



PRIVACY NOTICE

Privacy Notice – This notice explains when we collect personal data, what we use it for, who we share it with and your rights.

Who are we – The Royal County of Berkshire Pension Fund, 22-30 York Road, Maidenhead, Berkshire, SL6 1SF.

The lawful basis for processing the information – The main legislation governing the Local Government Pension Scheme (LGPS) and provides the lawful basis for processing information is the following:

Principal Regulations

- The Local Government (Discretionary Payments) Regulations 1996
- The Local Government (Early termination) (Discretionary Compensation) (England and Wales) Regulations 2006
- The Local Government Pension Scheme (Amendment) Regulations 2015
- The Local Government Pension Scheme (Miscellaneous Amendments) Regulations 2014
- The Local Government Pension Scheme (Transitional Provisions, Savings and Amendment) Regulations 2014
- The Local Government Pension Scheme Regulations 2013 (as amended)
- The Local Government Pension Scheme (Management and Investment of Funds) Regulations 2009
- The Local Government Pension Scheme (Management and Investment of Funds) Regulations 2016

Historical Regulations

- The Local Government and other Officers' Superannuation Act 1922
- The Local Government Superannuation Act 1937
- The Local Government Superannuation Act 1953
- The Local Government Superannuation Regulations 1974
- The Local Government Superannuation Regulations 1986
- The Local Government Pension Scheme Regulations 1995
- The Local Government Pension Scheme Regulations 1997

- The Local Government Pension Scheme Transitional Provisions Regulations 1997 (as amended)
- The Local Government Pension Scheme (Benefits, Membership and Contributions) Regulations 2007
- The Local Government Pension Scheme (Administration) Regulations 2008
- The Local Government Pension Scheme (Transitional Provisions) Regulations 2008

All LGPS regulations may be subject to overriding legislation, consisting of, but not limited to, the following:

Relevant Overriding Legislation

- Pensions Increase Review Orders
- Section 148 Orders
- Income and Corporation Taxes Act 1988 (c1)
- Pensions Schemes Act 1993 (c48)
- Pensions Act 1995 (c26)
- Welfare Reform and Pensions Act 1999 (c30)
- Finance Act 2004 (c12)
- Pensions (Increase) Act 1971
- Pensions (Increase) Act 1974
- Disclosure of Information (Occupational Pension Schemes) Act 2006
- The Registered Pension Scheme (Provision of Information) Regulations 2006
- Public Service Pension Act 2013
- The Public Service Pensions (Record Keeping and Miscellaneous Amendments) Regulations 2014

How do we collect information from you – Personal data is supplied by you as the service user or supplied by your employer or AVC provider participating in the LGPS administered by the Royal County of Berkshire Pension Fund. Accepted methods of receiving data are either paper based, electronically, by telephone or face to face.

A list of paper forms used to collect personal data from you can be found by visiting our website at:

http://www.berkshirerpensions.org.uk/downloads/file/308/berkshire_pension_fund_document_list

What type of information is collected from you – The Royal County of Berkshire Pension Fund is statutorily required to collect and hold National Insurance Number, Surname, Forenames (or Initials), Gender, Date of Birth, Address, Postcode, Date Pensionable Service Started, Expected Retirement Date, current Membership Status and any previous Membership Status.

Other types of personal information collected and held to administer your benefits are Telephone Number, E-mail Address, Marital Status, Hours, Weeks, Salary, Basic Contributions Paid, Additional Contributions Paid, Past LGPS Membership and Transferred In Service, Date Left Pensionable Service, Periods of Absence from Pensionable Employment, Guaranteed Minimum Pension (GMP) Values, and Dependant Details.

How we use the information you have provided – All information provided is used by the Royal County of Berkshire Pension Fund to administer your benefits whilst a current and former contributor to the LGPS and in consideration of the Principle, Historical and Relevant Overriding Legislation described above.

Who has access to the information about you – We store your personal data securely. We have in place security policies which are intended to ensure, as far as possible, the security and integrity of all personally identifiable information.

