

PENSIONS OFFICER

Candidate Pack



Job Summary

This summary has been generated using AI to provide a clear and accessible overview of the role. It is intended to support candidates who may find the full job description harder to read, such as those who are neurodiverse, have learning disabilities or lower literacy levels. Our goal is to make the application process more accessible and inclusive for everyone

- This role helps to run the NHS Pension Scheme for staff across Shropshire, making sure all pension records are correct and up to date.
- It involves answering questions from staff and the NHS Pensions Agency and giving clear information when people need it.
- The job includes entering and checking important pay and pension details, as well as working out pension figures when staff retire or leave.
- You will also handle requests to join or leave the scheme and make sure all tasks are completed on time and accurately.
- The role requires good number skills, strong attention to detail and the ability to work calmly under pressure.
- You will also support the Pensions Manager and be able to step in during her absence when needed.

Job Description

Job title:	Pensions Officer
Grade:	Band 4
Site:	Shrewsbury Business Park
Accountable to:	Head of Payroll Services
DBS required:	No

Job purpose / summary

- To assist the Pensions Manager to deliver a quality, full NHS Pension Scheme service, within the Shared Payroll Service in Shropshire, with countywide staffing levels in excess of 10,000.
- The resolution of all enquiries, and requests for information, received from the NHS Pensions Agency, Trust employees, and managers.
- The verification and maintenance, of all necessary pensions records, consistent with current legislation, policies and procedures.
- Deputise for the Pensions Manager in her absence and have the necessary knowledge and experience to attend the Corporate Induction should the need arise

Scope and range

- Uses specialist knowledge to assist with the provision of a full NHS Pension Scheme within the Shared Payroll Service, and to ensure that the scheme is administered in accordance with Agency and Government regulations.
- Uses experience and knowledge to respond promptly to all requests for information received from the NHS Pensions Agency.
- Uses advanced word processing and keyboard skills to provide personal responses to employee requests for forecasts, estimates and information.
- Significant VDU use, including daily use of the NHS Pensions 'on line' System, ESR and PRISM.
- The post holder needs to be highly numerate in order to complete accurate complicated manual calculations necessary to calculate pensions benefits.
- Use of Excel to provide data to the NHS Pensions Agency and to the Department.
- The ability to process information and apply this to a specific scenario.
- The post holder needs to have the ability to deal with queries from Members at all levels, and from different ethnic backgrounds.
- In depth knowledge and an extensive experience of NHS Payroll is essential.

Main Duties and Responsibilities

- The control and maintenance of all NHS Pensions Scheme records in respect of Trust employees throughout Shropshire.
- To respond promptly and accurately to enquiries and requests for information, made by the NHS Pensions agency, in respect of employees, or former employees of the Shropshire Trusts. Examples of these are overlapping employments, members exceeding Whole Time, or confirmation of current pensionable pay.
- Entering employee earnings, contributions and personal information on to the Pensions 'on line' system, and updating the pension information on ESR, to ensure correct details reflect the Pension Agency records, and notifying the NHS Pensions agency accordingly, of any discrepancies.
- Calculating the appropriate total pensionable pay figure when members retire for the last three 365 days service prior to retirement.
- Dealing with all aspects of Pension benefits, to include retirement and ill health applications, the purchase of added years contracts and the provision of forecasts and estimates as required by employees. This entails both using the automated Pensions 'on line' system, and manual calculations which can be very complicated and time consuming.
- Dealing with employee requests for scheme literature.
- To process applications to join the scheme or to 'opt out' of the scheme.
- To process and submit to the Scheme, details of all Scheme leavers providing accurate details of pay and contributions to date of leaving.

- To prepare and submit applications for a refund of contributions.
- To calculate arrears or refunds of contributions, and input relevant details into ESR, in order to adjust personal records via the payroll system.
- To create an effective pending/follow up system to ensure nothing is overlooked.
- To order stationery from the NHS Pensions Agency and monitor stocks as required.
- To prepare the majority of the typed correspondence from the Pensions Department.
- The post holder, at the request of the Head of Payroll Services, is expected to attend relevant meetings and seminars, arranged by the NHS Pensions Agency and associated government bodies.
- Following annual appraisal, agrees with the Pensions Manager, any necessary action to maintain and improve personal skills and knowledge, in respect of pensions and payroll administration.
- Complying with Standard Financial Instructions of the Trust, and general rules as issued to Finance Directorate staff, observing Data Protection regulations and acting in accordance with departmental procedures.
- Abiding by the health and safety practices and codes authorised by the Trust.
- The ability to multi task and work under considerable pressure.

Systems and equipment

- Use of PC, photocopier, fax machine, telephone and microfiche.
- Through continuous training, achieving and maintaining a good working knowledge of relevant software programmes, NHS Pensions 'on line', PRISM, ESR, Word and Excel.

