



**Staffordshire
Pension Fund**
Local Government Pension Scheme

Staffordshire Pension Fund Employer Website

www.staffspf.org.uk

Employers' area of website

- This area contains technical information about the LGPS in relation to Staffordshire Pension Fund as well as forms and documentation.
- We have a comprehensive set of factsheets and guides, available on the website which are regularly reviewed and updated with the current Scheme rules and operational practices.
- Direct weblink: <https://www.staffspf.org.uk/Employers/Employers.aspx>
- Can also be accessed from the Pension Fund's homepage (www.staffspf.org.uk) using tabs at top of the page.



Employers' Website Homepage



Keyword Search



Home

About Us +

Employers

Finance and Investments

Governance

Videos - Pensions Made Simple

Contact us

[Home](#) > [Employers](#)

Home

Employers

Employer training workshop estimates, early leavers and retirements

LGA frequently asked questions for employers on Covid-19

Guides and factsheets

Forms and documents

Employer forum / AGM

Newsletters

Latest news

Year end data

i-Connect

Automatic enrolment

Monthly contribution payment process

Types of retirement

Ill-health retirement

Internal dispute resolution procedure (IDRP) - complaints and disputes

Discretions

Academies

Pension administration strategy

McCloud judgement

Employer focus peer group

Information for employers



Employers



Forms and documents

Find employer forms and documents



Ill health retirement

Guidance on ill health retirement



iConnect

Guidance on iConnect for pensions employers



Employer forum

Notes and presentations from the employers forum



Academies

Information for academies



Latest news

The latest news about pensions

Employers' Portal (screenshot)



Keyword Search



Home

About Us +

Employers

Finance and Investments

Governance

Videos - Pensions Made Simple

Contact us

Employers' Portal

This area of the site is for employer representatives only and requires a username and password to access. For enquiries regarding access please contact pensions.employers@staffordshire.gov.uk

Please note: If you tried to search for the Staffordshire Pension Fund Online Member Portal (My Pension Portal) via Google, you may have been directed to the Staffordshire Pension Fund Employer log in area due to the way that Google search parameters work.

If this is the case, please use the My Pension Portal link (<https://www.staffspf.org.uk/Calculator/Self-Service-Calculator.aspx>) to access the online member system. Alternatively, you can visit the Home page of the website and use the "My Pension Portal" link.

Username:

Password:

Login

Save Password

Sign in with AD FS

Employers' Portal (notes)

- Employers' Portal – access to employer forms and documentation
- This is a restricted area for employer representatives only – requires username/password to access
- If you have forgotten your username or password, or if you don't currently have access to this area but need to do so as part of your responsibilities, then please contact [**pensions.employers@staffordshire.gov.uk**](mailto:pensions.employers@staffordshire.gov.uk).
- Requests will be forwarded to the County Council's Web Team. Usually dealt with in 24 hours. Will receive username and temporary password via email. Prompted to change first time you log in

Employers' Forms & Documents (screenshot)



Keyword Search



Home

About Us +

Employers

Finance and Investments

Governance

Videos - Pensions Made Simple

Contact us

[Home](#) > [Employers](#) > Forms and documents

Employers

Forms and documents

General Documents

All Employers (Except
Staffordshire CC)

Staffordshire CC Employer

Forms and documents

There are three types of documents within this section:

- [general documents](#) that are used by all employers
- [All employer](#) documents (except Staffordshire County Council)
- documents specifically for [Staffordshire County Council as an employer](#)

Where should I send my completed form?

Once you have completed any of our forms, please forward them to the following email address, where they will be picked up by a member of the team:

- **Email:** pensions.employers@staffordshire.gov.uk

Please use the same address for any queries on which form to use or how to complete them.

Employers' Forms & Documents (notes)

- Once you are signed-in, you will have access to a number of forms and documents.
- The forms are regularly reviewed by the Fund so to ensure you are completing the most up to date version, please download the latest forms from the [employer section of our website](#) rather than using versions stored locally.
- There are three types of documents within this section:
 - [general documents](#) that are used by all employers
 - [All employer](#) documents (except Staffordshire County Council)
 - documents specifically for [Staffordshire County Council as an employer](#).