Your data is stored securely by our software provider, *heywood* Limited Aquila House 35 London Road, Redhill, Surrey RH1 1NJ and accessed only by administrators, of the Royal County of Berkshire Pension Fund, by using their own Username and Password all chosen in line with pre-defined user credentials

Where we have given you (or where you have chosen) an email, username, password or activation code which enables you to access certain parts of our sites, you are responsible for keeping this information confidential and we ask you not to share this information with anyone.

Unfortunately, the transmission of information via the internet is not completely secure. Although we will do our best to protect your personal data, we cannot guarantee the security of your data transmitted to our sites; any transmission is at your own risk. Once we have received your information, we will use strict procedures and security features to try to prevent unauthorised access.

Who we may share your information with – The Royal County of Berkshire Pension Fund will not share personal information with any other parties, except where required and with parties required to carry out its statutory duties and functions or where required by law.

The Royal County of Berkshire Pension Fund participates in data sharing arrangements with other LGPS Pension Funds in England, Wales and Scotland:

- > National Insurance Database - Hosted by the South Yorkshire Pensions Authority to help locate past membership of the LGPS.
- > Tell Us Once (TUO) – Linked to the Department for Work and Pensions (DWP), ensures quicker notification of death of scheme members avoiding potential overpayment of benefits.

Other Arrangements

- > National Fraud Initiative (NFI) – A bi-annual exercise that matches electronic data within and between public and private sector bodies to prevent and detect fraud.
- > Mortality Screening – A secure service provided by ATMOS to allow the monthly review of scheme member data to identify those who have deceased.

The details of the information which may be shared is contained within these services' privacy notice.

How long we store your information – Upon you exiting the LGPS, administered by the Fund, and extinguishing all right to future benefit - through having received a refund of pension contributions, having transferred to another pension provider or following death - there may be circumstances where you or your dependant needs to be contacted by the Fund and there will be circumstances where the Fund will need to be able to demonstrate to parties associated with the LGPS, that are carrying out their statutory duties and functions or where required by law, how liabilities were settled.

The Fund will endeavor to review the data it collects and holds electronically to ascertain whether or not it is adequate, relevant and limited to what is necessary in relation to the purposes for which it is processed and that personal data shall be accurate and, where necessary, kept up to date; every reasonable step will be taken to ensure that personal data that is inaccurate, having regard to the purposes for which it is processed, is erased or rectified without delay.

With consideration of these points, any personal information held electronically that is deemed unnecessary will be removed from the database, and no longer held by the Fund, 7 years after the end of the financial year in which the last related activity occurred.

Paper documentation received by the Fund and held securely against your membership record will be stored securely on site and destroyed after a period no longer than 12 months after the date that it was received.

Does your service utilise automate decision making? – No.

Your rights

You have a right to access and obtain a copy of the personal data that we hold about you and to ask us to correct your personal data if there are any errors or it is out of date. In some circumstances you may also have a right to ask us to restrict the processing of your personal data until any errors are corrected, to object to processing or to transfer or (in very limited circumstances) erase your personal data. You can obtain further information about these rights from the Information Commissioner's Office at: www.ico.org.uk or via their telephone helpline (0303 123 1113).

If you wish to exercise any of these rights, please contact the Royal County of Berkshire Pension Fund. You also have the right to lodge a complaint in relation to this Privacy Notice or our processing activities with the Information Commissioner's Office, which you can do through the website above or their telephone helpline.

We may from time to time ask for further information from you. If you do not provide such information, or ask that the personal data we already hold is deleted or restricted, this may affect the benefits payable to you from the Royal County of Berkshire Pension Fund. In some cases it could mean that we are unable to put your benefits into payment or have to stop your annual pension, if already in payment.

Contacting us

The Royal County of Berkshire Pension Fund can be contacted in writing at the address shown at the top of this Privacy Notice or as follows:

Telephone: 0845 6027237

E-mail: info@berkshirepensions.org.uk

Date this version of Privacy Notice produced

16 April 2018

LOCAL GOVERNMENT PENSION SCHEME

Memorandum of Understanding regarding Compliance with Data Protection Law

1 INTRODUCTION

1.1 The Local Government Pension Scheme (“**LGPS**”) in England and Wales is an occupational pension scheme registered under section 153 of the Finance Act 2004 and its rules are currently set out in The Local Government Pension Scheme Regulations 2013 (SI 2013/2356) as amended (“**LGPS Regulations**”).

