

Effective from 1 April 2026

Administration Strategy

Find us at:

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INTRODUCTION

THE ADMINISTRATION OF THE WEST SUSSEX LGPS

From the point of joining the LGPS to a member's retirement, and through to the payment to any beneficiaries, the Pension Fund seeks to deliver a high-quality service to all stakeholders.

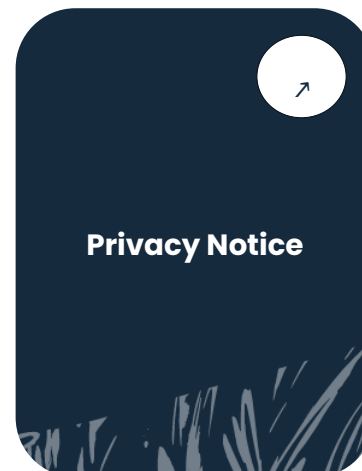
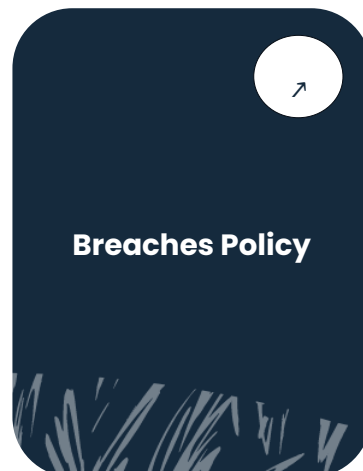
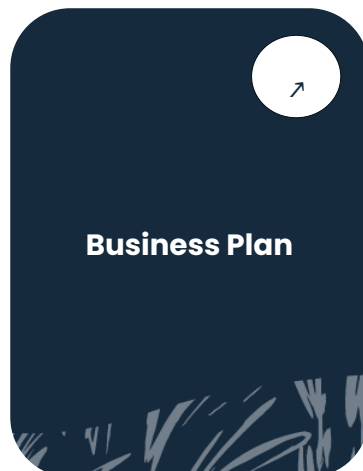
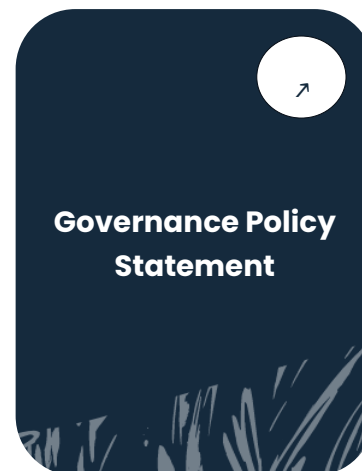
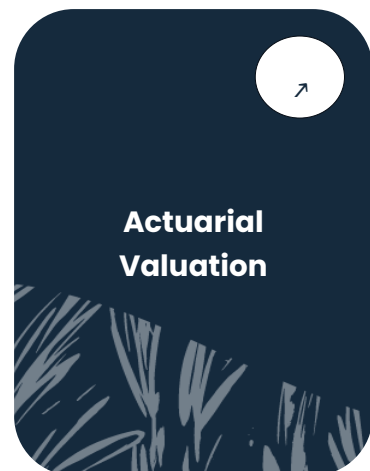
Day-to-day administration of member benefits is delivered by Hampshire Pension Services, in partnership with the Pension Fund. The diagram below illustrates who's who:



A key aspect of delivering a high-quality administration service is ensuring that members and employers have the information needed about their pension and the pensions of their employees and that the information provided is accurate and provided at the right time. This is done through working closely with our partners to ensure that the Fund's processes support timely transactions and sharing of data or information, providing clear communication and being transparent and accountable.

- This document sets out how member benefits are administered and is split into several sections:
- The administration service relevant to members and employers.
- The process for managing key casework items and the roles and responsibilities of employers, members, and the Scheme.
- Timescales for the management of other casework items and the roles and responsibilities of employers and the Scheme

Other supporting documents and policies can be linked to below:



USE OF TECHNOLOGY AND COMMUNICATION

HOW WE ENGAGE WITH A DIVERSE STAKEHOLDER GROUP

The Pension Fund aims to provide engaging, understandable information about the Scheme – which ultimately supports informed decision making.

The law details when the Pension Fund must communicate with its members and employers, the information it must provide and the timescales for providing this information. These requirements range from information provided when a member joins the Scheme, through to ongoing communications and information when an individual takes their benefits. Other communication will be discretionary but important to supporting employers and members.

The Pension Fund recognises that a variety of communication methods are required to engage effectively with different groups of stakeholders and is keen to continually improve the tools and formats used to provide members or their representatives (active, pensioner and deferred), prospective members and employers with relevant, clear, considered communication which is inclusive. The Fund also seeks to anticipate changes within the pension industry and reflect best practice in how it engages with stakeholders.

Website, Member Portal, and Employer Hub

The Pension Fund maintains a [website](#) which is accessible to all stakeholders. Additionally, it has a secure, online [Member Portal](#) that allows members to access information about their pension and update their personal information. It also has a secure, online [Employer Hub](#) for employers to view information about their employees participating in the Scheme and provide timely and accurate information to the Fund. Some key functionality of the both the Member Portal and Employer Hub is set out below:

[Member Portal](#)

- Add or amend an 'expression of wish' for payment of a death grant.
- Change address, name, marital status.
- Change of bank details (pensioners only).
- Securely view Annual Benefit Statements and payslip (active and deferred members only).
- Securely view of P60 (pensioners only).
- Request a retirement estimate.
- Complete a Membership Option Form, Retirement Declaration Form and Preserved Refund Claim Form.
- Contact the administration team securely (My Messages) and upload documents.

[Employer Hub](#)

- View the pension records for employees in the Scheme.
- Run reports on membership (including estimates).
- Complete a Notification of Joiner form and Notification of Leaver form.
- Inform the Fund of 50/50 section membership, AVC commencement and any hour changes or absences.
- Make any changes to the payroll number or job description.
- Upload completed documents (Ill-health Certificate, EIRA form, Leaver Form, Opt Out Form, Estimate Request Form, and CETV Request Form).

Pension Dashboards

In addition to the Member Portal, in the future active and deferred members can access pension information via the [Pensions Dashboard](#). The Pensions Dashboard is intended to help individuals understand their pension and support retirement planning by providing a national online tool which shows information about pensions from different providers, and the State Pension, in one place.

The table below shows the information required to support the Pension Dashboard Programme, along with timescales for the Pension Fund and employers.