General Documents

[Home](#) > [Employers](#) > [Forms and documents](#) > General Documents

Forms and documents

General Documents

Industrial action information for scheme employers

Internal dispute procedure - documentation

General Documents

Forms and documents that apply to all employers can be found here:


- [Internal dispute process](#)
- [Industrial action information for employers](#)

Employer data sharing policy template

-  [Employer data sharing policy template](#) (244 KB)

If you have difficulty opening or making a copy of the document above we can provide a Word copy on request.

Reduction or restriction in pay

-  [Notes on reduction or restriction in pay](#) (267 KB)

Notes on final pay

-  [Notes on final pay](#) (185KB)



Encryption of sensitive data

Staffordshire pension fund currently encrypt sensitive data sent by e-mail to AES 256 standard via .zip file attachments. You will need WinZip version 9 + or an equivalent program to decode these files.

When sending sensitive information to the Staffordshire Pension Fund, we would ask you to use this or a similar level of encryption to protect your data.

Monthly returns

Please see below for the CTR1 contribution return form. This should be completed and returned to Staffordshire Pension Fund every month. Also below is the new pension contributions procedural policy, which outlines the expectations Staffordshire Pension Fund has for the payment of contributions.

-  [CTR1 form](#) (22 KB)
-  [CTR1 Example Form](#) (23 KB)

Employer contacts details form

-  [Employer Contact Details - Template](#) (193 KB)

Documents for Staffordshire County Council

Home	About Us +	Employers	Finance and Investments	Governance	Videos - Pensions Made Simple	Contact us
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[Home](#) > [Employers](#) > [Forms and documents](#) > Staffordshire CC Employer


[Forms and documents](#)

[Staffordshire CC Employer](#)

Staffordshire CC Employer

Approval Form

This approval form should be used when a member's benefits are being released on grounds of Flexible Retirement or Early Retirement where there is a cost to the Staffordshire County Council for the early release of the pension benefit (also known as Actuarial Strain).

 [Approval form 1 - redundancy](#) (22KB)

 [Approval form 2 - flexible / early retirement](#) (36KB)

Termination Form

This form should be used for Voluntary Retirement over age 55 (both for cases where the employer will take on the Actuarial Strain and for those where the employee will have a reduction applied to their benefits), Ill Health Retirement, Redundancy, Business Efficiency and Death in Service. Where your payroll is provided by Stoke on Trent City Council, Capita or Liberata (formerly Staffordshire County Council Payroll), you do not need to provide payroll data, as we will automatically receive this data directly from the payroll provider.

 [Termination form - external payroll provider](#) (51KB)

Flexible Retirement

The FR1 form is to be completed by the employer to confirm the grounds of the Flexible Retirement. Where your payroll is provided by Stoke on Trent City Council, Capita or Liberata (formerly Staffordshire County Council Payroll), you do not need to provide payroll data, as we will automatically receive this data directly from the payroll provider.

The FR5 form should be passed to the employee to complete to apply for Flexible Retirement.

The FR12 form should be passed to the employee to complete **only** where the member does not wish to continue to build up pension in their ongoing reduced employment.

 [PEN FR 1 - Notice of Flexible Retirement Form](#) (63KB)

 [PEN FR 5 - Member Election for Flexible Retirement form](#) (58KB)

 [PEN FR 12 - Flexible Retirement Election to Opt Out of the LGPS form](#) (115KB)

Documents for All Employers

[Home](#)[About Us +](#)[Employers](#)[Finance and Investments](#)[Governance](#)[Videos - Pensions Made Simple](#)[Contact us](#)

[Home](#) > [Employers](#) > [Forms and documents](#) > All Employers (Except Staffordshire CC)

[Forms and documents](#)[All Employers \(Except Staffordshire CC\)](#)[Ill health forms and guidance](#)

All Employers (Except Staffordshire CC)

Appointment form

- [PEN APT 1 \(OS\)](#) (70KB)

Amendment form

- [PEN AMD 1 \(OS\)](#) (61 KB) **May 2015**

Change of section of the scheme (50/50 or main section)

- [PEN APT 2 \(OS\)](#) (57 KB) **April 2014**

Estimate request

- [Form PEN EST 1 OS](#) (113 KB) **January 2021** - form suitable for on-screen completion

Termination form

- [Excel Termination form](#) (59KB) **January 2024**

Form suitable for on-screen completion. Please note, this form is a cut down version of the Word PEN LV 1 document. There are drop-down boxes for pay elements and the reason for leaving. In addition, notes are included which provide guidance on the completion of the leaver form.

