Appendix - Action Plan

Action	Responsibility	Deadline
1 Request details of hours changes and service breaks, in respect of the period 1st April 2014 - 31st March 2022 Initial Request covering 1st April 2014 - 31st March 2020 Second Request covering 1st April 2020 - 31st March 2021 Final Request covering 1st April 2021 - 31st March 2022	Pensions Team Manager (Employers, iConnect and McCloud)	31st March 2021 30th June 2021 30th June 2022
2 Add the Altair Member Reference and Employer Reference to the received data from Employers when ALL data is received from an employer: Initially match on NI Numbers; Then match on Payroll Reference; Remaining records will need to be updated manually.	Pensions Team Manager (Employers, iConnect and McCloud)	31st March 2023
3 Load data into Altair Insights Reporting Tool for assessment Amend any data following assessment	Assistant Team Manager (Continued Improvements)	31st March 2023
4 Load data into Altair using Interface Tool Errors will need to be assessed manually Records containing concurrent data will need to be removed and assessed manually. Await national guidance regarding how to treat these.	Assistant Team Manager (Continued Improvements)	31st March 2023
5 Report on records to check for missing data Liaise with employers to establish how to obtain missing data. Await national guidance regarding how to deal with missing data.	Assistant Team Manager (Continued Improvements)	31st March 2023
6 Agree appropriate comms for members ahead of implementation date	Pensions Project Manager	1st September 2023
7 Assess current pensioners, including dependants that are in scope for this exercise to establish who is affected. Running bulk processes through altair to establish where underpin applies	Pensions Team Manager (Employers, iConnect and McCloud)	1st October 2023
8 Establish Business as Usual process for members approaching retirements or are aged 64.5 or over Assess whether any changes will be required when running benefit calculations and whether any changes will be made to comms	Pensions Project Manager	1st October 2023
9 Assess other categories of members to establish who is affected by ruling, including deferreds, trivial commutation cases. Running bulk processes through altair to establush where underpin applies	Pensions Team Manager (Employers, iConnect and McCloud)	1st October 2023

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