Year-end checklist

Month 12 is nearly here...

March's 'month 12' file is fundamental to the successful production of your scheme members' annual pension statements

GOOD HOUSEKEEPING

- *Make sure you've confirmed contractual hours changes throughout the scheme year*
- *Make sure you've notified us of service breaks where the member hasn't bought back the lost pension*
- *Make sure all your contacts are up-to-date and if you need to notify us of any new ones complete a* Main contact registration form

TOP TIPS

What to remember when putting your March file together to limit follow-up queries (blocks and quarantines) so we can process pension statements in line with the statutory deadline.

1. Attend our *Preparing for year-end* online training – click here to book.
2. Ensure all **active** scheme members are included on the file, including casual members who may not have worked in that month or recent months.
3. Ensure that the data provided is accurate.
4. Ensure that you have reported assumed pensionable pay for any periods of protected absence that a member has had during the scheme year. Contact your Employer Pension Fund Representative if you need further guidance on this.
5. Provide the member's full-time equivalent (FTE) annual rate; this is used to calculate their final salary benefits. For further guidance on calculating this click on the links below.

West Yorkshire Pension Fund and Lincolnshire Pension Fund employers

Hounslow Pension Fund and Barnet Pension Fund employers

ADDITIONAL PREPARATION

Follow these three steps to make sure your data is correct. This will reduce the potential number of **block** and **quarantine** processes you will receive.

1. Use the employer portal to send all your outstanding leaver and retirement notifications for members who have left the scheme. Each month after we process your monthly file you'll see an exception report on the portal that identifies leavers in that month.
2. Carry out a membership audit. This process involves a check of the number of pension records we hold for your employees and allows you to verify they are in the correct status. Contact us to arrange this at **wypf.pfr@wypf.org.uk**
3. See our training materials on **wypf.org.uk/employers/help-centre/training**

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