

APPENDIX 3 to Pensions Administration Strategy: Update Report

Annex 3 of Administration Strategy Statement

Performance Criteria (to be reported in Stewardship Report) - Joint Delivery to Members

Employer Service Information and Performance Standards – OPERATIONAL & FINANCIAL

Element	Employer	Target (working days)	The Fund	Target (working days)	Average % within target?
Early Leavers	Employer to send the Fund completed leaver form - electronically by 01.04.2012*	Within 15 days of month end after date of leaving	The Fund to advise member of deferred benefits	Within 10 days of being in receipt of all necessary information	
Actual retirement forms	Employer to send the Fund completed leaver form - electronically by 01.04.2012*	On or before retirement date	The Fund to pay benefits to member	Within 10 days of being in receipt of all necessary information	
Estimate Requests	Employer request for estimate to the Fund	n/a	The Fund to provide Employer with estimate	Within 10 days of receipt of all necessary information	
Death in Service	Employer to send the Fund completed form - electronically by 01.04.2012*	Within 5 days of being notified	The Fund to advise member benefits	Within 7 days of receipt of all necessary information	
Year End Data submission Employer each year to supply schedules showing contribution and pensionable pay information in the format specified by the Fund in LGPS 51 and LGPS 52 format (after LGPS 51 has been reconciled to LGPS50's)	Supply to the Fund electronically	By 15 th May (6 weeks after year end)			

Year End Data queries Responding to Year end/ Valuation queries resulting from APF reconciliation of member data submitted	Response to queries on reconciling the year end returns to the Fund	within 1 month of being raised			
Annual Benefit Statements			Issue <i>Statements</i> for those active members whose data is updated reconciled and complete	By 31 st December each year	

SMALLER Employers have until 01.10. 2012 to move to electronic submission by on-line forms