Pensions Officer & Employee Expenses & Benefits Administrator
Career progression framework
June 2025
**Further evidence guidance provided at the end of this document*

Medway Council
Serving You

Pension Officer		
Performs varied tasks, sometimes complex and non-routine, using standard methods and procedures. Works under general direction, exercises discretion, and manages own work within deadlines. Proactively enhances skills and impact in the workplace and contributes expertise to deliver team objectives.		
MPR3		
Level A (Developing)	**Level B (Practising)**	**Level C (Accomplished)**
Required for this level	In addition to level A	In addition to levels A and B
Qualifications • Five GCSEs (grades 4-9), or equivalent level 2 qualification, in English and Maths	**Qualifications**	**Qualifications**
Evidence requirements: • Certificates provided during onboarding	**Evidence requirements to progress to level B:**	**Evidence requirements to progress to level C:**
Knowledge (one pension scheme) • Understanding of pension terminology; Pension Leaver Declaration (PLD), estimates, Additional Voluntary Contributions (AVCs) • Understanding of the impact on benefits of pensionable and non-pensionable pay and the effect on contributions • Knowledge of opt out procedures • Knowledge of the month end and year end reports and processes	**Knowledge (one pension scheme)** • Understanding of the automatic enrolment process and how this interacts with occupational pension schemes • Can explain the different types of interaction with tax and taxable pay • Understanding of the different types of retirement and how they are processed; ill Health, Voluntary and Redundancy • Knowledge of the flexible retirement process • Demonstrates continuous learning and applies this knowledge in the role. • Developing knowledge of Medway specific systems in relation to the service area, such as Resourcelink and TopDesk	**Knowledge (one pension scheme)** • Knowledge of the cyclical re-enrolment process and reporting requirements • Knowledge of specific pay types that are included or excluded from pensionable pay • Detailed knowledge of the various leaver processes and timelines • Understanding of earlier versions of the scheme(s) and can convey the differences between changes • Basic knowledge of the relevant options for employees to obtain additional pension benefits • Significant commitment to developing personal and technical knowledge and skills
Evidence requirements: • Can verbally describe what is meant by a PLD, a Pension estimate, and an AVC. This must include in what circumstances they would be used and any deadlines or timetables associated with the documents.	**Evidence requirements to progress to level B:** • Post holder can reference a sample of five new starters, including at least one casual worker, and identify which scheme the employee should be entered, and why. A summary of the records and findings should be submitted	**Evidence requirements to progress to level C:** • Write a statement detailing what is involved in the cyclical re-enrolment process – when it must be carried out, who we must report the re-enrolment to and how often it is carried out for each establishment. Include any potential

