

## Schedule A – Position Description

Job Title:	Transitions Administrator
Positions This Position Reports To:	Transitions Team Manager
Positions Reporting to This Position:	None

### Role

This role is primarily about assisting new Class Super clients with moving their SFMF data onto the Class Super system.

### Duties and Responsibilities

#### Transitions

Receive client data in various formats and capture it via a defined process  
Load and validate the new funds onto the Class Super system including:

- Collate information provided by clients and check off against a checklist
- Use of specialist migration tools for extraction and pre-population of excel loader spreadsheets
- Data entry of information into Excel spreadsheet
- Importation of completed information into software
- Data retrieval of historical information from data providers using specialist tools where applicable
- Information will include:
  - Bank balances, member balances, holding balances,
  - Preserved amounts, asset acquisition details and asset cost bases
  - Cost based adjustments.
- Other duties and responsibilities as directed by Transition Team Manager

### Key Performance Indicators

Colleague satisfaction as assessed by your manager, peers and associated project and support staff – note this assessment may be performed either informally by interview or formally via survey subject to the applicable management processes in place at that time.  
The assessment will include:

- How effectively you execute the above responsibilities (includes pro-activeness , responsiveness and thoroughness)
- How professionally you interact and communicate with your colleagues and clients
- Migrating fund completed in 2 hour time frame (Manual Funds)
- Information uploaded into software to be correct