

Qualification Structure for Certificate in Pensions Administration

CERTIFICATE – any 8 units – should be completed within 5 years of registration at least one out of the 3 Mandatory units have to be completed and only one unit from Customer Service Group allowed

Unit Titles	Certificate (L3)
Monitor Ongoing Entitlement to Pension Scheme Benefits	M
Process Pension Scheme Data for Periodic Events	M
Process Contributions for a Defined Contribution Scheme	M
Payment of Pension Scheme Benefits	
Create Pension Scheme Records for New members	
Update Pension Scheme Member Records	
Process Applications for Pension Scheme Transfers Out	
Process Pension Scheme Retirement Benefits	
Process Applications for Pension Scheme Additional Voluntary Contributions (AVCs)	
Process Applications for Pension Scheme Early Leavers	
Prioritise and Organise own Pension Administration Activities	
Process Pension Scheme Death Benefits	
Process Pension Scheme Transfers In	
Calculate and Quote DB & DC Pension Scheme Death Benefits for Members without Special Circumstances	
Calculate and Quote DB & DC Pension Scheme Leavers Benefits for Members without Special Circumstances	
Calculate and Quote DB & DC Pension Scheme Retirement Benefits for Members without Special Circumstances	

Calculate and Quote DB & DC Pension Scheme Transfers In and Transfers Out	
<i>Customer Service Optional Units – maximum one unit allowed – not compulsory to do any units from this section</i>	
<i>Follow the Rules to deliver customer service</i>	
<i>Demonstrate an understanding of the rules that impact on improvements in customer service</i>	
<i>Process information about customers</i>	
<i>Deal with incoming telephone calls from customers</i>	
<i>Make telephone calls to customers</i>	
<i>Deal with customers in writing or electronically</i>	
<i>Do your job in a customer-friendly way</i>	
<i>Deliver reliable customer service</i>	
<i>Use questioning techniques when delivering customer service</i>	
<i>Deal with customers using bespoke software</i>	