	Timescale
Ensure a connection to the Pensions Dashboard is maintained, via an Integrated Service Provider (ISP).	By 31 October 2026.
Ensure that data is made available and kept up to date in accordance with Pensions Dashboard standards.	From 31 October 2026 onwards.
Respond to partial match queries or missing value data queries where value data is not provided on the dashboard.	Within 10 working days of member providing additional information.
Respond to data query required for the Fund to calculate and provide value data for the Pensions Dashboard.	Within 5 working days of receipt of the request.
Notify the Fund of a permanent National Insurance number if one was not provided with the starter information.	Within two months of member start date in the Scheme.

Other Communication

The table below signposts additional key communication activities by stakeholder group. These will be supplemented by local and industry-wide campaigns such as the [Pension Attention Campaign](#) in (October).

Audience	Annual Benefit Statement	Pension Saving Statements	P60 and Payslips	Newsletter
Active Member	August	October	N/A	November
Deferred Member	August	October	N/A	November
Pensioner Member	N/A	N/A	April	March
Employers	N/A	N/A	N/A	Quarterly

In addition to member and employer focused communication, the Pension Fund:

- Publishes meeting dates, agenda and papers for [Pension Committee](#) and [Pension Advisory Board](#) meetings online. Members of the public and the press are also able to attend the meeting for Part 1 items.
- Publishes [Policy documents and strategies online](#), and each year an [Annual Report and Statement of Account](#).
- Complies with requirements on local authorities to publish [open data](#) for re-use and in a timely way.
- Is subject to [Freedom of Information](#) and [Subject Access Request](#) legislation.

Employers must also write, publish and maintain a policy on areas of the regulations in which employers can exercise their discretion.

TRAINING

SUPPORTING MEMBERS THROUGH WEBINARS AND WORKSHOPS

We know pensions can be daunting. To support members and employers the Pension Fund offers webinars and training sessions to provide information about the Scheme.

Listed below are some key training activities for members and employers. Employers are encouraged to support the Pension Fund by advertising member webinars via their own internal communication.

Member Training

- Monthly webinars to all new starters.
- [“Taking Control of your Finances”](#) online workshop is suitable for all members to support members understand their current financial position, support with budgeting and provide guidance on possible options of how to cut costs.
- [“Planning for Retirement”](#) online workshop is targeted at members aged 50 and over to support members understand their LGPS and state pension entitlements and guide them through the decisions they need to make regarding how to claim their pension benefits.

Employer Training

- Online training on payroll responsibilities such as the employer hub, employee changes (starters, pensionable pay, paying less and additional pension contributions, leavers including retirement).
- Online training on other HR matters including discretions and disputes and organisational change.
- Employer bite size training.
- Employer roles and responsibilities

COSTS AND CHARGES

ADDITIONAL COSTS CHARGEABLE TO EMPLOYERS OR MEMBERS

Most of the costs associated with administering the Pension Fund are included within the employer contribution rate. However, in some cases, it may be necessary to make additional charges to an employer or charge a member or employer for additional services.

The certified rate within the Rates and Adjustments Certificate, which forms part of the formal Actuarial Valuation Report, is the minimum employer contribution due for the next three years. However, the Pension Fund will make additional charges to employers in some circumstances, including where members are entitled to early payment of their retirement benefits. These are set out in the [Funding Strategy Statement](#).

Where additional services (actuarial or other) are required by, or result from, the actions or inaction of an employer, the employer will be required to reimburse the Fund for the costs involved. This includes the cost of additional and disproportionate resources being deployed by the Fund because of an employer's poor performance. Where appropriate, an estimate of these costs will be provided, or written notice will be given of the reasons for the charge or re-charge.

In addition, where a regulator or regulatory body requires the Pension Fund, its administrator, or their officers to pay compensation or a fine due to an employer's default, omission, or negligence, the amount will be recharged to the employer.

Other additional costs must be paid in advance and are summarised on the next page.

	Charge
Additional estimate requested by an employer (first two in a 12-month period are free).	£100 +VAT by employer
Urgent estimate (turnaround within 5 days).	£100 +VAT by employer
Additional estimate requested by an employer and urgent (first two in a 12-month period are free, turnaround within 5 days).	£200 +VAT by employer
Additional estimate where requested by a member where within 18 months of retirement (first in a 12-month period is free).	£100 +VAT by member
Additional Cash equivalent transfer value and estimate of current pension benefits for Pension Sharing on Divorce (first in a 12-month period is free).	£150 + VAT by member
Urgent cash equivalent transfer value and estimate of current pension benefits for Pension Sharing on Divorce (within three months of request).	£150 + VAT by member
Information required in addition to one cash equivalent transfer value plus one member estimate for purpose of divorce.	£150 + VAT by member
Implementation of a Pension Sharing Order covering setting up a new deferred credit member record for ex-spouse if appropriate, dealing with the transfer out of the deferred credit benefit (if required), putting into payment the deferred benefit to the ex-spouse and payment of any inherent death benefits and administering the pension once in payment.	£650 + VAT by member
Implementation of an earmarking order.	£250 + VAT by member

BREACHES

IDENTIFICATION, REPORTING AND MANAGING BREACHES OF THE LAW

The Pension Fund has a policy and procedure for identifying, reporting and managing breaches of the law. This procedure also sets out the responsibilities of those who become aware of any breach of law relating to the management and administration of the Fund.

A breach of the law is an act or omission which is in contravention of a statutory provision or regulation or of any court order or of any policy requirement which is in place in accordance with legal and regulatory requirements. It can cover many aspects of the management and administration of the scheme, including failure:

- to do anything required under the LGPS Regulations.
- to do anything required under relevant legislation, statutory guidance or codes of practice.
- to act on evidence of a fraudulent act or omission.
- to make payments.
- to provide information or maintain records in accordance with Regulations.

All staff involved in the management or administration of the Fund are required to take a pro-active approach to the identification and reporting of all breaches that come to their attention as having occurred, or likely to occur.

The administration team will escalate any failure by an employer to provide relevant information if an employer fails to respond. Any escalations will be reviewed, and appropriate actions will be agreed with senior officers.

The Pension Fund's [Breaches Policy](#) is published on the Pension Fund website.

COMPLAINTS

COMPLAINTS ARE TREATED SERIOUSLY AND CONSIDERED THOROUGHLY

If an employee has a problem with their benefits, they should contact Hampshire Pension Services or their employer. Some queries, such as those about contribution rates should be handled by their employer.

From time-to-time individuals may not be satisfied with the service provided, with a decision made by the Pension Fund in relation to their and / or with a decision or the consideration of a complaint by an employer under their own complaint's procedure.

Concerns may be raised informally and dealt with quickly by the administration team – which is encouraged.

