Job title:	**Pension Analyst, Data and Employer Services**
Department:	**Pension Services**
Reports to:	**Team Lead, Data and Employer Services**

■ **Full-time**
☐ **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 & Employer Services, this position is responsible to maintain communication and provide support to employers, as well as processing, analyzing, and reconciling data issues, and determining eligibility and service credit for disabled members. The Pension Analyst, Data and Employer Services administers the .6 rule for retired members, prepares, analyzes, and maintains data for various reports, and assists with the annual audit and valuation processes. Additionally, this position generates annual statements, newsletters, and other communications to members and employers.

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

Disability Service Maintenance
- Work with employers and disability benefit providers (i.e. insurance carriers) to determine eligibility for disability service crediting.
- Credit disability service as required per the plan rules, including peer review.
- Communicate with members, employers, and disability benefit providers in relation to member disability benefits.

Retired Member Maintenance
- Administer the .6 rule, notifying retired members when they have reached .4 of a year of service, obtain employer projections of service, adjust or suspend pension payments if service limit is exceeded, and inform members of adjustments.

Statements and other Mailings
- Participate in the preparation of annual statements, newsletters and Annual Report highlights for distribution to active, inactive and retired members by generating necessary data reports, completing analysis of exception reports, and working with the distributor in reviewing and approving proofs.
- Create, test, and generate general communications to members and employers.

EMPLOYER REPORTING
- Educate and guide employers on the application of ATRF's legislation, policies, and procedures.
- Assist employers in using the FTP site to download and import payroll files, resolve validation errors, and submit files electronically to ATRF.
- Support employers in resolving issues, and monitor and respond to Helpdesk inbox inquiries.

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- Process employer files from ATRF-CS to data warehouse, review cases on exception reports, and take necessary action to resolve any critical errors providing a release code when required.
- Request revised information from employers pertaining to changes to pre ATRF-CS service, salary, or contribution data, and verify the accuracy of the employer's calculations.
- Foster effective communication with employers to ensure monthly data is submitted on a timely basis.
- Perform quarterly and annual reconciliations of employer data.
- Review reports and work with employers to ensure accuracy.
- Process and peer review excess contribution refunds
- Assist in developing content for the Employer Newsletters.
- Work with internal and external auditors in reviewing controls established for employer reporting.
- Follow up with employers on outstanding questions from Member Services regarding data issues that may member benefit calculations.

DATA ANALYSIS AND RECONCILIATION

Reporting and Data Maintenance
- Extract required data to support benchmark reporting and the Annual Report.
- Complete adjustments on funds received by the employer, and communicate adjustments to the impacted member.
- Analyze routine data discrepancies identified by the actuary, through ad hoc reports, or Service Change Analysis. Process write-offs, request corrections from employers, and initiate recalculations as needed.
- Research, reconcile, analyze, and update historic service as required.

Valuation
- Consolidate and verify information of demographic reports from the Private School employers and submit to the Senior Pension Analyst or the Team Lead for review and approval.
- Investigate possible data problems identified by the actuary draft responses for review and approval by the Team Lead or Director – Client Excellence, Pension Services.
- Initiate adjustments, maintaining contact with impacted employers to obtain corrected data, and following up as required.

CHANGE MANAGEMENT AND PROCEDURAL DOCUMENTATION
- Coordinate and test updates/changes to the YMPE, salary cap, ATA rates, and contribution rates.
- Participate and identify continuous improvement opportunities for system changes and enhancements, communication materials, and documentation and procedural issues, providing solutions to senior team members (Senior Pension Analyst, Team Lead, Data & Employer Services and/or Director – Client Excellence, Pension Services) for review/approval.
- Monitor the Employer section of the website and submit updates to the Director – Client Excellence, Pension Services for review and approval.
- Assist with the revision and maintenance of the ATRF Employer Procedure Manual and ATRF-CS training material.

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, human resources, or payroll.
- Certified Employee Benefit Specialist (CEBS), Pension Plan Administration Certificate (PPAC), Payroll Compliance Professional (PCP) designation or equivalent would be an asset.
- Demonstrated interest in working directly with members and employers in a professional and highly regulated industry.

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- 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 and verbal and written communication skills. Bilingual in both French and English is an asset.
- Strong analytical and problem-solving skills and a strong aptitude for math.
- 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).

Responsibilities are supervised occasionally with freedom of action restricted to modifications of procedural guidelines. Unusual problems are referred to a Senior Pension Analyst 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. Work involves performance of specialist or technical tasks and judgement is required to effectively plan the work, set priorities and make decisions. Recommendations for improvement are taken to the Director, Pension Services prior to implementation.

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

This position has no supervisory responsibilities but participates in peer-reviewing the 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 – Client Excellence, Pension Services. In addition to training and peer reviewing the work of others, the incumbent is consulted as a resource in the technical function. Significant interaction and support of team members, ATRF staff, employers, and other external stakeholders is necessary and a significant aspect of this role. Work is reviewed for accuracy, timeliness, and adherence to policies and procedures by team members, the Team Lead, and/or Director – Client Excellence, Pension Services.

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