



JOB DESCRIPTION

Job title: Pension Operations Assistant
Department: Pension Services
Reports to: Team Lead, Data and Employer Services
<input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time

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

Reporting to the Team Lead, Data and Employer Services, this position supports the effective administration of the Pension Services team by managing incoming communications and ensuring accurate, timely processing. The Pension Operations Assistant is responsible for scanning and indexing all incoming member communications, initiating appropriate workflows, and maintaining up-to-date member records. This position also prepares and distributes requested forms and statements, manages returned mail, and provides general assistance to members to support a positive and responsive member experience.

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 words such as perform, responsible for, deliver, develop, etc.

Correspondence Management and Document Maintenance

- Scan and index all incoming correspondence from various communication channels (email, mail, fax, website, etc.) to member and pensioner files, initiating required workflows
- Open, sort and distribute incoming mail
- Process all outgoing mail and registered mail
- Ensure all documentation is accurately filed and linked in accordance with established records-management standards
- Coordinate with Reception to ensure return of documentation to plan members
- Research and maintain archived files
- Manage the returned mail process (including returned email notifications), researching alternate addresses, and maintaining documenting actions taken

Customer Service

- Update plan member personal information, assist and contact plan members accordingly
- Accurately complete processes and data entry for pension operations in accordance with established benchmarks
- Provide timely and courteous responses to member inquiries and calls, including assistance with personal data updates and issuing required forms and statements
- Provide backup for Reception
- Complete other duties assigned as needed from time to time

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.

- High school diploma
- Additional certification (i.e. administrative certificate) or completion of relevant post-secondary coursework is considered an asset
- Minimum of two years of related experience in an administrative or office environment
- Excellent verbal and written communication skills
- Proficiency with standard office software, with demonstrated experience using Microsoft Office applications such as Outlook, Excel, Word, and Teams
- Demonstrated ability to maintain a high level of accuracy and attention to detail, including proficient data entry skills
- Ability to work both independently and collaboratively in a team environment
- Well developed organizational and time management skills and adaptability in a fast-paced office environment

INDEPENDENCE OF ACTION/AUTHORITIES: Describe the extent to which decisions and recommendations are made independently. (e.g., complexity of problem solving).

Responsibilities are supervised occasionally with freedom of action restricted to modifications of procedural guidelines. Problems are referred to the Team Lead, Data and Employer Services for resolution. The employee takes independent action as directed by general instructions, established methods, and/or clearly defined precedents or technical infrastructure. Innovation/creativity is required to improve the basic operating and administrative methods of the job and to serve customers. Recommendations for improvement are taken to the immediate supervisor prior for implementation.

LEADERSHIP, MANAGEMENT, SUPERVISORY & TEAM RESPONSIBILITY: Describe the extent of responsibilities.

No supervisory or advisory responsibility, limited responsibility for coordinating or directing the work of another employee.

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