

EMPLOYER ENGAGEMENT

FORUM 2025

www.wypf.org.uk

FREE ONLINE EVENTS

[CLICK HERE TO BOOK](#)



PENSIONS DASHBOARD PROGRAMME –
WHAT YOU NEED TO KNOW

PRIORITISING YOUR LEAVERS

WYPF DIGITAL UPDATE

GUEST SPEAKER – MY MONEY MATTERS

Prioritising Your Leavers

Understanding your responsibilities & steps to success!

Agenda

- Pensions administration Strategy
- Employer Responsibilities
- Leavers
 - Leavers Overview
 - Prioritise your leavers
 - Tactics/top tips
- Resources
 - How to guides **(NEW!!)**
- Here to Help!
 - How to Contact US & your PFR



West Yorkshire Pension Fund



Lincolnshire
Pension Fund



London Borough
of Hounslow



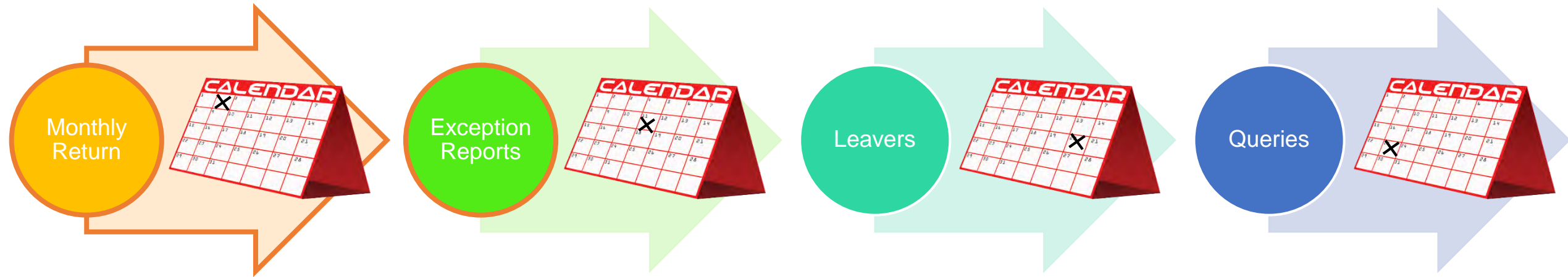
www.wyopf.org.uk

A person's hand, wearing a blue denim sleeve, points to a document on a wooden table. The document features various charts, including a donut chart and a bar chart. Other documents with similar charts are scattered on the table. The background is slightly blurred, showing other people and a tablet device.

Pensions administration strategy

- The latest version of our Pension Administration Strategy is now live on our website [here](#).
- The Strategy is an important document that sets out the **duties and responsibilities** of
 - **us** as the Administrator and
 - **you** as an Employer in the Pension Fund(s).
- The Statement also sets out possible **penalties** that may be incurred should your responsibilities not be adhered to (see Appendix B, page 14)

Responsibilities



- Statutory requirement - **Valuation Year**
- deadlines for submitting forms
- Need to allocate time and resources to manage
- More manageable if actioned each month – bite size chunks

Pension Dashboard



Pension dashboard deadline Oct 2025



Increased visibility/scrutiny



Engagement from members



Responsibility to display accurate data



Records need to be incorrect status



Leaver's Overview

Total Leavers Outstanding

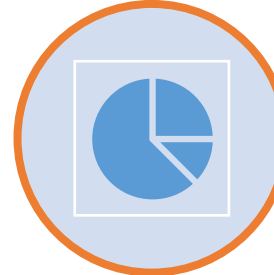
Row Labels	Count of FOLDERREF
LB Barnet LGPS	255
LB Hounslow LGPS	122
LGPS	1547
Lincolnshire LGPS	596
Grand Total	2520



THANK YOU!
WE APPRECIATE YOUR
HARD WORK



NUMBERS HAVE
DROPPED & GOOD
POSITION ACROSS
LGPS FUNDS.

