

Pension Administration Strategy

Effective from 8th November 2021

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1. Introduction

This is the Pension Administration Strategy of the Westminster City Council Pension Fund (WCCPF “the Fund”) about the Local Government Pension Scheme (LGPS) in the City of Westminster.

This document:

- ♣ Confirms the purpose of the strategy and says what it is intended to achieve
- ♣ Outlines the role of WCCPF’s scheme employers and sets out their expected levels of performance
- ♣ Outlines the role of WCCPF and sets out its expected levels of performance
- ♣ Explains how the performance of WCCPF and its employers will be monitored
- ♣ Explains what actions might be taken when employers do not meet the requirements
- ♣ Confirms how WCCPF will communicate with its employers
- ♣ Details the resources and support that is available for employers to access the UPM Civica - Employer Hub Portal

The LGPS is a statutory scheme, established by an Act of Parliament. Regulation 59 of the LGPS Regulations outline the key responsibilities of administering authorities and fund employers. The regulations include specific provisions recommending the fund develops an administration strategy.

It also includes a schedule of additional administrative costs under Regulation 70 of the LGPS Regulations 2013, which provides scope for pension funds to recover costs where additional costs are being incurred due to an employer’s level of performance.

The PAS is linked to the following statutory documents of the Fund which are available on WCCPF website - <https://www.wccpensionfund.co.uk/westminster-city-council-pension-fund/> : **NB check with Diana on website new link**

- ♣ Retention Policy and Full Privacy Notice
- ♣ Communications Policy
- ♣ Annual Report
- ♣ Statement of Investment Principles

Under no circumstances does the PAS override any provision or requirement of the LGPS regulations nor is it intended to replace the more extensive guide provided by the Employers’ Guide available on the Hampshire Pension Services website [Employer Administration Tools and Guidance | Hampshire County Council \(hants.gov.uk\)](#) for day-to-day operations.

2. Purpose of the Pension Administration Strategy

The revision to the PAS, effective from 8th of November 2021, reflect the growth towards a seamless, automated pension service, employing appropriate technologies and best practice which both significantly improves the quality of information overall and the speed with which it is processed to provide better information for Scheme employers and stakeholders and more efficient service to Scheme members.

- ♣ Provides clarity on the key roles and responsibilities of WCCPF and its employers
- ♣ Sets expectations and confirms the targets that WCCPF and its employers need to work to
- ♣ Helps all parties to achieve regulatory compliance by providing a framework that is clear and user-friendly
- ♣ Assists WCCPF and its scheme employers in adhering to the Pensions Regulator's Codes of Practice
- ♣ Complements procedures that help all parties to meet their data protection and data quality responsibilities
- ♣ Helps to ensure all parties provide the best possible service to scheme members and other relevant stakeholders
- ♣ Emphasises the importance of the shared role that WCCPF and its scheme employers have in ensuring excellent service delivery to scheme members
- ♣ Promotes efficient working practices, hand in hand partnership with transparency and a culture of continual improvement

3. Roles and Responsibilities

The purpose of the strategy set out in Section 2 will be achieved by:

- ♣ Clearly defining the respective roles of Scheme Employers and the Administering Authority
- ♣ Setting clear and achievable standards of service levels for the functions carried out by Scheme Employers and the Administering Authority
- ♣ Setting out clear procedural guidance for the secure and effective exchange of information between Scheme Employers and the Administering Authority
- ♣ Monitoring service delivery, identifying poor performance and establishing a platform for the provision of support to improve performance where required
- ♣ Continuous development of resources via the use of digital technology and staff training for both the Fund and its employers
- ♣ Applying charges where an employer consistently fails to meet deadlines to ensure the resulting additional administrative strain is not a burden on all employers

3.1 The Employer's Roles and Responsibilities

The primary responsibilities for the employer are to:

