

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 | <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. Market to other employers during 2014/15 once complete. | 2/3 Q14 |
| Move to Electronic Delivery of generic information to members | Implement the 3 year Strategy to move to electronic delivery to all members (other than those who choose to remain with paper). Campaign to increase the sign up of members to Member Self Service (<i>My Pension on line</i>) to allow electronic access to documents | 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 from 2Q 14 |
| 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 |