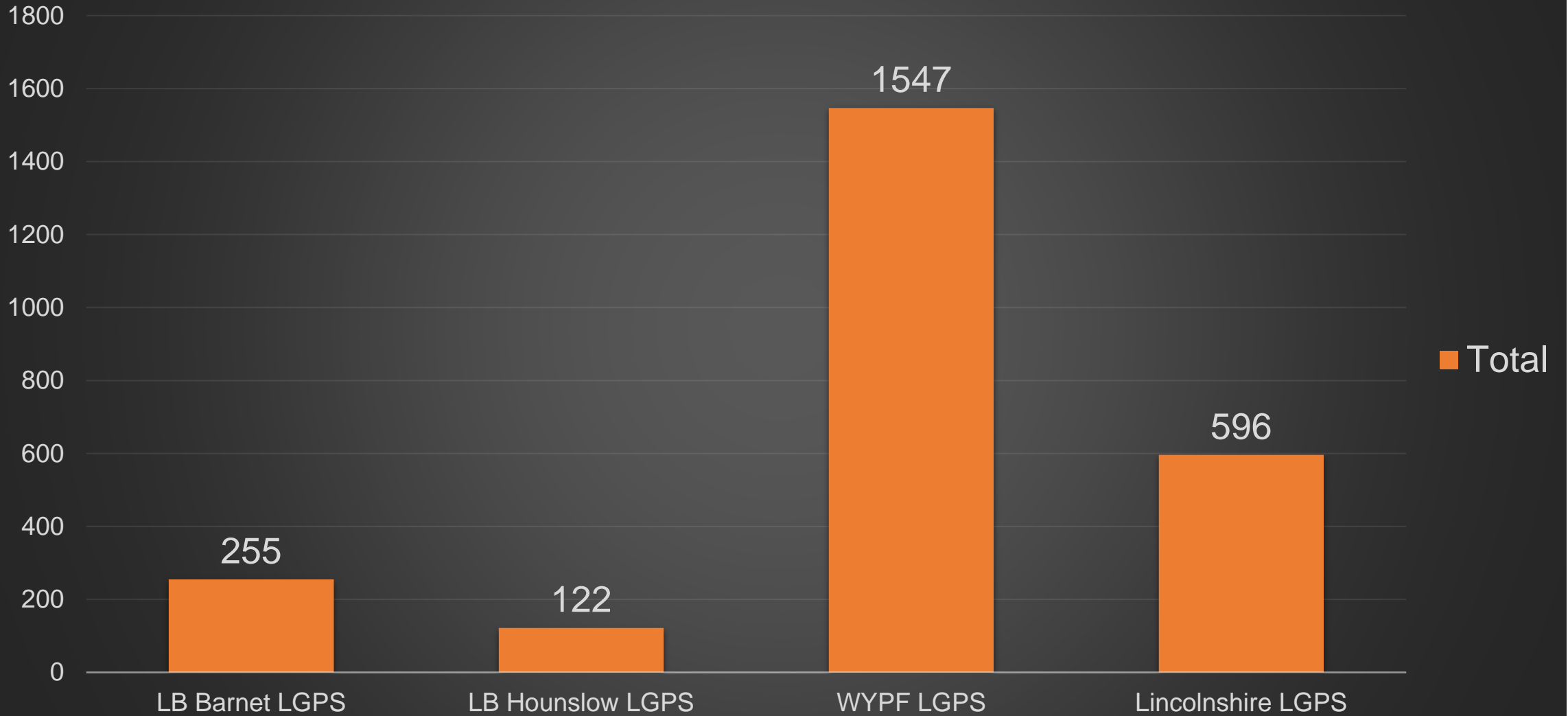


2024 ACCOUNTS FOR
50% OR HIGHER OF
TOTAL OUTSTANDING
LEAVERS

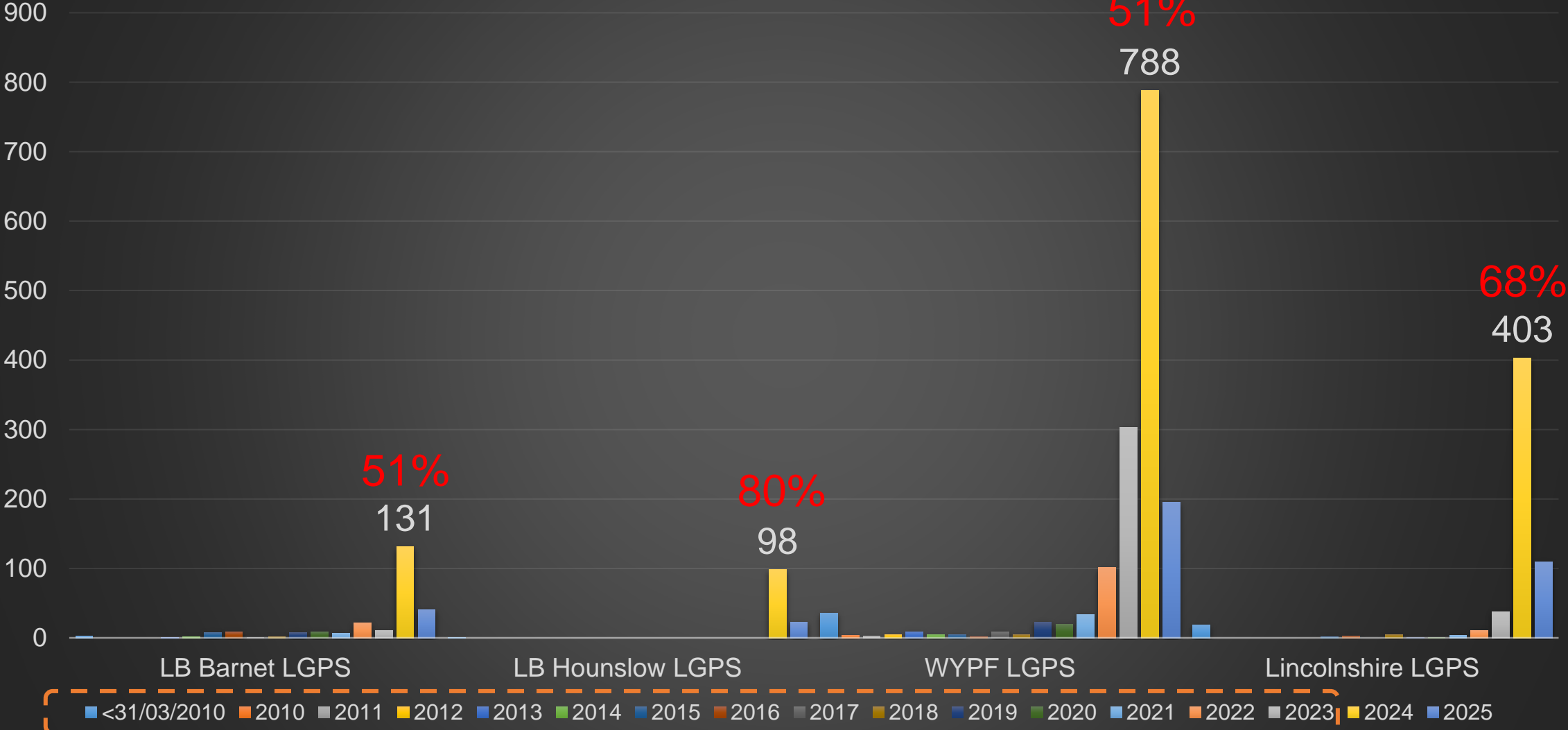


30% PRE 2024 LEAVERS
OUTSTANDING GOING
BACK 10 + YEARS

Client Total Outstanding Leavers

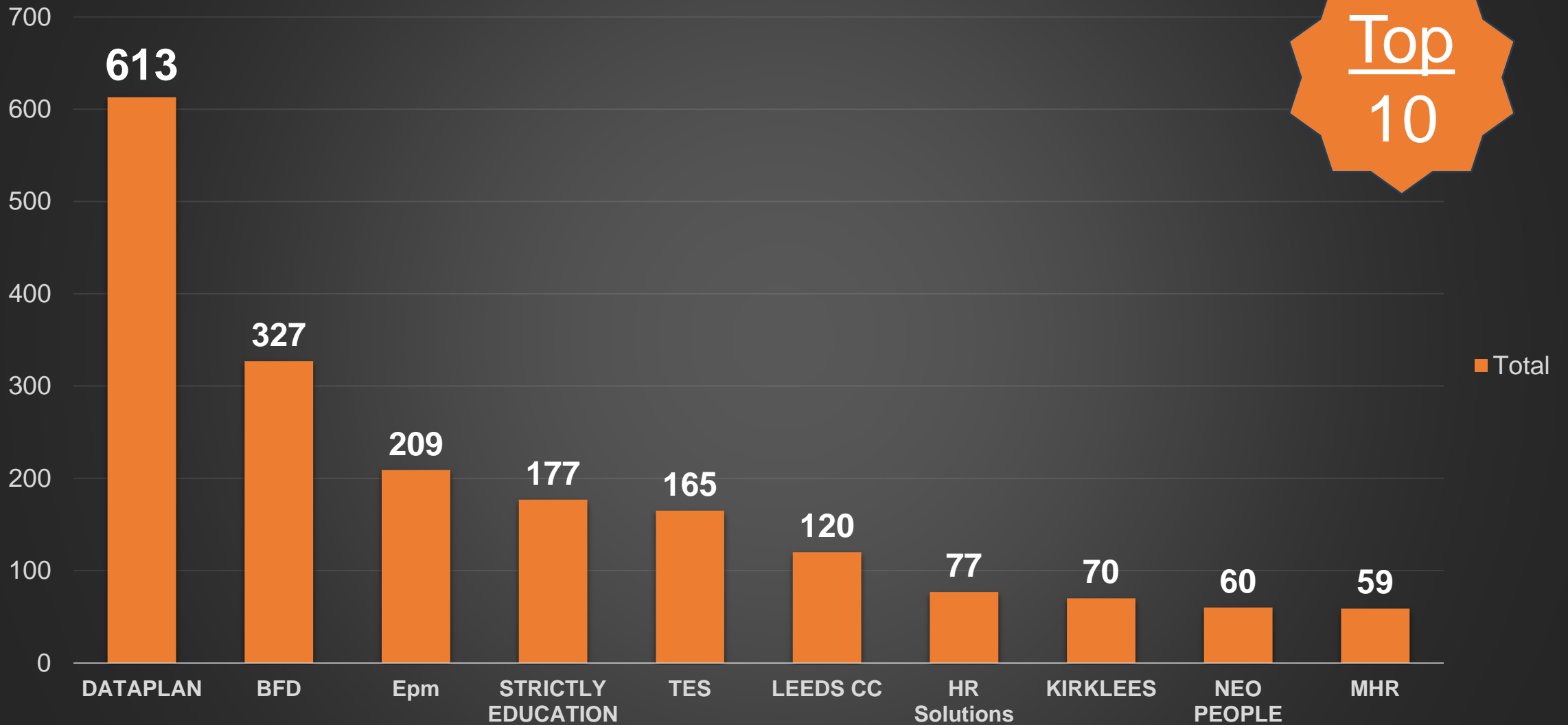


Client Total Leaver's Per Year

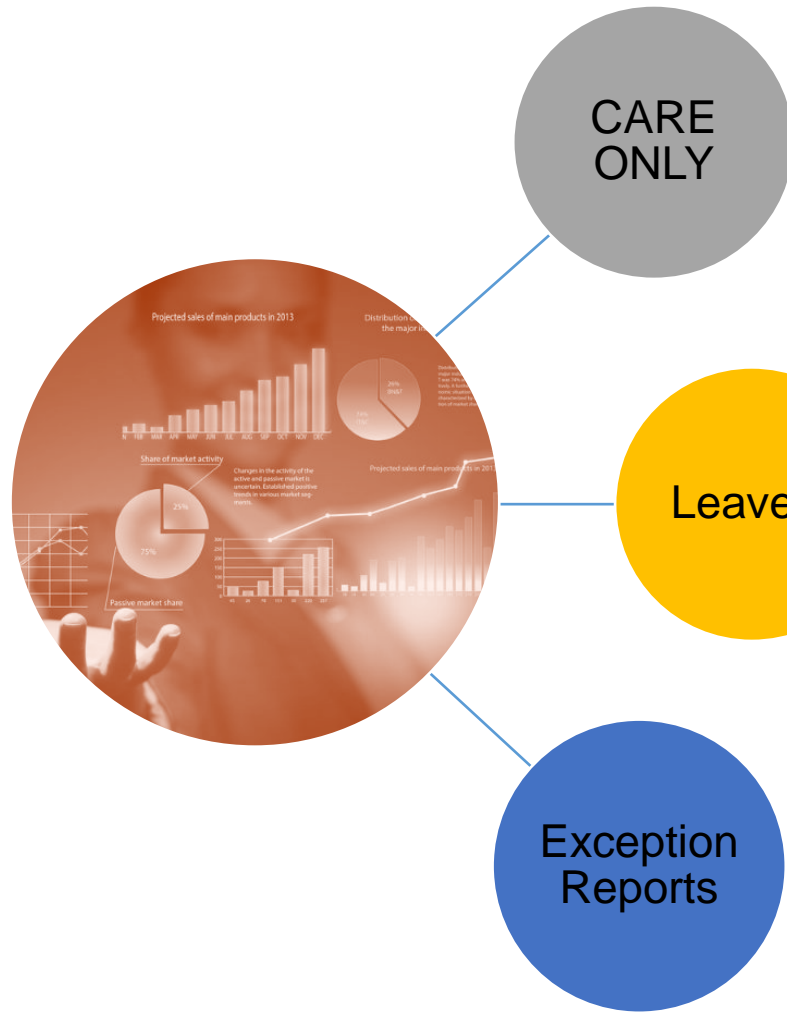


Payroll Provider: Outstanding Leavers

Top
10



Prioritising Your Leaver's



- We've identified records that hold 'Care Only' membership Post 1 Apr 2014 joiner
- Leaver notification report now shows Date Joined
- Quick Win - can target simple straight forward cases

- Action as soon as you're able to, stay on top of leavers
- More manageable bite size chunks, action month to month
- Allocate time and resources to action
 - Current Leavers
 - Historical leavers

- Produced each time successfully submit a monthly return.
- Provides you a list of leavers that require a leaver or retirement notification to be submitted.
- Monitor performance

