

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 Due Q1 2019/20
i-Connect software – to update member data on ALTAIR pension database automatically monthly	All Unitary Authorities Live (BCC, B&NES, S.Glos – all live) <ul style="list-style-type: none"> North Somerset – In Progress (expected to go live by end March 19) All Other Employers (see strategic projects below; identified in 2018/21 Service Plan)	March 2019 September 2019
I-Connect Roll Out	Key projects identified in 2018/21 Service Plan To improve efficiency and performance Roll out of monthly returns across all employers (75% of active membership covered as at 31 January)	Ongoing
Address Tracing	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)	Completed Completed Completed Commencing Q2 2019/20
Member Aggregation	Aggregation/link option - Appx 3,869 cases (85% cleared at January 2019) Develop new process & clear outstanding backlog	In Progress
Reply Due		On hold due to resource move
2014 Scheme – refund option	Develop & Implement new process to manage increase in workload – impacting from April 2019	Commencing Q1 2019/20
Trivia commutation of Small Pension Pots	Undertake review of pensioner member pots to identify potential commutation opportunity following Gov't budget announcement. Feasibility study – in progress	In Progress Due completion March 2020
Historic Status 9 Cases (Old member leaver cases with no pension	Identify cases and contact former members (tracing agent support) concerning pension refund payment.	Ongoing Completion due 19/20

entitlement. Previously untraced)		
TPR Requirements	<p>Data Quality Management Control – ensure processes and reporting in place to reflect TPR compliance.</p> <p>Undertake review of overall data accuracy – incorporating new TPR Data Score requirements for Common and Scheme Specific data.</p> <p>Sept 2018 - Further guidance on scheme specific data measurements awaited from SAB/TPR/LGA</p>	<p>Completed</p> <p>On Hold Pending LGA Guidance</p>
Guaranteed Minimum Pension (GMP) Data Reconciliation Exercise Following cessation of Contracting out section April 2016	<p>Carry out full reconciliation with HMRC records to mitigate risk from holding incorrect GMP liability.</p> <p>Final stage – determine pension rectification actions</p>	<p>Ongoing</p> <p>Due Completion 18/19</p> <p>Due Q4 2019/20</p>
2017/18 Year End Process	<p>Ensure complete data receipt from employers and carry out reconciliation process. Issue member ABS prior to 01/09/2018</p> <p>(1) Issue employer data match file</p> <p>(2) Deadline for data receipt (30/4/18)</p> <p>(3) Deadline for reconciliation (end June 18)</p> <p>(4) ABS production timetable (July/August)</p> <p>(5) Member AA Notifications (by 6 Oct 18)</p>	<p>Completed Jan 18</p> <p>Completed</p> <p>Completed</p> <p>Completed</p> <p>Completed</p>
Move to Electronic Delivery of generic information to members	<p>Continue to move to electronic delivery to all members (other than those who choose to remain with paper).</p> <p>Campaign to increase the sign up of members to Member Self Service (<i>My pension online</i>)</p>	<p>Ongoing</p> <p>Ongoing</p>
Review Pension Admin Strategy	Review & update current PAS (2015) for approval by Pensions Committee	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)	Ongoing Update report at June 2019 Committee