- [Form PEN LV 1 OS](#) (116KB) **July 2023**

Alternatively, you can use the Word version of the leaver form. This can either be completed on-screen, or can be printed out and completed by hand.

On completion, please return this form to:

- **Email:** pensions.employers@staffordshire.gov.uk


Please note: when completing the termination and estimate request forms, please be aware that both CARE pay and final salary are required. Details of how these two separate elements should be calculated are outlined in the pay notes below. Please read these notes carefully.

Documents for All Employers (continued)

Flexible retirement forms


Notice of flexible retirement

Employer to complete.

-  [Form FR 1](#) (61 KB) **July 2023**


Election for payment of benefits on flexible retirement

Member to complete in **all** cases.


-  [Form FR 5](#) (58KB) **July 2023**

Election to opt out of the scheme on flexible retirement


Member to complete only if they no longer wish to build up pension benefits after taking flexible retirement.

-  [Form FR 12](#) (117KB) **NEW May 2018**

Pay notes

-  [Notes on final pay](#) (membership before 31/03/2014) (192KB) **September 2016**

Absence FAQs

-  [PEN AB FAQ](#) (494 KB) **December 2017**

This document advises employers of how to treat Child-Related Absence, Sickness Absence, Authorised Absence and Absence due to a Trade Dispute.

For information about reserve forces leave, please contact us:

- **Email:** pensions.employers@staffordshire.gov.uk

Staffordshire Pension Fund should be informed of all unpaid absences using the monthly contributions return.

From June 2015, any obsolete absence forms that are sent to the Fund will not be accepted.

Miscellaneous

-  [Employer Contact Details - Template](#) (193 KB)

This form is to be used to provide Employer designated pensions contacts for Pension Services to liaise with.

Ill-health forms and further guidance

[Home](#)[About Us +](#)[Employers](#)[Finance and Investments](#)[Governance](#)[Videos - Pensions Made Simple](#)[Contact us](#)

[Home](#) > [Employers](#) > [Forms and documents](#) > [All Employers \(Except Staffordshire CC\)](#) > Ill health forms and guidance




All Employers (Except
Staffordshire CC)

Ill health forms and
guidance

Ill-health forms and further guidance

The latest guidance made available to employers in August 2018, explained the importance of obtaining an accurate and detailed report from our independent registered medical practitioners (IRMPs).

The templates require the employer or IRMP to document the nature of the illness, any treatment available, medical evidence considered etc.

-  [Ill health guidance - deferred beneficiary](#) (438 KB) **August 2018**
-  [Ill health guidance - active member](#) (395 KB) **August 2018**
-  [Focus ill health update](#) (558 KB) **August 2018**

Independent registered medical practitioner panel

This is the [current panel of approved independent doctors](#) for use by scheme employers on ill-health retirement, deferred benefit release referrals and stage 1 and stage 2 appeals.

Ill-health Guidance documents

Guidance documents

This document explains the purpose of the documents below:

-  [PEN DEF 4](#) word version (77KB) deferred benefit on ill health claim form (Staffordshire County Council members) - this form can be sent to a member for on-screen completion **October 2022**
-  [PEN DEF 4](#) (319 KB) deferred benefit on ill health claim form (Staffordshire County Council members) October 2022
-  [PEN DEF 4A](#) word version (77KB) deferred benefit on ill health claim form (non-Staffordshire County Council members) - this form can be sent to a member for on-screen completion October 2022
-  [PEN DEF 4A](#) (313 KB) deferred benefit on ill health claim form (non-Staffordshire County Council members) October 2022
-  [Explanation of 3 tiers](#) (60 KB) January 2015
-  [DCLG cover letter to statutory guidance](#) (1.0 MB) September 2014
- [DCLG statutory guidance to LGPS 2014](#)
-  [DCLG FAQs on LGPS 2014 \(revised edition\)](#) (external link to a PDF document)
-  [DCLG statutory guidance to LGPS 2008](#) (282 KB) September 2014
-  [DCLG supplementary guidance for IRMPs 08 2011](#) (522 KB)
-  [DCLG questions and answers 6 2011](#) (154 KB)
-  [State pension age - retirement dates](#) (97 KB)
-  [Hymans guidance on ill health retirement](#) - (958 KB) October 2017