New Simplified Leaver form



Removed elements to avoid confusion



Removed request for Cumulative Pensionable Pay (CPP) on Leaver Form



Reduce Queries



Avoid Delays



Improve Member experience



West Yorkshire Pension Fund

Lincolnshire
Pension Fund



London Borough
of Hounslow

BARNET
LONDON BOROUGH

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Prioritising Your Leaver's

- ✓ **GREEN CARE** only - easy and straight forward cases to complete
- ✓ **RED** = oldest leavers
- ✓ **Amber** – current leavers
- ✓ Contact your PFR for assistance/guidance to tackle tricky cases

22
Leavers

32
Leavers

DATE JOIN	FSH LEAVINGDATE	SCHEMENAM	EMPLOYER	EMPRE	DATECLOS	PFR
09-12-2013	31/08/2014 00:00:00	Client	Employer	Employer ref		Richard Quinn
30-09-2003	31/03/2015 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-09-2011	31/03/2015 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-09-2013	31/03/2015 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-09-2013	31/03/2015 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-09-2014	31/03/2016 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-09-2014	14/10/2016 00:00:00	Client	Employer	Employer ref		Richard Quinn
23-04-2018	31/03/2019 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-09-2010	31/03/2019 00:00:00	Client	Employer	Employer ref		Richard Quinn
06-03-2015	31/08/2019 00:00:00	Client	Employer	Employer ref		Richard Quinn
04-09-2017	17/12/2019 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-09-2015	31/03/2020 00:00:00	Client	Employer	Employer ref		Richard Quinn
18-09-2018	31/03/2020 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-06-2013	31/10/2020 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-09-2018	31/03/2022 00:00:00	Client	Employer	Employer ref		Richard Quinn
03-09-2018	31/03/2022 00:00:00	Client	Employer	Employer ref		Richard Quinn
13-06-2019	31/03/2022 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-10-2020	31/03/2022 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-10-2020	31/03/2022 00:00:00	Client	Employer	Employer ref		Richard Quinn
09-12-2014	17/05/2022 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-09-2021	30/11/2022 00:00:00	Client	Employer	Employer ref		Richard Quinn
12-03-2007	01/03/2023 00:00:00	Client	Employer	Employer ref		Richard Quinn
30-09-2019	16/02/2024 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-05-2024	31/05/2024 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-05-2024	31/05/2024 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-06-2013	11/06/2024 00:00:00	Client	Employer	Employer ref		Richard Quinn
09-09-2019	24/08/2024 05:15:23	Client	Employer	Employer ref		Richard Quinn
01-09-2021	24/08/2024 05:15:23	Client	Employer	Employer ref		Richard Quinn
10-01-2022	24/08/2024 05:15:23	Client	Employer	Employer ref		Richard Quinn
01-07-2015	26/09/2024 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-12-2024	31/12/2024 00:00:00	Client	Employer	Employer ref		Richard Quinn
01-08-2010	05/01/2025 00:00:00	Client	Employer	Employer ref		Richard Quinn

3rd Party Payroll Provider

- As an employer you may have delegated or outsourced your duties to a payroll provider.
- Ultimate responsibility still lies with the “you” as the employer to ensure all necessary information is submitted to create, maintain and process member benefits.
 - data,
 - leaver/retirement notifications
 - Final pay calculation
- Changing Payroll provider, ensure you obtain all data extracts to be able to provide information
 - HR
 - Payroll
- Strategic contact – is the registered point of contact we would contact if we are experiencing any difficulties or require further clarification
 - Point of escalation

Key points to remember

- ✓ Submit an online leaver form / retirement notification as soon reasonably possibly
- ✓ Make sure that the information you supply on the leaver form is **100% accurate** as this is what we use to calculate and pay members benefits
- ✓ If you need further guidance in calculating pay, there is a link on the form to our fact sheet
- ✓ Be prepared for us to come back for pay information from you if we discover that the member has in fact met the vesting period and is entitled to a deferred benefits
- ✓ If you are still unsure just ask me



