End of Year 2018	Comments	Owner	Due date Status	December 3	January	February	March	April	May	June	July	August	September	October	November	December
Prepare/Review templates	EOY return, recording sheet, query templates	JS	15/01/2018 In Progress													
· ·																
Get in touch with employers by phone to confirm who our contacts are for	or Chase outstanding - contact forms	Employer team	19/01/2018													
the annual return																
Pension fund Forum - regulator visit	Communicate preparation for eoy process.	SAF/SC	17/01/2018 In Progress													
Annual returns emails to be drafted	Included FAQ information, reminder about	JS	16/01/2018													
	AVC's. Employers required to sign to confirm															
	return balances & has all starter & leaver															
Determine to be a control of the con	information		16/01/2010													
Returns to be sent between Mid January 2018	Option of data extract given? As at 31/12/2017	Employer team	16/01/2018													
Contact all employers who have had previous issues to check receipt	Telephone call	Employer team	28/02/2018													
support needed		- 1	20/02/2040													
Identify unresolved queries - send to employer to include in return	Outstanding x queries to be resolved	Employer	28/02/2018													
Week before the April deadline send a reminder to High level contacts	CC to any 3rd party payroll providers	Employer team	31/03/2018													
that the data is required by 19 April		ama mlassau	21/05/2010													
Reconcile returns received and deal with any reconciliation queries -		employer	31/05/2018													
using tolerances agreed 10 days turnaround		team/investment														
Non balanced returns to be sent back (employer deadline 5 days) Identify no compliance - record breaches	E doug fine worning	Employer JS/JF	31/05/2018 01/05/2018													
May – upload returns based on 80% match rate	5 days fine warning	RS	22/06/2018						100							
	Invoice fine	JS/JF	08/05/2018													
Follow up no compliance	1															
Errors to be recorded between reconcile conts and Pens rem queries	All information on record, 2 task, to pick up if unresolved queries.	Employer Team	15/06/2018													
May - June Queries sent - deadline 1 months	Focus on Schools first - due to holidays	Employer Team	20/06/2019													
July - End of year Query resolutions	Mopping up queries	Employer Team							<u> </u>							
No response issue pens rem query statements	Task to identify	JS	29/06/2018													
ABS production Commences	Back up needed for ABS productions	RS/JS	22/05/2018													
Produce ABS week 1	Target 5 %	RS/JS	25/05/2018					1000000000								
Progress Meeting	raiget 5 %	Team	28/05/2018													
Produce ABS week 2	Torget 150/	RS/JS	01/06/2018													
Progress Meeting	Target 15%		04/06/2018													+
Produce ABS week 3	Target 20%	Team RS/JS	08/06/2018													+
Progress Meeting	rarger 20%	Team	11/06/2018													+
Produce ABS week 4	Torget 250/															
Produce ABS week 4 Progress Meeting	Target 25%	RS/JS	15/06/2018 18/06/2018													
Produce ABS week 5	Target 30%	Team RS/JS	22/06/2018													
Progress Meeting	rarger 50%	Team	25/06/2018													
Produce ABS week 6	Target 35 %	RS/JS	29/06/2018													+
Progress Meeting	rarger 55 %	Team	02/07/2018													
Produce ABS week 7	Target 45%	RS/JS	06/07/2018													+
Progress Meeting	raiget 40 /6	Team	09/07/2018													+
Produce ABS week 8	Target 60%	RS/JS	13/07/2018													
Progress Meeting	Target 00 /8	Team	16/07/2018													
Produce ABS week 9	Target 70%	RS/JS	20/07/2018													
Progress Meeting	Target 1076	Team	23/07/2018													+
Produce ABS week 10	Target 80%	RS/JS	27/07/2018													
D 11 c	raigot 00 /0	Team	30/07/2018													
Progress Meeting Produce ABS week 11	Target 85%	RS/JS	03/08/2018													
Progress Meeting	1419010070	Team	06/08/2018													
Produce ABS week 12	Target 90%	RS/JS	10/08/2018													
Progress Meeting	raigot 90 /0	Team	13/08/2018													
Produce ABS week 12	Target 100%	RS/JS	17/08/2018													
Final Progress/review meeting	raigot 10070	Team	20/08/2018													+
Data Cleansing	send snapshot in preparation for 2019	I Calli	30/11/2018				+									
Employer performance rating feedback	acin anapanor in proparation 101 2013		20/11/2010			-	_			_	_					

Monthly returns		Owner	Due date	Status	December 3	January	February	March	April	May	June	July	August	September Octo	ber Nov	ember [December
Identify and missing returns for 2017/2018	Initial chase/investigation	JF	05/01/2018	In Progress													
Identify and missing returns for 2017/2018	Pre Feb categories in to number missing	SF/JF		In Progress	<u> </u>												
MARS Chases - 1 -3 return missing	remind employer (5 days)	SF/JF	09/02/2018														
MARS Chases - 1 -3 return missing	Chase - Fine to follow	SF/JF	16/02/2018														
