

## UPDATE PENSION SCHEME MEMBER RECORDS

PERFORMANCE CRITERIA	SCOPE
<p>You must be able to:</p> <ol style="list-style-type: none"> <li>1. Check all updates for proper authorisation</li> <li>2. Accurately record complete <b>member details</b> using the appropriate pensions administration system</li> <li>3. Investigate and resolve any <b>discrepancies</b> or unusual features</li> <li>4. Correctly process all <b>updates</b> to member information within scheme or organisational service level agreements</li> <li>5. Follow procedures for maintaining security and confidentiality correctly in accordance with organisational and regulatory requirements</li> </ol>	<p>In meeting the performance criteria you must show you can:</p> <p>(A) Correctly <b>update <u>eight</u> members details</b> including at least <b><u>three</u></b> of the following types of change:</p> <ol style="list-style-type: none"> <li>(i) Individual salary/pension income</li> <li>(ii) Employer within scheme</li> <li>(iii) Employment status</li> <li>(iv) Name</li> <li>(v) Address</li> <li>(vi) Marital status</li> <li>(vii) Death/beneficiary nomination</li> <li>(viii) Leave of/temporary absence</li> <li>(ix) Change in working hours</li> <li>(x) Amend benefit details</li> <li>(xi) DWP notifications</li> <li>(xii) DC switching/lifestyling</li> </ol> <p>(B) Resolve a minimum of <b><u>two</u> discrepancies</b> or unusual features using any of the following methods:</p> <ol style="list-style-type: none"> <li>(i) Within limits of own job responsibility</li> <li>(ii) Another appropriate person</li> </ol>

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## **Knowledge and Understanding**

You must show that you know and understand:

- K1** The internal procedures that you need to follow to update member records
- K2** How to apply relevant sections of scheme regulations/rules
- K3** How to identify sources of information for the resolution of discrepancies
- K4** Awareness of internal policies, practices and procedures for signatories and authorisations and how to apply these
- K5** Awareness of regulatory, scheme and organisational timescales and schedules for updating, presentation and despatch of data and the consequences of non-compliance
- K6** What is meant by the scheme being contracted out or not contracted out of the State Second Pension Scheme (S2P) and what information must be provided when a member ceases to be contracted out
- K7** How to check that the information you receive is acceptable and complete
- K8** The disclosure regulations and scheme standard timescales
- K9** The procedures in place to maintain security and confidentiality, including Data Protection Act, and why it is important to ensure information is kept secure and confidential