However, an individual has the right to ask for an issue to be formally investigated or looked at again. This may be under the [Formal Complaint Procedure](#) or the [Internal Dispute Resolution Procedure](#).

Any complaint made is treated seriously and considered thoroughly and fairly.

No charge is made at any stage for investigating a complaint.

The Pension Fund's [Complaints Policy](#) is published on the [Pension Fund website](#). This sets out a two stage complaints process and the response times. It also provides information about the Pensions Ombudsman, as a point of escalation for any complaint, and signposts to other organisations who can help.

Employers should also have their own Internal Dispute Resolution Procedure in place and nominate a complaints officer to deal with any Stage 1 disputes raised with the employer. Stage 2 disputes are looked at by the Pension Fund.

DATA, RECORD KEEPING AND ANNUAL RETURNS

TIMELY AND ACCURATE DATA IS CRITICAL TO MANAGING THE SCHEME

The LGPS is a valuable part of the pay and rewards package of employees who are entitled to join the Scheme. High quality data is critical to the Fund's success.

Employers have a critical role to ensure high quality data is held – which is achieved by employers providing the administration team with updates on changes to their employees during the year, and at the end of each financial year in the Annual Return.





The Pension Fund will also work to continually improve the data the scheme holds. This involves reviewing data, deciding how it can be improved and agreeing to improvement plans to address these items.

Data retention is also important and expectations for this are set out in the [LGPS Privacy Notice](#). The employer must keep a full pay history for the 13 years, ending 31 March, before the member leaves the Scheme.

It is important that an employer updates the administration team on changes to hours, details of long-term absence, payroll numbers etc. using the [Employer Forms](#) templates published via the [Employer Hub](#). The Pension Fund will amend member's records within 15 days of the employer notification. Where incomplete or inaccurate data is held, there are several consequences for the Fund, employers and members including:

- ▶ The Fund may pay an incorrect level of pension benefits to members or may be unable to make benefit payments at all.
- ▶ Members may receive and rely on annual benefit statements for retirement planning which contain incorrect data.
- ▶ The Fund Actuary will not have accurate information to assess an employer's liability and accounting reports may be misstated.
- ▶ The Fund may invest assets inappropriately because the nature and timing of liabilities is not fully understood.
- ▶ The Fund or employers may be in breach of statutory requirements for holding accurate and complete data. The Pensions Regulator has recourse to apply sanctions, including fining an employer up to a limit of £60,000 per day per breach.

The end of year process is a key activity to ensure records are up to date. The process is set out below.

Action	Timescale
 An employer should send the administration team data in the spreadsheet provided for each member for the year ending 31 March; and contributions paid during the year.	By 30 April.
 The Fund will check the data against information already held in the administration system and raise any queries.	By 15 June.
 An employer should respond to queries on the annual return raised.	10 working days of the query.
 The Fund will use the clean data to reconcile payments and update member records. This data will be used for the fund valuation activities, the publication of Annual Benefit Statement (ABS) for members and Pension Saving Statements (PSS) for impacted members.	The ABS will be available for members to view on their Member Portal account by 31 August each year. Where applicable, a PSS will be available for members to view on their Member Portal account by 6 October each year.

NEW JOINERS AND RE-JOINERS

ENROLLING ELIGIBLE EMPLOYEES INTO THE LGPS

During the last financial year, the administration team processed nearly 7,000 new joiner notifications.

A new employee, an employee with a new concurrent role, a re-joiner or a starter after flexible retirement should be enrolled into the LGPS in line with the process on next page.

Individuals should also be automatically entered into the Scheme if they meet auto-enrolment criteria or at your auto-enrolment staging date

Eligibility for your employees will depend on the type of employer you are, as summarised below, but if you are unsure about the eligibility of your employees, please contact us:

Scheduled employers such as the County, District and Borough Councils, Academies and the Police Authority where all employees are eligible (except where an employee is eligible to join another Statutory Pension Scheme).

Admitted bodies where eligible staff are listed in the Admission Agreement.





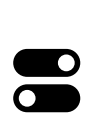


Resolution Bodies such as Town, Parish, and City Councils where eligible staff will have been designated by the employer as being eligible.

If an employee with a contract of employment for less than 3 months makes an election to join the scheme, they will be brought in from the beginning of the next available pay period following their election to join (rather than from the date of the election).

If an employee whose contract is for less than three months has their contract extended, opts in, or becomes eligible under automatic enrolment rules they must be enrolled into the LGPS, if eligible.

If an employee has concurrent employments, the employments need to be kept separate.

The process for enrolling employees into the Scheme is set out below:

	Action	Timescale
	<p>An employer must decide who is eligible to become a member of the LGPS (and the date from which membership of the LGPS starts) and:</p> <ul style="list-style-type: none"> include pension related wording in contract / appointment communications. notify the employee that they have been enrolled into the LGPS. provide Scheme details and advise the employee of their contribution rate (if the employee holds more than one post, the contribution rate should be applied to each post). 	<p>On appointment.</p>
	<p>An employer must notify the administration team of the via the Employer Hub or completing a Bulk Starter Notification.</p>	<p>10 working days following the end of the month of the enrolment.</p>
	<p>The Fund will set up a record for the new member(s) and email new joiner information including a new starter webinar.</p>	<p>20 working days from when notified of membership.</p>
	<p>The member will set up their Member Portal account. Once registered the member can read the Statutory Notification, check their details, and complete information relating to transfers and an Expression of Wish for death benefits.</p>	<p>N/A</p>
	<p>If a member has previous membership in the LGPS (England and Wales), and where relevant, the Fund will provide information to a member about their options, including joining together new and previous periods of membership (“aggregation”).</p>	<p>20 working days from when notified of membership.</p>
	<p>The member should notify the administration team of their decision in relation to aggregation (where applicable).</p>	<p>By the one-year anniversary of re-joining the LGPS.</p>
	<p>An employer must notify the Fund of a permanent National Insurance number if one was not provided with the starter information.</p>	<p>Within two months of the member’s start date.</p>

PAYMENT OF CONTRIBUTIONS

CONTRIBUTION RATES FOR EMPLOYEES AND EMPLOYERS

Each employer must set an employee's contribution rate on joining and review contribution rates periodically.

Every three years, the Pension Fund will undertake an Actuarial Valuation which will calculate the employers' assets and liabilities in the Scheme and set an employer contribution rate.

Other types of extra contributions are set out in the Employer Manual.

Where members choose to increase their pension through an [Additional Voluntary Contribution](#) arrangement, employers should contact the Fund (contributions.lgps@westsussex.gov.uk). Employers with contributing members must collect and pay over AVC contributions to Legal & General by 19th of the month following deduction.

Employee contributions are set nationally and published on the [national Scheme site](#).






