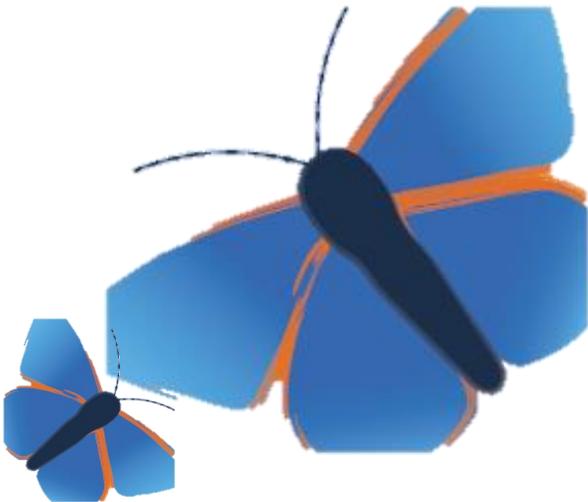


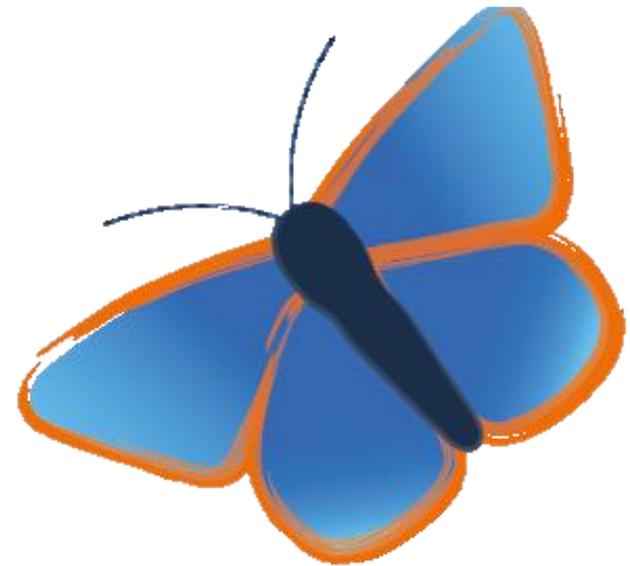
Dorset County Pension Fund - PLOG

Employers Meeting 29 February 2024



TODAY

- New McCloud Processes for Employers
- Co-habiting Partners and Death Grants
- AVC Reminder
- Local Pension Board – Employer Vacancy
- McCloud Update from Fund



New McCloud Processes for Employers

- **The requirement to add hour change history** has been added to the leaver form and the estimate request form
- **Over 65 Process**
 - Affects active / in scope members reaching age 65 only
 - Going forward, new regular process, final pay and service history data will be required
 - You will receive requests for members who have previously reached age 65 before new regular process in place
 - Historic cases may be problematic (payroll changes etc)



Work Item Processing: Web McCloud Age 65 Pay Request

UPMFolder: Mrs Test Memberd, 119435: 121230, (Status: Active), [🔗](#)

Last Modified: 28/02/2024, 12:45:09

ACTIONS

★ [McCloud Age 65 Pay Request](#)

McCloud Age 65 Pay Request

Please provide a leaver form for the member

★ McCloud Age 65 Pay Request

The member named below has an underpin protection as part of the McCloud Remedy. As the McCloud underpin finishes at age 65 we will need the member's Final Pay information on the date they reach age 65. Please calculate the Final Pay for this member as if they had left the scheme with the last working day being the day before their birthday.

Member Name:

Test Memberd

Date of Birth:

01/02/1959

National Insurance Number:

LJ997805A

Employee Payroll Number:

175503

Date Reached Age 65:

01/02/2024

Final Pay (Full Time Equivalent Pay 2008 definition)

Final pay as at 01/02/2024 for the last 365 days worked: is mandatory.

Please enter the amount of the member's full time equivalent final pay for the year (365 days) as at the date the member turned age 65.