- ♣ Communicate the entitlement to benefit from the LGPS to all eligible staff. Provide staff with information on how they can access further information on their LGPS pension including the member portal.
- ♣ Apply the scheme via the collection and payment of the correct levels of pension contributions
- ♣ Report information and data to the WCCPF as set out in this strategy

3.2 The Administering Authority's Roles and Responsibilities

The Fund outsources administration to a specialist third party administrator – The Hampshire Pension Services. The WCCPF and The Hampshire Pension Services (HPS), working very closely with our Fund employers, their respective payroll providers are responsible for the delivery of a high quality, value for

money administration service. We want to ensure our members, and employers, receive the appropriate level of service and we fully comply with our statutory requirements.

The key responsibilities for the Administering Authority are to:

- ♣ Administer the LGPS in respect of all scheme members (Active, Deferred and Pensioner members) in accordance with this Strategy
- ♣ Maintain and review the Fund's Statements, Policies and Reports and all other matters relating to the Governance of the scheme
- ♣ Communicate and engage with employers on LGPS matters
- ♣ Provide support/training to scheme employers
- ♣ Maintain and develop an effective web presence for the benefit of members and scheme employers

A summary to the roles and responsibilities of employers and the Administering Authority are set out in Appendix A, Appendix B. The guide includes a summary of duties, defining the main functions, which enable the Pension Fund to deliver an efficient, accurate and high-quality pension service to scheme members.

4. Performance Monitoring

The strategy recognises that there is a shared responsibility for ensuring compliance with the LGPS regulations and the PAS.

WCCPF will monitor employer performance across the following key areas:

- ♣ The submission of monthly data returns
- ♣ The payment of contributions and other payments due
- ♣ The number of queries, along with the rate and quality of responses
- ♣ The number of complaints received and IDRP cases upheld against the employer

The LGPS regulations provide pension funds with the ability to recover any administration costs sustained because of the underperformance of a scheme employer, from the employer responsible for the underperformance. To date the Fund has rarely recovered these additional costs and has taken the decision to work with employers to improve service delivery.

From November 2021, WCCPF will monitor any additional costs sustained in the administration of the scheme as a direct result of underperformance, with a view to recovering these costs from the responsible employer.

WCCPF working in conjunction with our new administration partner in HPS will provide support to employers wherever possible to help fulfil our joint responsibilities to members. We welcome questions on anything that is not clear and will listen to feedback to help improve the service for our employers and members alike.

If you represent an employer that is struggling to meet the terms of this PAS, please contact us at the earliest opportunity so that we can work with you and avoid additional charges if outstanding issues can be resolved in a way agreed between WCCPF and the employer.

Where an employer does not actively engage with the Fund to resolve issues or consistently fails to meet its responsibilities under the LGPS Regulations, the Fund (or stakeholders such as the Pension Board) has a statutory duty to report any breach to The Pensions Regulator.

More information about the work of The Pensions Regulator can be found via the following link: <https://www.thepensionsregulator.gov.uk/en>

A schedule of charges is detailed in table below.

Administration Description	Performance Targets	Charge
New Starters and Transfers In		
New Scheme Member		
Employer to send to the Administrating Authority the details of the new member.	Within 25 working days after the start date.	£50 per case
Leavers and Transfers Out		
Scheme Leaver		
Employer to send the Administrating Authority a completed leaver notification.	Within 25 working days from the employee's last day in the Scheme.	£50 per case

Administration Description	Performance Targets	Charge
Retirements		

Employer to send the Administrating Authority a completed notification.	15 working days after their final pay.	£50 per case
Deductions		
Monthly Deductions		
Employer to send funds and schedule of deductions from salary to the Administering Authority.	By the 19th day of the month following the month in which contributions were deducted.	£100 per instance of late submission.
Payment of Other Sums Due		
Employer's should make payment of any invoiced sums as set out within this PAS within 30 days of invoice date.	By the 19th day of the month following the month in which contributions were deducted.	£100 per instance of late payment.
Year-End Data Return		
Submitted returns will be subject to additional validation and tolerance checks by officers which must be passed before the return can be accepted and proceed to the next stage. No charge if the return is received by the deadline 30th April and passes the validation check.	We will charge if the return is received after 30 April and does not pass the validation check.	up to £50 daily rate

5. Communication, Recourses and Available Support

The various channels of communication employed by the fund include:

1. The **Westminster City Council Pension Fund** website is the main communication tool for both employers and scheme members.