• Can demonstrate, using five existing personnel records, what effect non-pensionable pay vs gross pay would have to the employees' contributions paid and the pension accrued under the CARE scheme. • Demonstrate using Resourcelink (or provide written workflow) of how to opt an employee both in and out of the pension scheme. Include providing refunds if required and explain what documentation then needs to be forwarded to the relevant pension body. • Explain the various monthly reports to be sent to the relevant pension body, who is responsible for completing them, why they are needed and any relevant deadline. Post holder should also be able to describe what the year-end process is for and why it is submitted.	• Evidence via query resolution and/or a written statement, describing what happens to an employee's gross and taxable pay when they pay into the pension scheme versus if they do not. Give one example of an alternative way tax relief on pension contributions can be given • Collate evidence of coordinating the following types of retirement; Voluntary 55+, redundancy and ill health. There should be two examples of each type and a supporting paragraph to describe any associated employer costs • Supply two examples of processing/coordinating the flexible retirement process within the organisation from start to finish. This should include interaction with stakeholders outside of the pensions team and any letters or submissions to the employee and pension fund • Evidence 10 hours of CPD relating to pensions, payroll or relevant personal development. The evidence should include the name of the provider, a summary of the content and date acquired and how learning has been applied to role. • Demonstrate knowledge of the areas specific to the administration of employee data and pension information Resourcelink • Knowledge of how to create, assign and update Top Desk calls to provide effective stakeholder communication	implications for non-compliance, both for the worker and the organisation • Post holder can list at least 5 pensionable pay elements and 5 non-pensionable pay elements that could appear on the employee pay slips. Explain how the pay type is decided as pensionable or non-pensionable • Post holder can evidence at least 20 completed PLD's, this must include both variable time employees, non-variable time employees and opt out PLD's • Provide a brief analysis of the key differences between the different versions of the LGPS or TP scheme, highlighting the effect on the employees' contributions and final benefits using an anonymised case study • Use information provided to employees, or create a visual graphic, to explain the options available to increase retirement income. This information should include where to seek further information, how tax relief is given and how to change or stop making additional contributions • Evidence 15 hours of CPD relating to pensions, payroll or relevant personal development. The evidence should include the name of the provider, a summary of the content and date acquired
<u>Experience</u> • At least 12 months experience within a Payroll or Pensions environment • Experience of using a computerised Payroll system • Experience of providing support to a range of internal and external stakeholders	**<u>Experience</u>** • Minimum of 1 year in a dedicated Pensions or Payroll related position • Experience in the preparation of Capitalised costs for payment, ensuring supporting documents are providedDeveloping knowledge of Medway specific systems in relation to the service area, such as Resourcelink and TopDesk • Has liaised with external pension stakeholders, such as Kent Pension Fund or a pension provider	**<u>Experience</u>** • Experience of playing an active part in the month end and/or year-end return processes • Experience of mentoring or training new users and colleagues, providing peer support • Has worked collaboratively with other areas of the service and/or organisation to improve stakeholder knowledge • Identified inefficiency or erroneous procedures or policies relating to pension provisions and sought to remedy or mitigate
<u>Evidence requirements:</u> • Evidenced through previous work experience at application stage and during interview process to detail transferable skills or tasks within a payroll or pensions role.	**<u>Evidence requirements to progress to level B:</u>** A minimum of 12 months satisfactory performance at level A evidenced via performance appraisal documents and regular one to one review • Evidenced through personnel records, performance appraisal documents and regular one to one review	**<u>Evidence requirements to progress to level C:</u>** A minimum of 12 months satisfactory performance at level B evidenced via performance appraisal documents and regular one to one review • Can demonstrate and evidence assistance in the completion of year end and month end pension returns. Describe what activities were undertaken, why they were critical to the

	• Can show evidence of a prepared payment header for capitalised cost payments that need to be signed off by the Chief Operating Officer or other appropriate authorise • Submit copies of communications with Kent Pensions Fund and/or pension scheme providers, acting as a point of contact	integrity of the return data and the implications of missing or erroneous data • Submit evidence of two mentoring, supervision, or training activities. These can be by way of a training plan, CPD session, bespoke meetings or guides/FAQ created • Provide a case study of working with colleagues in other areas, or with stakeholders, to increase their technical knowledge of how the pension scheme operates, what benefits they might receive and their retirement options • Show an example revising, creating or updating a pension policy or procedure to improve accuracy and/or efficiency. Share the before and after documents and describe how the new element was distributed and embedded into the organisation
Skills • Proficient in Microsoft Word, Excel, Outlook and Teams • Excellent customer service • Excellent written and oral communications, able to convey complex information in a clear manner • Strong arithmetic ability • Able to prioritise and organise own workload in order to achieve deadlines • Able to utilise initiative to find answers and knowledge where gaps exist • Good level of attention to detail	**Skills** • Able to utilise Excel to conditional format cells and add data validation options to department spreadsheet, ensuring better data quality • Able to proactively problem-solve and utilise technical and situational knowledge • A developed level of attention to detail with minimal instances of human error • Confident in explaining complex and technical information to stakeholders in a clear and concise manner, via a range of communication methods • Able to deal with stakeholders in a sensitive and empathetic matter	**Skills** • Excellent attention to detail, using knowledge of Medway and local government specific agreements to identify errors and issues • Can analyse proposed changes to pension and pay policy to convey financial and procedural impact to the organisation • Intermediate excel skills; VLOOKUP, SUM and 'IF' formulae
Evidence requirements: • Assessment at interview to demonstrate competency in Microsoft Word, Excel, Outlook and Teams. • Reference feedback or testimonials from customers or colleagues that highlight your customer service skills or assessment at interview to demonstrate competency in Customer service. • Give examples of communications where you have had to convey complex information in concise and jargon free language to internal and external stakeholders. • Detail examples where you have had to use mathematical and arithmetic skill to perform, or check, important financial calculations, such as PLD's or estimates. • Describe the regular deadlines within the role, how you ensure these are recorded and monitored. Provide examples of a	**Evidence requirements to progress to level B:** • Document examples of spreadsheets where you have a) applied conditional formatting to highlight certain attributes and b) restricted the values that can be entered. Explain how these tools can facilitate data integrity • Submit a case study to show problem solving ability, such as responding to a new query subject using research. Include detail on how you arrived at the required answer, what organisational values this activity represents and how this supported your development • Document a quality control process or procedure you have actively adopted, created, or shaped to demonstrate an increased level of attention to detail • Supply a copy of five communications where you have had to convey complex information in concise and jargon free	**Evidence requirements to progress to level C:** • Share two instances where your technical pension scheme and/or organisation procedural knowledge has facilitated identification of an issue or error. Add commentary on any controls that could be added to mitigate any potential future risks • Submission of a summary detailing a recent or proposed change to pay or pension policy. This should include any potential financial impact, supporting calculations and any new or existing policy and procedure updates that will be required following the changes • Document multiple examples of spreadsheets where you have a) used a vlookup, b) used the SUM function and c) used an IF Function. Explain how these tools can facilitate data integrity and create efficiency within the processing environment

