ATRF

JOB DESCRIPTION

Job title:	**Pension Specialist – Member Services**
Department:	**Pension Services**
Reports to:	**Team Lead, Member Services**

■ **Full-time**
☐ **Part-time**

PURPOSE: Give a brief description of why the job exists and how it adds value to ATRF.

The Pension Specialist, Member Services reports to and duties are delegated by the Team Lead, Member Services in all aspect of the delivery of Pension Services at ATRF.

The Pension Specialist plays a key role in the organization, responsible for a range of tasks including verifying eligibility, calculating and confirming benefits, and adjusting, suspending or terminating pensions. Additionally, this position is accountable for updating active and retired member personal information including beneficiary and bank changes, communicating with members or their representatives, as well as employers, and analyzing and reconciling employer data as it relates to the payment of benefits.

ESSENTIAL DUTIES AND RESPONSIBILITIES: Give a brief description to state overall purpose, expectations and/or objectives of the position. Then add bullet points, listing the specific tasks and job duties of the position that are required on a daily basis. Items should begin with action works such as perform, responsible for, deliver, develop, etc.

Benefit Delivery

- Verifies eligibility and ensures all necessary documentation and information is on file for member and retired member benefit calculations.
- Reviews, verifies and enters information reported by employers to calculate benefits.
- Calculates and prepares member communication packages for benefit calculations including terminations, retirements, purchases, transfers with reciprocal authorities, and death benefits.
- Conducts the final verification on outgoing benefit payments.
- Communicates with reciprocal authorities, employers, disability insurance carriers, and Canada Revenue Agency as required.
- Maintains member, retired member, and beneficiary information relevant to the payment of benefits.
- Calculates and pays benefits in accordance with ATRF’s governing legislation and the tax rules.

Customer Service

- Maintains contact with plan members regarding the status of their applications and addresses underlying customer/stakeholder needs.
- Provides information to members, retired members, individuals entitled to a benefit, and individuals acting on behalf of those entitled to a benefit on the telephone, in writing, and in person to help them make informed decisions about their ATRF benefits.

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- Maintains contact with reciprocal authorities and financial advisors as required.
- Coordinates with the Counsellors as required.
- Processes any recalculations of benefits.
- Contacts members to inform them of general or specific issues affecting their benefit or status.
- Responsible for delivering quality service.

Data Analysis & Reconciliation

- Credits, adjusts, and verifies accrual of pensionable service for disabled members when a benefit application is in progress.
- Researches, reviews and adjusts plan members' service, salary, contribution, and interest records as required.
- Coordinates with Data and Employer Services team as required.

Change Management Procedural Documentation

- Assists in the drafting, revision and maintenance of procedural documentation for review and approval by the Team Lead or Director, Pension Services – Client Excellence.
- Identifies and documents system or procedural issues, prepares problem reports, and proposes solutions. Solutions to be tested with supervision if required.
- Tests system changes and provides results to Director, Pension Services – Client Excellence for review and approval.
- Suggests enhancements to Plan Member Benefit System processes, workflows and communication materials as appropriate and assist with the implementation of those enhancements.
- Suggests changes to communication materials to improve member experience.

Other Duties

- Provides backup for reception.
- Assisting at Teachers' Convention by conducting individual pension interviews with plan members.
- Ad hoc/other duties as required.

EDUCATION AND WORK EXPERIENCE QUALIFICATIONS: This section is used to describe what knowledge, skills and abilities are required to perform the daily tasks and job duties bulleted above. For education requirements indicate type of degree or diploma required, certifications and/or designations.

- Post-graduate diploma in business or benefits, plus at least two years of experience in pension administration or closely related field (i.e. banking industry).
- Certified Employee Benefit Specialist (CEBS) or Pension Plan Administration Certificate (PPAC) designation or equivalent would be an asset.
- Demonstrated interest in working directly with members and employers in a professional and highly regulated industry.
- Self-motivated with strong organizational skills, attention to detail, and the ability to multitask.
- Ability to work efficiently and effectively in a team environment with minimal supervision.
- Strong customer service orientation, along with excellent verbal and written communication skills. Bilingual in both French and English is considered an asset.

EDUCATION AND WORK EXPERIENCE QUALIFICATIONS: This section is used to describe what knowledge, skills and abilities are required to perform the daily tasks and job duties bulleted above. For education requirements indicate type of degree or diploma required, certifications and/or designations.
• Strong analytical and problem-solving skills along with a strong mathematical aptitude • The ability to identify inefficiencies with processes and recommend improvements.

INDEPENDENCE OF ACTION/AUTHORITIES: Describe the extent to which decisions and recommendations are made independently. (e.g., complexity of problem solving).
• Job issues are usually well defined but of moderate complexity and variation, requiring decisions on sequencing and the identification of errors. The choice of action exists within generally defined limits, usually relating to a given work function. Work involves performance of specialized or technical tasks requiring additional specific training. • Judgment is required in planning the work, setting priorities and making decisions on the work, which is often diversified. • The results of decisions or actions affect the job and may affect other jobs or services. Errors or omissions are generally detected within the unit or department. Employee accountability is limited by accepted standards and policies. • Decisions that require a policy, procedure, or legislation interpretation or revision require approval by the Director, Pension Services – Business Excellence. • Responsibilities are supervised occasionally with freedom of action restricted to modifications of procedural guidelines. Problems are referred to a Senior Pension Specialist or the Team Lead for resolution. The employee takes independent action as directed by general instructions, established methods, and/or clearly defined precedents or technical infrastructure.

LEADERSHIP, MANAGEMENT, SUPERVISORY & TEAM RESPONSIBILITY: Describe the extent of responsibilities.
• Shares information as appropriate within the unit, with other department members, other departments, and external consultants in an effort to provide more effective benefit delivery. • Keeps Team Lead informed of potential problems that could impact the benchmark results. • Assists with training new employees on all processes performed by the Pension Analysts. • Participates in cross-training activities to provide back-up support within the unit. • Builds and maintains positive relationships with other ATRF staff, employers and other outside parties. • Maintains confidentiality. • Reviews routine work of one or more employees doing related jobs. • Planning is required for some aspects of the position, but deadlines and priorities are set by the Team Lead or Director, Pension Services – Client Excellence or are legislated.

Signature

The electronic signature below indicates that the supervisor and Human Resources have read, discussed and agreed that the information accurately reflects the work assigned.

______________________	______________________	______________
Name	Signature	Date