

Benchmark Title	Pension Clerk 1
Group	[2] Administration – General
Sub-Group	(b) Pensions
BM Pay Grade & Job Code	<p>. Base Level (Pay Grade 2) [Job Code 282801] . Supervision Level 3, 4, or 5 (Pay Grade 3) [Job Code 282802]</p> <hr/> <p>. Second Language required, plus Supervision Level 2, 3, or 4 (Pay Grade 3) [Job Code 282802] . Second Language required, plus Supervision Level 5 (Pay Grade 4) [Job Code 282803]</p>
Scope & Level Definition	Jobs at this level provide routine pension-related support to senior staff, clients, and departments.
Sample Duties at this Level	<ul style="list-style-type: none"> ▪ Performs duties related to researching and verifying member data (e.g., work history and leaves of absence) by reviewing various sources of information (e.g., dockets, human resources information system, fiche, and employee files), documenting anomalies, and making recommendations for corrections ▪ Assists with mailouts such as lump sum payments, elections, annual statements, newsletters, and retirement and termination packages, ensuring inclusion of appropriate government forms (e.g., CPP, OAS, T2151, TD1) ▪ Performs data entry into a pension-related information system, including new member information, beneficiary changes, and address changes ▪ Assists in conducting audits of leaves of absence to ensure contributions, earnings, and service are accurate and makes corrections ▪ Processes pension-related forms, such as DOBs (direction of benefits) ▪ Conducts pension-related research, such as locating pension plan members ▪ Answers routine pension-related inquiries ▪ Assists senior staff in processing termination/retirement packages for deferred members ▪ Performs administrative duties such preparing and sending correspondence, maintaining a supply of communications materials and government forms, and maintaining paper and electronic filing systems
Knowledge (Education & Experience)	<ul style="list-style-type: none"> ▪ High School graduation, plus one year of post-secondary education, plus two years of related experience <p>OR</p> <ul style="list-style-type: none"> ▪ An equivalent combination of education and experience
Judgement, Authority, Decision Making	<ul style="list-style-type: none"> • Works under general supervision. • Work is performed in accordance with established procedures and well-defined standard practices involving limited freedom to select which methods are applicable in any given situation. • Job tasks are usually well defined through others, requiring the use of established guidelines where there is little or no choice of action. • Some planning may be required. • Performs routine duties independently.
Creativity, Problem Solving, Analytic and/or Technical Thinking	<p>Job duties are of a straightforward procedural nature.</p> <ul style="list-style-type: none"> • Assembles and maintains data and/or information and ensures its reliability and quality. • Resolves routine problems and refers other problems to senior staff. • Some opportunity for improvement of work methods that are of a straightforward procedural nature.

Benchmark Title	Pension Clerk 1
Group	[2] Administration – General
Sub-Group	(b) Pensions
Responsibility for the Work of Others	<p>Levels of Supervision:</p> <p>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</p> <p>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</p> <p>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</p> <p>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</p> <p>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</p>
Interpersonal Skills	<p>Moderate interpersonal skills are required.</p> <ul style="list-style-type: none"> • Verifies, explains, and/or exchanges detailed/specialized information. • Selects information from more than one source. • Responds to basic complaints
Working Conditions	<ul style="list-style-type: none"> • Standard office environment • Workplace interruptions are expected, and do not create undue stress in task completion with known and predictable deadlines
Physical and Sensory Effort	<p>Minor fatigue results from the requirement for extra attentiveness for performance of some detailed tasks requiring consistency and accuracy; the incumbent may change to alternative tasks requiring less sensory effort</p>
	<p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>