1.2 The LGPS is administered locally by administering authorities which are defined in Regulation 2 of the LGPS Regulations and listed in Part 1 of Schedule 3 of the LGPS Regulations.

1.3 The Royal Borough of Windsor & Maidenhead (“**Administering Authority**”) is an administering authority under the LGPS Regulations. The Administering Authority manages and administers the Royal County of Berkshire Pension Fund within the LGPS (the “**Fund**”) in accordance with its statutory duty under Regulation 53 of the LGPS Regulations. Employers employing employees who are eligible to be members of the LGPS will participate in the Fund as a “**Scheme Employer**” (as defined in schedule 2 of the LGPS Regulations). The Administering Authority and the Scheme Employer (together the “**Parties**”) are required to share personal data relating to the Scheme Employer’s current and former employees who participate in the Fund (the “**Members**”) and their dependants, in order for the Administering Authority to fulfil its statutory duties to manage and administer the Fund under Regulation 53 of the LGPS Regulations and provide the Members with benefits upon retirement, pay ill-health benefits, pay death grants, pay survivors’ pensions to Members’ spouses, civil partners and co-habiting partners, pay children’s pensions upon the death of the Member, offer Members the option of paying additional voluntary contributions to one or more providers in accordance with Regulations 1 – 52 of the LGPS Regulations.

Scheme Employers are under a statutory obligation, as detailed in Regulation 80 of the LGPS Regulations, to provide certain personal data relating to its Members on a monthly and annual basis to the Administering Authority, including Pay Reference Number, Post Number, National Insurance Number, Surname, Forenames (or Initials), Title, Gender, Date of Birth, Address, Postcode, Date Pensionable Service Started, Marital Status, Hours, Weeks, Pay, Basic Employee and Employer Contributions Paid, Additional Employee and Employer Contributions Paid, Date Left Pensionable Service, Reason Left Pensionable Service and Periods of Absence from Pensionable Service.

1.4 This Memorandum of Understanding sets out:

- (a) the basis on which data will be shared between the Parties;
- (b) the Administering Authority’s expectations of the Scheme Employer during its participation in the Fund;

in order to comply with Data Protection Law, including the General Data Protection Regulation (2016/679) (“**GDPR**”) which will have direct legal effect in the UK on and after 25 May 2018.

1.5 References to “**Data Protection Law**” in this Memorandum of Understanding mean the Data Protection Act 1998, the Data Protection Directive (95/46/EC), the Electronic Communications Data Protection Directive (2002/58/EC), the Privacy and Electronic Communications (EC Directive) Regulations 2003 (SI 2426/2003) (as amended), the General Data Protection Regulation (2016/679) and all applicable laws and regulations relating to personal data and privacy which are enacted from time to time, including (where applicable) the guidance and codes of practice issued by the Information Commissioner’s Office and any other competent authority.

2 DATA CONTROLLERS

2.1 The Parties acknowledge that they will:

- (a) not hold a pool of joint data;
- (b) be separate and independent data controllers in relation to the copies of the Members’ personal data they respectively hold;
- (c) act as data controller in relation to personal data transferred to them;
- (d) each be responsible for complying with the requirements in Data Protection Law that are applicable to them as data controllers.

2.2 References to Members’ personal data includes personal data relating to the Members’ dependants (including children) and surviving partners (where applicable).

3 DATA SHARING

3.1 The Parties confirm that they understand their respective obligations under Data Protection Law as data controllers and agree to only process personal data relating to the Members:

- (a) fairly and lawfully and in accordance with the data protection principles set out in Data Protection Law;
- (b) where there are lawful grounds for doing so; and
- (c) in accordance with Data Protection Law and best practice guidance (including the Data Sharing Code issued by the Information Commissioner’s Office and updated from time to time).