- ✦ **Employers** – a dedicated and secure employer section where employers can access procedure guides, information on courses run by the Fund. All employers are required to provide data through the UPM - Civica Employer Hub Portal.

- ♣ **Scheme members** – access to up-to-date information about all aspects of the LGPS and the Member Self Service area where members can update personal details, review annual benefit statements, complete their own pensions estimates and access online tutorials.
- ♣ **Contact Details** – Westminster City Council Retained Payroll and Pension contact information are available on the website, together with contact details for the Hymans Robertson Team, Investment and Pension Fund Committee and Pension Board.

2. **Scheme members** who have chosen to opt out of the Member Self Service will continue to receive postal communication. They will still be able to access up-to-date information about all aspects of the LGPS via our website.

3. **Employer newsletter** are issued to scheme members and all employing authorities and published on the WCCCPF website.

4. **Pension surgeries** Maybe arranged to support individuals or groups of individuals who need support with particular pension issues. Employers can contact the WCCCPF administration team to discuss the needs of members.

5. **Regular feedback** sent directly to employer representatives to provide notification of any scheme / administrative updates and developments.

6. **Employer workshops** to review scheme developments, and/or to resolve any training needs that employers may have.

For further information regarding our methods of communication, please see our Communications Policy which is located on our website.

6. Feedback and Review Process

WCCPF is also accountable for its performance and we welcome feedback from our Employers regarding the performance of the Fund against the standards in this administration strategy, as set out in Section 3. Comments should be sent to the Strategic Pension Lead Sarah Hay shay@westminster.gov.uk . Any feedback received will be incorporated into the quarterly reports provided to the Pension Board.

You should send any questions about this Pension Administration Strategy to the Strategic Pension Lead Sarah Hay.

Sarah Hay
Strategic Pension Lead
Westminster City Council
11th Floor
64 Victoria Street
London
SW1E 6QP
E-mail: shay@westminster.gov.uk

Westminster City Council Pension Fund is not responsible for verifying the accuracy of any information provided by the employer for the purpose of calculating benefits under the provisions of the Local Government Pension Scheme. This responsibility rests with the employer.

Regulation 59 of the Local Government Pension Scheme (LGPS) Regulations 2013 is the regulation that allows WCCPF to create this strategy.

Regulation 59 states that on creating or revising its strategy, the administering authority must consult with its employers.

The WCCPF Pensions Committee approved this strategy on [...date...]

It is effective from 8th of November 2021 and we will keep it under review to ensure it remains up to date and meets the necessary regulatory requirements.

In preparing this pension administration strategy, we have consulted with our Fund employers and our third party administrator. If we need to revise this strategy, we will notify our Fund employers and our third party administrator.

We will publish the current version of the strategy statement on our website at <https://www.wccpensionfund.co.uk/westminster-city-council-pension-fund/> and will make paper copies available on request.

Appendix A

Summary of Scheme Employer's Roles and Responsibilities

Responsibility	Agreed Deadline
1 General Information	

Confirm nominated representative(s) to receive information from the Fund via the submission of a completed contacts form.

Each employer will nominate a contact to administer the three main areas of the LGPS:

1. Administration contact for the day to day administration of the administration, completing of forms and responding to queries
2. Nominated Payroll contact who will be the responsible third-party contact who can maintain a Payroll authorised user list.
3. Finance contact for completion and submission of the monthly postings and co-ordination of the exception reports

Authorised officers should sign all documents and/or instructions received from an employer. In signing a document, the authorised officer is not merely certifying that the form comes from the employer stated, but also that the information being provided is correct. Consequently, if an authorised officer is certifying information that someone else has compiled, for example leaving information including a final salary pay, career average pay, assumed pay, they should satisfy themselves that the information is correct.