Employee contribution rates must be reviewed every April based on an employee's actual annual cumulative pay and their Scheme (main section or 50/50) and should be reviewed during periods of absence. Employers may also review the appropriate band where there is a change in employment, or a material change which affects the member's pensionable pay in a financial year.

The employer should notify each employee of their contribution rate and let their employees know that they can use the [Internal Dispute Resolution Procedure](#) if they think their rate is wrong.

Where an employee holds more than one post, the contribution rate should be determined and applied to each post.

Employer contributions are set locally. The Funding Strategy Statements sets out how employer contribution rates are calculated and factors which may impact an employer contribution rate. The minimum employer contribution rate is then certified by the Actuary. Employers joining the Scheme between valuations will be notified of their minimum contribution rate as part of the admission process.

The process for calculating and paying over normal contributions to the Scheme is set out below:

Action	Timescale
	
<p>An employer must set up an employee's pension contribution for the relevant section of the Scheme based on the employee's actual annual cumulative pay and deduct the correct rate of pension contributions payable by the employee and the employer.</p> <p>All salary, wages, fees, overtime and other payments, and any benefit specified in an employee's contract must be used when calculating the contribution due for a member. Items of pay that are not pensionable, circumstances where Assumed Pensionable Pay (APP) should be used are and contributions are due during an absence are set out in the Employer Manual.</p>	<p>For the first pay period in which the employee joins the LGPS and monthly thereafter.</p>
	
<p>An employer must complete monthly remittance form containing detail of the contribution payment and send this to the Fund.</p>	<p>Prior to payment and no later than 19th of the month following deduction.</p>
	
<p>An employer must complete pay the contribution deductions and employer contribution, including any additional contributions to the Fund.</p>	<p>By 19th of the month following deduction.</p>
	
<p>Where a contribution or monthly remittance is not provided this will be recorded as a breach by the Fund. The employer will be contacted up to three times before the position is escalated to the Head of Pensions.</p>	<p>Employer contacted Working Day (WD) 5, WD 8 and WD 11) with escalation at WD 14.</p>
	
<p>The Fund will check that the rate received reconciles to the minimum employer contribution rate and is in line with payment trends.</p> <p>Once the payment has been validated the Fund will allocate all contributions received to the employer's respective income codes and provide information to the Fund Actuary.</p>	<p>10 working days of the payment.</p>

OPT OUT AND LEAVERS (NON-RETIREMENT)

REFUNDS AND 'VESTED' MEMBERSHIP

Current members may choose to opt out of the Scheme or leave their job before taking their pension.

Employers are not allowed to give employees an opt out form. Instead, if requested, they should direct a member to [Opting Out](#) on Pensions Fund's website. Details of how to administer an opt-out are set out in the [Employer Manual](#).

If an employee is dismissed due to a criminal, negligent or fraudulent act or omission, where the employer has incurred financial loss, compensation may be paid from the pension fund, and the member may forfeit pension rights. In these circumstances the employer should contact the administration team to discuss the case.

The Scheme rules have a two year "[vesting period](#)". The vesting period is the length of time that a member must be an active member of the LGPS to qualify for benefits in the Scheme (albeit that a member can transfer a pension into the LGPS and meet this criteria). As a result, when a member leaves the Scheme determines whether they receive a refund of contributions via payroll, a refund by the Scheme or a deferred benefit.

If the member has met the two year "[vesting period](#)" when they leave, they will have deferred benefits in the LGPS.

If the member has not met the vesting period, they could choose to take a refund of the pension contributions paid.

They may also be able to transfer the value of their LGPS pension to another pension arrangement after they leave.

The process for [Notification of a Leaver](#) is set out below:

Action	Timescale	
<p>If under 3 months and opts out</p>		
	<p>An employer must refund contributions through the payroll and adjust for tax and national insurance.</p>	<p>Next pay period after receiving request to opt-out.</p>
	<p>An employer must provide a copy of the opt out form to the administration team and advise that the refund has been made.</p>	<p>10 working days after the month the employee was taken out of the Scheme.</p>
<p>In all other cases including under 3-month leavers</p>		
	<p>An employer must determine reason for leaving and complete Notification of Leaver process on the Employer Hub.</p>	<p>10 working days after the month the employee left or last paid.</p>
	<p>The Fund will update the member record and provide the member with the other options available to them in accordance with the Regulations</p>	<p>30 working days.</p>
<p><i>If membership is more than 3 months but less than 2 years</i></p>		
	<p>The member must notify the administration team of their decision.</p>	<p>Five years following date of leaving, or age 75 (if earlier).</p>
	<p>The Fund will make payment of a refund of contributions to the member.</p>	<p>15 working days following receipt of election form from member.</p>
<p><i>If membership is more than 2 years</i></p>		
	<p>The Fund will update the member record and provide the member with a benefit statement showing accrued benefits at date of leaving. Accrued benefits will increase each April in line with the cost of living and an annual statement published.</p>	<p>30 working days and then by 31 August each year.</p>

ESTIMATES

WHEN AND HOW TO RECEIVE AN ESTIMATE

Estimates are helpful to provide members with an understanding of their benefits and for employers to understand any potential cost associated with their decision making.

Using the [Employer Hub](#) employers can run their own estimates. An employee can also run their own estimate using the [Member Portal](#).

If a members proposed retirement date is more than 18 months away, they should refer to their annual benefit statement which is available to view on the [Member Portal](#). A new statement will be added to the Member Portal every year.




Most members can also obtain an estimate of their benefits at any time through the Member Portal.

However, if a member is thinking of retiring within 18 months, the administration team can run the estimate on their behalf. This can be requested by email (pensions@hants.gov.uk). A member can only request one free estimate within any 12-month period.



Only employers can also run estimates for retirements where the member must give their consent, or where there could be a cost to them – e.g. redundancy or efficiency, ill health early retirement, flexible retirement or switching on the 85-year rule and / or waiving reductions for members choosing to retire before normal pension age. To avoid overstating benefits, an employer should only request ill health estimates once they are confident which tier an employee will retire under.

If an employer would prefer the Fund to run the estimate, please follow the process below. Employers may have two free estimates per pension account in any 12 months.

The process for providing member estimates is set out below:

Action	Timescale
 The member must complete the Request an Estimate form . A separate estimate must be requested for each LGPS account. This will be sent to the members employer.	As required.
 An employer must supply details required for completion of an estimate and send the full form to the administration team.	10 working days of member request.
 The Fund will provide details of the member estimated benefits.	15 working days.

