

## Extract of Amendments to the Pension Administration Strategy (October 2019)

The table below sets out the levels of performance which Scheme employers, their contractors and the administering authority are expected to achieve in carrying out their Scheme functions.

Task	Scheme Employer (or their contractors) performance	Administering Authority (or their contractors) performance
Divorce Estimates		<p>The Administering Authority will provide estimates/actuals for pension sharing provided during the year within 15 working days of receiving all necessary information.</p> <p><u>The Administering Authority charges for estimates in accordance with its Pension Administrators estimates policy</u>  <a href="https://www.hants.gov.uk/hampshire-services/pensions/local-government/employers/forms">https://www.hants.gov.uk/hampshire-services/pensions/local-government/employers/forms</a></p>
Death Benefits	Notification must be provided to the Administrator within 5 working days of the death of the member.	<p>The Administering Authority will:</p> <ul style="list-style-type: none"> <li>• acknowledge in writing the death of a member enclosing claim forms to the informant or next of kin within 5 working days of being notified of the death.</li> <li>• Supply survivor beneficiaries with notification of their entitlements including the method of calculation within 15 working days of all the information being received.</li> <li>• pay any death grant due within <del>10</del> <u>15</u> working days of receipt of all necessary paperwork to be able to produce the calculation (this includes Grant of Probate or Letters of Administration).</li> </ul> <p>As agreed by exception in certain circumstances (e.g. hardship cases)) the timescale can be contracted</p>

Task	Scheme Employer (or their contractors) performance	Administering Authority (or their contractors) performance
Provision of the LGPS Employee Guide to all new employees	<p>An employer must ensure that all new employees eligible to join the Local Government Pension Scheme (LGPS) receive a copy of the Employee Guide to the Scheme within two months of becoming employed.</p> <p>The Employee Guide can be found on the Fund's website.</p>	
New Starter including for Bulk Transfer In	<p>New Starter form to be provided within 10 working days following the end of the month in which the employee joined the LGPS.</p> <p>A member may elect to transfer other pensions into the Scheme by completing the necessary form within 12 months of joining.</p> <p>The Employer should notify the Administering Authority as soon as they identify that a bulk transfer is likely to take place.</p>	<p>The Administering Authority will set up a member record within 20 working days of receipt of the new starter form.</p> <p>Where a member transfers in other pension benefits the Administering Authority will update the members pension record and issue member with statutory notification with relevant details within <del>10</del> <u>15</u> working days of confirmation that the payment from the other pension scheme has been allocated to the pension fund.</p> <p>For bulk transfers, the performance level will be agreed between the Administering Authority, its Actuary the Administrator and the Predecessor Scheme on a case by case basis.</p>

Task	Scheme Employer (or their contractors) performance	Administering Authority (or their contractors) performance
Retirement Estimates	<p>The Employer must provide estimated pensionable pay details within 10 working days of the members' request.</p> <p>Employers may consider a previous years pay may be more beneficial to the member and should provide such information if necessary.</p>	<p>In line with the Employer Estimate Policy the Administrator will provide the retirement estimate within 15 working days of receipt of accurate pensionable pay details from an employer.<sup>1</sup></p> <p><u>The Administering Authority charges for estimates in accordance with its Pension Administrators estimates policy</u>  <a href="https://www.hants.gov.uk/hampshire-services/pensions/local-government/employers/forms">https://www.hants.gov.uk/hampshire-services/pensions/local-government/employers/forms</a></p>
Year End Information	<p>The employer (or their payroll contractor / agency for whom the employer is responsible) shall provide <del>Capita</del> <u>the administrators</u> with year-end information as at 31 March each year in the notified format no later than 30 April.</p> <p>The information should distinguish those amounts representing deductions for voluntary contributions and the employees paying those voluntary contributions.</p>	<p>The Administering Authority will request information and provide specification to employers not later than the end of <del>the first week in</del> March. A reminder will be sent out 10 working days before the due date of 30 April.</p>

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<sup>1</sup> In addition to online functionality employers can request a maximum of two estimates per employee in any 12 month period. Additional estimates provided to employers, subject to a separate administration charge. A member is restricted to one estimate in any 12 month period (in addition to their annual benefit statement).