

Hampshire Pension Services
Employer Focus Group – 21 November 2022

Attendees:

Employer representatives: Doug Correa, Donna Shorter, Jon Gorman, Pamela Byrne, Shaun Tetley, Vicki Broomfield, Teresa Porter, Carol Clouder

Hampshire Pension Services: Amanda Baulcomb, Luke Dennison, Marian Kerr

Introduction

Amanda gave a brief background to the purpose of this focus group and highlighted areas for discussion and feedback:

- The annual return template review
- The annual return process review
- Annual return workshops
- Employer performance benchmarking
- The data validation exercise
- Future focus groups

The Annual return template review

Luke reminded everyone what the annual return template looked like and invited employers to feedback and comment.

Doug fed back that they deal with several other returns for different Funds, and it is the easiest one to deal with.

Jon asked whether we would look to move to monthly returns at some point, as turnaround for an annual return is quite tight, with the other returns they need to produce as well. Amanda confirmed that monthly returns was something Hampshire Pension Services were looking at in the future, however this was unlikely before McCloud – Amanda also covered off that currently for leavers, we are unable to accept in bulk due to concerns of data held on service (even after McCloud still concerns over pre 2014 service data) – this is something we would also need to look to address with employers. Shaun also raised monthly returns as being something Hampshire Pension Services should move to, as would be required for the dashboard. Amanda confirmed that Hampshire Pension Services were focusing their resource to meet legislative changes e.g. McCloud, Pensions dashboard, so any unforced move to monthly returns would have to fit around this, also taking on board the pressures Employers are already facing. Amanda confirmed that Pensions dashboard would only show a value from the ABS each year, and would not be updated monthly, even if the data was available.

Amanda also confirmed that a draft template for next years annual return would be sent some time in December, however we are not expecting any major changes – just basic updates (and tweaking guidance on feedback to make it clearer)

Annual return process

Luke gave an overview of the annual return process and invited feedback on this or the annual return queries template.

Doug asked that when queries are raised could historic queries be excluded. Doug has found this specifically when taking on a payroll and historic queries have not been resolved or an issue outstanding from the old payroll. Amanda clarified that we do a big piece of work when an employer changes payroll and everything appears correct at that time, and it is only once the return is seen that odd historic issues we are unaware of, come out – it is important that these issues are captured as part of the annual return which we use as our starting point to make sure all members receive the correct annual benefit statement. Any known historic queries are a responsibility for employers to resolve before the following year end return, and therefore we believe that it is right to acknowledge this as part of employer performance ratings.

Donna fed back that there were a lot of queries and not all sent back at once. Luke has said that he could look at this for Donna, although Amanda covered off that sometimes new things come to light after query responses received or new starters have been sent, which means at times we do need to send additional queries, although where possible try to send these out upfront.

Feedback given that query spreadsheet was easy to follow – no changes suggested.

Annual return workshops

Luke gave an overview of what was covered at the annual return workshops and also touched on some feedback given after the sessions.

Donna asked whether it was possible to include the different types of queries that came out.

Vicki picked up on the point that different examples might suit different organisation types and suggested perhaps some slightly different sessions for different groups of employers e.g. councils, schools, parish councils. This is something we have said we could look at.

Luke also confirmed that we were looking at a mix of face to face sessions and virtual to meet different needs.

Donna fed back that liked the training format and online worked well.

Pamela fed back that she has not attended the virtual session but the in person session she attended was superb.

Employer Benchmarking

Luke gave an overview of the employer benchmarking that is undertaken as part of the annual returns process.

Jon asked where the letters get sent to. Amanda explained that these go to the high-level contact for the organisation. Donna said that it was quite upsetting for these letters to be sent to the head without understanding why the letters had been sent in the first place. It would be useful to see more feedback on why rated red in the first place without the need to ask.

Amanda explained that it is expected that employers would understand the ratings given the timing of the submission and the number of follow up queries – the letter is supposed to be at a high level and not detailed. Amanda did acknowledge that we are looking to highlight the process of benchmarking more prominently in future annual return workshops, which we would hope would help raise further awareness.

There was no feedback on needing to change the criteria for the ratings and generally employers seemed happy with these.

Employer Data Validation

Luke gave an overview of the purpose and process of the data validation.

Some employers fed back that they found this useful. Doug commented that it was time consuming exercise.

Amanda shared that we would be looking to get a report on the Employer Hub in the future which employers can run themselves on active members between 2 dates. The general feedback was that this would be very welcome.

No other feedback on changes or suggested improvements.

Future Employer Focus Groups

Amanda gave a high-level summary on the purpose of Employer Focus Groups:

- Employer feedback to help improve member and employer communication
- Review of processes
- Review of documents for members and employers
- Opportunity for Pension Services to understand employer issues

- Help improve customer journey for member

There was a mixture of feedback on whether we should hold face to face or virtually, Vicki suggested one to be face to face and another to be virtual – so is something we will look to take forward into next year.

It was fed back that it was useful to get a bit of an update of what is going on, but generally employers are happy with the format and purpose of the group and would like these to continue.

AOB

Jon asked about whether annual hour change data would be required after McCloud. Amanda outlined that HPS had initially indicated that we would collect this, however we are currently reviewing the need and purpose of this (Amanda has since confirmed that we will not look to collect hour changes after 1 April 2022).

Doug commented that there can sometimes be a delay in the one-time code coming through (can be several minutes, which isn't long but feels it, however with Teachers Pensions it is instant). Amanda stated she was not sure the scheduler action to get codes sent out, but would look into this to see if there was anything more, we could do to improve.

Doug fed back that with Teachers Pensions, when you are inactive and are logged out, if you log back in within a 4-hr timeframe you do not need to re-enter the one time passcode again. Amanda advised she would feed this back, but unlikely to change, however Amanda did share that as per the recent Member Portal improvement to have an alert to extend the session after a period of inactivity, this is something we are looking to develop and put in place with the Hub. Teresa also agreed with these points.

Jon asked whether it would be possible when reviewing the records for a specific member, whether it can show the record start and end dates, as this would help reduce the amount of work of having to go into each record to find this out and find out the record you need to update. Amanda advised that this was the view internally that HPS see on the pensions system, so would pass this feedback on to see whether we could make this change.