MARS Chases - 1 -3 return missing	Fine	SF/JF	23/02/2018														
Mars Chases - 3 or over	Chase - Fine to follow	SF/JF	09/02/2018														
Mars Chases - 3 or over	No response - Fine	JS/SF	16/02/2018														
February MARS	check returns received	SF/JF	19/03/2018														
February MARS chase	1st chase	SF/JF	21/03/2018														
February MARS chase	2nd Chase - fine to follow	SF/JF	28/03/2018														
February MARS chase	Invoice fine - record non compliance	JS/SF	04/04/2018														
March MARS	check returns received	SF/JF	19/04/2018														
March 2018 MARS chase	1st chase	SF/JF	20/04/2018														
March 2018 MARS chase	2nd Chase - fine to follow	SF/JF	27/04/2018														
March 2018 MARS chase	Invoice fine - record non compliance	JS/SF	04/05/2018														
Collate feedback from Employers regarding process	use, January MARS returns Pension fund forum																
Review spreadsheet for returns	Send out update MARS - include I Connect	JS	28/02/2018														
Treview apreausmeet for returns	information FAQ's document,	30	20/02/2010														
	acknowledgements																
Run provisional CARE	acknowledgements	System Team?	28/02/2018		+										-	\rightarrow	
April 2018 MARS	check returns received	SF/JF	21/05/2018		+											\rightarrow	
April MARS chase	1st chase	SF/JF	23/05/2018		+											-+	
April MARS chase		SF/JF			+			-									
April MARS chase	2nd Chase - fine to follow Invoice fine - record non compliance	JS/SF	30/05/2018 05/06/2018		+			-								-+	
	check returns received				+												
May 2018 MARS May 2018 MARS Chase		SF/JF	21/05/2018													\rightarrow	
May 2018 MARS Chase	1st chase	SF/JF	23/05/2018														
	2nd Chase - fine to follow	SF/JF	30/05/2018													\rightarrow	
May 2018 MARS Chase	Invoice fine - record non compliance	JS/SF	05/06/2018														
Communication		Owner	Due date	Status	December 1	lanuan/	February	March	April	May	June	July	August	September Octol	her Nov	ombor [December
Communication					December	January	lebluary	March	April	iriay	Julie	July	August	September Octo	Jei Ivov	EIIIDEI D	recember
Write to Scheme employers	Administration guide, TPR letter	SAF		In Progress	4												
Email templates/acknowledgements to finalise	MARS/EOY	JS	16/01/2018														
Update team at team meeting	EOY process.	JS/SAF	15/01/2018														
Pension Fund Forum	Administration update, confirm eoy coming out	SAF		In Progress	4												
Monthly updates - talking pensions	Pick up issues identified	JW/RO	31/01/2018														
Monthly updates - talking pensions	Pick up issues identified	JW/RO	31/03/2018														
Monthly updates - talking pensions	Pick up issues identified	JW/RO	31/05/2018														
Monthly updates - talking pensions	Pick up issues identified	JW/RO	31/07/2018														
Option of Final pay workshop/help with EOY form		JS/JW	19/04/2018	-												-	
Implementation of i-connect		Owner	Due date	Status	December 3	January	February	March	April	May	June	July	August	September Octol	ber Nov	ember D	December
Finalise contract issues	heywood contract	SAF	22/12/2017	In Progress		1											
Visit other sites with i-connect	Berkshire	JS	19/01/2018	In Progress		1											
I connect Demonstration to Employers	Pension fund forum	Ask for volunteer	rs, 17/01/2018	i													
Send information out with MARS return	Brief overviewneed to start looking at final pay	JS	28/02/2018	,													
Draft implementation plan	Employer order	JS	31/01/2018	i													
Agree implementation plan/make changes	resources needed	SAF	16/02/2018	i													
Set implementation Target % of employers	for pension fund committee	SAF/JS	16/02/2018														
Implementation of ERM		Owner	Due date	Status	December 3	January	February	March	April	May	June	July	August	September Octol	per Nov	ember D	December
Review what functionality is	How user friendly is it, can we send bulk emails, I	re JS/SAF	31/01/2018	In Progress													
Discuss with provider future improvement options	Heywoods ERM plan/consultant visit																
Make a decision about implementation			08/02/2018														
Review information held on system (depending on decision)	Employer contacts, Email	JF	16/02/2018														
Chase outstanding Employer contact forms	Runs along side EOY process		16/02/2018														
Staffing		Owner		Status	December 3	January	February	March	April	May	June	July	August	September Octol	per Nov	ember D	December
Draft new structure - to meet resource need	In progress	JS		In progress	/												
Agree new structure		SC/SAF	08/01/2018	,													
Document work structure between system team and employer team	Flow chart progress		05/01/2018	,													
Implement new structure	Job description review, Review competencies	JS	31/01/2018	\													
Implement new structure Recruitment	Job description review, Review competencies Assistant/ 2 further admin	JS JS	31/01/2018 31/01/2018														