PENSIONS ADMINISTRATION TEAM WORKPLAN

Project	Proposed Action	Report
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 - delayed Onboarding B&NES - delayed Strictly Education (3rd Party Payrolls) Onboarding UWE Onboarding Univ of Bath EPM (3rd Party Payrolls)	Due 2017/2018 Q1 2018 Q1 2018 expected 18/19 Completed Expected 18/19 Expected 18/19
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 *(My pension online)*	Ongoing Ongoing
Launch of Member Self Service (MSS II)	To replace existing MSS. With enhanced self service and interface features.	Completed
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)	Completed Completed Completed Completed

	(4) Member AA Notifications (due by 6 Oct)	Completed
Review Workflow & Data Processing	Implement new Task Workflow Arrangements . (Phase 2) - trans process). (Phase 3) – Divorce & Death) (Phase 4) – member estimates (link to MSS 2 project plan) Implement New Leaver Form & Process	Completed Completed Completed Completed
Trivia commutation of Small Pension Pots	Undertake review of pensioner member pots to identify potential commutation opportunity following Gov't budget announcement	Due 18/19
Pensions Payroll – Platform Replacement (Cobol to Java)	Replacement of existing platform under guidance from Financial Systems team and in conjunction with IT/Heywood. Dual benefit processing over 2 month period to align payroll system	Due Q4 2017 In progress
Review Pension Admin Strategy	Review & update current PAS (2015) for approval by Pensions Committee (including employer SLA document)	Due Q1 2018 (Report at March Committee)
General Data Protection Regulation (GDPR)	Undertake review of existing arrangements in conjunction with B&NES corporate policy to ensure compliance with EU legislation - effective May 2018)	Due Q2 2018 (Report at June Committee)