

PENSION ADMINISTRATION TEAM WORKPLAN TO 31 March 2017

Project	Proposed Action	Report
Employer Self Service rollout	Employer Self Service roll-out and training of all remaining employers to enable full electronic data delivery. Due completion 2016/2017.	Ongoing
i-Connect software – to update member data on ALTAIR pension database automatically monthly	All Unitary Authorities Live Align with new BCC software(including Fire scheme) Onboarding North Somerset Onboarding B&NES	Due 2016/2017 Nov/Dec 2016 Sept/Oct 2016 Sept/Oct 2016
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). Campaign to increase the sign up of members to Member Self Service (<i>My pension online</i>)	Ongoing Ongoing
Successfully Implement New Fire Scheme Pension Reform	To follow through Project Plan to effectively implement and communicate the New Fire Scheme. Including staff training & member presentation sessions	Completed 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 Completion due 16/17
TPR Requirements	Data Quality Management Control – ensure processes and reporting in place to reflect TPR compliance.	Completed
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 Update Report to Committee Dec 2016
2015/16 Year End Process	Ensure complete data receipt from employers and carry out reconciliation process. Issue member ABS prior to 01/09/2016	Completed
Review Workflow & Data Processing	Implement new Task Workflow Arrangements . (Phase 1 leaver process/Phase 2 trans process). (Phase 3) – Divorce & Death) (Phase 4) – member estimates Introducing new software – Process Automation	Completed Due Q3 2016 Due Q4 2016 Due 2017/18