How to Guides



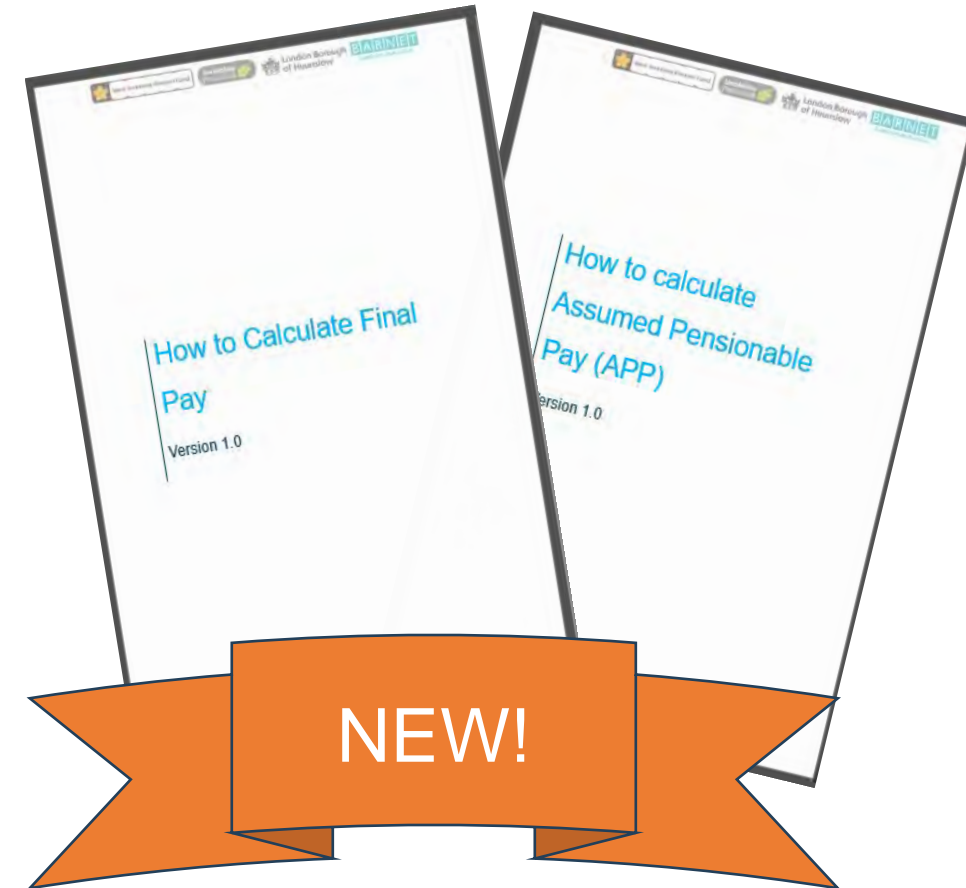
Final Pay & APP



Comprehensive Guides



Scenario based practical examples



Dealing with leavers – best practice

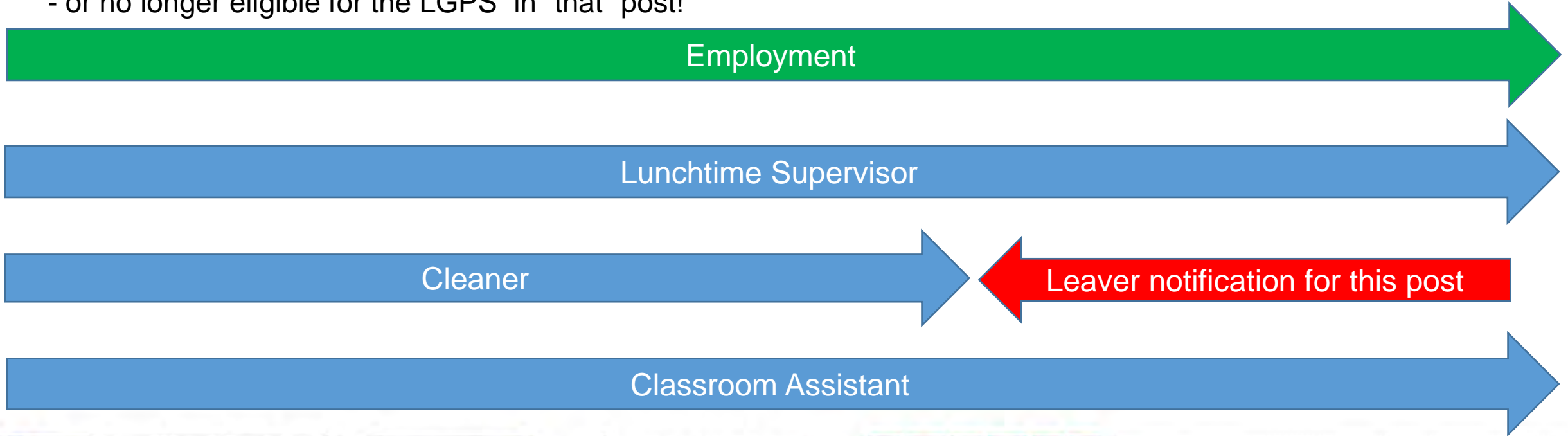
- You / your payroll provider will tell us on your monthly data file that someone has left by inputting a date of leaving
- You should complete an online leaver notification / retirement notification via the employer portal
 - **<55 Leaver notification**
 - **>55 Retirement notification**
- Your exception report shows the leavers identified in that month

Outstanding Leavers

When referring to Leavers, we are making reference to “ending active membership of “The Pension Scheme” rather than terminating actual employment with you as an employer.