- If the member was not in the scheme for the whole year prior to the date of leaving, please reciprocate their pay to 365 days by taking the Final Pay dividing it by the number of days worked and then multiplying by 365.
- If the member was in the scheme for the whole year prior to the date of leaving, but you are completing the form for only your portion of the final year (for a payroll transfer for example), please do not reciprocate the final pay to a full year's equivalent. The DCPF will add your figure to the figure for the remainder of the year from the other provider.

Please use decimal places but do not use the £ sign. For example 27000.00

Best of three years Final Pay (£):

Best of the last three years - previous Final Pay details if applicable

Cohabiting Partners and Death Grants

- The Fund has ultimate discretion of who receives a DG
- Where members are not married, this can be more complex
- The completion of an Expression of Wish form is really important, for all members, but especially members who live with their partners but are not married/in a civil partnership
- Can employers help?
- Stress importance of this and writing a Will, protection to family and loved ones
- We are looking to see what information we can pass to you
- We can help with communications



- Contributions to be paid over monthly by 19th of following month
- Please send schedule at the same time, delay causes issues to the member and to the Prudential
- Please send only one schedule per month
- Ensure contact details with the Pru are kept up to date
– consider a generic email?



Local Pension Board – Employer vacancy

- We have a vacancy for an Employer Representative on the Local Pension Board for the Dorset County Pension Board
- The position is voluntary, employers usually support time off for attendance and training
- If you are interested, please email;
 - karen.gibson@dorsetcouncil.gov.uk, and
 - lgpsemployers@dorsetcouncil.gov.uk



McCloud Update from Fund

- The good news – we have completed all data cleansing required for McCloud. This has taken months of work, and includes nearly 60,000 items of manually updated data, a massive achievement!

But....

- Our software provider has not provided all the developments needed to process BAU or the huge amount of rectification work required
- Technically we are now in breach of the regulations
- Members will not be impacted as such, although some will as any arrears of pension, for example, will be further delayed
- Underpin still not impacting many members
- All work completed between April 2014 and March 2022 must be reviewed and revisited
- Plus, before the main rectification work, we also have to re-visit benefits calculated since 1 October
- The Fund is doing everything it can to mitigate issues arising from this

Pension Officer Liaison Group Meeting 29 February 2024

End of Year Returns 2024

**Dorset County
Pension Fund**

administered by Dorset Council



Timescales and Financial Penalties

Timescales

- Returns **must** be with the DCPF by 30 April at the latest
- Annual Benefit Illustrations must be sent out by 31 August 2024

Financial Penalties

- End of Year Returns received from 1 May 2024
- Leavers who left before 1 January 2024
- Starters who joined before 1 January 2024

Employer support and help

- End of Year Training Sessions
 - Thursday 14 March 13:30—15:00
 - Tuesday 26 March 10:00—11:30
- Web page containing <https://dcpfemployers.org/end-of-year-returns/>
 - Template spreadsheet
 - Specification document for the spreadsheet
 - Example spreadsheet including guidance on each field
- Email or phone the Employer Relations and Communication Team

The spreadsheet

If multiple employer numbers - a spreadsheet is needed for each payroll location – different from monthly returns

The spreadsheet assumes you will have been sending in forms throughout the year, for example

- Hour changes
- Address changes
- Leavers
- Starters

Only collecting the information needed to post the contributions and pay details. If submitting a monthly return this should be an easy process

