

Summary of Forms and Spreadsheets

Form Name	Title	Employer guidance	Deadline to return to NILGOSC	NILGOSC procedure
JOINING AND OPTING OUT				
LGS1	Employee's Membership Form	<p>When an employee joins your authority, they should be automatically enrolled in the Scheme unless they have a contract of less than three months.</p> <p>An employee does not have to complete this form before being enrolled in the Scheme and you should not delay enrolling while waiting on a form.</p> <p>Employer completes the remainder of the form with details of employment.</p> <p>If you have not reached your automatic enrolment date you should forward form LGS1 to NILGOSC.</p> <p>Contribution rate is based on the actual pay for the post</p>	Within 10 working days of a member joining the Scheme	<p>NILGOSC will register the member on our system and send a membership pack to the member, including documentation to complete should they wish to transfer previous pension benefits to the Scheme.</p> <p>A copy of the membership certificate will be sent to the employer.</p>
SS1	New Member Spreadsheet	<p>If you have reached your automatic enrolment date you should complete spreadsheet SS1 and forward it to NILGOSC.</p> <p>Contribution rate is based on the actual pay for the post</p> <p>Employers to complete these spreadsheets when new members join Contact Employer Liaison Officer for more information on these spreadsheets, including detailed Field Specification and validation rules</p>	Within 30 days of the member joining	As per LGS1, but the employer receives the confirmed spreadsheet, rather than copies of the membership certificate(s)
LGS2	Opt-out Notice	If an employee wishes to opt out of the Scheme they must complete this form.	Submit the details on the electronic Opt-Out	n/a

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		Section A must be completed and returned to their employer and Sections B and C should be completed and returned to NILGOSC	Spreadsheet SS2 within 3 months of Automatic Enrolment date or 10 days from date of leaving the Scheme. If the employee has more than 3 month's membership you must also submit form LGS15 within 10 working days.	
SS2	Opt-out Spreadsheet	Employer to complete this spreadsheet when an employee opts out	Within one month of the effective date of opting out	
FINANCE/REMITTANCES				
LGS6	Monthly Remittances	This is a summary of all employee and employer contributions which should be completed on a monthly basis and emailed to our Finance Department at finance@nilgosc.org.uk . At year end, the information on these forms will be matched against the Annual Return and any discrepancies investigated.	Payment is due on the first working day of the month following the month to which the contributions relate. Form LGS6 must be submitted to NILGOSC by the date of payment.	
LEAVER FORMS				
LGS13	Waiving Reduction	For employer to complete This form should be used to notify NILGOSC of an employer's wish to exercise its discretion to waive members' reductions or apply the Rule of 85 on early retirement before age 60.	Within 3 months of anticipated retirement date	NILGOSC will invoice the employer

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		This will result in a cost to the employer.		
LGS15	Leaver's Form	<p>To be completed for all leavers, i.e. entitled to immediate benefits, not entitled to immediate benefits, death in service or moving to another employer in the Scheme.</p> <p>All sections of the form must be completed with details of leaving, details of pay and contributions. Any award of additional benefits, waiver of any reductions or applying the Rule of 85 should be confirmed on this form (and on Form LGS13) and must be in accordance with your policy statement.</p> <p>If there is a change in pay after leaving a revised LGS15 should be submitted.</p>	To be submitted to NILGOSC within 5 working days for immediate benefits and death in service, within 10 working days for all others.	<p>NILGOSC will use these details to pay out any pension, lump sum or death grant due, or to calculate the deferred benefits payable when member reaches retirement age.</p> <p>NILGOSC will invoice the employer for any strain cost.</p>
LGS16	Advance notification of impending retirement	To be completed by employer to outline the circumstances of a retirement.	To be submitted to NILGOSC three months before the intended date of retirement.	NILGOSC will issue retirement quotation to member so that they can consider the amount of pension and lump sum they wish to receive.
LGS17	Employer request for a quotation	To be completed by employer to request pension benefit and capital cost figures	To be submitted to NILGOSC three months before the intended date of retirement.	NILGOSC will issue retirement quotation to the employer.
SS17	Bulk quotation request spreadsheet	To be completed by employer to request bulk quotations for members aged between 55 and 65 e.g. bulk redundancy quotations	To be submitted to NILGOSC three months before the intended date of retirement.	NILGOSC will issue a spreadsheet to the employer listing the pension benefits and capital costs to release the benefits to the members.
LGS18	Death Benefits Claim form	If a member dies in service, you should complete LGS19 immediately and LGS15 as soon as possible. NILGOSC will send	LGS15 to be submitted within 5 working days of date of death or date of	On receipt of completed claim forms, NILGOSC will pay the lump sum death grant and

