

## PENSION ADMINISTRATION TEAM WORKPLAN TO 31 December 2016

| <b>Project</b>  | <b>Proposed Action</b>  | <b>Report</b>  |
|---|---|--|
| Employer Self Service rollout   | Employer Self Service roll-out and training of all remaining employers to enable full electronic data delivery. Due completion March 2016   | Ongoing  |
| i-Connect software – to update member data on ALTAIR pension database automatically monthly                             | All Unitary Authorities Live<br><br>On-boarding and set up of Avon Fire & UWE<br><br>Market to other employers during 2015/16 once complete.  | 4Q15<br><br>4Q15<br><br>Commence 1Q16                |
| Move to Electronic Delivery of generic information to members   | Continue to move to electronic delivery to all members (other than those who choose to remain with paper).<br><br>Campaign to increase the sign up of members to Member Self Service ( <i>My pension online</i> ) | Ongoing<br><br>Ongoing                               |
| Successfully Implement New Fire Scheme Pension Reform   | To follow through Project Plan to effectively implement and communicate the New Fire Scheme.<br><br>Including staff training & member presentation sessions   | Completed<br><br>Completed                           |
| 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.  | Ongoing<br>Completion due 16/17                      |
| TPR Requirements  | Data Quality Management Control – ensure processes and reporting in place to reflect TPR compliance.  | Process set up – Sept 15. Reporting qly to Committee |
| Guaranteed Minimum Pension (GMP) Data Reconciliation Exercise Following cessation of Contracting out section April 2016 | Carry out full reconciliation with HMRC records to mitigate risk from holding incorrect GMP liability   | Ongoing<br><br>Report to Committee March 2016        |
| 2014/15 Year End Process  | Ensure complete data receipt from employers and carry out reconciliation process. Issue member ABS prior to 01/09/2015  | Completed  |
| Review Workflow & Data Processing   | Implement new Task Workflow Arrangements.<br>Introducing new software – Process Automation  | Completion due 4Q15                                  |