They have either....

- left employment,
- opted out,
- reached age 75
- or no longer eligible for the LGPS in “that” post!



Leaver Form Checklist

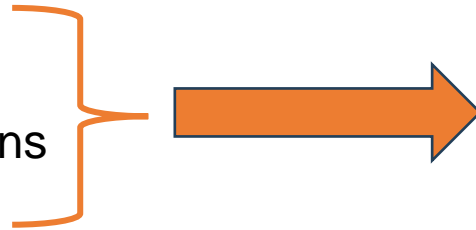


Ensure Actioned against correct member record/folder reference – Leaver's exception report will provide confirmation



Review additional data views – ensure info held is accurate before completing the leaver form

- Service
- Monthly postings
- Earnings and Contributions
- AVC View



Complete a Record Maintenance Form



Final pay figure required – for Pre-1 April 2014 Joiner

- If start date after 01/04/2014 enter 0.00 in final pay questions



Correct date of leaving



Correct Reason for leaving – ****impacts benefit eligibility****



Best Practice

[Back To Search](#)

[Membership Details](#)

[Personal Details](#)

[Additional Data](#)

[View Documents](#)

[Actions](#)

Please click on the additional data you wish to view:-

[AVC Payments Received](#)

[AVC view](#)

[CARE](#)

[Court Order Details](#)

[Deductions](#)

[Earnings and Contributions](#)

[Ex Spouse Details](#)

[Member Contribution Rate](#)

[Monthly Postings](#)

[Pension History \(Deferred or In Payment\)](#)

[Service](#)

[Starting Salary](#)

[Transfer In Summary](#)

You have access to Additional data views to cross check the information being submitted:

- **AVC View** – confirms if AVC arrangement
- **Earnings and Contributions** – can be used to cross check final pay figures
- **Monthly postings** – information from monthly return file is recorded –
 - check CPP totals,
 - missing CPP/APP etc
 - annual rates of pay
- **Service** - where a member's hours are recorded

****This will ensure accurate information is submitted & reduce queries****

You are currently logged in as Mr WYPF PFRS

[Update Account Details](#) [Home](#) [Help](#) [Accessibility](#) [FAQs](#) [Contact](#) [Logout](#)

Search

Membership

Change Password

Worktray

View Location Details

Work Finder

Group Trays

Enter Membership Search Criteria

Please do not use the back or forward buttons on your browser if available please use the 'cancel' option.

Folder Ref

Surname

Forenames

NINo

Date of Birth

 (dd/mm/yyyy)

Search Criteria:-

- ****Folder ref**** – unique pension reference on the WYPF admin system (Quoted on email subject header copy & paste)
- Surname
- Forename
- ****NINO**** – National Insurance number
- ****Date of birth****

****Unique identifiers will return more accurate search results****

- Search
- Membership
- Change Password
- Worktray
- View Location Details
- Work Finder
- Group Trays

Membership Details

Please do not use the back or forward buttons on your browser. Instead please use any provided 'back' option available please use the 'cancel' option.

Mr Web Enabled Testing Active T97654321

[Back To Search](#)



- Membership Details
- Personal Details
- Additional Data
- View Documents
- Actions

Membership Details

Date Contracted Out 01/04/1992 **Date Joined Current Employer** 01/04/1992
Expected Retirement Date 06/03/2031 **Membership Reference** T97654321

Location Details

Employer WYPF Test Employer **Company Name** West Yorkshire Pension Fund (WYPF)

Scheme Details

Date Joined Scheme 01/04/1992 **Scheme Name** LGPS

Reference	Description	Value
MCCLLOUDREMEDYCASE	McCloud Remedy Case	Y

- Search
- Change Password
- Worktray
- View Location Details
- Work Finder
- Group Trays

Actions / Calculations

Please do not use the back or forward buttons on your browser. Instead please use the 'cancel' option available please use the 'cancel' option.

