

Job Description/Specification

Identification:	J0290	TFEU/BCTF Joint Salary Committee Decisions
JOB/POSITION TITLE:	Member Records and Fees Analyst	FORMER TITLE/DEPARTMENT: New Position
DIVISION/DEPARTMENT:	FAS/Member Records and Fees	PAY GRADE: 4
SUPERVISOR'S TITLE:	Data Manager, FAS	DATE APPROVED: August 2012

Function and purpose (a)

Assists in the co-ordination of a centralized membership records department; which processes and maintains all teacher member records concerning membership status and fee rates, distributes membership information regarding records and fees; processes all membership applications and renewals; maintains control over records by ensuring that Federation policy and membership prerequisites are adhered to.

Analyses, corrects school district payroll fee tables, set up and systems; performs complex analysis of financial data in UnionWare. Exports, manipulates and records financial information; responsible for collecting and balancing outstanding balances from school districts.

Principal duties and responsibilities (a)

- A. Assists in the co-ordination of the receipt and processing of sign-up forms and member information.
 1. Compiles, maintains, and processes information regarding teacher-member records, membership application, status and fee rates, etc., and performs a variety of clerical tasks related to the maintenance and upkeep of membership records.
 2. provides direction and assistance to the Member Records and Fees Assistant's to ensure the timely processing of sign-up forms
 1. routinely contacts local and school board offices regarding sign-up information or member file inquiries
 2. Receives incoming telephone inquires and visitors to the department. Answers inquiries within prescribed limits of authority regarding membership information such as status, timing and scheduling of mailings and BCTF publications, the policies and procedures

regarding membership certification and fee deductions, and the policies regarding various types of membership. Refers queries outside of scope to appropriate senior staff.

B. Assists in the control of BCTF membership information for the purposes of processing BCTF fees and member information:

1. processing and data verification/matching of information contained on SD data feeds and/or hard-copy payroll reports against existing member data;
2. researching and documenting all out of balances and resolving discrepancies;
3. extracts and analyzes financial data from membership system and creates district/local discrepancy reports;
4. participates in the effective written and oral communications with district staff related to fee and member data validation arising from dues processing and liaises with district staff, local officers and Federation staff to ensure the timely receipt of reconciliation queries.
5. ensures that monthly reconciliation files are closed upon completion.
6. liaises with school board staff, local officers and Federation staff to ensure the accuracy of membership information and data received;
7. extracts, compiles and analyzes membership information and data supplied in a variety of electronic and hard-copy formats from school board offices, local offices, BCTF members and other BCTF departments;
8. performs complex analysis of financial data in order to correct invalid information stored on member records and/or determine if fee errors are due to a board error in the administration of fees or a payroll set-up error;
9. assists in the preparation and testing of script for the upload of electronic data files and member information into the membership system and troubleshoots and modifies existing script;
10. ensures the timely response to inquiries and either prepares manual lists and keying instructions, or, where feasible converts data to a format compatible with membership system and performs upload of data to system.
11. Creates system searches and exception reports for voting, mailing, local counts and grant purposes and upon request, extracts, compiles and analyzes member information from the membership system and converts data to excel or CSV format for distribution.

C. In conjunction with the Member Records supervisor:

1. collaborates in the development and implementation of policies and procedures for coding, processing, storing and retrieving member record files;
2. assists in the co-ordination, storage, security, retrieval, weeding and disposal of all records; periodically inventories and audits active and inactive records;
3. assists in the maintenance and upkeep of tables in the membership system;
4. collaborates in the development of policies regarding the security control of records and assists in the maintenance and development of effective control systems to ensure that the dissemination of membership information is made only within previously established policies and procedures.

