



Social Insurance Scheme Administration

Course: Contributions, Benefits and Actuarial Valuation

20 – 24 September 2027

London - Central London four-star



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Introduction:

Social insurance scheme administration, covering contributions, benefits and actuarial valuation, is a 5-day course for coverage, collection, benefits and scheme finance teams in social security and pension agencies, ending with a Scheme Administration Improvement Plan for a case agency. Agencies lose revenue and member confidence when employers evade registration, arrears pile up, pension awards take months and long-term projections go unchallenged. Nominees already run registration, collection, award or finance units and work through case studies built on employer ledgers, claim files and valuation tables. CoreConcept Training Center delivers this social insurance scheme administration course.

Course Objectives:

- Map the contributory branches of a social insurance scheme against the minimum benefit standards of ILO Convention No. 102 and identify coverage gaps among insured persons and employers
- Operate employer registration, contribution assessment, field audit and arrears recovery procedures that raise collection rates and reduce evasion
- Determine eligibility and calculate old-age, invalidity, survivors and employment injury benefits from qualifying periods, reference wages and accrual rates
- Apply fraud and error controls, data matching and service quality standards across the benefit award and payment cycle
- Interpret an actuarial valuation of the scheme, including demographic and financial projections, the support ratio, reserve ratio and general average premium
- Compare parametric reform options and draft a Scheme Administration Improvement Plan with targets, owners and a monitoring routine

Target Audience:

- Managers responsible for registering employers and insured persons and maintaining contribution records
 - Managers who lead contribution assessment, employer inspection and arrears enforcement units
 - Managers accountable for benefit claims intake, eligibility decisions, pension calculation and payment
 - Managers responsible for medical boards, invalidity assessment and employment injury claims
 - Managers in actuarial, planning and finance units who project scheme income, expenditure and reserves
 - Internal audit, integrity and service quality managers covering social insurance operations
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Course Outline:

Day 1: Social Insurance Foundations, Coverage and Agency Baseline

- Contributory Versus Tax-Financed Social Security Scheme Comparison
- ILO Convention No. 102 Branch Standards for Contributory Benefits
- Pay-As-You-Go, Partial Funding and Full Funding Financing Methods
- Coverage Gap Analysis for Self-Employed and Non-Standard Workers
- Agency Baseline Assessment Using Collection, Award and Backlog Data

Day 2: Collection Frameworks, Benefit Formulas and Service Standards

- ISSA Guidelines on Contribution Collection and Compliance Structure
- Single Insured Person Identifier and Employer Register Data Model
- Defined Benefit Formula Using Accrual Rate and Reference Wage
- Pension Indexation Methods Linked to Prices or Average Wages
- ISSA Guidelines on Service Quality Applied to Member Channels

Day 3: Contribution Assessment, Arrears Recovery and Benefit Award Processing

- Monthly Contribution Declaration Matching Against Wage Records
- Risk-Based Employer Field Audit Selection and Inspection Checklist
- Arrears Recovery Ladder From Reminder Notices to Enforcement Action
- Old-Age Pension Claim Workflow and Qualifying Period Verification
- Survivors Benefit Share Allocation Among Spouses, Children and Parents

Day 4: Invalidity, Employment Injury, Integrity Controls and Scheme Sustainability

- Invalidity Assessment Through Medical Boards and Work Capacity Grading
- Employment Injury Claim Investigation and Temporary Incapacity Payments
- Benefit Fraud and Error Detection Through Cross-Agency Data Matching
- ISSA Guidelines on Actuarial Work for Valuation Review
- Support Ratio, Reserve Ratio and General Average Premium Indicators

Day 5: Case Study Practice and the Scheme Administration Improvement Plan

- Case Agency Briefing With Employer Ledgers and Claim Files
 - Case Collection Shortfall Diagnosis and Arrears Recovery Targets
 - Case Benefit Award Backlog Review and Service Standard Targets
 - Parametric Reform Scenarios on Retirement Age and Contribution Rate
 - Scheme Administration Improvement Plan Completion and Panel Defence
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Skills You Will Gain:

- Insured Person Register Management
- Employer Contribution Audit
- Arrears Enforcement Planning
- Pension Benefit Calculation
- Invalidity Claim Adjudication
- Benefit Integrity Control
- Actuarial Projection Interpretation
- Parametric Reform Appraisal

Why Attend This Course:

- Deliver a Scheme Administration Improvement Plan to the agency's director general and executive committee with collection, award and sustainability targets
- Decide which employers to audit, which arrears to escalate and which benefit claims need medical or investigative review, using documented criteria
- Avoid lost contribution revenue, overpaid benefits, award backlogs and reform proposals built on unexamined actuarial assumptions
- Share audit checklists, benefit calculation worksheets and valuation review questions with collection, benefits and finance colleagues

Conclusion:

Back at the agency, the participant presents the Scheme Administration Improvement Plan to the director general, the heads of collection and benefits and the actuarial unit. Management uses it to set collection and arrears targets, fix award processing standards, prioritise integrity checks and frame the parametric questions for the next actuarial valuation. After the first quarter under the plan, the agency should compare collection rates, arrears ageing, award turnaround times and detected overpayments with the targets, then revise the actions that have not moved the indicators.

Frequently Asked Questions FAQ:

What should participants know before a social insurance scheme administration course?

Participants should already work in registration, contribution collection, benefit award or scheme finance in a social security or pension agency. Familiarity with the agency's benefit rules and spreadsheets helps. Anonymised arrears reports or claim statistics from their own agency make the case study days more useful.

How does social insurance scheme administration differ from a pension fund governance course?

This course covers the operating side of a contributory public scheme: registering members, collecting contributions, awarding benefits and reading valuations. A pension fund governance course addresses the board's fiduciary duties, investment policy and oversight of service providers, which this course does not cover.

Why does social insurance scheme administration track the support ratio?

The support ratio compares contributors with beneficiaries. When it falls, each pension depends on fewer contributors, so contribution income lags expenditure and reserves are drawn down sooner. Tracking it shows managers when parametric changes, such as contribution rate or retirement age adjustments, need to be prepared.

What do participants take back from the social insurance scheme administration course?

Participants take back a Scheme Administration Improvement Plan for a case agency, with collection and arrears targets, award processing standards, an integrity control list and reform scenarios, plus audit checklists and benefit calculation worksheets they can adapt to their own scheme.
