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.	Ongoing
	Review of software to ensure product is fit for purpose and meets Fund requirements. Undertake review as part of PAS	Due Q3 2019/20
i-Connect software – to update member data on ALTAIR pension database automatically monthly	All Unitary Authorities Live	Completed Q4 2018/2019
	All Other Employers (see strategic projects below; identified in 2018/21 Service Plan).	By end March 2020
	Currently 258/438 (58% active scheme employers submitting monthly data)	
	Key projects identified in 2018/21 Service Plan To improve efficiency and performance	
I-Connect Roll Out	Roll out of monthly returns across all employers (86% of active membership covered as at 30 June)	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 Q3 2019/20
Member Aggregation	Aggregation/link option - Appx 3,869 cases (100% cleared at March 2019)	Completed
Reply Due Cases	Develop new process & clear outstanding backlog	On hold due to resource move
2014 Scheme – refund option	Develop & Implement new process to manage increase in workload – impacting from April 2019	In Progress
Trivia commutation of Small Pension Pots	Undertake review of pensioner member pots to identify potential commutation opportunity following Gov't budget announcement.	In Progress Due completion March 2020
	Feasibility study – in progress	
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 end March 2020

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 Scheme Specific data.	In Progress
	July 2019 – SAB issued draft conditional data requirements for scoring. Further development on providing guidance notes are in progress with LGA	
	APF have commenced development of reports based on draft SAB requirements	
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 2019/20
	Final stage – determine pension rectification actions	Due Q4 2019/20
2018/19 Year End Process	Ensure complete data receipt from employers and carry out reconciliation process. Issue member ABS prior to 01/09/2019	
	(1) Issue employer data match file	Completed Jan 19
	(2) Deadline for data receipt (30/4/18)	Completed
	(3) Deadline for reconciliation (end June 18)	Completed –
	(4) ABS production timetable (July/August)	Completed - Report in December 2019
	(5) Member AA Notifications (by 6 Oct 18)	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).[Service Plan refers]	Ongoing
	Campaign to increase the sign up of members to Member Self Service *(My pension online)*	Ongoing
Review Pension Admin Strategy	Review & update current PAS (2015) for approval by Pensions Committee	Completed
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 March 2020 Committee