The process for providing employer estimates is set out below:

Action	Timescale
 An employer must complete the Request an Estimate form . A separate estimate must be requested for each LGPS account. Anybody requesting an employer estimate must be an authorised signatory.	As required.
 The Fund will provide you with details of the member estimated benefits.	15 working days. If an estimate is needed more urgently this can be requested (and is chargeable).

LEAVER (RETIREMENT)

DIFFERENT TYPES OF RETIREMENTS

A member (who has met the two-year vesting period) can take their LGPS pension at any time from age 55 to 75.

Members can retire because of voluntary, flexible, efficiency or on the grounds of ill health. Drawing a pension will affect a member's income in later life. It is important that they make the right decisions for themselves.

The government sets the earliest age at which a member can access their pension savings under normal circumstances. This is currently age 55 - however it is rising to age 57 from 6 April 2028. This does not impact ill health early retirement.

If the timescales set out in the following pages are not met, the members pension could be delayed.






Voluntary Retirement: Benefits are paid in full if a member chooses to take them from your Normal Pension Age, but a member may choose to draw their benefits earlier with a reduction.

Flexible: Flexible retirement is a way to move gradually into retirement. It allows a member to reduce their hours or move to a less senior position and take some or all the pension benefits they have built up.









Efficiency: if an employee loses their job because of redundancy or business efficiency, have met the two-year vesting period and are age 55 or over, they must be paid their LGPS benefits immediately. The Government has announced the earliest age that a member can take your pension will increase from age 55 to 57 from 6 April 2028.

Ill health: The LGPS protects a member if they are too ill to work by paying their pension straight away. Ill health benefits can be paid at any age. A member's pension would not be reduced for early payment – and may be enhanced to make up for the early retirement. Each employer should have an appointed independent doctor. They must not have been involved in the case before, must hold the right qualifications (these are listed on the ill health certificate) and will make a recommendation on the outcome from the occupational health assessment. An employee may appeal under the Internal Dispute Resolution Procedure if they are unhappy with how their case was handled or the employer's decision.








The process for a Voluntary Retirement is set out below:

Action	Timescale
 An employer must determine the reason for retirement and notify the Fund, supplying timely and accurate information so that benefits payable from the LGPS are calculated correctly.	Within 20 working days before an employee's retirement date.
 The member should access the Member Portal where they can complete an online Retirement Declaration Form. A member should run their own estimate using the Member Portal or request this from the administration team.	20 working days before retirement date. Note: this must not be completed more than 3 months before the date of retirement.
 The Fund will notify the member of the amount of their pension.	15 working days from receipt of all information. It may take longer if information is required from the AVC provider.
 The Fund will pay the retirement lump sum to the member.	Within 10 days of retirement or date of retirement letter (if later).
 The Fund will pay pension to the member.	Next pension payment date.







The process for a Flexible Retirement is set out below:







Action	Timescale
 <p>An employer should have a policy on flexible retirement. This should set out the process to be followed and any discretions to allow or refuse a request for a flexible retirement.</p> <p>It is recommended that an estimate is requested by the employer from the administration team to support decision making. A member can run their own estimate using the Member Portal or request this from the administration team.</p>	As required.
 <p>If the employer agrees to the flexible retirement, they must notify the Fund via the 'Notification of Leaver' process.</p>	At least four weeks before retirement date.
 <p>The member should access the Member Portal where they can complete an online Retirement Declaration Form.</p>	20 working days before retirement date.
 <p>The Fund will notify the member of the amount of their pension and any lump sum.</p>	15 working days from receipt of all information (it may take longer if information is required from the AVC provider).
 <p>The Fund will pay the retirement lump sum to the member.</p>	Within 10 days of retirement or date of retirement letter (if later).
 <p>The Fund will pay pension to the member.</p>	Next pension payment date.
 <p>An employer must re-enrol the member into the Scheme.</p>	On appointment.
 <p>The Fund will provide notification the employer of strain cost (where applicable).</p>	One month following retirement.

The process for an Efficiency Early Retirement is set out below:

Action	Timescale
	As required.
<p>If an employee will lose their job because of redundancy or business efficiency, has met the two-year vesting period and is age 55 or over, their LGPS benefits must be paid immediately.</p> <p>If a member is awarded early retirement, there may be a strain cost payable by the employer. Costs vary depending on the member's age, pension account and underpin or other protections that may apply.</p> <p>It is recommended that an estimate is requested by the employer from the administration team to support decision making.</p>	
	At least four weeks before the retirement.
<p>If the retirement is to proceed the employer must notify the Fund via the 'Notification of Leaver' process.</p>	
	20 working days before retirement date.
<p>The member should access the Member Portal where they must complete an online Retirement Declaration Form.</p>	
	15 working days from receipt of all information (it may take longer if information is required from the AVC provider).
<p>The Fund will notify the member of the amount of their pension and any lump sum.</p>	
	Within 10 days of retirement or date of retirement letter (if later).
<p>The Fund will pay retirement lump sum.</p>	
	Next pension payment date.
<p>The Fund will pay retirement benefits.</p>	
	Within a month following the members retirement.
<p>The Fund will provide notification of strain cost (where applicable).</p>	

The process for an Ill Health Early Retirement (for current and former employees) is set out below:

Action	Timescale
 <p>An employer should have a policy on ill health early retirement. This should set out the process to be followed and any decision about an individual qualifying for ill health benefits.</p>	As required.
 <p>An employer must arrange Independent Qualified Medical Practitioner (IQMP) assessment and ask the doctor to complete an ill health certificate.</p>	As required.
 <p>On receipt of the ill health certificate, an employer must decide whether to authorise the retirement and complete the certificate.</p> <p>The employer must base their decision on the medical practitioner’s opinion but may make a decision that is not in line with it if you have a good reason.</p> <p>The employer must inform the member of your decision and of what they can do if the member is dissatisfied with the outcome.</p>	In line with your process.
<p><i>If the employer agrees to the ill health early retirement</i></p>	
 <p>An employer should request an ill health estimate from the administration team when the tier of ill health is determined.</p>	In line with your process.
 <p>If the retirement is to proceed the employer must notify the Fund via the ‘Notification of Leaver’ process and provide an ill health certificate.</p>	Within four weeks once a decision has been made.
 <p>The member should access the Member Portal where they must complete an online Retirement Declaration Form.</p>	20 working days before retirement date.

