

## JOB DESCRIPTION & PERSON SPECIFICATION



**Director Area:** Resources

**Job Ref Number:** 04024

**Service Area:** Pensions  
(Payroll, Pensions, People Administration)

**Grade:** G4

**Job Title:** Pensions Officer Level 2

### **PURPOSE OF JOB:**

To assist in the provision of a comprehensive pensions service to employees as part of the Payroll, Pensions and People Administration Department.

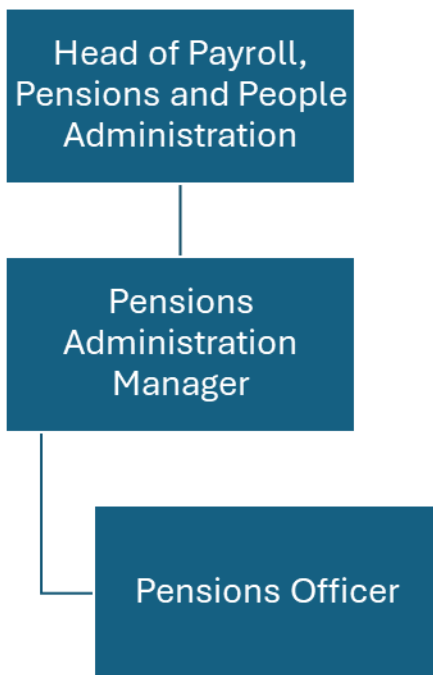
To provide an accurate, effective, economic transactional processing service administering and maintaining pension records and data ensuring all data and information is processed in accordance with all relevant scheme policies.

To ensure all data maintains financial integrity and reliability, and reporting obligations are compliant.

To deliver a high quality, customer focused service to meet the requirements of all pension schemes, ensuring the delivery of a responsive service by reacting to and meeting a range of fluctuating pressures and daily demands.

To act as first point of contact for staff pension queries and support all Lincolnshire County Council staff and management on all Pension Schemes and associated provisions.

**TEAM STRUCTURE:**



**MAIN DUTIES:**

To process pension transactions on a daily basis to in accordance with statutory requirements and agreed service levels.

Specific duties and responsibilities include:

1. To be responsible for the efficient and accurate processing of documentation relating to new starters and leavers for the Council's four pensions' schemes (LGPS, TPS, FPS and NHS), to include calculations of Pensionable Pay and processing of retirement applications, ensuring the prompt and accurate preparation and submission of documentation for new members, leavers and changes in status.
2. To be responsible for processing and maintaining accurate employee pension records on the Council's HR and Payroll system, including but not limited to actioning pension opt-ins/outs, refunds, AVCs, Buy Backs and contribution rate re-bandings, movement in schemes and Scheme eligibility.
3. To administer scheme transfers including processing requests from members for transfers in and transfers out of the relevant pension scheme, including divorce quotes.
4. To assist the Pensions Team Leader in the administration of monthly auto-enrolment activities, including earnings assessments, the generation of accurate and timely Auto Enrolment communications such as auto enrolment letters, postponement letters, age 22 letters to staff, and the reporting of auto-enrolled staff to pension providers
5. To process any correspondence and enquiry forms received from the Pensions Schemes and employees ensuring deadlines are met.
6. To act as first point of contact for pension scheme administrators and for all staff pension enquiries ensuring that all forms and corresponding documentation is responded to handled sensitively and professionally.
7. To provide detailed information on pensions procedures as and when required, providing informative advice and guidance to all stakeholders.

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| 8. To communicate standard pension scheme information in an appropriate way to members and prospective members.  |
| 9. Undertake data input on the payroll system with regard to the pensions function to ensure that system integrity and security is maintained including absence returns and adjustment to pension contributions and pensionable pay.                                   |
| 10. Ensure contributions are correctly deducted from remuneration for all pensionable employees and that statutory requirements are complied with. Completing monthly checking through a suite of reports to monitor data integrity and accuracy.                      |
| 11. Ensure that data held is sufficient and in a format that meets the legislative requirements for reporting including pension auto enrolment and annual returns for HMRC, National Insurance and the pensions schemes.   |
| 12. Ensure that accurate staff records are maintained, and the payroll system is updated to reflect changes in all data that affects pensions, for example, sickness and maternity leave, annual increments, and calculating and reporting on Assumed Pensionable Pay. |
| 13. Production and submission of the monthly returns for all pension scheme providers, ensuring exceptions, mismatches and missing details are corrected by the required deadlines.  |
| 14. Support the Team Leader on the prioritising and allocating of team tasks and duties.   |
| 15. Assist the Team Leader with end of year processes to ensure all statutory requirements are met, and that all Annual Benefit Statement queries are resolved and updated to ensure member statement details are correct.   |
| 16. Assist the Team Leader with the triennial Pensions Auto Re-enrolment process.  |
| 17. To complete complex manual calculations following internal SOP's as required.  |
| 18. To produce a number of regular pension reports including pension scheme monthly and internal management reports in collaboration with the Pensions Team Leader.  |
| 19. To maintain a current knowledge and keep abreast of any new developments of Pension Regulations and ensure information is consistent with their provisions.  |