All contacts will receive a login name and password that allows them to access the Employer Portal for online administration and the combined remittance and monthly return.

When registering, each contact should complete a "main contact registration form and authorised user form" and signing the administrator's user agreement for the secure administration facility.

The three main contacts are responsible for ensuring that contacts are maintained by notifying the administrator when one leaves and registering new contacts where necessary. Within 20 days of change or becoming a Scheme employer.

Responsibility

Agreed Deadline

<p>Employers must nominate an adjudicator to deal with appeals at stage one of the IDRPs where the dispute is against a decision the employer has made or is responsible for making. Employers are responsible for providing details of the IDRPs and the adjudicator in writing to members when informing them of decisions they have made.</p>	<p>Within 20 days of change or becoming a Scheme employer</p>
<p>The employer is responsible for exercising the discretionary powers given to employers by the regulations. The employer is also responsible for compiling, reviewing and publishing its policy in respect of the key discretions as required by the regulations to its employees.</p>	<p>A copy of the policy document is to be submitted to the Fund within 20 days of the change in policy</p>
<p>Distribute any information provided by the Fund to scheme members/potential scheme members (e.g. scheme benefits or benefit statement production)</p>	<p>In a timely manner as required</p>

<p>Responsibility</p>	<p>Agreed Deadline</p>
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Additional responsibilities (optional) of those using an external payroll provider.

If that employer decides to outsource some of its functions to a third-party provider or another part of its wider organisation. Therefore, an employer must ensure that the third-party provider or equivalent can meet all of the employer's duties and obligations that they have been appointed to carry out.

Employers should monitor their payroll providers to check they are meeting their responsibilities in full and we recommend employers ask third party providers to confirm compliance with the terms of this PAS on a regular basis. Third party providers should provide reports that confirm compliance in relation to all key aspects covered within the PAS including compliance on joiners, leavers and the provision of annual return data. The fund recommends to employers that they carry out regular audits of any third party to assure themselves of the performance of the third-party contractor. Employers are reminded that non-compliance with the regulations is an employer responsibility and cannot be outsourced to a contractor.

WCC recommends that Employers ensure that any third-party contractor understands the requirements of the LGPS and confirms that they will be able to comply with all of the standard terms set out within this PAS where that service has been given to the third party. Any costs or fines that are levied by the fund for non-compliance will be the responsibility of the employer.

Employers must tell us when they change providers

The employer is responsible for providing correct pay information to the Fund under LGPS regulations. An employer must ensure it always has access to historical pay information for its members, which can include pay data going back as far as the last 15 years.

Responsibility	Agreed Deadline
<p>Methods of data exchange</p>	<p>Employers should submit data and information to the Fund in the requested (original) format. Employers should speak to relevant person in the Fund to obtain approval to submit information in an alternative format.</p> <p>All employers must use Employer Hub transfer system, UPM, to submit data every month. All forms should be submitted using a secure method of data transfer via online portal. Additional information can also be supplied by email. However, employers must consider data protection when sending information by email and take appropriate steps to ensure data breaches do not occur.</p> <p>Employers with access to UPM workflow must use the workflow task and comments functions to respond to queries or exchange information securely where appropriate, unless the Fund have requested a response in a different format.</p>

Responsibility		Agreed Deadline
2	New Starters	
	Decide who is eligible for LGPS membership (and the date from which membership of the LGPS starts).	On joining employer (or at point becomes eligible if later)
	Determine rate of employee contributions	For the first pay period in which the employee joins the LGPS and each April thereafter or following any change of job role.
	Notify the Fund of new joiner via online portal	By end of month following the date joined (e.g. by the end of May if joined in April)
	Provide new employees, who are eligible for the LGPS, with details about the LGPS This may be in the form of providing a copy of the Key Facts leaflet and/or directing them to the Fund's website	With 20 days of commencing eligible employment

