

PENSION ADMINISTRATION TEAM WORKPLAN TO 31 MARCH 2015

Project	Proposed Action	Report
Employer Self Service rollout	Employer Self Service rolling out of all remaining employers to enable full electronic data delivery by the end of Q4 2014/5 including employer training	4 Q 14
i-Connect software – to update member data on ALTAIR pension database automatically monthly	<p><i>i-Connect</i> middleware to provide monthly update to APF pension database purchased by the Fund and four unitary authorities. Remaining project to admit final unitary authority and then assess requirements for on-going support.</p> <p>Market to other employers during 2014/15 once complete.</p>	2/3 Q14
Move to Electronic Delivery of generic information to members	<p>Implement the 3 year Strategy to move to electronic delivery to all members (other than those who choose to remain with paper).</p> <p>Campaign to increase the sign up of members to Member Self Service (<i>My Pension on line</i>) to allow electronic access to documents</p>	2/3 Q14
Successfully Communicate proposed government changes to LGPS benefits	To follow through the project plan to effectively communicate the New LGPS 2014 and what it will mean for members/employers utilising electronic (website), paper and face to face meetings with employers' and their staff.	On track to end 2/3Q 14
Historic Status 9 Cases (Old member leaver cases with no pension entitlement. Previously untraced)	Identify cases and contact former members (tracing agent) concerning pension refund payment.	Report quarterly
2013/14 Year End Process	Ensure complete data receipt from employers and carry out reconciliation process. Issue member ABS prior to 6.10.2014	3Q 14
Review Workflow & Data Processing	Implement new Task Management procedure and Workflow Arrangements. Introducing new software – Auto Task assignment.	4Q 14
TPR Requirements	Data Quality Management Control – ensure processes & procedures in place to satisfy TPR minimum requirements.	3 /4 Q 14