3.2 Each Party will separately inform the Members (as required under Data Protection Law) of the respective purposes for which they will each process their personal data and provide all required information to ensure that the Members understand how their personal data will be processed in each case by the Administering Authority or Scheme Employer (as applicable). The Scheme Employer’s privacy notice to Members will inform them that their personal data will be provided to the Administering Authority and a copy of that notice will be provided to the Administering Authority on request.

3.3 Each Party confirms that it understands its respective obligations under Data Protection Law, to ensure that the Members’ personal data of which it is a data controller is kept and used securely at all times and to take such technical and organisational security measures against unauthorised and unlawful processing of, accidental or unlawful destruction,

loss, alteration, unauthorised disclosure of, or access to the Members' personal data transmitted, stored or otherwise processed as may be required. Such measures will have due regard to the state of technological development and the cost of implementation of these measures, to ensure a level of security appropriate to the harm that might result from such processing and the nature, scope, context and purposes of processing the Members' personal data and the risk or likelihood and severity for the rights and freedoms of data subjects. Such measures will ensure:

- (a) the ongoing confidentiality, integrity, availability and resilience of processing the Members' personal data;
- (b) the ability to restore the availability and access to the Members' personal data in a timely manner in the event of a physical or technical incident;
- (c) carrying out of regular testing, assessing and evaluating the effectiveness of technical and organisational measures for ensuring the security of the processing.

3.4 Each Party undertakes to notify the other as soon as practicable if an error is discovered in the Members' personal data of which it is a data controller and which was received from or a copy of which has been provided to the other Party, to ensure that such other Party is then able to correct its own records. This will happen whether the error is discovered through existing data quality initiatives or is flagged up through some other route (such as the existence of errors being directly notified to the Administering Authority or Scheme Employer (as appropriate) by the Member (or the Member's dependants, surviving partner) themselves).

4 TRANSFER OF MEMBERS' PERSONAL DATA

4.1 The Parties agree that Members' personal data will only be transferred from one Party to the other via an acceptable method specified by the Administering Authority which includes any of the following:

- (a) Postal Service including Courier;
- (b) Secure e-mail;
- (c) SFTP link;
- (d) Secure electronic interface;
- (e) Encrypted removable media;
- (f) Secure web delivery including Employer Self Service (ESS); and
- (g) Other third party solution as agreed by the Parties

4.2 Each Party will, when transferring the Members' personal data of which it is the data controller to the other Party, ensure that that data is secure during transit (whether physical or electronic).

4.3 If either the Administering Authority or the Scheme Employer appoints professional advisers, third party administrators or another entity which provides other services involving

the transfer of Members' personal data, those third parties will be data processors or data controllers in their own right. The Administering Authority or the Scheme Employer (as applicable) will comply with its own obligations in accordance with Data Protection Law (in particular, by ensuring that any entity to which it transfers Members' personal data also complies with Data Protection Law) and shall ensure that that nothing in the terms of engagement between the Administering Authority or the Scheme Employer (as applicable) and such third party would contradict this Memorandum of Understanding.

5 RIGHTS OF MEMBERS (INCLUDING THE MEMBER'S DEPENDANTS, SPOUSES/CIVIL PARTNERS (WHERE APPLICABLE))

5.1 Each Party shall, in respect of the personal data of which it is a data controller, respond to any requests from Members to have access to any of their personal data or a complaint or enquiry relating to that Party's processing of the Members' personal data received by that Party in line with its own obligations under the Data Protection Law.

5.2 Each Party agrees to provide reasonable assistance to the other as is necessary to enable the other Party to comply with any such requests in respect of Members' personal data of which that Party is a data controller and to respond to any other queries or complaints from Members.

6 DATA SECURITY BREACHES AND REPORTING PROCEDURES

6.1 Each Party confirms that it understands its respective obligations under Data Protection Law in the event of any personal data breach, unauthorised or unlawful processing of, loss or destruction of or damage to any of the Members' personal data, including (where necessary) an obligation to notify the Information Commissioner's Office and/or the Member(s).