Responsibility		Agreed Deadline
3	Contributions	

<p>Apply the employer contribution rate agreed with the Fund on becoming a scheme employer and adjust as instructed by the Fund from a date determined by the Fund. and Complete monthly remittance form containing detail of the contribution's payment.</p>	<p>Payment date - payment must credit the pension fund bank account on or before 19th of the month following the month to which deductions relate (or previous working day if 19th is a weekend or public holiday)</p> <p>Remittances - a copy of this monthly remittance must be sent 3 working days prior to the date that payments are credited to the fund, to the following email addresses: WCCIMSupport@westminster.gov.uk and PensionFund@westminster.gov.uk</p>
<p>Implement changes to employer contribution rates as instructed by the Fund at the date specified by the Fund's actuary</p>	<p>In line with the Rates & Adjustment</p> <p>Certificate as per the valuation or on commencement as a scheme employer. We are recommending employers to check the rates every April.</p>
<p>Calculate and review the correct employee contribution rate band for all members at commencement and on 1st April each year. Also, to be reviewed at intervals during the year at the employer's discretion. Current employee contribution bandings and rates available at https://www.wccpensionfund.co.uk/westminster-city-council-pension-fund/contributions.</p>	<p>As required, typically annually or when the employee has significant change</p>

<p>Responsibility</p>	<p>Agreed Deadline</p>
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Manage the deduction of all additional contributions or amend such deductions, as appropriate	As required
Arrange payment of Additional Voluntary Contributions (AVCs) to the AVC provider(s) and inform the Fund as required.	As required. AVCs payments - should be paid monthly by 19th of the following month of deduction. AVCs - all LGPS-related AVCs for Westminster must be paid direct to AEGON
Make additional fund payments in relation to early payment of benefits from flexible, redundancy or business efficiency retirement or where a member retires early with employer's consent, or the employer 'switches on' the 85-year rule, and a financial strain cost arises	Within 20 days of receipt of invoice from the Fund
Refund contributions through the payroll to any employee who opts out of the scheme with less than 3 months membership. Please note that the correct opt out form needs to be completed and securely stored on the members pay or HR record in case of further query subject to data time limits.	From the next pay period after receiving the employee's request to opt out.

Responsibility		Agreed Deadline
4	During Membership	

	Move employees into the 50:50 section or Main section	From the next pay period after receiving the employee's election
	Move employee back into the Main section when member reaches nil pay	If the employee is in the 50/50 section and either goes onto no pay due to sickness or injury or passes the member's automatic re-enrolment date, the employee must be moved back into the main section from the beginning of the next pay period if they are still on nil pay at that time.
	Notify the Fund of changes affecting pension entitlement via online portal - changes in employees' circumstances which may impact Fund benefits (eg, movement in and out of scheme, marital or civil partnership status, maternity, paternity, career break, long term absence etc.)	By end of month following the date of change (e.g. by the end of May if the change occurred in April)
Responsibility		Agreed Deadline
5	Leavers	
	Leavers & Redundancy (non-retirement) submit the leaver form via online portal	By end of month following the date of leaving or opting out of the scheme.

Responsibility		Agreed Deadline
6	Retirements	

Notification of retirement via online portal	Retirement form and signed letter authorising early payment of benefits completed by authorised signatory (optional) should be sent to the Fund as early as possible but, in any event, no later than 10 working days after the member's final payroll has run
Early Retirement at member's choice	Completed early leaver form or cancellation of membership form as appropriate and also upload previous year's pay information if a certificate of protection is held. The forms should be sent as early as possible but no later than 10 working days after the member's final payroll has run
Ill Health Retirement notification notify the Fund via Ill Health Retirement (medical certificate) form or via online portal	Signed ill-health certificate completed by approved IRMP should be sent to the Fund as soon as the retirement date is known. The form should be sent to the Fund as early as possible but no later than 10 working days after the member's final payroll has run
Ill-Health Retirement (Deferred members)	Notification of employer decision relating to applications for the early release of deferred pension benefits on the grounds of ill-health.

