PUNJAB PENSION FUND

Employee Facilitation Officer

Terms of Reference

JOB TITLE	**Employee Facilitation Officer**
REPORTING TO	**Assistant Manager Coordination & Administration**
QUALIFICATION	**Sixteen years of education or equivalent in Business Administration, Finance, Human Resource Management, Commerce, or a related discipline from an HEC-recognized institution.**
EXPERIENCE	**At least two years of post-qualification experience in employee or customer facilitation, human resources, or related roles, preferably in pensions, insurance, banking, or financial services.**
SUPERVISION	**None**

Key Performance Indicators

- Timely and accurate resolution of employee queries and complaints within the defined turnaround times.
- Employee satisfaction with the quality of facilitation and support provided.
- Accuracy and completeness of employee enrolment, records and data maintained for the Defined Contribution Pension Scheme (DCPS).
- Timely processing and follow-up of employee requests, such as account updates, fund switching, and claims.
- Completeness and accuracy of the query, complaint and issue log, and timely escalation of unresolved matters.
- Level of employee participation and awareness achieved through facilitation sessions and outreach activities.

Key Responsibilities

1. **Employee Support:** Serve as the first point of contact for employees of participating entities on matters relating to the Defined Contribution Pension Scheme (DCPS), responding courteously and accurately to queries received in person, by phone, email and other channels.
2. **Enrolment and Onboarding:** Assist employees and their departments with the enrolment process, including collecting, verifying, and processing required forms and documents, and help new members understand their rights, options, and responsibilities under the scheme.
3. **Scheme Guidance:** Explain the features of the DCPS in clear and simple terms, including contributions, investment options, fund switching, account statements, withdrawals and retirement benefits, in line with the approved scheme rules and policies.

4. **Request and Claims Processing:** Receive, check, and process employee requests, including updates to personal and nominee details, fund-switching requests, and claims, and coordinate with the relevant internal teams to ensure timely completion.
5. **Coordination with Departments:** Coordinate with focal persons and the accounts and HR offices of participating entities to obtain employee data, resolve discrepancies in contributions and records, and ensure timely, accurate submission of information.
6. **Query and Complaint Management:** Record employee queries, complaints, and feedback in a central log, track them to resolution within the defined turnaround times, and escalate complex or unresolved matters to the Assistant Manager Coordination & Administration or the Head of the DCPS Unit.
7. **Internal Coordination:** Work closely with the DCPS team to obtain accurate information, resolve employee issues, and ensure employee responses are consistent and up to date.
8. **Facilitation Sessions and Outreach:** Assist in organizing and conducting awareness, orientation, and help-desk sessions for employees at their offices, and support the Communication Officer in disseminating scheme-related information.
9. **Records and Data Management:** Maintain accurate, confidential, and up-to-date records of employee interactions, requests, and supporting documents, and support the accuracy and updating of employee data in relevant systems.
10. **Feedback and Improvement:** Collect and analyze employee feedback and recurring issues, and recommend improvements to processes, forms, FAQs, and communication materials to enhance the employee experience.
11. **Reporting:** Prepare periodic reports on queries received, complaints, turnaround times, and facilitation activities for the Assistant Manager Coordination & Administration and the Head of the DCPS Unit.
12. **Confidentiality and Professional Standards:** Observe the Fund's code of ethics and professional conduct; maintain the confidentiality of employee information; and comply with applicable laws, rules, regulations, and internal policies.
13. **Other Duties:** Proactively undertake any additional tasks and responsibilities assigned by the Head of the DCPS Unit to contribute to the overall success and effectiveness of employee facilitation.