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## Improved estimate request forms

We've recently enhanced our estimate request forms by publishing them as fillable PDFs. This means you can complete the editable fields either in a web browser or after downloading the forms. As before, you can sign electronically, instead of printing and signing by hand. We hope that these changes will improve the service we all provide by:

- using less paper
- saving time
- enabling members to email their estimate requests to you
- supporting accessibility

### Voluntary retirement

The '**Voluntary retirement estimate request**' form is for your employees aged 55 and over. They complete 'Section 1 – Your personal details', including the prospective retirement date they wish to receive an estimate for, before sending it to you to complete and return their pay details to [dpf.employers@derbyshire.gov.uk](mailto:dpf.employers@derbyshire.gov.uk).

You can find this form on our [forms and guides](#) page of the website.

If an employee needs an estimate quickly or in confidence, you can encourage them to use the self-service facility in [My Pension Online](#), or our [pension calculator](#).

### Redundancy, flexible retirement, and serious ill health

The '**Redundancy, flexible retirement and serious ill health estimate request**' form is for you to complete and return to [dpf.employers@derbyshire.gov.uk](mailto:dpf.employers@derbyshire.gov.uk) in the following circumstances:

Derbyshire Pension Fund		CONTROLLED ONCE COMPLETED		lgps	
VOLUNTARY RETIREMENT ESTIMATE REQUEST					
<b>Section 1 – Your personal details</b>					
Surname				Title	
Forename(s)				Phone	
Address					
Date of birth	dd/mm/yyyy	National Insurance number			
Email			Employer		
Employee number			Post ref (if applicable)		
<b>Section 2 – Your declaration</b>					
Prospective retirement date	dd/mm/yyyy				
I wish to receive an estimate of what my voluntary retirement benefits will be at the proposed date, which is within the next 2 years. I will be between 55 and 75 years old on this date.					
Signature				Date	dd/mm/yyyy
If sections 1 and 2 have been completed by the employer (or their payroll provider), please select this box to confirm that this is on the instructions of the employee.					
<i>After completing sections 1 and 2, this form should be given to your employer's payroll team for them to complete sections 3, 4 and 5. Incomplete forms won't be accepted.</i>					
<i>If you don't wish your employer to see this request, you can calculate your pension benefits using our <a href="#">pension calculator</a> or <a href="#">My Pension Online</a>. See our website for more information: <a href="http://www.derbyshirepensionfund.org.uk">www.derbyshirepensionfund.org.uk</a></i>					

Derbyshire Pension Fund		CONTROLLED ONCE COMPLETED		lgps	
REDUNDANCY, FLEXIBLE RETIREMENT & SERIOUS ILL HEALTH ESTIMATE REQUEST					
For estimates on voluntary retirement grounds, the employee should use the <a href="#">voluntary retirement estimate request form</a> , the <a href="#">pension calculator</a> or <a href="#">My Pension Online</a> . All can be accessed from: <a href="http://www.derbyshirepensionfund.org.uk">www.derbyshirepensionfund.org.uk</a>					
Employer name				Employer ref	
<b>Section 1 – Employee details</b>					
Surname				Title	
Forename(s)				Phone	
Address					
Date of birth	dd/mm/yyyy	National Insurance number			
Employee number			Post ref (if applicable)		
<b>Section 2 – Retirement details</b>					
Prospective retirement date	dd/mm/yyyy				
Reason for leaving					
<small>Redundancy or ill health estimate age 55+ / Flexible retirement age 55+ / Serious ill health for those with limited life expectancy</small>					
Return estimate to (name & address)					
Children's Services HR consultant (County Council school cases only)					

- **Redundancy or efficiency exercise:** We can provide shortfall costs, and if necessary, an estimate of LGPS benefits to the employee
- **Flexible retirement:** We can provide shortfall costs to you where applicable, and an estimate of LGPS benefits to the employee
- **Employees with limited life expectancy:** We can help you assess whether it is of greater financial benefit to an employee's family for them to die in service, or retire on grounds of ill health retirement

**Note: Ill-Health Retirement estimates** - We are only able to provide estimates for ill-health retirement where the member has a limited life expectancy.