7 RESPONSIBILITIES OF SCHEME EMPLOYERS

7.1 Notwithstanding the statutory obligations which apply to Scheme Employers under the LGPS Regulations and as a data controller under Data Protection Law, the Administering Authority, as Administering Authority for the Fund, expects Scheme Employers participating in the Fund to comply with the responsibilities set out below in relation to Members' personal data.

7.2 On request, the Scheme Employer will inform Joanne Brazier, Assistant Pension Manager – Communications, at the Administering Authority of any appointed qualified person to fulfil the role of data protection officer ("DPO") together with their contact details. If the Scheme Employer has not appointed a DPO, the Scheme Employer, on request, will inform Joanne Brazier, Assistant Pension Manager - Communications, at the Administering Authority of the details of a nominated person for GDPR compliance purposes.

7.3 The Scheme Employer acknowledges the financial penalties that can be imposed by the Information Commissioner's Office in relation to breaches of Data Protection Law. The Scheme Employer further acknowledges that any liability it may have to pay a financial penalty to the Information Commissioner's Office may result in a revision of the rates and adjustments certificate in accordance with Regulation 62(7) of the LGPS Regulations.

8 COMPLIANCE WITH THE MEMORANDUM OF UNDERSTANDING

8.1 Failure by the Scheme Employer to comply with the terms set out in this Memorandum of Understanding may result in the Administering Authority taking any or all of the following actions:

- (a) Reporting the Scheme Employer's non-compliance to the Information Commissioner's Office;

9 REVIEW AND AMENDMENT OF MEMORANDUM OF UNDERSTANDING

The Administering Authority will review the Memorandum of Understanding from time to time. The Administering Authority reserves the right to amend the Memorandum of Understanding at any time and with immediate effect and will provide written notice to the Scheme Employer of such amendment.

Q&A for LGPS members

What is the GDPR?

The General Data Protection Regulation (GDPR) is a new set of European Union (EU) regulations due to come into force on 25 May 2018. It will change how organisations process and handle data, with the key aim of giving greater protection and rights to individuals.

What laws currently govern data protection in the UK?

Currently in the UK the Data Protection Act 1998 sets out how your personal information can be used by companies, government and other organisations. The GDPR will replace the Data Protection Act 1998 when it comes into force on 25 May 2018.

Will the GDPR still apply to the UK after Brexit?

The UK is in the process of implementing a new Data Protection Bill which largely includes all the provisions of the GDPR. There are some small differences, but once the Bill has passed through Parliament and become an Act, UK law on data protection will largely be the same as that of the GDPR.

So what's new?

There are new and extended rights for individuals in relation to the personal data an organisation holds about them, for example, an extended right to access and a new right of data portability. You can obtain further information about these rights from the Information Commissioner's Office at: www.ico.org.uk or via their telephone helpline (0303 123 1113).

In addition, organisations will have an obligation for better data management and a new regime of fines will be introduced for use when an organisation is found to be in breach of the GDPR.

What are the main principals of the GDPR?

The GDPR states that personal data must be:

- processed lawfully, fairly and in a transparent manner
- collected only for specified, explicit and legitimate purposes
- adequate, relevant and limited to what is necessary
- accurate and kept up to date
- held only for the absolute time necessary and no longer
- processed in a manner that ensures appropriate security of the personal data.

What is personal data?

The GDPR applies to 'personal data' meaning any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier.

This definition provides for a wide range of personal identifiers to constitute personal data, including name, identification number, location data or online identifier, reflecting changes in technology and the way organisations collect information about people.

How will the GDPR affect LGPS members?

Your LGPS fund will already have procedures in place which comply with similar data protection principles under the Data Protection Act 1998. The new regulations will reinforce these existing requirements, and LGPS members are unlikely to notice a change in the service they receive from their LGPS fund.

How will members know that their LGPS fund is GDPR compliant?

Every LGPS fund will be required to update their privacy notice in line with the new requirements setting out, among other things, why certain data is held, the reason for processing the data, who they share the data with and the period for which the data will be retained. Within the notice, members will also be provided with additional information about their rights under the legislation.

Why do LGPS funds hold personal data?