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| 20. To be the complex queries escalation path, responsible for first point of initial contact for support and query resolution prior to escalating to Pensions Team Leader.  |
| 21. To complete testing of all pensions requirements.  |
| 22. To assist in the completion of PPPA Process & Procedure Matrix and documentation, ensuring that the end-to-end procedure is accurate, the documentation is correctly formatted and reviewed in accordance with the annual review date.                       |
| 23. To perform at a senior level in relation to provide and communicate detailed information on all payroll aspects as and when required, providing informative advice and guidance to all stakeholders.   |
| 24. The prompt reporting of BW System faults and the monitoring of those tickets with the LCC BW Team.   |
| 25. To provide on-going contributions and make recommendations to management for improvements and developments in the payroll systems and procedures.  |
| 26. To support the Payroll Team Leader by ensuring that any new procedures or policies are implemented within the team   |
| 27. Record data for reporting on the KPIs and internal service measures relating to pensions.  |
| 28. To process any documentation, correspondence and complex enquiries received from scheme bodies and employees are completed accurately, forwarded promptly ensuring deadlines are met and are handled in a polite friendly, sensitive and professionally way. |

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| 29. To comply with all Pensions procedures to ensure that robust systems remain in place and pro-actively identifying and changing service delivery to ensure continuously improved customer service.  |
| 30. Ensure that data protection is applied to all employee records and exercising absolute integrity in respect of confidential matters and ensure that any specified procedures for ensuring the security and confidentiality of information is always followed and maintained. |
| 31. To provide cover and support to colleagues in the services for the wider team as required, catering for fluctuating workloads and absences, including contributing to over cover in accordance with the needs of the service.  |
| 32. To act as an effective team member by sharing knowledge, providing support and assistance to other team members.   |
| 33. To complete Staff Development Reviews and Personal Development Plans.  |
| 34. To develop skills and competencies of self through training and development activities, ensuring that progress is maintained, and future needs identified and actioned.  |
| 35. Maintain own compliance with the councils mandatory and statutory training requirements.   |
| 36. To undertake other duties as deemed appropriate by the Head of Service, Pensions Manager or Pensions Team Leader to always ensure business continuity of the Pensions Service.   |

#### PERSON SPECIFICATION

| Requirements  | Where identified* | Essential | Desirable |
|---|-------------------|-----------|-----------|
| Educated to GCSE level with a minimum of 4 passes at grade 5 or above (or equivalent) or NVQ Level 3 or equivalent. | A                 | ✓         |           |
| Relevant professional qualification   | A                 |           | ✓         |
| Proficient in using Microsoft Windows and Office software   | A                 | ✓         |           |
| 4 years' experience of working in a Local Government Pensions role/team   | A                 | ✓         |           |

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| Detailed understanding of Local Government Payroll and Pension legislation and processes   | A/I | ✓ |  |
| Detailed knowledge of local government, fire and teacher's pay and conditions  | A/I | ✓ |  |
| Experience of data manipulation in excel and/or management reporting from a database   | A/I | ✓ |  |
| Understanding of the principles of the Data Protection and Freedom of Information Acts   | I   | ✓ |  |
| Aptitude for working with figures to a high degree of accuracy with attention to detail, particularly when working to tight deadlines          | I   | ✓ |  |
| Proven organisational and prioritising skills for own workloads, demonstrating the ability to adapt to changing needs and responding flexibly. | I   | ✓ |  |
| Effective customer care skills   | A/I | ✓ |  |

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| Ability to communicate effectively with a wide and diverse range of customers, be customer focused recognising the need for empathy with an understanding of customer needs and expectations | A/I | ✓ |  |
| Proven written and verbal communication skills with the ability to produce quality, accurate and timely documents, reports and communications  | A/I | ✓ |  |
| Ability to work on own initiative and work under pressure to meet deadlines and performance targets  | A/I | ✓ |  |
| An effective collaborator who promotes positivity and adds to the team's success, supporting colleagues, builds relationships and sharing workloads.   | A/I | ✓ |  |
| Excellent numerical and analytical skills including calculations   | A/I | ✓ |  |
| Ability to interpret, understand legislation and guidance, supporting colleagues   | I   | ✓ |  |
| Understand the need for a high standard of integrity, professionalism and confidentiality  | I   | ✓ |  |
| Demonstrable experience of working as an effective and positive contributor to a team  | A/I | ✓ |  |
| Ability to work flexibly to challenging deadlines in a performance driven office   | A/I | ✓ |  |
| Ability to analyse and solve problems and is solutions focused.  | A/I | ✓ |  |
| Willingness to learn and commitment to Continuous Development  | A/I | ✓ |  |
| *A = Application form      T = Test/Assessment      I = Interview      P = Presentation  |     |   |  |

**GENERAL**

The postholder is required to take personal responsibility for contributing to organisational transformation and changes in ways of working, maximising the benefits and efficiencies for both internal and external customers, including the promotion and use of self-service to achieve maximum cost effectiveness.

The postholder is expected to work to the Lincolnshire County Council Core Values and Behaviours and to carry out the duties in accordance with Lincolnshire County Council policies.

**Other Duties** - The duties and responsibilities in this job description are not exhaustive. The post holder may be required to undertake other duties within the general scope of the post. Any such duties should not substantially change the general character of the post. Duties and responsibilities outside of the general scope of this grade of post will be with the consent of the post holder.

**Safeguarding** - All employees need to be aware of the possible abuse of children and vulnerable adults and if you are concerned you need to follow the Lincolnshire County Council Safeguarding Policy. In addition, employees working with children and vulnerable adults have a responsibility to safeguard and promote the welfare of children and vulnerable adults during the course of their work.