Benchmark Title	Pension Clerk 2
Group	[2] Administration – General
Sub-Group	(b) Pensions
BM Pay Grade & Job Code	<p>Base Level (Pay Grade 4) [Job Code 282901] Supervision Level 3, 4, or 5 (Pay Grade 5) [Job Code 282902]</p> <hr/> <p>Second Language required, plus Supervision Level 1, 2, or 3 (Pay Grade 5) [Job Code 282902] Second Language required, plus Supervision Level 4 or 5 (Pay Grade 6) [Job Code 282903]</p>
Scope & Level Definition	Jobs at this level provide moderately complex pension-related support to senior staff, clients, and departments.
Sample Duties at this Level	<ul style="list-style-type: none"> ▪ Enters, updates, and retrieves data in pension-related and other information systems, such as processing pension plan enrollments, downloading pension plan member demographic data, and creating reports ▪ Performs, coordinates, and checks calculations related to pension plan members (e.g., related to retirement and termination, and for members with limited years of service in the pension plan) ▪ Processes retroactive pension changes by performing duties such as collecting contributions, backdating enrollment, ensuring accurate deductions are made from payroll, and resolving related issues ▪ Performs duties related to auditing, verifying, and correcting data, such as verifying plan member investment allocation forms, verifying plan membership eligibility, auditing contribution accounts, and providing instruction for required corrections ▪ Sets up pension-related pay schedules and maintains recordkeeping processing cycles ▪ Remits contributions to the pension plan custodian and instructs pension plan custodian on fund investment allocations ▪ Performs financial duties such as reconciling ledgers, preparing working papers for pension plan year-end financial statements, tracking budgets and expenditures, and processing requisitions, journal vouchers, and invoices ▪ Reports system errors to appropriate parties for corrective action ▪ Conducts pension-related research ▪ Answers moderately complex pension-related inquiries ▪ Performs administrative duties such preparing and sending correspondence, and maintaining paper and electronic filing systems for pension records, such as deduction listings, monthly investment journals, and journals to record contributions, transfers, payments, and expenses
Knowledge (Education & Experience)	<ul style="list-style-type: none"> ▪ High School graduation, plus two year of post-secondary education, plus two years of related experience <p>OR</p> <ul style="list-style-type: none"> ▪ An equivalent combination of education and experience

Benchmark Title	Pension Clerk 2
Group	[2] Administration – General
Sub-Group	(b) Pensions
Judgement, Authority, Decision Making	<ul style="list-style-type: none"> ▪ Works independently under general supervision. ▪ Work is performed in accordance with established procedures and accepted practices involving freedom to select which methods are applicable in any given situation. ▪ Job tasks are generally standardized with ability to choose action within limits defined by standard/accepted data, information and procedures. ▪ Organization of work to accomplish goals is expected
Creativity, Problem Solving, Analytic and/or Technical Thinking	<p>Job duties cover work of a minor interpretive and/or technical and/or analytical nature.</p> <ul style="list-style-type: none"> • Compiles, manipulates, and performs calculations on data. • Compiles, interprets, and evaluates information to occasionally resolve moderately complex problems. • Ideas developed result in minor changes to existing procedures, practices, standards, specifications, services, or projects.
Responsibility for the Work of Others	<p>Levels of Supervision:</p> <p>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</p> <p>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</p> <p>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</p> <p>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</p> <p>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</p>
Interpersonal Skills	<p>Considerable interpersonal skills are required.</p> <ul style="list-style-type: none"> • Builds rapport and defuses tense situations with people who may be difficult or challenging. • Actively listens, and probes for information to clarify requests. • Uses tact and discretion when discussing problems and eliciting sensitive or confidential information. • Provides interpretation of a routine to moderately complex nature. • Makes informal demonstrations or presentations in areas of expertise.
Working Conditions	<ul style="list-style-type: none"> • Standard office environment • Interruptions are an expected part of the work, and re-prioritization and/or rescheduling of tasks is required for work completion
Physical and Sensory Effort	<p>Moderate fatigue results from the requirement for extra attentiveness for performance of many detailed tasks requiring consistency and accuracy; the incumbent may change tasks, but most tasks have similar sensory demands.</p>
	<p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>

