

Hampshire Pension Fund employers' newsletter

As this is a valuation year we have delayed our usual spring edition of Pensions Matters and combined it with the summer edition so we can include an update of how we are doing on the End of Year process. We hope you find it informative, as always we welcome any feedback you may have.

End of year returns 2

Leaver forms..... 2

Group AVCs..... 3

Member Self Service - Update..... 3

Bulk Starter Notification..... 3

Pensionable Pay spreadsheets 3

Customer Service Excellence 2016 4

Hampshire Pension Fund – Employer website 4

Scheme employer - outsourcings 4

Employer contacts, authorisations and change of payroll..... 5

Opt out forms..... 5

Published employer discretions policy..... 6

Auto enrolment..... 6

Reminder to employers to contact the Pensions Regulator.....6

Auto enrolment compliance6

Councillors 6

Pre retirement course 7

Other news 7

DCLG bulletins7

Hampshire Pension fund – Forms and guides updated8

Dates for your diary 8

Employer training days 20168

Annual Employer Meeting (AEM).....9

End of year returns

2016 is the triennial fund valuation. The annual end of year return data is a key part of the valuation information we need to provide to the Fund Actuary in order that they can meet the scheme statutory deadlines.

Thank you to everyone who sent their end of year in by the 30th April 2016. Last year we received 59% of returns by the deadline. This year that has improved and we received 80% of returns by the deadline.

We are currently working through all end of year returns to upload these on to our systems. Any outstanding queries need to be resolved quickly to ensure the quality of your employees annual benefit statements are not affected. It is now too late to include any outstanding starter or leaver information in the valuation data that we send to the fund actuary so your valuation results will be based on the information we currently hold and may result in higher employer contribution rates from 1 April 2017. Please can you response as quickly as possible to any queries you receive.

Leaver forms

To assist us in prioritising leaver forms, if you email a leaver form to Pensions Services, please ensure that the format of the title is as follows:

Reason for leaving, Employer name, Member name

Please use the list of reasons for leaving below:

- Leaving before retirement
- Opt out
- Death in Service
- Normal or early retirement
- Ill Health Retirement
- Redundancy/Business Efficiency
- Flexible Retirement

The form needs to be in a PDF format when emailed.

Group AVCs

We have been asked to remind employers that they should make sure the 'Pay Centre' details held with Zurich are up to date. They have recently identified that this has not been happening with all employers and access is still available to staff that have left.

If you need to add someone, please ensure you request 'Paycentre administrator access'.

Member Self Service - Update

We currently have 15,500 deferred and active members registered for Member Self Service.

Annual benefit statements will be made available online only by 31st August 2016, unless a member has written to opt out.

If you would like a report of which employees have registered to do your own internal promotion, please email pensions.systems@hants.gov.uk

Bulk Starter Notification

For those employers who are not aware, we do have the ability to receive a bulk starter spreadsheet, with details of new starters to the scheme. This removes the need to provide individual starter forms.

[The bulk starter notification](#) form can be found on the employer area of the website.

These should be sent to pensions@hants.gov.uk

Please be aware we are not able to receive a bulk spreadsheet for leavers.

Pensionable Pay spreadsheets

	A	B	C	D	J	K	L	M	Q
1	Input into yellow fields only								
2	Name								
3	NI								
4	leaving date								
5									
6	Year from	Year to	Pens pay						
7	1	#VALUE!	#VALUE!						
8	2	#VALUE!	#VALUE!						
9	3	#VALUE!	#VALUE!						
10	4	#VALUE!	#VALUE!						
11	5	#VALUE!	#VALUE!						
12									
31	Name								
32	NI			Date of leaving					
34									
35	Year from	Year to	Pensionable pay	PI date	PI	Pay with PI			
36	#VALUE!	#VALUE!		#VALUE!	0	#VALUE!			
37	#VALUE!	#VALUE!		#VALUE!	0	#VALUE!			
38	#VALUE!	#VALUE!		#VALUE!	0	#VALUE!			
39	#VALUE!	#VALUE!		#VALUE!	0	#VALUE!			
40	#VALUE!	#VALUE!		#VALUE!	0	#VALUE!			
41	Highest average	#VALUE!		Pay without PI	#VALUE!		PI date	#VALUE!	
42									
43									
44									

We have now updated the pensionable pay spreadsheets to help with calculations of the best 3 in 10 years calculations.

