#### Trent University LogoEXEMPT JOB DESCRIPTION

**Job Title:** Pension & Benefits Advisor

**Job Number:** X-154 | VIP: 1122

**Band:** EXEMPT- 6

**NOC:** 1121

**Department:** Human Resources

**Supervisor Title:** Director, Pension, Benefits and Payroll

**Last Reviewed:**  May 5, 2021

#### **Job Purpose:**

The Pension & Benefits Advisor provides subject matter expertise to employees and managers and members of the Department of Human Resources in the effective administration of group benefit plans (Exempt, OPSEU, TUFA, CUPE), and pension plans.. The Pension & Benefits Advisor regularly liaises with the benefit carrier to resolve escalated issues, participate in negotiations/renewals, and to ensure the University is meeting its legislative requirements and governance guidelines. Assisting the Director, Pension, Benefits and Payroll, the Pension & Benefits Advisor provides administrative support for the Pension Plans and the upcoming conversion to the UPP. The Pension & Benefits Advisor also provides strategic case management for all disability claims/cases, both occupational (Worker's Compensation) and non-occupational (STD and LTD).

#### Key Activities:

***Group Benefits & Pension Plan;***

1. Administers all employee benefit plans at Trent; Life, LTD, Extended Health, Dental, Semi-Private, University Health Insurance Plan, Employee Assistance Plan, flex benefits, etc. Responsible for all related correspondence, employee education, reconciliations, report design and production, Responsible for inputting benefit information to HRIS (new hire choices, life insurance age reductions, flex benefit amounts, prepaid benefit amounts, rates, etc.).
2. Interprets, applies and maintains current knowledge of all regulations, employment laws and other legislated requirements as related to benefit and pension plans.
3. Provides strategic advice and data/cost analysis in support of the negotiation of benefit plans and collective bargaining.
4. Acts as Trent’s primary contact person with all benefit providers.
5. Maintains benefits involvement at the inter-university level.
6. Reconciles and requests payments for EAP, Sun Life, RRSPs and Health Spending Account.
7. Responsible for the administration of flex benefits for all employee groups (run report, calculates and verify amounts, forward to card office, send memo, deal with discrepancies, forward entitlement to payroll).
8. Administers all forms of leaves including maternity/parental, vacation, unpaid leaves etc.
9. Monitors sick leaves in accordance with the Attendance Awareness Program and assures that adequate medical documentation is received as per university policy Follows up with requests for more information when needed.-
10. Administers all applications for Long Term Disability, monitors claims, and works with the Carrier on rehabilitative opportunities. Provides regular updates to managers and acts as a resource for managers, and employees for questions related to disability claims and sick leave. Responsible for the maintenance of employee medical files.
11. Calculates employee vacation entitlements and approves carry over requests
12. Is responsible for the calculation of all OPSEU employees' seniority and creates the OPSEU seniority list annually.
13. Approves and tracks tuition waivers in accordance with OPSEU, CUPE, and TUFA collective agreements and university policy.
14. Acts as the university’s benefits representative on CUPE committees, with all benefit providers and at the university level with the University Health insurance Plan and the University Life Insurance Plan.
15. Maintains information on Benefits website and develops and maintains procedure manual for benefit administration. Is proactive in keeping up-to-date with current trends in benefits administration.
16. Responsible for managing complicated employee accommodation, return to work planning, meetings, and follow up.
17. Responsible for all aspects of the WSIB program, filing claims, responding to WSIB inquiries and questions, investigating WSIB requirements for employees, advising employees and managers of the process and status of application, assisting in the return to work process, reporting, and paying remittances.
18. Assists the Director of Pension, Benefits & Payroll with the pension plans; responding to questions regarding retirement estimates and quotes, retirement, termination and death benefit payments, etc.
19. Assists at ensuring that the Human Resources website is kept up-to-date with information pertinent to the pension plans (i.e. legislative changes, plan information, etc.)
20. Assists in providing members, retirees, and beneficiaries with timely communication and information regarding the pension plans.
21. Provide administrative support for conversion of Pension Plans
22. Responsible for coordinating, planning, and overseeing New Hire Orientation quarterly.
23. Provides support on HRIS by ensuring the Benefits feed to Sun Life is flowing and working correctly. Tests any work orders that affect Benefits directly and provides solutions on further automation. Works together with all areas of HR in the implementation of Phase 2 in VIP.

