	Frequent			
19 Fine Manipulation-Left Hand	1-13	Frequent			
20 Pushing and Pulling (right hand)	1-13	Occasional			
21 Pushing and Pulling (left hand)	1-13	Occasional			
22 Reaching (above shoulder level)	3	Occasional			
23 Reaching (below shoulder level)	3	Frequent			
24 Lifting-up to 10 lbs.	1-13	Occasional			
25 Lifting-11-25 lbs.	3	Occasional			
26 Lifting-26-50 lbs.	n/a	Never			
27 Lifting 51-75 lbs.	n/a	Never			
28 Lifting 76-100 lbs.	n/a	Never			
29 Lifting 100 + lbs.	n/a	Never			
30 Carrying 0-10 lbs.	1-13	Occasional			
31 Carrying 11-25 lbs.	3	Occasional			
32 Carrying 26-50 lbs.	n/a	Never			
33 Carrying 51-75 lbs.	n/a	Never			
34 Carrying 76-100 lbs.	n/a	Never			

PART 3: SENSORY REQUIREMENTS

Activity	Examples of Duties/Functions Requiring Activity	FREQUENCY RATING Never, Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Functional vision, normal or corrected	1-13	Constant			
2 Functional color vision, normal or corrected	13	Occasional			
3 Functional night vision, normal or corrected	n/a	Never			
4 Functional hearing, normal or corrected	1-13	Constant			
5 A sense of smell or taste	n/a	Never			

PART 4: COMPREHENSION LEVEL

Activity	FREQUENCY RATING Never, Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Follow Oral Instructions	Constant			
2 Follow Written Instructions	Constant			
3 Required to sustain concentration	Constant			

PART 5: NATURE OF TASKS

Activity	FREQUENCY RATING Never, Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Follow set procedures	Constant			
2 Organize own work	Constant			
3 Able to ask questions or request assistance when needed	Constant			
4 Required to make decisions independently	Constant			
5 Required to train and/or lead other staff	Constant			
6 Required to direct other staff (e.g. planning, goal setting, performance)	Constant			

PART 6: WORK PACE

Activity	FREQUENCY RATING Never, Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Tightly scheduled and rapid pace of work activities at high volume	Frequent			
2 Meet time sensitive deadlines	Constant			
3 Long and/or irregular hours	Occasional			
4 Limited/unpredictable opportunity for breaks	Never			
5 Required to perform on-call or emergency work	Occasional			

PART 7: COMPLEXITY/VARIABILITY

Activity	FREQUENCY RATING Never, Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Variable and unpredictable workflow	Occasional			
2 Attention divided by issues requiring multi-tasking	Constant			
3 Work requires precise attention to detail	Constant			
4 Use of judgment in routine matters	Constant			
5 Requires use of judgment in adapting procedures from one task to another	Constant			
6 Possible legal ramifications associated with work activities or work product	Constant			

PART 8: INTERACTIONS WITH OTHERS

Activity	FREQUENCY RATING Never, Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Works with others (e.g., co-workers, other departments/agencies, public)	Constant			
2 Interactions limited to giving/receiving information	Occasional			
3 Interactions exceed giving/receiving information (e.g., advises, persuades, justifies)	Constant			
4 Interactions occur under circumstances of emotional stress	Occasional			
5 Risk of confrontation with violent or assaultive clients or customers	Never			

PART 9: ENVIRONMENTAL FACTORS/WORKING CONDITIONS:

Activity	FREQUENCY RATING Never, Occasional; Frequent, or Constant	MEDICAL Can Perform	PROVIDER Temporarily Restricted	USE ONLY Permanently Restricted
1 Work Inside	Constant			
2 Work Outside	Never			
3 Extreme Heat (above 100 degrees)	Never			
4 Extreme Cold (below 32 degrees)	Never			
5 Excessive Noise (must raise voice to be heard)	Never			
6 Vibration (e.g., jack hammer, hammer drill, chainsaw, etc.)	Never			
7 Dust, Vapors, Fumes, Smoke	Never			
8 Silica, asbestos, etc.	Never			
9 Solvents (e.g., gas, turpentine, etc.)	Never			
10 Grease, oils	Never			
11 Acidic, Caustic Solutions	Never			
12 Pesticides	Never			
13 Explosives (e.g., dynamite, bomb, etc.)	Never			
14 Cleaning supplies, abrasives	Occasional			
15 Other Chemicals (e.g. drugs and other contraband)	Never			
16 Human Blood, Body Tissues, or Fluids	Never			
17 Human Wastes	Never			
18 Animal Blood, Body Tissues, or Fluids	Never			
19 Animal Wastes	Never			
20 Biological Toxins (e.g., poison ivy, poison oak, anthrax, etc.)	Never			
21 Insect Bites (e.g., ticks, mosquitos, spiders, etc.)	Never			
22 Biomedical Waste	Never			
23 Ionizing Radiation	Never			
24 Non-Ionizing Radiation	Never			
25 Electrical Energy	Never			
26 Walking on uneven, slippery, or rough surfaces	Occasional			
27 Proximity to moving mechanical parts (e.g., equipment, machinery)	Never			
28 Proximity to moving vehicles or objects	Never			
29 Heights (e.g., rooftop, ladders, scaffolding, etc.)	Never			
30 Contact with water, other liquids, humid conditions - not weather related	Never			
31 Work Below Ground: (e.g., excavation, trench, etc.)	Never			
32 Potential exposure to airborne infectious diseases (e.g. clinics, labs, corrections)	Never			
33 Operates non-commercial motor vehicles (cars, trucks)	Occasional			
34 Operates commercial vehicles – CDL Class _____ Endorsements _____	Never			
35 Operates passenger van to transport clients, inmates, etc.	Never			
36 Pulls non-commercial trailers or equipment	Never			
37 Operates heavy equipment	Never			
38 Other:				

PART 10: MEDICAL SCREENING, SURVEILLANCE AND VACCINATION REQUIREMENTS:

Please check each of the medical screening, surveillance, and vaccination requirements that apply to the position, and indicate if the requirement applies pre-employment/pre-placement only, or whether there are additional requirements after hire.

Medical Screening, Surveillance or Vaccination	Pre-Hire	Post-Hire	Frequency (one time, annual, etc.)
1 Audiometric Testing			
2 DOT Commercial Driver Drug and Alcohol Screening			
3 DOT Commercial Driver Physical Exam			
4 Respirator Physical Exam			
5 Respirator Questionnaire – Short			
6 Respirator Questionnaire – Standard			
7 Blood lead level			
8 Hazardous Waste/Emergency Worker physical			
9 Heavy metal screen (mercury, lead, arsenic)			
10 HINT Hearing Noise Sensitivity Testing			
11 Tuberculosis skin test			
12 Vaccine: MMR			
13 Vaccine: Hepatitis B			
14 Vaccine: Influenza			
15 Vaccine: Meningococcal			
16 Vaccine: Pneumococcal			
17 Vaccine: Rabies			
18 Vaccine: Rabies Titer			
19 Vaccine: Tdap			
20 Vaccine: Chickenpox			

PART 11: ADDITIONAL INFORMATION, PICTURES, ETC.