

Working Title Supervisor, Trust Administration Assistants	Name
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Position Number	Reports to Position No., Class & Level	Division, Branch/Unit Strategic Services - Office of the Public Guardian and Trustee, Trust Administration	Ministry Assisted Living and Social Services
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Present Class	Requested Class
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Dept ID	Program Code	Project Code (if applicable)
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PURPOSE: Give a brief summary of the job, covering the main responsibilities, the framework within which the job has to operate and the main contribution to the organization (see Non-Management Job Description Writing Guide [Pages 7-8](#)).

Reporting to the Manager of Trust Administration, this position is responsible for the completion of a diverse range of tasks within trust administration including frontline supervision of Trust Administration Assistants. The incumbent is also responsible for training trust administration assistants, managing the BOT project and the timely payment of client invoices, managing monitoring activities and benefit applications and management of the precedent documents resulting in the completion of accurate documentation within acceptable timelines for represented adults, minors and estates of deceased persons in accordance with various Acts. The incumbent may also be responsible for other projects that arise within trust administration.

RESPONSIBILITIES AND ACTIVITIES: The purpose of the job can be broken down in different responsibilities and end results. Each end result shows what the job is accountable for, within what framework and what the added value is. Normally a job has 4-8 core end results. For each end result, approximately 3-6 activities should be described (see Writing Guide [Pages 9-10](#)).

1. Supervision

Supervises the trust administration assistants in accordance with good supervisory practices and consistent with Human Resource policies to ensure the development and retention of highly skilled and service oriented work units.

Activities

- Monitors work loads and standards to ensure effective workflow and use of manpower.
- Provides training and development to enhance employee competencies.
- Establishes unit goals and objectives to meet divisional requirements.
- Promotes teamwork.
- Monitors and provides feedback on employee performance.
- Resolves complex employee issues.
- Coordinates the completion of special projects to ensure objectives, standards and deadlines are met, e.g. update policies, procedures and forms in accordance with Rules of Court and Alberta Statutes revisions; assist with electronic records retention and disposal program to facilitate ARC (Alberta Records Centre) project.
- Reviews and updates job descriptions as part of the Performance Commitment Plan (PCP) to ensure that employees are setting their goals using the most up-to-date information and are aware of position expectations.
- Provides staff with feedback, guidance and training.
- Assists staff with PCP learning plan to ensure on-going development of skills.
- Provides advice, statistics and assistance in attendance management.
- Participates in the recruitment process.
- Develops testing criteria as part of the recruitment process.

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2. Development and Maintenance - Administration

Provides advice and assistance to trust administration in the development and maintenance of precedent documents, addressing the needs of Trust Administration under the guidelines of office policies, procedures and legislation.

Activities

- Develops and implements procedures, forms, schedules, and reports to support the operational requirement of the unit.
- Develops and maintains automated precedent documents in Word and Excel for use within Trust Administration.
- Develops procedures and forms to standardize and facilitate processing.

3. Development and Maintenance – Client Invoice payments

This position manages workflow and the BOT to ensure timely and accurate payment of client invoices.

Activities

- Monitors work flow of invoices from the Mailroom to Trust Administration
- Monitors to ensure the timely and accurate authorization of client invoices including the use of BOTs
- Identifies roadblocks and works to resolve any roadblocks to ensure client invoices are continuously authorized accurately and in a timely manner

4. Development and Maintenance – Trust Administration

This position manages several ongoing monitoring activities and benefit applications to ensure that represented adult clients are receiving all benefits they are entitled to receive.

Activities

- Manages all projects, annual or otherwise, in relation to represented adult benefit applications
- Manages all monitoring activities, monthly and annual, to ensure that key areas of administration are reviewed appropriately
- Manages other projects within trust administration as they arise to successful completion
- Manages termination and passing accounts applications for represented adults to ensure that court imposed timelines are met and processes are adhered to and provides monthly reporting
- Manages the Informal Benefits Administration Program to ensure processes are followed
- Monitors and manages shared inbox for RA tasks to ensure tasks are completely accurately and in a timely manner
- Monitors and manages shared inbox for Searches to ensure that searches are completed in a timely manner and within the guidelines established

SCOPE: List specific information that illustrates the challenges, problem solving and creativity requirements and decision making capacity of the position. Also identify the internal or external areas the job impacts (see Writing Guide [Pages 11-12](#)).

- Administrative and consultative services provided impact the entire office and stakeholders, business partners and clients of the office.
- Direct supervision is exercised for a staff count of up to 7 assistants
- This position directly impacts Trust Administration with indirect impacts on the Mailroom, Records Management, Income Tax and Financial Services.

SCOPE: List specific information that illustrates the challenges, problem solving and creativity requirements and decision making capacity of the position. Also identify the internal or external areas the job impacts (see Writing Guide [Pages 11-12](#)).