LGPS funds require various pieces of personal data provided by both the individual member and their employer in order to administer the pension scheme. This data includes, but is not limited to, names, addresses, National Insurance numbers and salary details which are required to maintain scheme records and calculate member benefits.

Who do LGPS funds share personal data with?

On occasion, LGPS funds are required to share personal data with third parties in order to meet regulatory and government requirements, to gather necessary information for the accurate payment of member benefits and to ensure scheme liabilities are met. Each fund's privacy notice will set out who they share data with; this is likely to include bodies such as scheme employers, fund actuaries, auditors and HMRC.

Can LGPS members ask for their data to be deleted?

The GDPR provides individuals with the 'right to be forgotten' in certain limited circumstances. However, in practical terms the exercise of this right in relation to LGPS funds is limited as the deletion of data can prevent the fund from carrying out its duties. LGPS funds are required to process personal data to comply with legal obligations under pension legislation, therefore, the 'right to be forgotten' is unlikely to apply to data held by LGPS funds.

What happens if there is a data breach?

Data breaches are a rare occurrence within LGPS funds. However, should a security breach concerning a member's personal data occur that is likely to result in a risk to that member's rights and freedoms, there will be a direct obligation under the GDPR for the fund to inform the Information Commissioners Office within 72 hours of the breach taking place.

General Data Protection Regulation (GDPR)

Royal County of Berkshire Pension Fund Privacy Notice – Collection of Personal Data



Additional Voluntary Contributions (AVCs)

AVC Admin - AVC instruction form issued to Prudential

AVCTVIN – proposed transfer of Prudential Additional Voluntary Contributions (AVCs)

Additional Pension Contributions (APCs)

APC4 – Additional Pension Contribution application form

Interfund out transfer to another LGPS Fund

IFAOUTAVC - Prudential Admin Request Form

IFAOUTAVC - Prudential Admin Request Form

Death notification

DTH3 - small estates form to claim balance of pension due to the deceased member's estate.

DTH18 - Declaration of Life Certificate for payment of a spouse's pension

DTH19 - request for bank details for payment of a dependants pension

DTH21 - Death Grant Declaration (Death in Service)

DTH22 - Death Grant Declaration (Death in Deferment)

Address Tracing

DWP Trace Letter – Letter issued to member via Department of Work and Pensions when no forwarding address held

Merge Options

A2 - Letter to member offering post 2014 deferred benefits options

B2 - Letter to member offering pre and post 2014 deferred benefits options

D2 - Letter to member offering pre 2014 with no disqualifying break deferred benefits options

D3 - Letter to member offering pre 2014 with a disqualifying break deferred benefits options

Refund of contributions

REF2 - Member's refund election signed within 1 month and 1 day

Retirement from the LGPS

RET2 -Lifetime Allowance Certificate

RET3 - Request for Bank Details Form

RET4 - Covering letter issued with retirement pack to member in month prior to 75th birthday

RET5 - Notification to member's employer advising member must be withdrawn from scheme on eve of 75th birthday

RET6 - Unreduced Retirement Benefit Options - Status 1 & Status 4 (No AVC)

RET7 - Unreduced Retirement Benefit Options - Status 1 & Status 4 (AVC Type 1)

RET8 - Unreduced Retirement Benefit Options - Status 1 & Status 4 (AVC Type 2)

RET9 - Unreduced Retirement Benefit Options - Status 4 (inc. Retained Rights) (No AVC)

RET10 - Unreduced Retirement Benefit Options - Status 4 (inc. Retained Rights) (AVC Type 1)

RET11 - Unreduced Retirement Benefit Options - Status 4 (inc. Retained Rights) (AVC Type 2)

RET12 - Reduced Retirement Benefit Options - Status 1 & Status 4 (No AVC)

RET13 - Reduced Retirement Benefit Options - Status 1 & Status 4 (AVC Type 1)

RET14 - Reduced Retirement Benefit Options - Status 1 & Status 4 (AVC Type 2)

RET15 - Reduced Retirement Benefit Options - Status 4 (inc. Retained Rights) (No AVC)

RET16 - Reduced Retirement Benefit Options - Status 4 (inc. Retained Rights) (AVC Type 1)

RET17 - Reduced Retirement Benefit Options - Status 4 (inc. Retained Rights) (AVC Type 2)

RET26 - Incapable of managing affairs form

LIFECERT - Declaration of Life Certificate

P46LETTER - Issue P46 for an employee with no P45

TOPS Beneficiary Bank Details form – Overseas Payment Service offered to retired scheme members living overseas. This service enables members to have their monthly pension paid into an account in the county of their residence.