If you would like us to send you copies of these, please email servdev.pensions@hants.gov.uk

Customer Service Excellence 2016

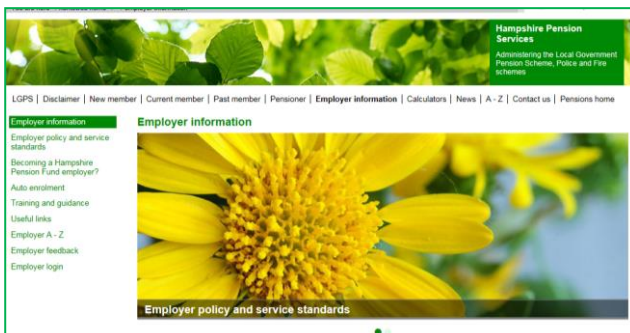
We recently had our year 2 assessment for Customer Service Excellence and are pleased to advise that we were awarded full compliance in 56 criterions and 1 compliance plus.



Hampshire Pension Fund – Employer website

We have been working hard on improving the employer area of our website. We are still working on this to improve the content, however you should already see new pages and content:

[Employer information](#)



We would love to hear what you think and would be pleased to hear of any further improvements we could make

[Employer Website Feedback](#)

Scheme employer - outsourcings

If you are currently undertaking any outsourcings which effect employees who are currently in the LGPS scheme can we please ask you to let us know by emailing servdev.pensions@hants.gov.uk

In most instances employees cannot automatically continue in the LGPS – in order to do this and protect employee's pension provision when TUPE'ing the outsourcing employer must ask for the new contractor to be admitted to the scheme. When we receive any details of possible outsourcings, we will advise on the information needed and potential costs for arranging this.

If you are a Best Value authority you may be interested in the latest government consultation about proposed changes to the scheme, in particular, whether Best Value authority outsourcings can be based on a contractor's broadly comparable scheme.

[Pension scheme regulations - government consultation](#)

Employer contacts, authorisations and change of payroll

We are currently contacting employers where we do not have an up to date contact and authorisation form. If there have been no changes, can we ask you to confirm this.

For high level contacts, please ensure that this is the most appropriate person for your organisation – this should be someone in a senior position – such as director, Headteacher as they will receive notifications of any pending consultations, invitations to the annual employer meeting and details of changes to employer contribution rates.

We can only receive information and release information to those named on the contacts and authorisation form in the areas that they are named as being able to deal with.

Please keep us up to date with any changes to ensure there are no delays in processing

Change of Payroll – Please let us know if you have or are planning on changing your payroll provider by emailing servdev.pensions@hants.gov.uk

Opt out forms

The image shows a screenshot of an 'Opt out form' for the Hampshire Pension Fund, administered by Hampshire County Council. The form is titled 'Local Government Pension Scheme Opt out form'. It includes a section for 'Personal information' with fields for 'First names', 'Surname', 'NI number', 'Pay number', and 'Name of employer'. Below this is a section titled 'Important information about opting out of the LGPS' which contains several bullet points explaining the process and consequences of opting out. At the bottom, there is a section 'What happens once you opt out' with further details.

We just wanted to send another reminder that employers should not be giving members opt-out forms and is an auto-enrolment requirement. Employers should instead direct the employee to our website where members are able to print a form. If this is not possible they should contact the Pension Fund and we will post a copy of the form to them. Employees should then complete and send you their completed form. Employers must not give this out with starter information.