Decisions and judgement

- The post consists of numerous tasks requiring the use of initiative, and appropriate knowledge and experience, to a significant level, working within clearly defined limits, with the assistance of the Pensions Manager available if required.
- Interpretation and input of all Pension Scheme amendments are performed without supervision although any areas of concern may be checked with the Pensions manager.
- The ability to work in an organised manner, and to submit data accurately and within the necessary timescale.
- The ability to manage and prioritize personal workloads using initiative with appropriate experience, guidelines, scheme rules, etc, to deal with routine and

non routine matters using discretion when necessary to consult the Pensions Manager.

- Confidence and appropriate knowledge to deputise for the Pensions Manager in her absence.

Communications and relationships

- Payroll and Pension Services is customer focused and therefore, customer Service skills are required.
- Excellent interpersonal communication skills are essential in order to Liaise with the NHS Pensions Agency team of advisors, and individual members of staff at all levels.
- Tact and diplomacy must be exercised as some pension enquiries may be of a sensitive nature, such as members or their partners being diagnosed with a terminal illness making pension planning paramount, death in service or long term ill health resulting in early retirement.
- The ability to work as part of a team, and to participate fully in the sections duties for the common good of the department

Physical demands of the job

- Excellent keyboard skills needed daily.
- Daily prolonged use of Computer, and additionally in order to access older records, the regular necessity to use a microfiche viewer.
- Regular audit and maintenance of filing systems.
- Work pattern is variable, and prolonged concentration is essential, to ensure the provision of accurate and timely information to the Pensions Agency and to scheme members.
- Ability to extract information from several different systems, paper records and microfiche simultaneously and apply that information appropriately.
- Ability to 'fairly' estimate pensionable earnings in some circumstances when full records are not available so as not to disadvantage the member

Most challenging / difficult parts of the job

- Frequent requirements for prolonged periods of concentration with constant interruptions, which disturb concentration, often resulting in stopping one task to complete another.

- Some telephone enquiries may be of a sensitive or difficult nature, possibly dealing with redundancy, ill health, death in service or divorce.
- Pension enquiries are varied and may be complex, necessitating the interpretation of pension regulations as applied to specific scenarios, together with the correct and accurate application of associated, assimilated data. The support of the Pensions Manager is available if required in complex situations.
- The Pensions Agency records are usually 2/3 months behind which creates a continuous backlog of work which can never be properly resolved and is mentally, very challenging.
- Some requests from the Pensions Agency can be for information spanning many years, often when computerised information was not available, making it extremely time consuming and difficult, to respond accurately to the enquiry.

Person Specification

	Essential	Desirable
Qualifications	<ul style="list-style-type: none"> • A good basic academic record, to include O level GCSE in Maths & English • AAT in payroll level 3 or the equivalent experience • Typing/Word processing to RSA 111 or equivalent, CLAIT, ECDL. 	
Experience	<ul style="list-style-type: none"> • Previous experience working within an NHS Pension team to include some payroll data administration • General office administration experience • Extensive Knowledge of the NHS pension scheme, and the associated pension legislation. • A thorough basic NHS payroll knowledge including ESR 	<ul style="list-style-type: none"> • Previous NHS pension administration • Experience of the NHS Pensions 'on line' system (POL) and ESR
Skills	<ul style="list-style-type: none"> • Computing/keyboard skills to include Word & Excel • Excellent interpersonal skills • Ability to communicate clearly both verbally, and in writing. • Good customer service skills & ability to deal with 	<ul style="list-style-type: none"> • Example • Example • Example

	<p>members at all levels.</p> <ul style="list-style-type: none">• Ability to prioritise and work in an organised and accurate manner within deadlines.• Organization skills essential with accurate attention to detail.• Numeracy is essential and the ability to extract relevant information from several different systems.• Ability to learn quickly.• Knowledge & Experience to deputize for the Pensions Manager in their absence• Methodical. Motivated, tactful and reliable.• Team Player.• Adaptable to Change.• Confident and knowledgeable	
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General conditions

As they undertake their duties, all our people are required to uphold and demonstrate the Trust's core values of: Partnering, Ambitious, Caring and Trusted. Collaboration and partnership are also central to our approach in delivering our fundamental activities of patient care, teaching, and research.

Health & Safety

As an employee of the Trust you have a responsibility to:

- take reasonable care of your own Health and Safety and that of any other person who may be affected by your acts or omissions at work;
- co-operate with the Trust in ensuring that statutory regulations, codes of practice, local policies and departmental health and safety rules are adhered to;
- not intentionally or recklessly interfere with or misuse anything provided in the interests of health and safety.

Infection Prevention and Control

The prevention and management of acquired infection is a key priority for the Trust. Any breach of infection control policies is a serious matter which may result in disciplinary action. As an employee of the Trust you have a responsibility to:

- ensure that your work methods are compliant with the Trust's agreed policies and procedures and do not endanger other people or yourself;
- be aware of infection prevention and control policies, practices and guidelines appropriate for your duties and you must follow these at all times to maintain a safe environment for patients, visitors and staff;
- maintain an up to date knowledge of infection prevention and control, policies, practices and procedures through attendance at annual mandatory updates and ongoing continuing professional development;
- challenge poor infection prevention and control practices of others and to report any breaches, using appropriate Trust mechanisms (e.g. incident reporting policy).