5. Performs duties relating to the “cleanup” which involves proofing, correcting and updating files for all members, non-members, retired teachers, etc, checking with other departments/divisions regarding status. Assists in the co-ordination, creation, maintenance and distribution of the BCTF Member Records and Fees Administrative Guide and membership forms and management of web applications.
 1. Prepares letter of good standing for BCTF members, upon request and aids callers for other requests, (e.g. grad-reunions etc.) Prepares other routine correspondence and clerical duties as assigned.
 2. Co-ordinates retiree lists for publication in the NewsMag and preparation of Honorary Associate letters for the President's signature for presentation to recently retired teachers.
 3. Co-ordinates and maintains group and school lists. (e.g. monitors Ministry schools list to ensure membership school file information is current and accurate and updates membership system by adding new schools, deleting closed schools, and processing changed information on the school files such as staff counts, address location, phone number and fax number.)
 4. Maintains and updates local office and district contact information.
 5. Provides technical direction and training as required to staff in the Federation and local offices on membership system methods and procedures.
 6. Provides backup to the Member Records and Fees Supervisor and performs some of the latter's duties during periods of absence, such duties involve organizing, allocating, training, prioritizing assignments, authorizing overtime and leaves of absence, attending weekly information exchange meetings.
 7. Performs other related duties as requested by Supervisor.

JOB REQUIREMENTS

This section sets out the minimum requirements in the areas of EXPERIENCE, EDUCATION, TRAINING, CERTIFICATES AND PHYSICAL DEMANDS necessary to perform the job.

Experience (b)

- Five years' experience maintaining and updating a variety of records, extracting data and creating reports Including two years experience working with financial records and data analysis and/or database administration. Good mathematical skills and knowledge of accounting principles (i.e. resolution of out of balance situations and experience in resolving/balancing reconciliation problems) and a working understanding of payroll set-up, applications and record keeping.
- Demonstrated analytical and problem-solving skills including the ability to prioritize and execute multiple requests in an efficient and professional manner and break down problems and navigate through them when data and operational rules are ambiguous.
- Strong technical skills (i.e. an in-depth knowledge of a range of word processing, spreadsheet, and database software such as MS Word, Excel and Outlook, Access, etc., and experience utilizing report writing tools such as Crystal Reports).
- Demonstrated strong verbal and written communication skills including an excellent telephone manner.

Education and training (c)

- Completion of secondary school (Grade 12) plus more than one year formal training in office and/or accounting procedures, including extensive training in database management and/or completion of a minimum of one year of a two year college program in a related field.
- Demonstrated knowledge of Excel level III and Access level II.

Licences and certificates (c)

- Associate Certificate in one of:
 - Information Technology
 - Accounting
 - Payroll
 - or equivalent.

Environment (g)

Physical/emotional environment limited to conditions normally associated with office clerical work such as communication skills, equipment operating dexterity, and scheduling pressures.

JOB CHARACTERISTICS

This section is a key component of the Salary Determination process. This section also forms part of the job description and describes some of the conditions under which the work is performed.

Contacts and relationships (d)

Contacts and relationships with all levels of Federation staff are required to transmit or exchange information, to explain or clarify information.

Contacts and relationship with persons external to the Federation office include BCTF members, local association presidents/offices, secretary-treasurers and payroll/personnel offices of school boards, Teacher Regulation Branch, universities, BC Pension Corporation, financial institutions, RCMP, lawyers and other organizations, that require clarification, exchange or explanation of information to ensure understanding.

Much of the information given or received from a member is confidential to that member and care must be continuously exercised to maintain that confidentiality and to ensure compliance with privacy requirements. Courtesy, tact, sensitivity, diplomacy in dealing with BCTF members required.

Machines, equipment and work aids used

Computer terminal and printer, telephone, fax, e-mail, voicemail, photocopier, label printer, and a wide variety of software systems (i.e. Excel, Word), *BCTF Members' Guide* and Federation policies and procedures, *BCTF Administrative Guide to Membership and Fees* and the *UnionWare Business Rules*.

Positions supervised (e)

None.

Physical and/or mental effort (f)

Stress may result from physical and mental fatigue during busy peak periods. Work requires lengthy periods of concentration due to high accuracy requirements and deadlines and frequent interruptions by incoming calls and Federation staff.

Mental fatigue, eyestrain, body aches and stiffness from lengthy periods on concentration on figures and images.

Working conditions (g)

This position involves exposure to video display screen glare when operating a computer terminal. It requires a large volume of paper handling.