Published employer discretions policy

Under the scheme regulations, all scheme employers must have a published Discretions policy.

Despite previous reminders we do not hold copies of all up to date final published policies for all of our employers. This can mean that a retirement or transfer can be held up if we need to obtain a copy.

If you do not have a discretions policy, please visit our [website](#) for more information on the discretions that you must have a policy on. Attached on the page is also a discretions template which you may find useful.



Employer name:	
Employer number:	
Policy effective from:	

Auto enrolment

Reminder to employers to contact the Pensions Regulator

Employers should contact The Pensions Regulator if they have any questions about auto enrolment, as this is out of the remit of the LGPS and Hampshire Pension Fund. The LGPS is a qualifying scheme for auto enrolment purposes and details of the scheme that you may need to provide the regulator can be found on [our website](#).

You can find out your staging date online, by visiting [The Pensions Regulator website](#)

Auto enrolment compliance

Following the ending of Contracting Out, the LGPS has been reassessed and certified as meeting the conditions as a qualifying scheme for auto enrolment.

[LGPS E&W auto-enrolment certificate](#)

Councillors

A reminder to any employer who has Councillors in the LGPS. This is now a closed scheme and new Councillors are not able to join. Also any Councillors who have completed their term of office since 1 April 2014 and have been subsequently re-elected are no longer able to remain in the scheme.

Pre retirement course

We are often asked to come and provide talks to members, however due to limited resources we are often unable to provide these. We have found most people who come along to these talks are often nearing retirement and are hoping that we can talk more about their choices on retirement. As this would be giving advice we are not able to answer their queries.

However, we have been in talks with a training provider, Affinity Connect, who are able to offer one day pre-retirement courses. Some of our larger employers already use this service but we have now organised a session for our smaller employers who may not have sufficient numbers to put on a day course for themselves. Details of the course are available on our website, for anyone that you think may be of interest:

<http://www3.hants.gov.uk/pensions/lgps/treasurers-pensions-pre-retirement-course.htm>

For further information and to book a place

Email: bookings@affinityconnect.org

Telephone: Sarah Turner on 0800 019 6076 (select extension 1 – Training)

Course dates: 24 June 2016 (Full) and 5 October 2016

Location: Winchester

Other news

DCLG bulletins

Since the last Pensions Matters the DCLG have released the following bulletins on their website

<http://www.lgpsregs.org/index.php/resources/news-updates>

Bulletin 142

- Revised contribution rates

Bulletin 143

- New member website
- ONS public sector classification
- AA & LTA factsheets
- Auto-enrolment guide

Bulletin 144

- DWP and new state pension
- Sample pension savings statements

- Update to employee guides
- HMRC lifetime allowance message

Automatic enrolment

Bulletin 145

- Consultation on amendment regulations
- Exit payment reform consultation
- Pension schemes newsletter no. 78
- Scheme reconciliation – recalculation of LGPS pensioner payment
- New state pension materials
- PLSA employer guides

Hampshire Pension fund – Forms and guides updated

[Leaver form](#)

[Retirement declaration form](#)

[Starter information – booklet and forms](#)

Dates for your diary

Employer training days 2016

If you are new to the LGPS, either as a new employer in the scheme or if you have recently taken on a role that involves LGPS administration for the first time, this is an ideal opportunity to come along to a session aimed at helping you understand some of the complexities of the employer role in the LGPS. The sessions could also be used as a refresher for existing staff.

All sessions are held in Winchester.

- 24th June 2016 - 9.30 to 3.30pm (Full)
- 16th September 2016 – 9.30 to 3.30pm

If you would like to register your interest in any of the training days, please email servdev.pensions@hants.gov.uk

Annual Employer Meeting (AEM)

Held in Winchester – 21st October 2016

We hope you find this edition of *Pensions matters* helpful. If you have any comments or queries please email servdev.pensions@hants.gov.uk and we'll be glad to help.