

**SPPA BUSINESS AND CALCULATION PRIORITIES**

<b>Operational Area</b>	<b>Business Priorities</b>	<b>Flexibility</b>
Data Migration	All data items migrated successfully to new system	
	All CRITICAL and GOOD to do data cleansing tasks complete	Other data cleansing tasks
	Reconciliation reports agreed and signed off	
IT Hardware / Software	Servers on the SCOTS network	
	Successful installation of software in both test and Live environments	
	Disaster Recovery / Back-ups in place	
	Mailroom software	
Images	Images available at go live	
Data Loading	Ability to load all member data	
Calculations	All calculations highlighted as priority 1, 2 and 3 must be present and working. See table below	Some flexibility for priority 4 and 5 Calculations
Documents	Document creation and view must be available	
Bulk Processes	Annual allowance, bulk leaver calculation, valuations, consistency checker and bulk consistency	
Workflows	All active open workflows migrated The ability to create / amend workflows Old workflows viewable	
Reporting	Must have: Task Management reports Management reports	
Payroll	Full payroll functionality	
Training / Scanning	Report writer training System administration and End user training User guides	

Digital Services	Member & Employer Services	<p>SPPA require the following:-</p> <ul style="list-style-type: none"> <li>• Pension modelling Calculations</li> <li>• Contact Us Portal</li> <li>• Personal Detail Updates</li> </ul>
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### CALCULATION PRIORITIES

Process Type	Priority	NHS	STSS	SLAB	SPPS	Police	Fire
Allocation	5	✓	✓				✓
Annual Allowance (AA)	1	✓	✓	✓	✓	✓	✓
Annual Benefit Statements (ABS)	4	✓	✓	✓	✓	✓	✓
Annual Pensions Increase (API)	1	✓	✓	✓	✓	✓	✓
Death In Preservation	1	✓	✓	✓	✓	✓	✓
Death In Retirement	1	✓	✓	✓	✓	✓	✓
Death In Service	1	✓	✓	✓	✓	✓	✓
Decoupled Added Years	2	✓					
Decoupled Additional Pension	2	✓					
Deferred Pension	1	✓	✓	✓	✓	✓	✓
Early Retirement Reduction Buy Out (Post 2015)	2	✓	✓			✓	
Faster Accrual	2		✓				

Process Type	Priority	NHS	STSS	SLAB	SPPS	Police	Fire
Ill Health Retirement	1	✓	✓	✓	✓	✓	✓
Implementation of Earmarking Orders	3	✓	✓	✓	✓	✓	✓
Injury Benefits	2	✓				✓	✓
Leaver Index Adjustment	1	✓	✓			✓	✓
Normal Retirement Pension	1	✓	✓	✓	✓	✓	✓
Options on Leaving	1	✓	✓	✓	✓	✓	✓
Pension Accrual & Revaluation (Post 2015)	1	✓	✓	✓	✓	✓	✓
Pension Sharing - Cash Equivalent Transfer Value (CETV)	2	✓	✓	✓	✓	✓	✓
Pension Sharing - Pensioner Equivalent Transfer Value (PETV)	2	✓	✓	✓	✓	✓	✓
Phased/Partial Retirement	1	✓	✓	✓			✓
Practitioner Flexibilities Value Earnings Credit	1	✓					
Premature Retirement with Actuarial Reduction	1	✓	✓	✓	✓		
Premature Retirement Without Actuarial Reduction	1	✓	✓				✓

Process Type	Priority	NHS	STSS	SLAB	SPPS	Police	Fire
Purchase/Maintenance of Added Years	2	✓	✓	✓	✓	✓	✓
Purchase of Additional Pension	1	✓	✓	✓		✓	✓
Re-Employment	2	✓	✓	✓	✓		
Refunds	1	✓	✓	✓	✓	✓	✓
Repayment of Withdrawn Contributions	3		✓				
Revision of Pensions	1	✓	✓	✓	✓	✓	✓
Short Service Annuity	2		✓				
Stepping Down/Voluntary Protection of Pay	2	✓	✓				
Transfer In	1	✓	✓	✓	✓	✓	✓
Transfer Out	1	✓	✓	✓	✓	✓	✓
Valuations	4	✓	✓	✓	✓	✓	✓
Winding Down	2		✓				

Priority Key

Priority 1 High – Priority 5 Low