

# JOB DESCRIPTION

<b>Vacancy reference:</b>	SRF29023
<b>Post Title:</b>	Pensions Assistant
<b>Grade:</b>	Grade 4
<b>School/Department:</b>	Human Resources
<b>Reports to:</b>	Pensions Manager
<b>Responsible for:</b>	N/A

## Purpose

The University has three main pension schemes for its members of staff. Although the administration of all schemes is carried out by third party administrators (TPAs), the Pensions Team provides the link between the employer and the administrators. The Team acts as a point of contact for staff enquiring about pensions and delivers a pensions service to both staff and to the employer.

The Pensions Assistant will be a key member of the Pensions Team and will carry out a range of administrative tasks facilitating the smooth running of the University's pensions function, ensuring that all work is carried out accurately and within set timescales.

## Main duties and responsibilities

1. Carry out the processes for submitting data to scheme administrators within the required timescales. Such processes include the provision of information on new joiners, leavers, contributions paid, changes to personal details and periods of absence.
2. Review and ensure the accuracy of data provided to administrators by investigating any anomalies and raising queries with HR, Payroll and Systems colleagues where appropriate.
3. Complete the monthly joiner process for new members of the Universities Superannuation Scheme:
  - produce the joiner pack by combining various documents including a standard letter into a pdf
  - email the joiner pack to members and respond to any related queries in a timely and professional manner
  - provide access to opt-out and membership withdrawal forms, making sure members are clear on the relevant submission timescales
  - notify members who have been auto-enrolled of their statutory opt-out period and process opt-outs which comply with the legal requirements.
4. Perform a range of tasks relating to the processing of opt-out and membership withdrawal forms making sure that members' requests are dealt with in accordance with both current legislation and the pension scheme rules. Help members make informed decisions by ensuring that they are alerted to details of the benefits lost by withdrawing from scheme membership.
5. Make appropriate use of the HR/Payroll system (Trent) and other databases to obtain information in order to respond to queries from or provide data to members and the external administrators.

6. Act as a key point of contact between members and the third party administrators particularly in respect of the provision of information and answering queries.
7. Respond to queries from employees regarding their pension benefits whether in person, by email or on the telephone. Attend employee facing information sessions to help people with their understanding of pension related matters. Expertise is not required but the postholder is expected to build up a reasonable level of understanding and knowledge and be able to direct individuals to other sources of help where this extends beyond their knowledge.
8. Process retirement cases Tasks include:
  - the completion and submission of request forms to the administrators
  - checking progress
  - maintaining data in a spreadsheet
  - issuing quotations and forms to members and processing the returned forms and associated documentation.
9. Carry out the functions necessary for the smooth running of the office including opening and logging incoming post, preparing papers for scanning, typing correspondence, entering data into spreadsheets, completing standard letters and forms and maintaining a diary / reminders system.
10. Perform basic calculations when required. This will generally be in order to answer queries or when investigating data issues.
11. Participate as a team member in a variety of *ad hoc* projects.
12. Deal with visitors to the office and enquiries from University staff and managers in an efficient, helpful, professional and friendly manner.
13. Respond to telephone calls and emails in a courteous, timely and helpful way.
14. Provide an excellent service to our customers.

### **Supervision received**

Reports to the Pensions Manager. Expected to work with minimum supervision.

### **Supervision given**

None.

### **Contact**

The Pensions Assistant will be required to have contact and liaise with

- all members of staff
- pension scheme members and their families
- colleagues in HR and Finance
- the external administrators of the University's pensions schemes
- the University's senior managers
- professional advisers.

### **Terms and conditions**

This is a full time permanent position. 36 hours per week.

This document outlines the duties required for the time being of the post to indicate the level of responsibility. It is not a comprehensive or exhaustive list and the line manager may vary duties from time to time which do not change the general character of the job or the level of responsibility entailed.

**Date assessed: 15 May 2019**

# PERSON SPECIFICATION

Job Title	School/Department
Pensions Assistant	Human Resources

Criteria	Essential	Desirable
<b>Skills Required</b>	<ul style="list-style-type: none"> <li>• Excellent planning and organizational skills to ensure that tasks are completed accurately and to deadlines</li> <li>• Good interpersonal skills for customer care and team working</li> <li>• Proficient numeracy and literacy skills</li> <li>• Attention to detail, high level of accuracy and methodical working</li> <li>• Demonstrable good communication skills both oral and written, particularly the ability to explain a complicated topic to a range of individuals</li> </ul>	
<b>Attainment</b>	<ul style="list-style-type: none"> <li>• A good general standard of education including GCSE or equivalent in English and Maths</li> </ul>	<ul style="list-style-type: none"> <li>• Certificate in Pensions Administration</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>• Awareness of issues of confidentiality and data protection</li> </ul>	<ul style="list-style-type: none"> <li>• A basic knowledge of pensions administration and/or employment law</li> </ul>
<b>Relevant Experience</b>	<ul style="list-style-type: none"> <li>• Working in a busy office environment</li> <li>• Use of the Microsoft suite of applications, in particular Word, Excel and Outlook</li> <li>• Working in an environment where confidentiality is key</li> <li>• Use of numeracy skills</li> </ul>	<ul style="list-style-type: none"> <li>• Previous experience of working with pensions</li> <li>• Familiarity with an HR / Payroll system</li> </ul>
<b>Disposition</b>	<ul style="list-style-type: none"> <li>• Ability to understand and use fairly complex information across a range of pension schemes</li> <li>• Capable of working well with a variety of contacts including staff and external professionals</li> <li>• Willingness to learn</li> <li>• Positive attitude</li> <li>• Ability to work under pressure</li> <li>• Self-motivated and flexible</li> <li>• Keen to provide an efficient service in a friendly and helpful manner</li> </ul>	
<b>Other</b>	<ul style="list-style-type: none"> <li>• Work flexibly</li> <li>• Team player</li> </ul>	

Completed by:	Stephanie A May	Date: 15 May 2019
---------------	-----------------	-------------------