 

JOB DESCRIPTION

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| **JOB TITLE** | Clerical Officer (MPF) |
| **GRADE** | Band D |
| **REPORTING TO** | Payroll Manager/Data Compliance & Technical Officer |
| **JD REF** | BUS0108G |

**PURPOSE**

To support the provision of a cost effective, customer focussed Pension Service. The core focus is to undertake administrative duties to include accurate processing of member records and financial records to ensure data quality is maintained. Responsible for the filing of non- member related documents into an electronic system.

# MAIN DUTIES AND RESPONSIBILITIES

1. Create and maintain active member records to ensure data quality and comply with statutory disclosure requirements and business requirements. .
2. Process Scheme AVCs and Additional Pension Contribution (APC) contracts, along with updating existing contracts including ARCs and Added Years.
3. Analyse and assess the accuracy of data automatically processed and interfaced from disparate employer systems into the Pension Administration system.
4. Work to well defined business process to assist in the production of statistical and qualitative performance targets.
5. Determine eligibility, calculate and process short service refunds of contributions, ensuring the appropriate regulations and are applied within section performance targets.
6. Process deferred benefits which have minimal routine membership adjustments.
7. Process outgoing and incoming mail, scanning and filing documents from all service areas within the Fund; indexing casework to initiate workflows, including interrogation of member records.
8. Deal with routine correspondence for active, deferred and pensioner members including processing changes of address, bank details and tax codes.
9. First point of contact either by telephone or face to face dealing with death notifications, bereaved family members on a daily basis.
10. Deal with general member enquiries including people wanting to join/leave the Scheme. Process and record members wishing to opt out of the Scheme.
11. To support Fund meetings ensuring a professional environment by undertaking duties such as booking/preparation of venue, hospitality, meeting/escorting attendees.

# ROLE SPECIFIC KNOWLEDGE, EXPERIENCE AND SKILLS

## Knowledge and skills:

* Knowledge of the Local Government Pension Scheme.
* An understanding of HMRC and related legislation.
* Excellent literacy and numeracy skills.
* Good interpersonal skills.
* Understanding of confidentiality requirements.
* Demonstrate the ability to analyse information and make an appropriate decision on a course of action.
* Demonstrate comprehensive IT skills.
* Able to work to deadlines

***Desirable***

*Using Lynx Heywood’s Altair pension administration software*

*Using Microsoft Word and Excel*

*Good verbal and written communication skills*

*Good numeracy skills*

*Use of an EDM system*

*Financial systems including an accounts receivable*

*Knowledge of the LGPS*

## Experience:

* Experience of basic data input entry to business support systems
* Experience of working in a customer service or financial environment

***Desirable***

*LGPS Administration – demonstrate technical knowledge*

*HMRC – financial regulations*

*Disclosure regulation*

# ADDITIONAL INFORMATION

The postholder must be able to travel across the borough

Able to work outside traditional hours, of a weekend and evening as required, adopting an agile working approach in response to business requirements.

**Health & Safety Considerations**:

* Lone working
* Work with VDUs (Video Display Unit) (>5hrs per week)

**DATE OF APPROVAL: APPROVED BY:**