

PENSIONS ADMINISTRATION TEAM WORKPLAN TO 31 DECEMBER 2017

| Project | Proposed Action | Report |
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| Employer Self Service rollout | Continuing Employer Self Service training of all new and remaining employers to enable full electronic data delivery. However, review of software to be undertaken to ensure product is fit for purpose and meets Fund requirements | Ongoing Q4 2017 |
| i-Connect software – to update member data on ALTAIR pension database automatically monthly | All Unitary Authorities Live Onboarding North Somerset Onboarding B&NES Strictly Education (3 rd Party Payrolls) UWE Fire scheme [on hold pending BCC software review] | Due 2017/2018 Q2 2017 Q2 2017 Q4 2017 Q4 2017 |
| 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 |
| Launch of Member Self Service (MSS II) | To replace existing MSS. With enhanced self service and interface features. | Due Q2 |
| Historic Status 9 Cases (Old member leaver cases with no pension entitlement. Previously untraced) | Identify cases and contact former members (tracing agent support) concerning pension refund payment. | Ongoing Completion due 17/18 |
| 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 Due Completion 18/19 |
| 2016/17 Year End Process | Ensure complete data receipt from employers and carry out reconciliation process. Issue member ABS prior to 01/09/2017 (1) Deadline for data receipt (30/4/17) (2) Deadline for reconciliation (June/July) (3) ABS timetable (July/August) (4) Member AA Notifications (Sept) | Ongoing Completed Ongoing Timetable Planned Ongoing |

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| Review Workflow & Data Processing | <p>Implement new Task Workflow Arrangements . (Phase 2) - trans process). (Phase 3) – Divorce & Death) (Phase 4) – member estimates (link to MSS 2 project plan)</p> <p>Implement New Leaver Form & Process</p> | <p>Completed</p> <p>Completed</p> <p>Due Q2 2017</p> <p>Due Q3</p> |
| Trivia commutation of Small Pension Pots | Undertake review of pensioner member pots to identify potential commutation opportunity following Gov't budget announcement | Due Q4 17/18 |
| Pensions Payroll – Platform Replacement (Cobol to Java) | <p>Replacement of existing platform under guidance from Financial Systems team and in conjunction with IT/Heywood.</p> <p>Dual benefit processing over 2 month period to align payroll system</p> | <p>Earmarked July/September 17</p> |
| Review Pension Admin Strategy | Review & update current PAS (2015) for approval by Pensions Committee (including employer SLA document) | Q4 2017 |