Benchmark Title	Pension Clerk 3
Group	[2] Administration – General
Sub-Group	(b) Pensions
BM Pay Grade & Job Code	<ul style="list-style-type: none"> . Base Level (Pay Grade 7) [Job Code 283001] . Supervision Level 2, 3, or 4 (Pay Grade 8) [Job Code 283002] <hr/> <ul style="list-style-type: none"> . Supervision Level 5 (Pay Grade 9) [Job Code 283003] . Second Language required, plus Supervision Level 1, 2, or 3 (Pay Grade 8) [Job Code 283002] . Second Language required, plus Supervision Level 4 or 5 (Pay Grade 9) [Job Code 283003]
Scope & Level Definition	Jobs at this level and coordinate and oversee pension-related services, and provide complex pension-related support to clients and departments.
Sample Duties at this Level	<ul style="list-style-type: none"> ▪ Organizes and coordinates pension benefit services for pension plan members, including pre-retirement & post-retirement death benefits, and termination/retirement calculations ▪ Oversees, prepares, and verifies complex calculations such as termination and retirement benefit calculations/options for pension plan members, and retroactive payment calculations ▪ Responds to general and complex inquiries from a variety of sources, including pension plan members, University departments, pension plan actuary, pension plan custodian, financial planners, and financial institutions ▪ Interprets and applies rules associated with pension plan text, Canada Revenue Agency, and provincial legislation ▪ Explains complex pension plan issues such as commuted value and double refund, as well as issues not directly related to the pension plan, such as the Canada Pension Plan (CPP), Old Age Security (OAS), and Registered Retirement Savings Plans (RRSPs) ▪ Prepares complex spreadsheets, reports, and statistical summaries ▪ Ensures data integrity of the Pension Administration System (PAS) by performing duties such as coordinating regular audits, investigating and resolving anomalies with respect to pension-related records and contributions, making corrections, and following up by collecting contributions as required ▪ Coordinates multi-million dollar pension payments, refunds, and fund transfers by liaising with the University's finance department and the pension plan custodian, and making required arrangements ▪ Determines eligibility for pension enrollment, and ensures compliance with compulsory enrollments ▪ Processes requisitions and forms such as cheque deposit forms and DOBs (direction of benefits)
Knowledge (Education & Experience)	<ul style="list-style-type: none"> ▪ High School graduation, plus two year of post-secondary education, plus seven years of related experience <p>OR</p> <ul style="list-style-type: none"> ▪ An equivalent combination of education and experience
Judgement, Authority, Decision Making	<ul style="list-style-type: none"> • Works independently under minimal supervision. • Work is performed in accordance with broadly established procedures and practices requiring initiative to plan and complete recurring assignments independently, and judgement to determine which of many methods are applicable in any given situation. • There are a variety of job tasks requiring ongoing prioritization. • Responsibilities and work situations are broader in scope, with limited opportunity for standardized solutions.

Benchmark Title	Pension Clerk 3
Group	[2] Administration – General
Sub-Group	(b) Pensions
Creativity, Problem Solving, Analytic and/or Technical Thinking	<p>Job duties cover work of an intermediate technical and/or analytical nature.</p> <ul style="list-style-type: none"> • Uses initiative, interpretation, and/or ingenuity to identify potential or actual problems, investigate causes, and resolve problems. • Frequently resolves moderately complex problems, and occasionally resolves complex problems, in specialized areas, including for other staff. • Ideas developed result in moderate changes to existing procedures, practices, standards, specifications, services, or projects.
Responsibility for the Work of Others	<p>Levels of Supervision:</p> <p>[1] Is not required to supervise; may explain work procedures to new or inexperienced staff</p> <p>[2] Formally trains new staff on work procedures, and/or oversees work of students and/or temporary staff</p> <p>[3] Supervises up to and including one (1.0) FTE ongoing, permanent staff member, and/or up to and including five (5) temporary staff, students, and/or volunteers</p> <p>[4] Supervises more than one (1.0), up to and including two (2.0) FTE ongoing, permanent staff members, and/or more than five (5) temporary staff, students, and/or volunteers</p> <p>[5] Supervises more than two (2.0) FTE ongoing, permanent staff members</p>
Interpersonal Skills	<p>A high level of interpersonal skill is required.</p> <ul style="list-style-type: none"> • Provides assistance and emotional support to individuals who are under stress or in crisis, showing empathy and sensitivity. • Actively listens, and probes for information to clarify complex requests. • Provides interpretation of a complex nature. • Makes informal demonstrations or presentations in areas of expertise. • Provides training and/or instruction of a routine nature in areas of expertise.
Working Conditions	<ul style="list-style-type: none"> • Standard office environment • Work pressures, peak periods, multiple demands, deadlines or interruptions moderately impact task completion ability.
Physical and Sensory Effort	<p>Significant fatigue results from the requirement for extra attentiveness for performance of most tasks, which are complex and/or lengthy, and/or for which maintenance of accuracy is critical and challenging; the incumbent often does not have the freedom to change tasks because one or more task must be completed within a critical time frame, and/or because the incumbent alone must complete key parts of processes</p>
	<p>This benchmark is for classification purposes only, and is not a job description. Benchmark qualifications represent the amount of education and experience typically required for full performance on the job, and are outlined for classification and compensation purposes. Note that specific "abilities" and "knowledge" required for the job should be outlined in the job description and posting, but are not specified in the benchmark.</p>