Opting in to the LGPS

LGS10 - Opt in form for admission to the LGPS

LGS10B - Application for re-entry to the MAIN Section from the 50/50 Section

LGS5050 - Admission to the 5050 Section of the LGPS

Opting out of the LGPS

LGS1E - Opt out form

Nomination forms

LGS5 - Expression of Wish for payment of a Death Grant

LGS6 - Cohabiting Partner nomination form

Transferring in previous pension rights

LGS13 - Declaration of Previous Pension Rights

TV9 – Election to transfer previous pension rights

TV10 – Declaration to transfer AVC pension rights

Transferring out to another pension provider

TV09 - Transfer Out Election Form

Employer Forms

Employer Policy Statement - Statement of policy regarding LGPS discretionary regulations

Year End Return – employer year end return

Employer Admission Agreement – Admission agreement to participate in the Local Government Pension Scheme

Employer Contribution Return – Monthly spreadsheet notification of employee and employer contributions

EST3 - Estimate request form for an active scheme member

EST4 - Estimate request form for a Deferred scheme member

LGS15A - Admission to the scheme

LGS15B - Changes to pensionable status

LGS15C - Withdrawal from the scheme

LGS15D - Automatic enrolment opt-out / opt-out notification

LGS18 - Final Pay calculation sheet

LGS26 - Ill-health Certificate for a current member of the LGPS

LGS26B - Ill health Certificate for a Deferred Beneficiary who ceased membership as an employee on or after 1 April 2008 and before 1 April 2014

LGS26C - Ill health Certificate for a Deferred Beneficiary who ceased membership as an employee on or after 1 April 1998 and before 1 April 2008

LGS26D - Ill Health Certificate for a Deferred Beneficiary who ceased membership as an employee before 1 April 1998

LGS26E1 - 3rd Tier Ill Health Retirement Review Certificate for a Current 3rd Tier Pensioner where the cessation of employment occurred after 31 March 2014 – England and Wales – Review taking place 18 months after the date of cessation of employment

LGS26E2 - 3rd Tier Ill Health Retirement Review Certificate for a Current 3rd Tier Pensioner where the cessation of employment occurred before 1 April 2014 – England and Wales – Review taking place 18 months after the date of cessation of employment

LGS26E3 - 3rd Tier Ill Health Retirement Review Certificate for a Suspended 3rd Tier Pensioner where the cessation of employment occurred before 1 April 2014 – England and Wales – Review taking place within 3 years of the date of cessation of the 3rd tier pension

LGS26E4 - 3rd Tier Ill Health Retirement Review Certificate for a Suspended 3rd Tier Pensioner where the cessation of employment occurred after 31 March 2014 – England and Wales – Review taking place at the request of the member whilst the 3rd Tier pension is in payment or within 3 years after payment of the 3rd Tier pension has been discontinued

LGS26E5 - 3rd Tier Ill Health Retirement Review Certificate for a Suspended 3rd Tier Pensioner where the cessation of employment occurred before 1 April 2014 – England and Wales – Review taking place 3 or more years after the date of cessation of the 3rd Tier pension

LGS26E6 - 3rd Tier Ill Health Retirement Review Certificate for a Suspended 3rd Tier Pensioner Where the cessation of employment occurred after 31 March 2014 – England and Wales - Review taking place 3 or more years after the date of cessation of the 3rd tier pension

LGS26G - Ill health Certificate for a Deferred Beneficiary who ceased membership as an employee on or after 1 April 2014

SCAPC template letter – letter issued to member containing details of the cost to buy back lost pension due to a period of absence through payment of Shared Cost Additional Pension Contributions (SCAPC)