Responsibility	Agreed Deadline
Death in Service	Notify the Fund of the Death of an Employee. Provide Next of Kin details. Provide an initial notification within 5 working days of the employer being informed of the death of the employee

Review payment of Tier 3 ill-health benefits	After benefits have been in payment for 18 months
Flexible retirement notification	The Flexible Retirement form should be sent to the Fund as early as possible but no later than 10 working days after the member's final payroll has run accompanied by a covering letter confirming the number of hours p.w. to be worked in the continuing job

Responsibility	Agreed Deadline
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7 Contracting Out of Services	
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Notify the Fund of contracting out of services which will involve a TUPE transfer of LGPS eligible staff to another organisation to enable LGPS information to be provided to another organisation.	Immediately if contracting out of services is being considered as a possibility and certainly before making any decisions to contract out services
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Notify the Fund of the intention to contract out of services which will involve a TUPE transfer of staff to another organisation by completing TUPE form to instruct the actuary	At least 6 weeks before going out to tender
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Responsibility	Agreed Deadline
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Work with Fund Officers to arrange for the admission of a stakeholder as a new employer in the Fund	In advance of the date of contract (admission agreement must be completed and signed before the contract signing)
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	Notify the Fund of changes / extension / cessation of arrangements with a stakeholder	During exploratory discussions or as soon as the decision is made
	Responsibility	Agreed Deadline
8	Year-End Data Return	
	Provide a fully reconciled and completed year-end return to the Fund in the format set by the Fund in the instructions issued each February/March	An accurate return to be submitted in the approved format no later than 30th April.

Appendix B

Summary of The Administering Authority's Roles & Responsibilities

Responsibility	Agreed Deadline
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1 General Information	
<p>Regularly review the Fund's pensions administration strategy and consult with all scheme employers</p>	<p>Every three years or earlier if regulatory or service changes justify amendment.</p>
<p>Each Administering Authority is responsible for exercising the discretionary powers given to it by the regulations. The Administering Authority is also responsible for publishing its policy to its members in respect of the key discretions as required by the regulations.</p>	<p>WCCPF will maintain links to this discretions on WCC website https://www.wccpensionfund.co.uk</p>
<p>Arrange for the reports and policies to be provided to all employers requiring such an information.</p> <p>WCCPF regularly review the Fund's policies:</p> <ul style="list-style-type: none"> • Retention Policy and Full Privacy Notice • Communications Policy • Annual Report • Statement of Investment Principles 	<p>WCCPF will maintain links to these policies on WCC website https://www.wccpensionfund.co.uk</p>
<p>Under the General Data Protection Regulations 2018 WCCPF will protect information relating to a member contained on any item issued by them or received by them from improper disclosure.</p>	<p>Ongoing requirement, online security within databases regularly reviewed</p>

Responsibility	Agreed Deadline
2 New Starters	

Set up a record for each new member and issue a statutory notification.	Within 20 working days from when notified of their membership.
To accurately record and update changes to a member's records on pension administration systems.	Within 15 working days from when the change was notified.
To produce a statutory notification and forward to member's home address, together with information relating to the LGPS including how to request a transfer, inform us of previous service, and complete an expression of wish form	Within 2 months of joining the scheme or within 2 months of request being made
3 Contribution Requirements	
Consult with employers on the outcomes of the triennial valuation	Every 3 years
Notify employers of contribution requirements for three years effective from the April following the actuarial valuation date	On or before 1 st April following final issue of rates and adjustments certificate by the actuary