Action	Timescale	
	<p>The Fund will notify the member of the amount of their pension and any lump sum.</p>	<p>15 working days from receipt of all information.</p>
<p>If a member has an in-house AVC, the AVC provider must pay the money to the Fund before the pension can be calculated – this will delay the pension and lump sum.</p>	<p>It may take longer if information is required from the AVC provider.</p>	
	<p>The Fund will pay retirement lump sum.</p>	<p>Within 10 days of retirement or date of retirement letter (if later).</p>
	<p>The Fund will pay retirement benefits.</p>	<p>Next pension payment date.</p>
	<p>The Fund will provide notification of strain cost (where applicable)</p>	<p>Within a month following the members retirement.</p>
	<p>For Tier 3 ill health retirements, the Fund will send a reminder to the employer to review the employees' circumstances and complete an ill health certificate.</p>	<p>15 months after retirements.</p>
	<p>For Tier 3 ill health retirements, the employer must review the employees' circumstances and complete an ill health certificate.</p>	<p>18 months after retirements.</p>

IN SERVICE DEATH BENEFITS

ELIGIBILITY FOR DEATH IN SERVICE BENEFITS

If a member dies after drawing their LGPS pension and before reaching age 75, a death grant may be payable. This process is dealt with by the administration team.




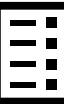


If a member dies before drawing their LGPS pension and whilst employed, it is important that the Fund and employer work together to ensure death benefits are paid in a timely way.

A death grant will be payable if the employee was an active member of the LGPS when they died, no matter when they joined the scheme.

Where a member dies in service, the member shall be deemed to have met the 2-year vesting period and a survivor's pension will be paid to eligible spouse, civil partner, eligible cohabiting partner or eligible child.

In all other cases, pensions for dependants will only be due if the employee paid into the LGPS for at least two years or if pension transferred into their LGPS account brought their membership to at least two years.

The process for the payment of death benefits is set out below, where this relates to a death in service:

Action	Timescale	
	<p>An employer should notify the administration team of a member's death and next of kin's details. Ideally this should be a phone call to the administration team.</p>	<p>As soon as possible.</p>
	<p>An employer must notify the administration team via the Notification of Leaver process. If possible, the employer should also forward a photocopy of the death certificate.</p> <p>Note: The employer must consider any reduction to the members contractual pay or hours because of ill health, the basis used to calculate the annual rate of Assumed Pensionable Pay and the treatment of any additional payments made in the year up to the employee's death. Further information is in the Employer Manual.</p>	<p>Within 5 working days of the member's death.</p>
	<p>The Fund will acknowledge the members' death in writing.</p>	<p>Within 5 working days of being notified of the death.</p>
	<p>The Fund will provide survivor beneficiaries with notification of their entitlements including the method of calculation and set up of new dependent beneficiaries.</p> <p>Note: Who the death grant is paid to is a discretion of the pension Fund, in line with its discretions policy.</p>	<p>Within 15 working days of all the information being received.</p>
	<p>The Fund will pay any death grant due.</p>	<p>Within 10 working days of the Fund's distribution decision.</p>
	<p>The Fund will pay dependants' pension.</p>	<p>Next pension payment date.</p>

SUMMARY OF KEY ADMINISTRATION TASKS

The tables below show the actions, timescales and responsibilities in relation to the range of activities required to support member and employer requests and to ensure accurate pension administration, the timely processing of benefit payments, and the objective to maintain the integrity of the pension fund's information. These are either a summary of the activities captured in the detailed pages above or in addition to.

Changes to payroll administration

Action	Timescale	Employer	Fund
Notify of a change of payroll provider.	No later than 20 working days before change.	✓	
Submit individual change of payroll provider forms for all transferring employees following change of payroll provider using "Employer change of payroll and Individual Employee change of payroll" form. These are not available on the Employer Hub (please email pensions.employer@hants.gov.uk for more information).	Within 20 working days post transfer.	✓	
Provide a mid-year return if date of change of payroll provider is not 1 April.	Within 20 working days post transfer.	✓	
Provide notification of new payroll numbers following change of payroll provider.	Within 20 working days post transfer.	✓	

Changing Scheme

Action	Timescale	Employer	Fund
Move employees into the 50/50 Scheme using the " 50/50 Section Membership " Form and inform the employee of the effect on their pension. Note: A member cannot join the 50/50 Section until they have been enrolled into the main section.	From the next pay period after receiving the employee's request.	✓	
Provide an amendment form to advise of change to/from 50/50 Section.	Within 15 working days from when the change was notified or within 10 working days following the change.	✓	
Provide an amendment form to the administration team to advise of change to/from 50/50 Section.	Within 10 working days following the change.	✓	

Additional Pension Contributions and Additional Voluntary Contributions

Action	Timescale	Employer	Fund
<p>Notification of member of Additional Pension Contributions (APC) options to buy lost pension because of absence (other than strike break) based on assumed pensionable pay using the "APC or Shared Cost Additional Pension Contributions (SCAPC)" form.</p> <p>Note: Employers can cover the whole cost of an APC if their discretions policy allows, as well as awarding extra pension under a different regulation.</p>	30 days from the date the member returns to work or longer at employers' discretion.	✓	
Notification of member of APC options to buy lost pension because of a strike break based on assumed pensionable pay.	As required	✓	
Appoint Additional Voluntary Contributions provider(s).	As required.		✓
Notify the Fund of a member's election to pay, vary or cease AVCs.	Within 15 working days from when the change was notified.	✓	
Cease any type of added contributions contract using "Amendment to Pension Record" form .	Within 15 working days from when the change was notified.	✓	

Payment of contributions

Action	Timescale	Employer	Fund
Set up an employee's pension contribution for the relevant section of the Scheme.	For the first pay period in which the employee joins the LGPS and monthly thereafter.	✓	
Complete monthly remittance form containing detail of the contribution payment and send this to the Fund.	Prior to payment and no later than 19 th of the month following deduction.	✓	
Pay the contribution deductions and employer contribution, including any additional contributions to the Fund.	By 19 th of the month following deduction.	✓	
Check that the rate received reconciles to the minimum employer contribution rate and is in line with payment trends – and allocate contributions received to the employer's respective income codes.	10 working days of the payment.		✓

End of Year

Action	Timescale	Employer	Fund
Send the administration team requested end of year data.	By 30 April.	✓	
Check the data against information already held in the administration system and raise any queries.	By 15 June.		✓
Respond to queries on the annual return raised	10 working days of the query.	✓	
Update data and publish Annual Benefit Statements.	31 August each year.		✓
Update data and publish Pension Saving Statements (PSS) for impacted members.	6 October each year.		✓

Death benefits

Deferred or pensioner member

Action	Timescale	Employer	Fund
Acknowledgement of death.	5 working days.		✓
Notification of death benefits to next of kin (for deferred and pensioner members).	15 working days of all the information being received.		✓
Set up of new dependent beneficiaries.	15 working days.		✓
Payment of death benefits for deferred or pensioner members.	Next available pension payroll date.		✓

