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. Review of software to ensure product is fit for purpose and meets Fund requirements. Undertake review as part of PAS	Ongoing December 2018
i-Connect software – to update member data on ALTAIR pension database automatically monthly	All Unitary Authorities Live (BCC, B&NES, S.Glos – all live) • Onboarding North Somerset – Ongoing delay All Other Employers (see strategic projects below; identified in 2018/21 Service Plan)	Expected Autumn 2018
   I-Connect Roll Out Address Tracing Member Aggregation Reply Due 2014 Scheme – refund option	Key projects identified in 2018/21 Service Plan To improve efficiency and performance Roll out of monthly returns across all employers (63% of active membership covered as at 30 June) To achieve compliance with TPR Cop 14 and enable member ABS to be issued (Stage 1 – mortality screening) (Stage 2 – automated reference testing) (Stage 3 – manual tracing) (Stage 4 – forensic trace) Aggregation/link option - Appx 3,869 cases (799 cases cleared at July 2018) Develop new process & clear outstanding backlog Develop & Implement new process to manage increase in workload – impacting from April 2019	 Ongoing Completed Completed In Progress Due follwing stge 3 In Progress Due 2018/19 Commencing Sept 2018
Trivia commutation of Small Pension Pots	Undertake review of pensioner member pots to identify potential commutation opportunity following Gov't budget announcement	Due March 2019
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 18/19
TPR Requirements	Data Quality Management Control – ensure processes and reporting in place to reflect TPR compliance.	Completed

	Undertake review of overall data accuracy – incorporating new TPR Data Score requirements for Common and Conditional data.	Due Q3 2018
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 Report to September Committee
2017/18 Year End Process	Ensure complete data receipt from employers and carry out reconciliation process. Issue member ABS prior to 01/09/2018 (1) Issue employer data match file (2) Deadline for data receipt (30/4/18) (3) Deadline for reconciliation (end June 18) (4) ABS production timetable (July/August) (5) Member AA Notifications (by 6 Oct 18)	Completed Jan 18 Completed Completed Completed In Progress
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
Review Pension Admin Strategy	Review & update current PAS (2015) for approval by Pensions Committee (including employer SLA document)	Due Q3 2018 (Report at December 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 Q3 2018 (Report at December Committee)