



Institute
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Quality Assurance Scheme

Supplementary Information Form

for applications by pilotee firms

August 2015

Supplementary Information Form for QAS Pilotee Organisations

To be submitted as part of the modified application for Quality Assurance Scheme (QAS) accreditation submitted by Organisations that participated in the pilot QAS.

Data Protection Act 1998: The Institute and Faculty of Actuaries is registered as a Data Controller in terms of the Data Protection Act 1998. By providing the information requested on this form you acknowledge that we will use, process and share the information for any purposes associated with the Quality Assurance Scheme. The information you provide will be held and used in accordance with the Data Protection Act 1998, will be treated in accordance with our data protection policy and only shared with third parties where necessary for the Quality Assurance Scheme.

1. Organisation (or part of Organisation) Details

Name of Organisation (or part of Organisation) applying:	
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2. Senior Quality Assurance Representative(s)

Please confirm whether the Senior Quality Assurance Representative(s) (SQARs) will be the same individual(s) that was/were Designated Representative(s) during the pilot QAS.	<p>Yes/No</p> <p>If the answer is no, please provide details of the changes and of the new SQAR or SQARs in the Annual Return form that is being submitted along with this form.</p>
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3. Changes to APS QA1

The requirements of APS QA1 are substantively the same as in the version of the APS used for the pilot QAS.

However, the final version of APS QA1 has been revised slightly with changes: (i) to clarify the outcomes in the Appendix to APS QA1; (ii) to reflect that APS X2 has been introduced and to align the definitions of terms such as Work Review and Actuarial Work with those used in other IFoA APSs; and (iii) more generally, to simplify the wording of the requirements.

Please use the space below to explain whether there is anything arising from any of the changes to APS QA1 or otherwise that would cause you to change the information provided in pilot application form that isn't covered in the Annual Return this Supplementary Information Form is accompanying.

4. Work review

The requirements of APS QA1 include outcomes in relation to Work Review. This reflects the introduction of the APS X2 on 1 July 2015 (which was not in force at the time of the pilot scheme).

Please explain in the space below whether there have been any changes since the date of the pilot assessment visit to the policies and procedures of the Organisation in relation to Work Review and the outcome set out at 1 (c) of the Appendix to APS QA1.

Please also provide copies of revised policies and procedures (if appropriate) or confirm that they will be made available for review during the Interim Assessment that will be carried out as part of the modified process.

5. Other relevant information

Please use the space below to provide any other relevant information not captured in the pilot Application Form or the completed Annual Return that you feel is pertinent to the assessment of the Organisation's application for QAS status.

6. Declaration

I confirm that the information supplied in this application is correct to the best of my knowledge and belief.		
Signed:		
For and on behalf of:		(the Organisation)
Name:		
Role:		
Date:		

7. Return Details

Please return the completed Supplementary Information and any supporting documentation to QAS@actuaries.org.uk along with the completed Annual Return.