Mr Web Enabled Testing Active T97654321

[Back To Search](#)

[Membership Details](#) [Personal Details](#) [Additional Data](#) [View Documents](#) [Actions](#)

Add / Update Details

- Additional Pay
- Change of Address
- Death of an active member
- Estimate Request
- Leaver Notification
- Record Maintenance
- Retirement Notification



Leaver form:
Leavers under 55

Retirement notification:
Leavers over 55
Ill Health Retirements

Online employer support

- **Employer training** continues to be delivered online, via Microsoft teams
- **Preparing for year end-** aimed at preparing the employer for fast approaching year end
- Slides/videos of previous series/topics can be found
>>> [Training & Events \(WYPF\)](#)





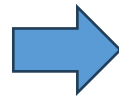
Pension Matters

Make sure you are signed up to receive instant updates around:

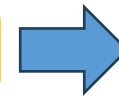
- ✓ Regulatory updates
- ✓ Invites to training and other events
- ✓ Best practice guidance
- ✓ System downtime

Simple: -

1. Click the link
2. Enter your email
3. Click Follow



[Pension Matters \(wordpress.com\)](https://www.pensionmatters.wordpress.com)



Follow Blog via Email

Enter your email address to follow this blog and receive notifications of new posts by email.

Follow

Join 1,627 other subscribers

Training Resources

- Check out WYPF's website & resources
- [Employer Zone](#)
 - Administration guides
 - Factsheets
 - Employer training and events

Click The Tiles

- LGA Employer Guides

- HR guide
- Payroll guide
- Auto enrolment
- Discretions



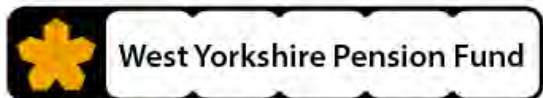
- LGA bite-size training (**click below**)



A tile with a background image of interlocking gears with the words 'REGULATIONS', 'RULES', and 'ADMINISTRATION' on them. Below the image is a blue box with the text 'Administration guide' and a list of topics: 'New members', 'Active members', 'Leavers and Retirements', and 'Death of a member'.

A tile with a background image of a person working at a desk with a laptop. Below the image is a blue box with the text 'Forms, guides and factsheets' and a list of items: 'Forms', 'Guides', and 'Factsheets'.

A large tile with a background image of a group of people in a meeting. Below the image is a blue box with the text 'Training and events'.



www.wypf.org.uk

SUPPORT IS AVAILABLE NOW

Member's helpline 01274 434999

pensions@wypf.org.uk

Employer Helpline 01274 434900

Employer Relations wypf.pfr@wypf.org.uk

Communications comms@wypf.org.uk

If you're unsure talk to your PFR

[Your employer relations team](#)



Who is your PFR

- Find the information using the employer portal
- View Location Details
- Pay location
- Membership details screen

Update Account Details

Search

Change Password

Worktray

View Location Details

Paylocation

Work Finder

Group Trays



PFR Group - wypf.pfr@wypf.org.uk 01274 434 900

Fund	PFR	Email	Phone
West Yorkshire	Sheryl Clapham	Sheryl.Clapham@wypf.org.uk	01274 432541
Lincolnshire	Kaele Pilcher	Kaele.Pilcher@wypf.org.uk	01274 432739
Hounslow & West Yorkshire	Finola Middleton	Finola.Middleton@wypf.org.uk	01274 432726
Barnet	Richard Quinn	Richard.Quinn@wypf.org.uk	01274 433646
Admitted Bodies	Ahmed Surtee	Ahmed.Surtee@wypf.org.uk	01274 433517
West Yorkshire	Mark Morris	Mark.Morris@wypf.org.uk	01274 437016
Fire Authorities	David Parrington	David.Parrington@wypf.org.uk	01274 433840



Membership Details	Additional Data	View Documents	Actions
Pay Location Details			
Pay Location Name	WYPF Test Employer	Pay Location Ref	480
Date Commenced	01/04/1974	Date Closed	01/04/1974
Category	LGPS Companies		
Reference	Description	Value	
ERWEB	Employer Web Enabled	Y	
ERWEBGROUP	Employer Web Group Tray	ZEMP003	
GROUPID	Group PayLocationID	480	
EMPTYTYPE	Employer Type	SCHEME	
CIPFATYPE	CIPFA Employer Type	NOT_APPLIC	
EDUSECTOR	Education Sector	N	
FINANCE	Finance Business Partner	BUTTERFIELAN	
PFR	Pension Fund Rep	PFR TEST	
AE_STAGINGDATEREVISIED	Auto Enrolment Staging Date (revised)	01/04/2013	
TEST_PAYLOC	TEST Pay Location	Y	

Actions for you...

- Contact your PFR for **prioritised list of leavers**
- Submit Leaver or Retirement Notifications promptly
- Ensure accurate information submitted in first instance
- Deal with queries promptly
- Contact your PFR if need assistance
- Review authorised contacts/users – correct access/enough resources allocated
- Review exception reports
- Attend/request training





London Borough
of Hounslow



EMPLOYER WEBCASTS

The end

Thank you for joining us