#### Education Required:

Honours University Degree in a related field with specialization in Human Resources and Benefits Administration. CEBS designation preferred.

#### Experience/Qualifications Required:

1. 5 years’ experience in benefits administration.
2. 1 - 2 year’s experience in administration of defined benefit pension plans.
3. Excellent customer service skills.
4. High level of attention to detail and accuracy.
5. Excellent communication skills; demonstrated tact, diplomacy and ability to maintain confidentiality.
6. Ability to work under minimum supervision and as part of a team.
7. Proficiency in a variety of software applications including word processing, spreadsheet, and web technologies.
8. Ability to multi-task with proven organizational skills.

#### Supervision:

* Some assigning of tasks of student employees in the Human Resources Department.

**Job Evaluation Factors:**

**Analytical Reasoning**

The analytical reasoning is done within the framework of collective agreements and university policy. Requests for information come in many forms and the information from many sources. Often a decision on how best to collect and present the data is needed.

The position involves many requests for information from many different sources, i.e. employees, managers, faculty and from within the HR department. Many of these requests are unpredictable so priorities must be analysed and re-established constantly.

**Decision Making**

Act independently within the internal governance structure, the provisions of the pension and benefit plans and related legislation and the terms of collective agreements.

**Impact**

* Failure to delete former employees from plans and errors in enrolment cause inconvenience to employees and non-payment of claims, payment shortfalls or overpayments. Incorrect information to Finance Department results in budgeting errors.
* Errors may negatively impact employees and take time and effort to correct.
* Failure to track sick time and send timely paperwork for Long Term Disability applications can result in employees not getting paid
* Failure to properly accommodate employees can result in lost time, negatively impact an employee’s health and wellbeing and can lead to grievances and costly arbitrations.
* Failure to properly report and remit for WSIB can lead to institutional fines of up to $500,000.
* Errors in seniority calculations can negatively impact an employees standing with the University in regards to bumping and job selection

**Communication**

Internal:

* Employees across all units of the university regarding benefits, leaves, tuition waivers, benefits costs, procedures etc.
* Managers, Directors and Deans – ranges from responding to routine queries to responding to more complex messages. Must use tact and diplomacy. Must deal with confidential private and medical information. Significant discretion is required.
* Local union representatives – Written and verbal communication ranging from responding to routine queries to explaining complex messages
* Faculty (Chairs/Associate Deans) - Ranges from responding to routine queries to explaining more complex messages. Must use tact and diplomacy. Must deal with confidential private and medical information. Significant discretion is required. Manager, Budgeting Services re employee salary/position database and benefits costing.

External:

* Account Executive, Sun Life - yearly contract renewals, benefits contract changes, procedural problems, employee education sessions etc.
* Principal, Mercer re: Sun Life benefits plan issues, analysis of benefits, new initiatives, etc.
* Senior Account Manager, Ceridian Lifeworks - employees assistance plan benefits and contract renewals
* Benefits Administrators/Managers at other Ontario universities
* Third Party Administrator, The Record Keeper – administration (withdrawals, partial withdrawals, transfers, terminations) or employees/faculty RRSPs
* Third Party Administrator, Campbell & Co. – administration of CUPE benefit fund, depositing of funds, contract interpretation
* WSIB
* Legal Counsel
* Benefits colleagues at other universities and colleges – ranges from responding to routine queries to explaining complex messages and policies
* Family members of deceased employees for benefit information and life insurance payouts

**Motor/ Sensory Skills**

* Computer Keyboard Skills – Most functions require the repetitive motions involved with keyboarding and writing.
* Common to most jobs, require a high level of accuracy

**Effort**

Mental:

* This position must deal with a large number of phone calls, e-mails, drop-ins and small tasks that must be co-ordinated, managed and responded to on a timely basis. Major tasks involve large amounts of data and calculations and must be accomplished amidst many interruptions. Often competing demands arise.
* Sustained concentration during major tasks
* Must deal with confidential private and medical information. Significant discretion is required. Information can be upsetting in nature.

**Working Conditions**

Psychological:

* Large volume of work to be accomplished in a timely and accurate fashion. There are many requests for information from different sources. The volume of these tasks cannot usually be anticipated in advance and must be accomplished in addition to regular responsibilities.
* Complaints, at times dealing with frustrated, angry, or confrontational people
* Lack of control over pace of work
* Multiple competing demands
* Conflicting work priorities
* Frequent time pressures