Pre-assessment checklist — 22 check points

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19 certain points, 3 set out with their uncertainty · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **The checklist does not conclude.** It gives a result, a source and a level of certainty per point, and brings the discrepancies to the surface. **A check that claims certainty on everything is a check people stop reading.**

What is checked

Family of checks	Points	Source
Identity and civil status	3	Career-record application, documents in the file
Consistency between declared and recorded periods	**5**	Inter-scheme register
Consistency of recorded earnings from year to year	4	Scheme records
Documents required by the situation	3	List by member situation

Family of checks	Points	Source
Quality and legibility of the documents supplied	2	Document management system
Conditions for entitlement	3	The fund's operating rules
Absence of double counting between schemes	**2**	Inter-scheme register

The three discrepancies in this file

Discrepancy	Finding	What the agent does	Why
Earnings recorded in 2007	**Ten times the neighbouring years — probable keying error, one zero out**	**Flags, does not correct**	**A silent correction to recorded earnings is exactly what a check must never do**
Double counting	**Two quarters counted by two schemes for the same period**	Sets out the discrepancy with both records	**It is the error that costs most to repair once the pension has been awarded**
Illegible document	A 1994 certificate scanned crooked	**Prepares the request, stating what is illegible and why**	So the member does not send back the same document

Degree of certainty, point by point

Level	Points	What the adviser does with them
Certain result	**19**	Skims them
Result given with its uncertainty and its source	**3**	**Decides — and that is where the profession lies**

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The adviser opens a file where 19 points are green, 3 are set out and the documents are there. The decision takes ten minutes, and it remains entirely theirs.

The date of the checklist

Element	Rule
Review of the checklist	**At every change to the operating rules, with the two regulatory specialists**
Display of the review date	**On every file — a check with no date is a check nobody knows is current**

Last review of the checklist: _____ · Next: _____

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