

Firefighter's Annual Benefits Statements 2016 workshop

Vicky Jenks
Senior Pensions Officer

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Project Team

- The project team involved the pensions team including, Systems, Communications and Administrators. The Fire Authority, HR and Finance and Payroll.
- Set out roles and responsibilities
- Fire Authorities responsibility for making sure correct pay data is received by pensions, payroll provide this on behalf of the Fire Authority
- Timescales – key dates agreed for the provision of payroll data for Year End, which would be incorporated into the Valuation and ABS

Project Plan

Project Name - Fire Benefit Statements 2016

Project Sponsor - Debbie Sharp

Project Lead - Rebecca Purfit

Systems Lead - Cheryl Morrell

Payroll Lead - Abbie Fitch

Fire Authority Lead - Lisa Vickers

Technical Lead - Vicky Jenks

- Action required
- Action Completed
- Action Overdue

Actions	Lead/Owner	Date	07-Jan-16	21-Jan-16	04-Feb-16	18-Feb-16	03-Mar-16	17-Mar-16	31-Mar-16	14-Apr-16	28-Apr-16	12-May-16	26-May-16	09-Jun-16	23-Jun-16	07-Jul-16	21-Jul-16	04-Aug-16	18-Aug-16
Data cleanse and match	CM/VJ/AF																		
Definition of pay for each Scheme	VJ/DS																		
Year end specification and template agreed - update to be provided at each meeting	AF/CM/VJ																		
Specification of ABS template to come from LGA	VJ/VP				draft received	actual expected													
Data uploaded to Altair - iconnect go live	CM																		
Full year end data received	CM/AF																		
ABS report available from Heywoods - expected in July release. Pensions Team to provide feedback on testing	CM/RP/VJ															*	*		
ABS sample provide to FA for signed off	LV/DS																*	*	
ABS's provided to Fire Authority to issue	CM/VJ																		
*These dates cannot be confirmed until Heywoods confirm the exact ABS release date.																			

iConnect

- Moved to iConnect in February 2016
- Reduced queries for year end as match up had been done before March posting.
- iConnect posted 90% of information.
- The other 10% which would need to be posted separately:
 - Part time hours for Retained – service credit
 - Full Time Equivalent Pay for A records.
 - APB contributions for period 1 July to 30 June
- A pensionable pay specification was drawn up by Pensions to enable payroll to gather the correct information for each scheme.
- Spreadsheet templates for additional information required not posted through iConnect

Testing Working Party



- Testing on ABS
- Testing on valuation
- Tested ABS results
- Picked up errors, most were fixed although some were still outstanding which meant manual intervention
- Heywood did a site visit and sat through testing – this helped show how as an administrator we hold data.
- High-lighted data for modified records held for payment of contributions not quite in line with Heywood spec
- Also linking of multiple employments

Issues picked up through testing

A number of errors were identified on calculation:

- Rolling up of pay for CARE benefits- tapered members
- Retirement date for modified 60 instead of 55
- 1992 scheme net lump sum total
- Formatting of headings including section headings and service lines.
- Protection status run - moving modified to incorrect protection status
- Making sure pay posted correctly with members who have A-1 records
- Linking/unlinking of records to get right protection status
- service indicator on service history posted as R instead of PT
- Some issues with Indicators for modified members as R instead of M
- Retained joining in the new scheme with no Final Salary service still need an R indicator on basic details
- Missing pay data- CPD for previous years
- Notes and formatting

Using the Heywood's template

- We used the EDP Heywood template statements not the Word version
 - Notes written to match the word document meant we had to do some alterations to match them up
- The format of the new statements was not consistent to the existing Heywood's template.
- Further work was required to make the statement headers consistent, include all service lines

Being Part of the Comms Group

- Being part of the communications group allowed us to feed into the content of the Annual Benefit Statement Notes.
- With the complexities of the schemes we felt it important to issue comprehensive notes that covered the majority of benefit options
- Suggested sending the notes to plain English to gain their Crystal Mark – so that they were not full of pension jargon!

Plain English Campaign

Fighting for crystal-clear communication since 1979



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Running the Test Data

- A copy of the test data was sent to the Fire Authority for checking.
- The data was also checked internally by the pensions team.
- Through this process an error was picked up- the rolling up of CARE pay for tapered members.
- 1992 Net Lump sum value
- 1992 taper scheme members value of benefits if the achieve 30 years service
- Modified Members retirement date



Feedback from the project

- Queries from firefighters' were minimal – this is due to the amount of work put in to check the data before it was sent out
- The Testing Working Party helped with making sure the data on records was held in the correct fields and all relevant data had been gathered
- Comprehensive Notes to go with statements has cut down on queries
- Definitions of pay and iConnect helped with getting pay data uploaded within the agreed timescales
- Highlighted the need for additional data not transferred through iConnect which we had over-looked - FS pay for CARE members

What could have been done better?

- Layout of statements not consistent – new version did not hold address field in correct place
- Different sets of notes for each member type
- Make sure we have the specification for all data required from payroll



Over to you

Discuss where you had issues and what the causes were:

- Payroll data?
- System?
- Time?

How you got round these

- Manual intervention?
- Down tools- increase man power ?
- Create your own fixes?