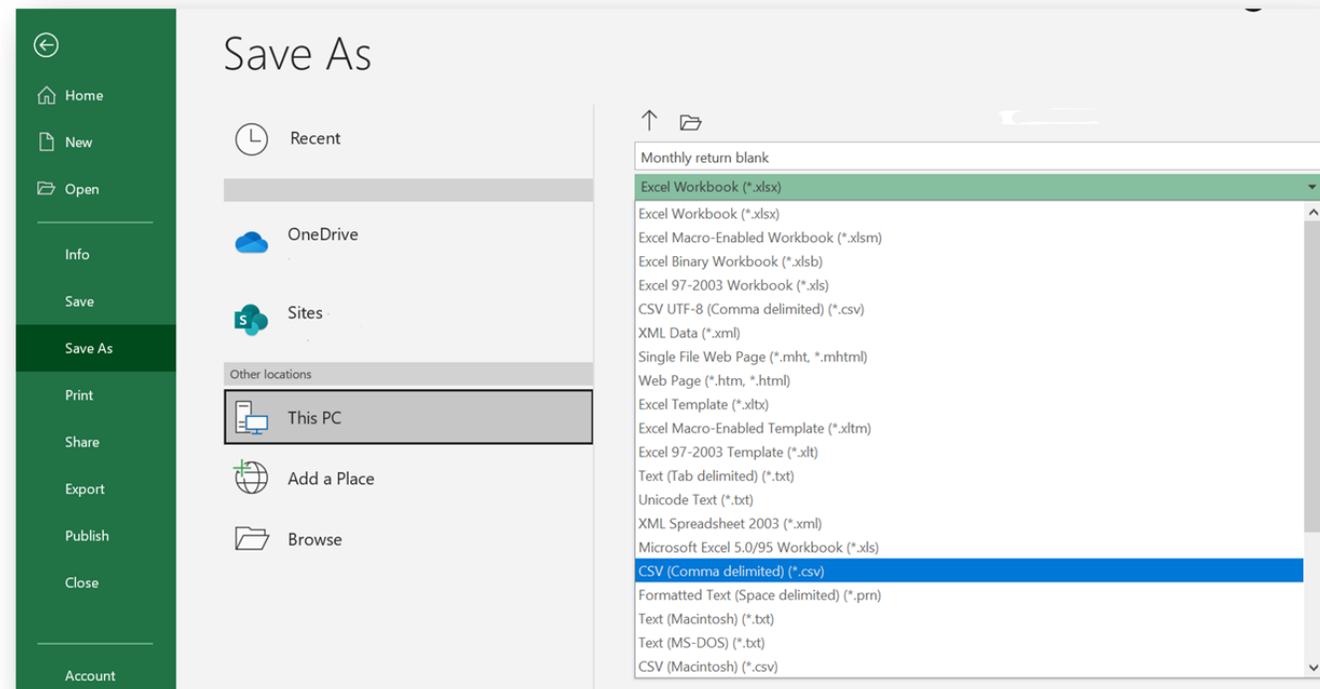
If Dorset Council manage your payroll this will be done for you.

Convert your spreadsheet to CSV

IMPORTANT

When you have completed your spreadsheet, you must copy and paste your data into a new spreadsheet.

After you have put it in a new spreadsheet, please convert to CSV (comma delimited).



Upload to the employer portal

You will need to upload the CSV document to the employer portal.

Annual Returns can be found under Start a Process. You then need to choose the employer code you are submitting for.

The screenshot shows the 'Work Item Processing: Start A Process' interface. On the left, under 'ACTIONS', there are two options: 'Do you want to start process?' and 'Proceed to Choose what to start the process against'. The main area is titled 'Select the Process you wish to start' with 'Doc Type: Client count: 1'. A 'Filter...' input field is present. Under the 'WEB' category, 'Employee forms HUB' is selected, and 'Annual Returns' is highlighted with a blue box. Other options include 'Hub', 'Create a new user', and 'Employer General Query'.

The screenshot shows the 'Work Item Processing: Start A Process' interface. Under 'ACTIONS', there are two options: 'Enter the search criteria' and 'Pick another process'. The main area is titled 'Choose what to start the process against' with the instruction 'Please search for the employer you wish to start the process against'. A search input field contains '09999'. Below the search bar, the results are displayed as 'EMPLOYERS (1 OF 1)' with 'Training Employer, 09999'. A button labeled 'Training Employer, 09999' is visible at the bottom right.