time(s) that you have had conflicting priorities that required additional organisation to achieve deadlines. • Reference feedback from colleagues or supervisors that highlights your proactive approach or use of initiative to research or deduce a successful query resolution. • Discuss how you have ensured good accuracy levels during data entry activities, also highlighting an instance where you have made an error, describing what mitigating measures you sought to put in place to prevent recurrence.	language to internal and external stakeholders, tailoring the language and content to the individual user's needs • Evidence dealing with two sensitive matters that required a tailored and personal approach	

Employee Expenses & Benefits Administrator

To provide an accurate and efficient benefits and expenses administration service, ensuring timely and appropriate payment is made to officers.
Provide day to day management and oversight of the vehicle schemes operated by the organisation.
Ensure that benefits and expenses are operated in a way that is compliant with council policy and statutory requirements such as National Minimum Wage.
Liaise with stakeholders in a way that promotes the One Medway Council Plan and Our Values and Behaviours

- Responsible for the processing of manual and computerised expense and mileage claims, identification and resolution of issues to enable timely payment
- Ownership of the lease car and salary sacrifice car schemes process from application to delivery, including setting up of relevant payroll deductions and insurance details
- Collation of information relating to P11d benefits to enable the processing of P11d documentation
- Management of applications for new benefits, ensuring relevant Payroll entries are processed correctly

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Evidence requirements: • Certificates provided during onboarding	**Evidence requirements to progress to level B:**	**Evidence requirements to progress to level C:**
Knowledge Expenses • Knowledge of the various mileage rates and mileage related thresholds approved by HMRC	**Knowledge** • Ongoing commitment to developing personal and technical knowledge and skills	**Knowledge** • Ongoing commitment to developing personal and technical knowledge and skills Expenses

• Understanding of the evidence required under HMRC and council policies for expense reimbursement <u>Benefits</u> • Knowledge of the impact of salary sacrifice benefits on normal pay and deductions • Awareness of annual benefit reporting requirements and deadlines to HMRC	• Developing knowledge of Medway specific systems in relation to the service area, such as Resourcelink and TopDesk <u>Expenses</u> • Knowledge relating to the tax treatment and effect on pay of paying workers more, or less, than the approved HMRC mileage rates • Knowledge of the applicable rates and policies within the NJC framework • Detailed understanding of relocation allowable expenses • Knowledge of the allowable travel and subsistence rates within the organisations policy <u>Benefits</u> • Is aware of the variety of benefits offered by the organization • Demonstrates understanding of the reporting requirements for approved and unapproved salary sacrifice benefits	• Has basic knowledge of PAYE Settlement Agreements (PSA) • Has full operational knowledge of car and mileage areas within Resourcelink HRIS <u>Benefits</u> • Has detailed knowledge of all Payroll affecting benefits offered by the organization, including any reporting and administrative requirements • Knowledge of items that may fall under the trivial benefit exemption
<u>Evidence requirements:</u> <u>Expenses</u> • Evidence with examples of stakeholder contact or interview questions, understanding of the current mileage rates and thresholds within the HMRC approved mileage allowance payments • Demonstrates knowledge of five common business expenses that an employee might claim for, any claim limits within the organisations policy and what evidence would be required to reimburse the employee <u>Benefits</u> • Provide an example or stakeholder communication showing the effect on gross and net pay when an employee enters a salary sacrifice arrangement, this should include the effect on any statutory deductions and/or other benefits • Be able to explain how non-exempt benefits are reported to HMRC, this must include the name of the document and the deadline for submission each year	**<u>Evidence requirements to progress to level B:</u>** • Evidence 10 hours of CPD relating to expenses, payroll or relevant personal development. The evidence should include the name of the provider, a summary of the content and date acquired • Demonstrate knowledge of the areas specific to the administration of employee expenses and benefit claims within Resourcelink • Knowledge of how to create, assign and update Top Desk calls to provide effective stakeholder communication <u>Expenses</u> • Detail the effect on an employees pay, and any reporting requirement should the mileage rate be higher or lower than the current approved mileage allowance rate. This should include how any relief or owed tax will be collected and be accompanied by a real-life example or a manual calculation. • Supply evidence of knowledge of the existing NJC mileage and rates and thresholds as in use by the organisation, through stakeholder management or written statement. • Draft a summary regarding relocation, this should include the current claim limit, an example of three types of allowable expense, the evidence required to process a claim, and the eligibility criteria laid out by the organisation. Provide five samples of dealing with relocation claims. • Evidence through claim checking and/or audit, referencing claims for travel and subsistence against existing internal	**<u>Evidence requirements to progress to level C:</u>** • Evidence 15 hours of CPD relating to pensions, payroll or relevant personal development. The evidence should include the name of the provider, a summary of the content and date acquired <u>Expenses</u> • Explain the purpose of a PSA, giving examples of three items that it may be used for and two it may not be used for. Also include detail on what must be reported to HMRC and when. Also include information on what alternative to a PSA exists and how this would affect an individual and the organisation. • Demonstrate via manager observation the monthly processing, and thorough understanding of, the expenses and car mileage claims through Resourcelink and via manual claim forms where required. <u>Benefits</u> • List all benefits processed through Resourcelink, collating evidence to show regular processing, such as monthly checklists and reports. Provide ten instances of responding to queries from workers regarding these benefits and detail any reporting deadlines and statutory documents. • Explain what is meant by a trivial benefit, the amount and frequency that is allowable and provide two examples of items that would be classed as a trivial benefit if provided to staff