Information Governance

The Trust is committed to compliance with Information Governance standards to ensure that all information is handled legally, securely, efficiently and effectively. You are required to comply with the Trust's Information Governance policies and standards. Failure to do so may result in action being taken in accordance with the Trust's Disciplinary Procedure.

- **Confidentiality and Security** - Your attention is drawn to the confidential and sensitive nature of information collected within the NHS. Whilst you are

employed by the Trust you will come into contact with confidential information and data relating to the work of the Trust, its patients or employees. You are bound by your conditions of service to respect the confidentiality of any information you may come into contact with which identifies patients, employees or other Trust personnel, or business information of the Trust. You also have a duty to ensure that all confidential information is held securely at all times, both on and off site.

- **Disclosure of Information** - The unauthorised use or disclosure of information relating to the Trust's activities or affairs, the treatment of patients or the personal details of an employee, will normally be considered a serious disciplinary offence which could result in dismissal. Upon leaving the Trust's employment and at any time thereafter you must not take advantage of or disclose confidential information that you learnt in the course of your employment. Unauthorised disclosure of any of this information may be deemed as a criminal offence. If you are found to have permitted the unauthorised disclosure of any such information, you and the Trust may face legal action.
- **Information Quality and Records Management** - You must ensure that all information handled by you is accurate and kept up-to-date and you must comply with the Trust's recording, monitoring, validation and improvement schemes and processes.

Professional Standards and Performance Review

As an employee of the Trust you have a responsibility to:

- participate in statutory and mandatory training as appropriate for the post; and
- maintain consistently high personal and professional standards and act in accordance with the relevant professional code of conduct;
- take responsibility for the maintenance and improvement of personal and professional competence and to encourage that of colleagues and subordinates;
- participate in the Trust's appraisal processes including identifying performance standards for the post, personal objective setting and the creation of a personal development plan in line with the KSF outline for the post.

Safeguarding Children and Vulnerable Adults

We all have a personal and a professional responsibility within the Trust to identify and report abuse. This may be known, suspected, witnessed or have raised concerns. Early recognition is vital to ensuring the patient is safeguarded; other people (children and vulnerable adults) may be at risk. The Trust's procedures must be implemented, working in partnership with the relevant authorities. The Sharing of

Information no matter how small is of prime importance in safeguarding children, young people and vulnerable adults.

- As an employee of the Trust you have a responsibility to ensure that:
 - you are familiar with and adhere to the Trusts Safeguarding Children procedures and guidelines.
 - you attend safeguarding awareness training and undertake any additional training in relation to safeguarding relevant to your role.

NHS Sexual Safety Charter

The Trust is committed to ensuring that all employees work in an environment that is safe, inclusive, and free from sexual misconduct, harassment, and discrimination. As a signatory to the NHS Sexual Safety Charter, the Trust upholds a zero-tolerance approach to sexual harassment and supports anyone affected by inappropriate behaviour. In accordance with the Workers Protection (Amendment of Equality Act 2010) Act 2023, the Trust has a statutory duty to take reasonable steps to prevent sexual harassment of its employees. All staff, are required to treat others with dignity and respect at all times and to cooperate with Trust policies, procedures and training designed to maintain a culture of safety, professionalism, and mutual respect.

Social Responsibility

The Trust is committed to behaving responsibly in the way we manage transport, procurement, our facilities, employment, skills and our engagement with the local community so that we can make a positive contribution to society. As an employee of the Trust you have a responsibility to take measures to support our contribution and to reduce the environmental impact of our activities relating to energy and water usage, transport and waste.

Continuous Improvement

The Shrewsbury and Telford Hospital NHS Trust aims to empower colleagues at all levels have the confidence, capability, passion, and knowledge, to test changes and make improvements at SaTH and in the communities we serve.

To support this, we have developed the SaTH Improvement Method, a structured approach to change that provides practical tools and techniques to help you understand what success looks like with clear aims, enables you to measure progress and plan meaningful improvements.

You won't be doing this alone. Whether you're new to improvement or already leading change, the Improvement Hub is here to guide you with expert advice, hands-on support, and a wide range of training opportunities to help you grow and thrive throughout your time at SaTH whilst making improvements in your area of

work. Join us in shaping a culture of continuous improvement, where every colleague is supported to make a difference.

Equal opportunities and diversity

The Shrewsbury and Telford Hospital NHS Trust is an Equal Opportunities Employer, fully committed to fostering an inclusive workplace where all staff feel valued and able to thrive. We believe that a diverse workforce, reflective of our community, is essential for delivering the best patient care.

We will not discriminate against any job applicant or colleague based on any protected characteristic, including age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race (including colour, nationality, ethnic or national origin), religion or belief, sex, or sexual orientation. Selection for appointment, training, development, and promotion will be based purely on merit and the individual's ability to meet the role requirements.

As a post-holder, you have a personal responsibility to uphold the Trust's commitment to equality by treating all colleagues and patients with respect and dignity. You must actively support measures introduced to ensure equality of opportunity and will not discriminate, harass, or bully others, or condone such behaviour.