Confirm Contributions Reconcile

Dorset County Pension Fund
administered by Dorset Council

Search keywords... X

EMP09999Test Tr...

Work Item Processing: LG Annual Returns
UPMPaylocation: Training Employer , 09999, [link]

Last Modified: 18/01/2024, 12:28:38

ACTIONS

- ★ [End of Year Declaration](#)

Load Data

★ **End of Year Declaration**

Before uploading the End of Year Return, you should check that:-

- * The Total Amount of Contributions (Employees and Employers) reconcile against those paid to Dorset County Pension Fund throughout the year.
- * The part time hours recorded on the return have been adjusted correctly for members with reduced weeks per year (term time workers) contracts.
- * Any employees in the scheme who have not worked in the year but still are employed under their contract are included.

Does the total amount of contributions recorded on the return balance against the total amount of contributions paid to Dorset County Pension Fund throughout the year? *

Yes

No

Please note, before we process the return we will check the contributions paid over balance with that recorded on the spreadsheet. If we find a discrepancy we will not be able to proceed until a valid reason is provided.

Please provide the reason for the discrepancy between the total amount of contributions on the return and the total amount of contributions paid to Dorset County Pension Fund. *

Proceed to Upload

After submitting

After you have submitted your End of Year spreadsheet the systems team will pick it up and load it.

All queries will be sent to your Group Work Feed on the employer portal.

You will receive an email to inform you that a work item has arrived in your group tray.

Queries on the Portal

The queries will need to be reassigned to your username in order to action them.

Ensure you have selected the group tray.

The screenshot displays the user interface of the Dorset County Pension Fund portal. At the top, there is a search bar with the placeholder text "Search keywords...". Below the search bar, the page title "Workfeed: My Work" is visible. On the left side, there is a sidebar with "OPTIONS" and "ACTIONS" sections. The "OPTIONS" section includes a "Filter..." input field, a "My Work" checkbox (unchecked), an "EMP09999" checkbox (checked), a "Select User" dropdown menu, an "Order by Due Date descenc" dropdown menu, and a "Filter By" dropdown menu. The "ACTIONS" section includes a "Reassign" button. The main content area shows a list of 10 items, each representing a query. Each item includes a user icon, a title, a description, and a "Due date" and "Start date". The "Due date" for all items is 11/03/2024, and the "Start date" is 26/02/2024. The "Leaver Form Request" item has a "Due date" of 08/03/2024 and a "Start date" of 23/02/2024. Each item also has a "New Item" label and a checkbox.

Item Title	Due date	Start date
EOY Query - Additional Contributions - Query with Employer - EMP09999 New Item	11/03/2024	26/02/2024
EOY Query - Hours Mismatch - Query with Employer - EMP09999 New Item	11/03/2024	26/02/2024
EOY Query - Main Scheme Election - Query with Employer - EMP09999 New Item	11/03/2024	26/02/2024
EOY Query - 50/50 Election - Query with Employer - EMP09999 New Item	11/03/2024	26/02/2024
EOY Query - High PR - Query with Employer - EMP09999 New Item	11/03/2024	26/02/2024
Leaver Form Request - Complete Leaver Form - EMP09999 New Item	08/03/2024	23/02/2024

Frequently Asked Questions

I submit a monthly return, do I need to complete an EOY?

Yes, you will still need to complete the EOY.

Do I report leavers on the EOY even if I've completed a leaver form?

Yes, you need to include everyone who was active in the year (apart from under 3 month opt outs refunded by payroll). This is to ensure that your contributions balance. This also means we will capture leavers who may have got missed during the year.

Dorset Council do my payroll? Will I need to do this?

If Dorset Council manage your payroll on 31 March 2024, they will complete the EOY on your behalf.

I've only got one / two members of staff do I need to complete this?

Yes, all employers will need to complete the EOY regardless of size.

End of Year process 2024

Any questions?

