

SURREY COUNTY COUNCIL – LGPS ANNUAL BENEFIT SUMMARY 2020

DEFERRED STATEMENTS

- 32,255 deferred statements were produced and published to Member Self-Serve on 22 July 2020
- Communications were sent to members via a variety of channels between 10 – 14 August 2020. Communication was phased across all funds to manage the volume of subsequent demand back into the help desk
 - Emails were sent to those members with an email address that were registered with MSS inviting them to view their statement
 - Emails were sent to those members with an email address that were not registered with MSS inviting them to register with MSS to view their statement
 - Where an email was returned as unsent, a letter was subsequently sent to
 - Letters were sent to those members (including overseas members) where there was no email address on their record inviting them to register with MSS
 - Paper statements were sent to those members opted out of digital communications
- The table below details the number of statements that errored and therefore not produced including a breakdown of error categories.

| Total no of statements produced | Total nos errored | Error breakdown | | | | |
|---------------------------------|-------------------|-----------------|-----------------|--------------|-------|---------------|
| | | Gone away | Error on record | Not eligible | Other | Total errored |
| 32,255 | 4,589 | 4,285 | 257 | 26 | 21 | 4,589 |

- **Gone away:** 4,285 statements were suppressed because the member’s record is marked as “gone away”. 4,143 of these records were included in the address tracing exercise conducted by ITM (Nov 2019 to April 2020) and could not be traced. It is assumed, that the remaining 142 records would have been updated as such after the exercise was completed.
- **Error on record:** 257 statements were not run and the following error messages on the report categorised them as
 - 186 records had “check basic details view - no benefit calc allowed”
 - 5 records had “check ID/guarantee set”
 - 7 records had “date pension due to commence missing”
 - 3 records had “module list data missing”
 - 11 records had “no consistency check”
 - 45 records had “PI may require re calculation”

Action: The records will be investigated and corrected.

ACTIVE STATEMENTS

- 33,293 active statements were produced and published via MSS within statutory deadlines of 31 August.

| Total no of statements produced | Nos of EOY not returned | No of records with missing 19.20 pay |
|---------------------------------|-------------------------|--------------------------------------|
| 33,293 | 2 (4 records) | 42 |

- To manage demand coming back to the help desk and to mitigate risks of producing large number of statements remotely, statements were run on groups of employers across all funds from 24 July to 28 August.
- All end of year returns were received from employers within the Fund.
- After several chasing with employers and their payroll providers, there were still 42 records where 19.20 pay was missing from the end of year return. The default option of 18.19 pay was entered in the 42 records and a statement was produced for each record.
- The same communication channels used for deferred members were used for active members with the addition of specific communications to those members who had 18.19 pay used in their statement
- All employers were also informed that their members' statements were available to view.
- The table below breaks down the employers and the associated number of records that have missing 19.20 pay.

| Employer | No of records with missing 19.20 pay |
|-------------------------------------|---|
| 00045 - Surrey County Council | 2 |
| 00382 - Brookwood Park Limited | 1 |
| 00512 - Three Rivers Academy | 1 |
| 00517 - The Beacon School | 14 |
| 0051Q - St Lawrence Primary Sch | 1 |
| 00522 - Hinchley Wood School | 7 |
| 00525 - Cobham Free School | 2 |
| 00528 - Wishmore Cross Academy | 1 |
| 0052J - Lightwater Village Schl | 1 |
| 0052P - Eastwick Schools | 1 |
| 005M3 - GLF Schools | 2 |
| 005MD - The Howard Pship Trust | 1 |
| 00603 - Woking Borough Council | 3 |
| 00744 - Freedom Leisure (Woking) | 1 |
| 00816 - Ability Housing Association | 1 |
| 00826 - Busy Bees | 1 |
| 00919 - St Paul's Catholic College | 1 |
| 00976 - U.C.A.-Univ.Creative Arts | 1 |
| Total | 42 |

Action: The records will need to be updated as a priority. If the Funds wish to follow up with the employers directly, individual record details can be shared with the Fun.