

<b>Job Role:</b>	<b>Clerical Officer</b>
<b>Service:</b>	<b>Merseyside Pension Fund (MPF)</b>
<b>Reports to:</b>	<b>Payroll Manager or Data Compliance &amp; Technical Officer</b>
<b>No of Subordinates:</b>	
<b>HR USE ONLY</b>	
<b>Job Role Ref:</b>	<b>BUS</b>
<b>Job Family:</b>	<b>Business Support</b>
<b>Proposed Grade:</b>	<b>Band D</b>

#### **JOB ROLE PURPOSE**

To support the provision of a cost effective, customer focused 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.

#### **KEY TASKS**

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 work flows, 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.

## **KEY RESPONSIBILITIES**

### **People**

To staff a reception service and provide information and guidance to members either face to face or by telephone and deal with complex and sensitive issues.

Engage with a diverse range of Scheme employers and external agencies to building constructive working relationships.

Provide administrative support to pension officers and collaborate with staff and employers in all service areas to promote a positive conducive team culture.

### **Financial**

Responsible for calculating short service refunds and processing for payment, ensuring relevant regulations are applied.

Responsible for ensuring accuracy of data that determine benefit payments and impact on employer liabilities, contribution rates and budgets.

### **Strategic**

Operate within established policies, procedures and operating frameworks to achieve targets. Maintain accurate member data to ensure compliance with associated legislative requirements. Process all incoming/outgoing mail, accurately initiate and route casework to appropriate service areas.

### **Resources**

Regularly operate and maintain business support systems. Routinely process personal, confidential and sensitive data.  
Engage with employers to resolve data issues and customer queries

### **Planning and Organising**

Ensure allocated workloads are prioritised to achieve agreed targets and deadlines, following established policies and procedures to ensure accurate member data and calculations.

## **Decision Making**

Maintain knowledge of Local Government Pension Scheme Regulations and other related legislation to ensure accurate member data is actioned and aligned to correct business process.

To provide relevant options and information to members and employers based on relevant legislation.

## **EXPERIENCE, QUALIFICATIONS, KNOWLEDGE AND SKILLS**

### **Essential Criteria**

#### **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

#### **Experience:**

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

### **Desirable Criteria**

#### **Knowledge and Skills:**

- Using Aquilla 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:**

- LGPS Administration – demonstrate technical knowledge
- HMRC – financial regulations
- Disclosure regulation

<b>ADDITIONAL WORK ELEMENTS</b>
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Work flexibly to suit the needs of the organisation

**NOTE:**

**The job role holder may be required to undertake other reasonable duties commensurate with the job role descriptor grade as directed by the Head of Service.**

This job role profile will be reviewed regularly and may be subject to amendment or modification at any time after consultation with the post holder. It is not a definitive statement of procedures and tasks, but sets out the main expectations of the Service in relation to the post holder's responsibilities and duties.

Elements of this job role profile and changes to it may be amended in light of organisational and service requirements.

**Signed Head of Service****Date**

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