	policy. Where claims have been rejected, provide copies of the communication with managers and employees Benefits • Provide examples of three current benefits offered to employees. Detail who they are available to, where information is available relating to these benefits, any application process required to access them and any cost to the employee. • Explain the difference between an approved and unapproved salary sacrifice scheme, giving one example each that is currently in operation in the organisation. For each type, explain any reporting requirements and the potential effect on an individual's tax status and pay.	
Experience • Some experience within a Payroll or Pensions environment • Experience of using a computerised Payroll or benefits system	**Experience** • Minimum of 1 year in a dedicated expenses, benefits or payroll related position • Experience of using Resourcelink or a similar integrated HRIS to process expenses and benefits • Demonstrable experience in processing expense claims in line with organisational policy and HMRC approved limits	**Experience** • Experience of personally undertaking P11d reporting annual work for corporate and bureau customers • Experience of mentoring or training new users and colleagues, providing peer support around benefits and expenses • Demonstrate an interest in improving benefits uptake and engagement, increasing employee financial wellbeing • Participated in the research and analyses of new employee benefits to support organizational strategy
Evidence requirements: • Evidenced through previous work experience at application stage and during interview process to detail transferable skills or tasks within an expenses, payroll or pensions role. • Evidence via application process, work history and/or scenario-based assessment of using, entering and amending data in a computerised HR and Payroll system	**Evidence requirements to progress to level B:** • A minimum of 12 months satisfactory performance at level A evidenced via performance appraisal documents and regular one to one review • Collate examples of five separate processes that you complete within Resourcelink (or similar HRIS), that directly amend, create or update an individual's pay or personnel record, providing supporting process notes • Supply five examples of where expense claims were reviewed and identified as being outside of agreed limits, or support with known limits as stated within policy or HMRC claim limits	**Evidence requirements to progress to level C:** A minimum of 12 months satisfactory performance at level B evidenced via performance appraisal documents and regular one to one review. • Submit details of work undertaken in relation of annual P11d reporting. This must include: - liaising with internal and external stakeholders to collate relevant information - performing calculation of benefit in kind values in line with current rates - entering relevant information into Resourcelink - production of statutory document - assistance with the preparation of electronic filing of relevant declarations, and payment of outstanding liability • Submit evidence of two mentoring, supervision, or training activities. These can be by way of a training plan, CPD session, bespoke meetings or guides/FAQ created • Evidence of designing and performing engagement activities for one or more benefits, ensuring materials are relevant and accessible to the target audience. Comment on how