Active member

Action	Timescale	Employer	Fund
Notify the administration team of a member's death and next of kin's details. Ideally this should be a phone call to the administration team.	ASAP	✓	
Notify the administration team via the 'Notification of Leaver' process. If possible, the employer should also forward a photocopy of the death certificate.	Within 5 working days of the member's death.	✓	
Acknowledge the members' death in writing.	Within 5 working days of being notified of the death.		✓
Provide survivor beneficiaries with notification of their entitlements including the method of calculation and set up of new dependent beneficiaries.	Within 15 working days of all the information being received.		✓
Pay any death grant due.	Within 10 working days of the Fund's distribution decision.		✓
Pay dependants' pension.	Next pension payment date.		✓

Divorce

Action	Timescale	Employer	Fund
Provide <u>"Cash Equivalent Transfer Value (CETV)"</u> estimate for divorce purposes.	15 working days.		✓
Implementation of a Pension Sharing Order following divorce and provide communication following application of the Pension Sharing Order.	15 working days.		✓

Estimate

Member initiated

Action	Timescale	Employer	Fund
Supply details required following receipt of a Request an Estimate form from a member and send the full form to the administration team.	10 working days of member request.	✓	
Provide details of the member estimated benefits.	15 working days.		✓

Employer initiated

Action	Timescale	Employer	Fund
Complete the Request an Estimate form . A separate estimate must be requested for each LGPS account.	As required.	✓	
Provide details of the member estimated benefits.	15 working days.		✓

Funding and Valuation matters

Action	Timescale	Employer	Fund
Appoint an actuary for the purposes of the triennial valuation of the Fund and to provide periodical actuarial advice when required.	As required, in line with procurement provisions.		✓
Provide accurate, timely data to the Fund actuary.	As required.		✓
Correspond with and commission any information required of the Fund Actuary on behalf of the employer.	As required.		✓
Arrange for the triennial valuation of the Pension Fund.	Every three years.		✓
Arrange for the annual accounting report to be provided to all employers requiring such a report.	Annually (for 31 March, 31 July, 31 August and 31 December).		✓

Leavers

Action	Timescale	Employer	Fund
Refund contributions through the payroll and adjust for tax and national insurance if under 3 months and opts out	Next pay period after receiving request to opt-out.	✓	
Provide a copy of the opt out for to the administration team and advise that the refund has been made, where relevant.	10 working days after the month the employee was taken out of the Scheme.	✓	
Determine reason for a member leaving and complete Notification of Leaver process on the Employer Hub .	10 working days after the month the employee left or last paid.	✓	
Update the member record and provide the member with the other options available to them in accordance with the Regulations.	30 working days		✓
Make payment of a refund of contributions to the member, where required.	15 working days following receipt of election form from member.		✓
Update the member record and provide the member with a benefit statement showing accrued benefits at date of leaving, updated annually.	30 working days and then by 31 August each year.		✓

New Starter

Action	Timescale	Employer	Fund
Decide who is eligible to become a member of the LGPS (and the date from which membership of the LGPS starts) and provide relevant notifications and communications to the employee.	On appointment.	✓	
Notify the administration team of the New Starter via the Employer Hub or completing a Bulk Starter Notification .	10 working days following the end of the month of the enrolment.	✓	
Set up a record for the new member(s) and email new joiner information including a new starter webinar.	20 working days from when notified of membership.		✓
Provide information to a member about their options if they have previous membership in the LGPS (England and Wales).	20 working days from when notified of membership.		✓
Notify the Fund of a permanent National Insurance number if one was not provided with the starter information.	Within two months of the member's start date.	✓	

Pension Dashboard Programme

Action	Timescale	Employer	Fund
Ensure a connection to the Pensions Dashboard is maintained, via an Integrated Service Provider (ISP).	By 31 October 2026.		✓
Ensure that data is made available and kept up to date in accordance with Pensions Dashboard standards.	From 31 October 2026 onwards.		✓
Respond to partial match queries or missing value data queries where value data is not provided on the dashboard	Within 10 working days of member providing additional information.		✓
Respond to data query required for the Fund to calculate and provide value data for the Pensions Dashboard.	Within 5 working days of receipt of the request.	✓	
Notify the Fund of a permanent National Insurance number if one was not provided with the starter information.	Within two months of member start date in the Scheme.	✓	

Policies & Communication

Action	Timescale	Employer	Fund
Publish and review the Pension Fund's Policies and prepare annual report and accounts.	As required.		✓
Notify the employers of any significant changes to: <ul style="list-style-type: none"> • Regulations that might affect members in their employ • Policies made by the administering authority under the Regulations. • Procedures adopted by it in accordance with this strategy. • Advice will be given to the employers in respect of matters arising from the interpretation and implementation of the Regulations. 	As required.		✓
Maintain a complaints procedure including the appointment of a specified person to act as a local referee at Stage 2 of the dispute process.	As required.		✓
Write, publish and maintain a policy on areas of the regulations in which employers can exercise their discretion.	On joining and as updated.	✓	

Retirement

General

Action	Timescale	Employer	Fund
Provision of pension estimate.	Within 15 days.		✓
Decision to waive reductions or switch on 85-year rule	As required.	✓	

Normal

Action	Timescale	Employer	Fund
Determine the reason for retirement and notify the Fund.	Within 20 working days before an employee's retirement date.	✓	
Notify the member of the amount of their pension following receipt of a members Retirement Declaration Form.	15 working days from receipt of all information (may take longer if member has an AVC).		✓
Pay the retirement lump sum to the member.	Within 10 days of retirement or date of retirement letter (if later).		✓
Pay pension to the member.	Next pension payment date.		✓

Flexible: Note an employer should have a Flexible retirement policy

Action	Timescale	Employer	Fund
If flexible retirement is agreed, notify the Fund via the 'Notification of Leaver' process.	At least four weeks before retirement date.	✓	
Notify the member of the amount of their pension and any lump sum following receipt of the Retirement Declaration Form.	15 working days from receipt of all information (may take longer if member has an AVC).		✓
Pay the retirement lump sum to the member.	Within 10 days of retirement or date of retirement letter (if later).		✓
Pay pension to the member.	Next pension payment date.		✓
Re-enrol the member into the Scheme.	On appointment.	✓	
Provide notification the employer of strain cost (where applicable).	One month following retirement.		✓

Efficiency: If an employee will lose their job because of redundancy or business efficiency, has met the two-year vesting period and is age 55 or over, their LGPS benefits must be paid immediately. A strain cost may be charged and it is therefore recommended that an estimate is requested by the employer from the administration team to support decision making.