Responsibility	Agreed Deadline
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	Notify new scheme employers of their contribution requirements	Within six weeks of receipt of the notification of admission application or commencement as a scheme employer
4	Additional Contributions	
	Notify the scheme employer of any scheme member's election to pay additional pension contributions (APCs), including all required information to enable deductions to commence	Within 10 working days of receipt of election from a scheme member
	Process scheme member requests to pay/amend/ cease additional voluntary contributions (AVCs)	Within 5 working days of receipt of request from a scheme member
5	Leavers	
	To accurately record and update member records on pension administration systems for those members leaving the scheme, without entitlement to immediate payment of benefits. Provide them with the options available and deferred benefit entitlement.	Within 15 working days
	Calculate benefits due when a member leaves employment and send details to the member.	Within 15 working days for retirements

Responsibility	Agreed Deadline
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	Deferred benefits processed and calculated for payment following receipt of election	Within 30 working days for deferred benefits, on receipt of all information needed to make the final calculation
6	Retirements	
	To produce retirement estimates for employers, once in receipt of all the necessary information.	Within 15 working days of receipt of all relevant information
	Upon receipt of members completed retirement forms finalise pension records and authorise payment of lump sum and set up of payroll record.	Within 10 working days of completing the calculation.
	Provide details of the final capital costs to be paid by the employer into the Pension Fund.	Within 10 working days of completing the calculation.
7	Deaths	
	Acknowledgement of a death	Within 5 working days of receiving the notification.

Responsibility	Agreed Deadline
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<p>Supply survivor beneficiaries with notification of their entitlements including the method of calculation.</p>	<p>Within 15 working days of all the information being received.</p>
<p>Pay any death grant due and set up dependant on pensioner payroll.</p>	<p>Within 10 working days of completing the calculation of entitlement</p>
<p>8 Support for Employers</p>	
<p>Provide support for employers through:</p> <ol style="list-style-type: none"> 1. A Dedicated Helpline 2. Written employer manual and technical information 3. Online workshops (organise and provide workshops sessions on the scheme employer role) 	<p>Dedicated helpline: Monday - Thursday; 8.30 am - 5.00 pm & Friday 8.30am to 4.30pm</p> <p>Telephone: 01962 845588 E - mail: pensions.employer@hants.gov.uk</p> <p>A dedicated Employer Team who will support with technical questions</p> <p>Employer workshops held at least twice a year</p>
<p>Provide a facility for employers to submit data via an Employer Hub portal</p>	<p>Employers being on boarded regularly from November 2021 onwards</p>

<p>Responsibility</p>	<p>Agreed Deadline</p>
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	Production and maintenance of an Internal dispute resolution procedure (IDRP) employer guide	On an ongoing basis
	Notify scheme employers and scheme members of changes to the scheme rules	As per disclosure requirements
	To process employer year-end contribution returns and provide consolidated and grouped error reports for action by employers.	3 months
9	Member Information and General Administration	
	Apply pensions increases annually to the relevant pensions in payment and deferred pensions retained in the Fund in accordance with the Pensions Increase (Review) Order issued by the Government.	Annually
	To produce annual benefit statements for all active members as at the preceding 31 March and notify electronically or by post to member's home address.	By 31 August following the year-end
	To produce annual benefit statements for all preserved members, as at the preceding 31 March, and notify electronically or by post to member's home address.	By 31 August following the year-end

Responsibility	Agreed Deadline
Produce and issue pension savings statements each year to members who have exceeded their standard annual allowance	By the 6 October for the preceding tax year. (provided receipt of all relevant information from the scheme employer)
Issue P60s to pensioners and beneficiaries	By 31 May following the year-end
Publish and keep up to date all forms required for completion by scheme members or employers	Within 30 days from any revision
Letters/E-mails from members (or member's representatives)	Answer or acknowledge within 5 working days
Changes to bank details made	By next payroll cut-off date