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		the LGS18 claim forms out to anyone who is eligible to claim a death grant or survivor's pension.	final payment if later.	arrange for pensions to be paid to any surviving spouse, civil partner or nominated cohabiting partner and any eligible children.
LGS19	Notification of Death	To be completed by the employer in the event of the death of an employee	As soon as possible	
RECORD MAINTENANCE				
LGS8	Transfer in Request	For member to complete This form is included in the membership pack which is sent to a new member.	Within 12 months of joining	NILGOSC will request a transfer value from the previous provider and will issue a transfer quotation to the member.
LGS9	Past Service Enquiry	For individual to complete This form enables a member to query whether they had a previous period of service	As soon as query arises	NILGOSC will try to trace any previous benefits or refunds and will respond to the individual
LGS10	Previous employment history	For member to complete This form enables NILGOSC to determine whether there is a five year qualifying break in public sector service	n/a	NILGOSC will offer relevant transfer in or aggregation options on receipt of completed form
LGS11	Election to re-join the main section	For member to complete. On receipt of this form the employer should put the member back in the main section from the beginning of the next pay period.	Complete SS11 and forward to NILGOSC as per below	n/a
SS11	Transfer to Main Section	For employer to complete. The employer should use this spreadsheet to notify NILGOSC of movements to the main section.	Within 1 month of the election taking place	NILGOSC will update its records
LGS12	Transfer to 50/50 Section	For member to complete. On receipt of this form the employer should put the member back in the main	Complete SS12 and forward to NILGOSC as per below	n/a

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		section from the beginning of the next pay period.		
SS12	Transfer to 50/50 Section	For employer to complete. The employer should use this spreadsheet to notify NILGOSC of movements to the main section.	Within 1 month of the election taking place	NILGOSC will update its records
LGS20	Expression of Wish	For member to complete. This form is issued to members as part of their new member pack. It allows the member to tell us who they would like to receive any lump sum grant and benefits payable from an AVC taken out after 31 March 2015 in the event of their death. NILGOSC retains complete discretion as to whom this will be paid.	No time frame, but it is of benefit to the member for this to be in as soon as possible.	NILGOSC will register the nomination and will confirm in writing to the member that we have registered the details.
LGS22A	Ill-health Medical Examination request – active member	To be completed by the employer to request a medical for a member who may be eligible for ill-health retirement.	Must be returned in advance of any date of leaving.	NILGOSC will arrange a medical appointment with our Committee doctor and we will advise member and employer of the decision. If eligible for ill-health retirement, we will ask the employer to complete LGS15 & LGS16.
LGS22B	Ill-health Medical Examination request - deferred member			

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LGS24	Change in Personal Circumstances	To be completed by the member. Notifies NILGOSC of changes in surname, marital / partnership status, address, email address etc.	As soon as possible after the change occurs.	NILGOSC will amend the employee's record to reflect the change.
LGS25	Change in contractual hours, weeks or employee's contribution rate	To be completed by the employer. Notifies NILGOSC of any changes in contractual working hours, weeks or contribution rate.	Within 2 months of the change.	NILGOSC will amend the employee's record to reflect the change.
LGS27 (A or B)	Additional Pension Contributions (APCs)	For employer and employee to complete This form should be used to notify NILGOSC of a member's wish to either buy additional pension or to buy back		
LGS34	Notification of Breaks in employment	To be completed by employer when member commences a period of unpaid leave or a career break.	Within 10 working days of commencement of break.	NILGOSC will mark the break on the member's record. The break will be removed if contributions are paid to cover it.
LGS35	Return to work following a break	To be completed by employer when member returns from a period of unpaid leave or a career break. This should detail dates of service break and what arrangements, if any, will be made to	Within 30 days of member's return to work.	
SS35	Service Break Return Spreadsheet	To be completed by employer to inform NILGOSC of strike action, unpaid sick or unpaid leave	As soon as absence is over	
LGS40	Employer Signatory and contact details	To be completed by employer to advise NILGOSC of the authorised signatories and contacts for that authority.	As soon as there is any change in signatories or contacts	NILGOSC will update the employer contact details.