Action	Timescale	Employer	Fund
Notify the Fund via the 'Notification of Leaver' process.	At least four weeks before the retirement.	✓	
Notify the member of the amount of their pension and any lump sum following receipt of the Retirement Declaration Form.	15 working days from receipt of all information (may take longer if member has an AVC).		✓
Pay retirement lump sum.	Within 10 days of retirement or date of retirement letter (if later).		✓
Pay retirement benefits.	Next pension payment date.		✓
Provide notification of strain cost (where applicable).	Within a month following the members retirement.		✓

Ill health: An employer should have a policy on ill health early retirement. The employer must base their decision on the medical practitioner's opinion but may make a decision that is not in line with it if you have a good reason.

Action	Timescale	Employer	Fund
Arrange Independent Qualified Medical Practitioner (IQMP) assessment. Doctor to complete an ill health certificate.	As required.	✓	
Decide whether to authorise the retirement and complete the certificate and inform the member (including what they can do if the member is dissatisfied with the outcome).	In line with your process.	✓	
Request an ill health estimate from the administration team when the tier of ill health is determined.	In line with your process.	✓	
Notify the Fund via the 'Notification of Leaver' process and provide an ill health certificate.	At least four weeks before the retirement.	✓	
Notify the member of the amount of their pension and any lump sum following receipt of a Retirement Declaration Form.	15 working days from receipt of all information (may take longer if member has an AVC).		✓
Pay retirement lump sum.	Within 10 days of retirement or date of retirement letter (if later).		✓
Pay retirement benefits.	Next pension payment date.		✓

Action	Timescale	Employer	Fund
Provide notification of strain cost (where applicable)	Within a month following the members retirement.		✓
For Tier 3 ill health retirements send a reminder to the employer to review the employees' circumstances and complete an ill health certificate.	15 months after retirements.		✓
For Tier 3 ill health retirements review the employees' circumstances and complete an ill health certificate.	18 months after retirements.	✓	

Staff transfer

Action	Timescale	Employer	Fund
Notify of outsourcing arrangements which impact on employees eligible to the LGPS and provide relevant information and undertaking for costs.	No later than 20 working days before change.	✓	
Complete admission agreement required.	Prior to the date of transfer.	✓	✓
Provide individual TUPE A and/or TUPE B forms for transferring staff.	Within 10 working days following the end of the month in which the transfer took place.	✓	

Other Member Events

Action	Timescale	Employer	Fund
Provide changes to personal details using "Change of Personal Details" form.	Within 15 working days from when the change was notified.	✓	
Correct hours or weeks using "Change of Hours and Notify Details of Absence" form.	As required.	✓	
Provide changes to employment details (e.g. location, job title) using "Change of Payroll No / Job Description" form.	Within 15 working days from when the change was notified.	✓	
Notification of unpaid absence.	Within 15 working days from when the change was notified.	✓	
Transfer in requests (including interfund and Club Transfers) and provide communication to member confirming.	Within 15 working days from when the change was notified.		✓
Transfer out (including interfund and Club Transfers) and provide communication to member confirming	Within 15 working days from when the change was notified.		✓
Apply Pension Increase to relevant pensions in payment and deferred pensions retained in the Fund in accordance with the Pensions Increase Review Order issued by Government.	Annually for April pension payment		✓

Other activities

Action	Timescale	Employer	Fund
Provide key contacts and authorised signatories.	On joining and as updated.	✓	
Appoint a person to consider applications from members regarding decisions, acts or omissions and to decide on those applications.	As reviewed in line with the Discretions Policy (every 2 years) or as updated.		✓
<p>Advise the Fund on events including:</p> <ul style="list-style-type: none"> • A decision which will restrict the employer's active membership in the Fund in future, or lead to a significant reduction in LGPS pensionable pay. • Any restructuring or other event which could materially affect the employer's membership, including a decision to cease business. • A change in the employer's legal status or constitution which may jeopardise its participation in the Fund. • If the employer has been judged to have been involved in wrongful trading. • If any senior personnel, e.g. directors, owners or senior officers have been convicted for an offence involving dishonesty, particularly where related to the employer's business. • Where the employer has, or expects to be, in breach of its banking covenant. • Details of any improvement notice (or equivalent) served by the appropriate regulator, e.g. Education Funding and Skills Agency, Office for Students, Charity Commission, Regulator for Social Housing etc, or S114 notice for local authorities Employers should provide this information in advance of the event occurring (where possible) and as soon as practicable thereafter. 	In advance of the event occurring or as soon as possible after.	✓	

APPENDIX | PAYROLL REQUIREMENTS

GUIDANCE FOR PAYROLL PROVIDERS

The administration strategy sets out the requirements for an employer under the LGPS scheme regulations. Employers must also comply with HMRC and automatic enrolment rules. Any contracted payroll provider must also be able to provide any information that the scheme employer is required to provide.

An employers duties include:

- Enrolling employees in the LGPS and deduct contributions
- Informing Hampshire Pensions Services of:
 - New starters
 - Changes of details or employment for existing employees who are scheme members
 - Leavers
- Dealing with employees who opt out
- Maintaining accurate records
- Paying correct employee and employer contributions into pension fund
- Updating pension bands every April
- Providing end of year, annual returns, information by deadlines – which includes, but is not limited to
 - Membership data – including Casual staff
 - Contribution details and pay data
 - Any member AVC information
 - Changes in membership through the year

Changing Payroll Provider

If you are thinking of changing Payroll provider:

- Ensure the provider has expertise in LGPS regulations and Pension administration as part of any tender.
- Clarify exact responsibilities, KPIs and Payroll staff staying up to date on LGPS legislation, Pension Fund procedures and mandatory deadlines as part of any contract.
- Ensure data is transferred and held securely with compliance safeguards and handover provisions in the event of contract termination or provider insolvency.

Be aware that even though delegation of Payroll may be outsourced, responsibility to ensure obligations to the Pension Fund and The Pensions Regulator rests with the employer who can be sanctioned and/or fined for non-compliance.

The LGA guide for HR and Payroll in the LGPS can be found on their website in the [Guides and sample documents](#) section

SUMMARY

THE ADMINISTRATION STRATEGY OF THE WEST SUSSEX LGPS IS BUILT ON A COMMITMENT TO DELIVERING A HIGH-QUALITY, TRANSPARENT, EFFICIENT SERVICE TO ALL STAKEHOLDERS.

Through the partnership with Hampshire Pension Services, and by working closely with employers and members, the Fund aims to ensure that pension benefits and services are administered accurately and in a timely manner. Ongoing collaboration, clear communication and accountability will remain central to maintaining and improving the services provided.