

MONITORING ONGOING ENTITLEMENT TO PENSION SCHEME BENEFITS



Pensions Management Institute
Moving pensions forward

Registered Office:
Devonshire House
60 Goswell Road
London
EC1M 7AD

T: +44 (0) 20 7247 1452
W: www.pensions-pmi.org.uk

PERFORMANCE CRITERIA	SCOPE
<p>You must be able to:</p> <ol style="list-style-type: none"> 1. Identify the cases that require confirmation of continuing entitlement 2. Obtain information of continuing entitlement from the appropriate person/establishment 3. Take follow-up action according to organisational timescales, where no response is received 4. Arrange the suspension of the pension with the paying agent, where necessary 5. Re-assess continuing entitlement according to Scheme regulations 6. Notify the relevant person of the effect of any change in entitlement in an appropriate and correct manner, within the required timescales 7. Arrange for the adjustment of the pension with the paying agent, where necessary 8. Update pension records to reflect the change in pension amounts or future reviews 9. Follow procedures for 	<p>In meeting the performance criteria you must show you can:</p> <ol style="list-style-type: none"> (A) Process <u>four</u> cases covering at least <u>two</u> of the following types of reviews: <ol style="list-style-type: none"> (i) Dependants pensions (ii) Pensioners (iii) National Fraud Initiative (iv) Ill health (v) Spouse's pensions (vi) Temporary pensions (vii) Discretionary pension (B) Identify the follow-up action that needs to be taken where no response is received for at least <u>two</u> of the following: <ol style="list-style-type: none"> (i) Sending out reminders (ii) Using other means to contact the members (iii) Referring to Internal Audit for further action or investigation (iv) Arrange to suspend pension (C) Ensure that scheme or organisational service level agreement timescales are met:

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maintaining security and confidentiality correctly in accordance with organisational and regulatory requirements	
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Knowledge and Understanding

You must show that you know and understand:

- K1** How to determine whether benefits continue to be payable as specified in scheme regulations
- K2** How to apply validation methods to ensure data is correct
- K3** How benefits are affected by the scheme rules
- K4** What are the Scheme's requirements for the payment of benefits and how they are applied
- K5** Where to identify sources of information for the resolution of discrepancies
- K6** Organisational requirements for issuing Life Certificates/Certificates of Existence to different categories of member
- K7** Organisational procedures for the suspension and reinstatement of pensions