You can find this form on our [Forms for employers](#) page.

## McCloud judgement - employee data declaration

The McCloud judgement determined that when the main public sector pension schemes, such as the LGPS, changed to a Career Average Revalued Earnings (CARE) basis, the protections brought in at that point, to ensure members were not disadvantaged, were age discriminatory towards younger members.

The remedy will involve checking the membership for members in the period 1 April 2014 to 31 March 2022. We, therefore, have to ensure that our employers have submitted the necessary employee data, or that the data is available. The data includes:

- Changes to part-time contracted hours
- Breaks in service (i.e. periods of employment where pension contributions were not collected from the member's pay)
- Hours worked each year for casual/relief employees

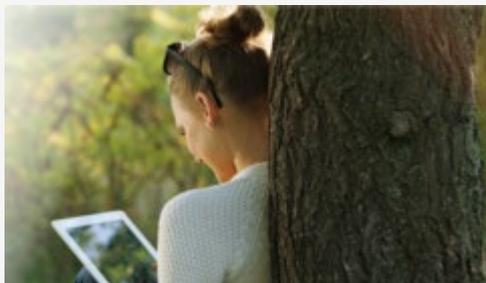
On 27 October, we emailed all our employer main contacts, asking them to complete a declaration form on behalf of each of our LGPS employing authorities. It would therefore not be appropriate for an outsourced payroll provider, for instance, to complete this form.

We will email a reminder to our main contacts today, but if you are in any doubt, we would ask you check that this email has been received and actioned by your organisation.

If you believe that your designated main contact information is not up to date, we'd be grateful if you could contact us at [pensions.regs@derbyshire.gov.uk](mailto:pensions.regs@derbyshire.gov.uk).

## My Pension Online

My Pension Online is continuing to grow; since the launch in June over 10,000 members have registered to use the member self-service platform including over 20% of active members. These members can now access their pension details as well as having the option to run estimates of their pension benefits in line with varying future retirement dates.



### Getting started

If you receive any questions from your employees about My Pension Online, you can direct them to our website. The [My Pension Online homepage](#) offers guidance on how to sign up and log in, including a step-by-step guide through the registration process.

### Promotional resources

Your help in promoting the service will allow us to reach even more members. To help with this process we've created promotional materials such as; images and posters which you can use in emails, newsletters, intranet pages. All of the resources can be found on our [My Pension Online resources](#) section.

If you have employees in other pension schemes, please add into your communications that My Pension Online is for LGPS members only.

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## Employee details changes

It's important that you let us know as soon as possible when an employee's details change, for example, title, name, address. This helps us to minimise the risk of data breaches occurring.

If you're not using i-Connect yet, please remember to notify us using the C1 Form when any of your LGPS members change their personal and contact details. The C1 Form is available on the [Forms for employers](#) section of our website.

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## Email addresses

A quick reminder of our email addresses and what they should be used for:

[dpf.employers@derbyshire.gov.uk](mailto:dpf.employers@derbyshire.gov.uk) - For submitting member notification forms such as the S1,L1, C1 and estimate requests. [All found here](#).

[pensions.tech@derbyshire.gov.uk](mailto:pensions.tech@derbyshire.gov.uk) - For submitting contribution returns (CR1), data and payment queries.

[pensions.regs@derbyshire.gov.uk](mailto:pensions.regs@derbyshire.gov.uk) - For queries relating to LGPS regulations, employer training, events and communications.

[pensions@derbyshire.gov.uk](mailto:pensions@derbyshire.gov.uk) - For queries and requests from members of the LGPS.

[pensions.icconnect@derbyshire.gov.uk](mailto:pensions.icconnect@derbyshire.gov.uk) – For employer queries about i-Connect.

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**If you have any queries about the information provided in this Newsletter,  
or about the LGPS in general, please contact us at:**

**Derbyshire Pension Fund, County Hall, Matlock, DE4 3AH**

**Tel: 01629 538900**

**Email: [pensions.regs@derbyshire.gov.uk](mailto:pensions.regs@derbyshire.gov.uk)**

**Website: [www.derbyshirepensionfund.org.uk](http://www.derbyshirepensionfund.org.uk)**