KNOWLEDGE, SKILLS & ABILITIES: Include information on required diplomas and degrees along with identifying the most important knowledge factors, including knowledge about practical procedures, administrative, technical or professional techniques, technical, scientific or program related processes, etc. Detail specific training if there is an occupational certification/registration requirement for the position. Specify the type of experience required for the position (see Writing Guide [Pages 12-14](#)).

1. This position requires an extensive knowledge of office, human resource and personnel policies and procedures relating to the division and to the administrative support staff. Extensive knowledge of legal procedures and a thorough knowledge of computer technology is necessary.
 - Incumbent is required to know system formatting and technology for numerous document types.
 - Incumbent must be knowledgeable and resourceful in the application of specialized management skills. A high level of independent action and thought is required in the day-to-day completion of workloads.
 - In order to achieve the level of results expected, the incumbent must possess good organizational skills to handle the volume and complexity of work required. The incumbent must be able to execute all work accurately.
 - The incumbent deals with constant change. As a result, the incumbent must be interested in learning, be very flexible and willing and able to perform any job on any given day.
 - The administrative duties of this position are completed for use by a team structure. The incumbent contributes positively by actively sharing information, by respecting others, supporting team decisions, completing requested assignments and assisting with additional workloads as volumes/need dictate.
2. Extensive knowledge of Microsoft Operating Systems.
3. Strong communication ability when dealing with both technical and non-technical users.
4. Strong organizational skills.
5. Ability to quickly adapt to rapidly changing business priorities.
6. Ability to work independently or as part of a team.
7. Up-to-date on industry trends and directions.

Education

- High-school diploma and four years of related experience.

Experience:

- Extensive “hands-on” computer programming experience.

Knowledge:

- Knowledge of various computer software programs (Microsoft Office, PTIS, etc.) at an advanced level acquired through related education or a combination of education and experience.
- A diploma in a related field considered an asset.
- Must possess exceptional knowledge of English grammar and spelling.
- Thorough knowledge of legal documents and terminology.
- Knowledge of policies, procedures and requirements of the Public Trustee, the Courts, Land Titles Office and other registry offices.
- Familiarity with legal abbreviations, texts, Alberta Statutes and Rules of Court.
- Knowledge of PTIS system

KNOWLEDGE, SKILLS & ABILITIES: Include information on required diplomas and degrees along with identifying the most important knowledge factors, including knowledge about practical procedures, administrative, technical or professional techniques, technical, scientific or program related processes, etc. Detail specific training if there is an occupational certification/registration requirement for the position. Specify the type of experience required for the position (see Writing Guide [Pages 12-14](#)).

- Knowledge of various Acts, Regulations and Legislation with respect to Trust Administration.

Skills

- Supervisory skills
- Analytical skills
- Computer skills
- Formatting skills
- Time-management skills
- Transcribing skills (from dictation, written material or verbal instructions)

Abilities

- Strong decision-making abilities.
- Reliability and a high degree of responsibility in order to function effectively as a supervisor.
- Ability to understand and format documentation quickly with a high degree of accuracy.
- A sense of responsibility, self-motivation and ability to work on own initiative.
- Ability to work in a team environment, understand time constraints and importance of meeting deadlines.
- Ability to exercise judgment in assessing internal and external customer requirements.

CONTACTS: Identify the main contacts the position communicates with and the purpose of the communication (See Writing Guide [Pages 14-15](#)).

- Internal Contacts: co-workers, other supervisors, managers, and other professionals within government.
- Internal function heads – to provide administrative and consultative services.

In all cases, the contacts are daily to facilitate the processes associated with the administration of justice for all Albertans.

SUPERVISION EXERCISED: List position numbers, class titles, and working titles of positions directly supervised (see Writing Guide [Page 15](#))

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CHANGES SINCE LAST CLASSIFICATION REVIEW: Identify significant changes, that have impacted the responsibilities assigned to your position since the last review (see Writing Guide [Pages 15-16](#)).

This information is being collected under the authority of Section 10 of the Public Service Act and will be used to allocate positions within a classification plan and to manage the Alberta government human resources program. If you have any questions about the collection of this information, contact the Job Evaluation Unit, 6th Floor, Peace Hills Trust Tower, 10011 - 109 Street, Edmonton, Alberta, T5J 3S8, phone 780/408-8400 or contact your Ministry Human Resource Office.

Signatures

The signatures below indicate that the incumbent, manager and division director/ADM have read, discussed and agreed that the information accurately reflects the work assigned (see Writing Guide **Page 16**)

Incumbent

Name	Signature		Date (yyyy/mm/dd)

Supervisor

Name	Signature		Date (yyyy/mm/dd)

**Division
Director/ADM**

Name	Signature		Date (yyyy/mm/dd)