Ill-health Guidance documents (continued)

Certificates (April 2021)

Certificates for active employees

- [Active Certificate 2014 Scheme](#) (70 KB) - to be used for any case where an Active member is being sent for Ill Health assessment after 1 April 2014

Certificates for deferred members

Members of the LGPS

- [Deferred Benefits LGPS 2014](#) (66 KB) - for members with a Deferred Benefit awarded after 1 April 2014
- [Deferred Benefits LGPS 2008](#) (68 KB)- for members with a Deferred Benefit awarded between 1 April 2008 and 31 March 2014
- [Deferred Benefits LGPS 1997](#) (66 KB) - for members with a Deferred Benefit awarded between 1 April 1998 and 31 March 2008
- [Deferred Benefits LGPS 1995](#) (70 KB) - for members with a Deferred Benefit awarded before 31 March 1998

Please note: The certificate below is for Councillor members of the LGPS (i.e. elected Councillors who chose to join the LGPS - this is no longer an option for Councillors elected after 1 April 2014)

- [Deferred Benefits \(Councillor\)](#) (66 KB)

Certificates for tier 3 ill health retirement cases

Tier 3 benefits awarded after 1 April 2014

- [Review of tier 3 ill-health pension \(in payment\) LGPS 2014](#) (60 KB) **February 2020**
- [Review of tier 3 ill-health pension \(within 3 years of cessation\) LGPS 2014](#) (59 KB) **January 2020**
- [Review of tier 3 ill-health pension \(more than 3 years after cessation\) LGPS 2014](#) (60 KB)

Tier 3 benefits awarded between 1 April 2008 and 31 March 2014

- [Review of tier 3 ill-health pension \(within 3 years of cessation\) LGPS 2008](#) (64 KB)
- [Review of tier 3 ill-health pension \(more than 3 years after cessation\) LGPS 2008](#) (62 KB)

Guides and factsheets

- <https://www.staffspf.org.uk/Employers/Guides-and-factsheets/Guides-and-Factsheets.aspx>
- Links to a number of guides and factsheets
- Includes external documents from the Local Government Association such as Employer Payroll and HR guides
- Internal guides produced by the Fund e.g. ill-health retirement, Absence FAQs, Assumed Pensionable Pay

Employer Pension Discretions

- <https://www.staffspf.org.uk/Employers/Discretions/Employer-pension-discretions.aspx>
- All employers have a legal requirement under the Local Government Pension Scheme (LGPS) regulations to prepare and publish their employer's pension discretions.
- This page provides information and guidance on formulating policies.
- Employer discretions template provided which covers the main policies on which you are required to have a discretion on and a couple of others that we would recommend you consider formulating a policy on.
- Mandatory policies: Shared Cost APC's, Power to grant additional pension, Flexible Retirement, Switch on "Rule of 85" and Early Retirement

Pension Administration Policy

- <https://www.staffspf.org.uk/Governance/Pensions-administration-strategy/Pensions-administration-strategy.aspx>
- Document sets out the roles and responsibilities for Scheme employers and the Administering Authority
- Two Key areas:
 - scheme governance and administration, and
 - scheme membership and employer administration
- Sets out actions required and timescales to act
- Pensions Administration Policy to be reviewed over course of next couple of months

Employer Focus newsletters

- <https://www.staffspf.org.uk/Employers/Newsletters/Employer-Newsletter-and-Information-Letters.aspx>
- Monthly Employer Focus Newsletter sent to employer designated pensions contacts (held on our internal Employer Contacts database). If you believe your organisation's contact details are incomplete or out of date, please complete the employer contact details template form.
- Provides updates of any changes to the administrative procedures operated by Pensions Services and regulatory changes

Employer Focus Peer Group

- This is a group of representatives from across the Fund's Scheme employer base. The group meets on a quarterly basis to discuss new developments and changes to the scheme processes and policies. The group provides valuable feedback to help shape the fund's services.
- If you are interested in joining the group, please contact the pension team by e-mailing Simon Jackson Email: simon.jackson@staffordshire.gov.uk

Questions?

