

# Pensions BIB Meeting – 14<sup>th</sup> November 2014

Hosted by The CIPP at Portcullis House, Westminster

## Attendees

- XXXXXXXXXXXXXXXXXXXX
- XXXXXXXXXXXXXXXXXXXX (Chair)
- XXXXXXXXXXXXXXXXXXXX
- XXXXXXXXXXXXXXXXXXXX
- XXXXXXXXXXXXXXXXXXXX
- XXXXXXXXXXXXXXXXXXXX
- XXXXXXXXXXXXXXXXXXXX
- XXXXXXXXXXXXXXXXXXXX (new attendee)
- XXXXXXXXXXXXXXXXXXXX (new attendee)

### **1. Introductions**

### **2. Agreeing the agenda**

### **3. Update on XXXX**

XXX is recovering well, currently on phased return to work.

### **4. Note-taking**

XXX to take notes at this session and circulate.

### **5. Relationship between TPR and Pensions BIB/PAPDIS**

***[Note, TPR has requested attribution on these sections, they have accordingly not been Chatham House'd in the normal way]***

Last November there was a workshop to review issues between payroll and pension providers. A follow-up session in January 2014 led to the creation of the industry standard PAPDIS and the TPR and XXX are supportive of this. The TPR are very interested in checking employers are making the correct contributions so while they are supportive of PAPDIS and a member of the BIB, they are not

leading this work. As a public sector body, TPR and XXX are unable to endorse, promote or favour PAPDIS and have previously given support to XXX. TPR and XXX need to remain even-handed. There is a special meeting this afternoon on data standards which includes PAPDIS and XXX and TPR and XXX are interested in both.

## **6. Update from TPR/XXX**

TPR test data pilot is almost ready and will be issued w/ 17<sup>th</sup> November. The data produced is not in a PAPDIS format, as TPR require more fields (so other columns not for PAPDIS/XXX are there), but the PAPDIS format is used for all the data fields included in the PAPDIS standard. The test data is not intended to test the payroll to pension provider interface, but rather to test that software is carrying out assessment and postponement correctly and issuing the right type of worker letters. Once the pilot is complete, the test data will be published, due for general release in March 2015. There is data to test both tax period and non-tax period Pay Reference Period software.

TPR are planning to develop a Worker Assessment Tool – it is currently still in the design stage. There will be a special workshop with the software industry in early December to allow them to comment on the design and give feedback. This is designed to have minimal impact on the software industry and is mainly designed for the 300k employers who are currently using HMRC's BPT (Basic PAYE Tools) as BPT will not cater for AE. The aim of the TPR tool is to make AE duties easy for micro employers, who have 9 employees or less. The current expectation is that the output of the assessment will be in PDF only and will not integrate with any other systems.

## **7/8. Relationship between XXX and Pensions BIB / Update from XXX**

XXX's position is the same as that of the TPR and cannot endorse any product, service or approach.

## **9. Launch of PAPDIS at Capacity Crunch Conference**

Comments and feedback at the launch and since has been positive so far. The process is a little bit clunky as it involves emailing XXX for a pack, with a short online form to complete. So far, 61 packs have been sent so far. One of the questions on the online form asks if the person/company would be happy to be part of a case study, so far 22 are keen and 11 have signed up to being a case study.

**Action – XXX to share the list of people/companies requested packs so far.**

Discussion - How do we ensure people are supported with PAPDIS? There isn't much support out there in an open environment, and not much support provided at the launch. Resources are not readily available, such as a knowledgebase, helpdesk etc. Something could be created quite quickly and published on XXX. We could document and bullet list the resources that are available, rather than basic information which is available at present. Could we put ourselves forward to do work on XXX to provide more information? Could we create a LinkedIn page or a Twitter feed? How can we solve the challenge of providing information support and direct those

**Action – XXX to circulate a list of resources that could be useful to PAPDIS Participants**

**Action – XXX to look to create a LinkedIn page/group but to hold fire on actually doing this until a joined up plan has been created around the promotion of PAPDIS and the support available for PAPDIS Participants.**

**Action – XXX at XXX, XXX, XXX, XXX and XXX to assist XXX on creating a list of resources; XXX to initiate a first draft of list to those referred to here.**

Payroll providers able to support PAPDIS will be able to support any employer and pension provider. Pension providers will be in the market for clients and payroll has an impact on provider choice.

XXX Pension Provider conference – 26 November 2014.

#### **11. The XXX XXX Video**

Who else is planning to implement PAPDIS?

XXX: planning to support in first half of 2015

XXX: planning to implement for Bureaus soon, still time for later stagers

XXX: waiting for a client to ask for it

XXX: looking at introducing PAPDIS

XXX: adopt for XML but CSV will remain as is

XXX: working with XXX on XXX, proof of concept in progress.

#### **12. Update on activities of our XXXXXX, XXX**

XXX not present, update to follow later; it is recognised that XXX has been doing a sterling job.

#### **13. Update our understanding of XXX's position on PAPDIS**

XXX are currently not looking to use PAPDIS in the short/medium/long term; it's not for us to challenge their thinking. We understand that XXX are planning to make improvements to their current system to improve customer experience. BIB group has met with XXX and provided feedback on why their current system is difficult to integrate with, for example NINO required by XXX to claim tax relief and reason codes for non-contributions. XXX are planning to make improvements to their current system by October 2015.

#### **14. Update on XXX's position on PAPDIS**

XXX have spoken to stakeholders and have offered to initiate a conference call between XXX, some of their shareholders (pension scheme providers) and Pensions BIB members, with 12.00 on Thursday 27 November being proposed.

There appears to be good support for the discussion in the XXX community and XXX will confirm participants nearer the time.

The call is to consider the best way forward in relation to the XXX and Origo issue.

**Action – all to review availability for 27 November conference call with XXX and stakeholders.**

#### **15. Update on technical development of PAPDIS**

To be covered later after DIP.

#### **16/17. Update on the Data Integration Platform (DIP) initiative**

See XXX's DIP presentation.

Notes: Initially pension scheme settings were not in scope but following gap analysis, scheme settings could be stored in DIP to add/combine to the data on the way through, eg. Payment Source

for XXX. Scheme management is not in scope for PAPDIS, e.g. when an employee moves pension scheme within the same company.

Q3 2015/16 launch in time for Q4 2015/16 surge.

Action – can everyone think about providing letters of support for DIP.

Action – XXX to pick up technical discussion after the meeting as time ran out.

**Agenda items not covered in detail as we timed-out:**

**18. Update on press release (which has subsequently been issued)**

**19. Planning our input into this afternoon's XXX/XXX meeting (which went very well despite)**

**20. Potential Pitfalls, as per Edward de Bono's Black Hat Thinking (we will pick this up at next meeting)**

**21. AOB**

**22. Next meeting (XXX to propose a date, will hold fire until we know what happens on the Origo front)**

**23. Actions Audit (not done, but XXX's notes are superb)**