		successful engagement was measured, how staff might benefit from taking up the target benefit and how engagement can be sustained over the next six to twelve months • Evidence working on a new potential benefit, showing how information was collated from multiple vendors, compared and analysed as to the potential cost and impact on the employee and Medway
Skills • Proficient in Microsoft Word, Excel, Outlook and Teams • Excellent customer service • Excellent written and oral communications, able to convey complex information in a clear manner • Strong arithmetic ability • Able to prioritise and organise own workload in order to achieve deadlines • Able to utilise initiative to find answers and knowledge where gaps exist • Good level of attention to detail	**Skills** • Able to utilise Excel to conditional format cells and add data validation options to department spreadsheet, ensuring better data quality • Able to proactively problem-solve and utilise technical and situational knowledge • A developed level of attention to detail with minimal instances of human error • Confident in explaining complex and technical information to stakeholders in a clear and concise manner	**Skills** • Able to identify risk and weakness in an area of work and suggest improvements to gain efficiency and/or accuracy • Able to utilise technical knowledge and system skills to problem solve pay and system queries • Able to build working relationships to create efficiencies and new collaborative ways of working, where possible • Able to deliver peer support to the wider service on expenses and benefits • Intermediate excel skills; VLOOKUP, SUM and 'IF' formulae
Evidence requirements: • Assessment at interview to demonstrate competency in Microsoft Word, Excel, Outlook and Teams. • Share feedback or testimonials from customers or colleagues that highlight your customer service skills or assessment at interview to demonstrate competency in Customer service. • Give examples at interview of communications where you have had to convey complex information in concise and jargon free language to internal and external stakeholders. • Detail examples where you have had to use mathematical and arithmetic skill to perform, or check, important financial calculations, such as PLD's or estimates. • Describe the regular deadlines within the role, how you ensure these are recorded and monitored. Provide examples of a time(s) that you have had conflicting priorities that required additional organisation to achieve deadlines. • Share feedback from colleagues or supervisors that highlights your proactive approach or use of initiative to research or deduce a successful query resolution. • Explain how you have ensured good accuracy levels during data entry activities, also highlighting an instance where you have made an error, describing what mitigating measures you sought to put in place to prevent recurrence.	**Evidence requirements to progress to level B:** • Document examples of spreadsheets where you have a) applied conditional formatting to highlight certain attributes and b) restricted the values that can be entered. Explain how these tools can facilitate data integrity • Submit a case study to show problem solving ability, such as responding to a new query subject using research. Include detail on how you arrived at the required answer, what organisational values this activity represents and how this supported your development • Document a quality control process or procedure you have actively adopted, created, or shaped to demonstrate an increased level of attention to detail • Supply a copy of five communications where you have had to convey complex information in concise and jargon free language to internal and external stakeholders, tailoring the language and content to the individual user's needs	**Evidence requirements to progress to level C:** • Share two instances where your technical expenses and/or organisation procedural knowledge has facilitated identification of an issue or error. Add commentary on any controls or policy changes that could be added to mitigate any potential future risks • Evidence of five complex queries that have had to use interrogation, system skill and critical thinking to resolve • Detail two distinct examples of working in collaboration with two other teams or service areas on a joint project. Summarise the situation that required the work, what tasks were carried out, what changed or was learned from the project and how this impacted routine operations. • Evidence at least five examples where training, mentoring or coaching of colleagues has occurred. For each item detail the subject matter, the way in which the support took place (i.e. in person, via teams etc), and include any guidance notes created during this time • Document multiple examples of spreadsheets where you have a) used a VLOOKUP, b) used the SUM function and c) used an IF Function. Explain how these tools can facilitate data integrity and create efficiency within the processing environment

***Evidence requirements:**

Where examples are requested, this should be a **minimum of 3 different pieces of work** (unless otherwise stated), but one piece of work may be used to demonstrate multiple competencies as appropriate. If one individual piece of work does not meet all the required criteria, please ensure additional documentation is provided to evidence all the relevant criteria as detailed in the framework has been met in full.

The discussion / evidence could include, but is not limited to, evidence such as:

- Case files
- Screen shots
- Feedback or testimonials from colleagues
- Meeting notes / minutes
- Service Desk calls
- Spreadsheets
- Project plans
- Feedback from other professionals
- Presentations
- KPI data
- Service Outcomes
- Observation of practice
- Reports
- Witness Statements
- Professional discussion with manager
- Training records
- Email correspondence etc.

Evidence may be supplemented with records/manager notes of discussions at 1:1s or by line manager observations

HR and Organisational Culture – Payroll & Pensions