An Roinn Caiteachais Phoiblí agus Athchóirithe
Department of Public Expenditure and Reform

Survey for 31 December 2022

2022 Single Scheme Annual Survey

This survey is being issued to all Relevant Authorities to capture information on overall Single Scheme membership numbers at **31 December 2022** as well as to assess progress with Scheme implementation.

Please ensure this survey is fully completed and returned to DPER by the 27 January 2023 deadline.

By submitting a response to this survey, you are acknowledging that you are authorised to do so on behalf of your organisation and have satisfied yourself to the accuracy of your response.

*** 1. Your Organisation's Designated Relevant Authority Number**

Please note that your designated relevant authority number can be found on our website at:
https://singlepensionscheme.gov.ie/for-employers/list-of-relevant-authorities/

RA code (up to 3 digits)

*** 2. Your Organisation's Name**

3. How many pensionable posts (headcount) in your organisation regardless of pension scheme?

*** 4. Did your organisation have any active members, deferred members or pensioners/beneficiaries under the Single Scheme on 31 December 2022?**
(Active members are those ordinarily on the payroll including those suspended or on approved periods of leave. Deferred members are those members that have vested and ceased pensionable Single Scheme employment.)

- ◯ Yes
- ◯ No

An Roinn Caiteachais Phoiblí agus Athchóirithe
Department of Public Expenditure and Reform

Survey for 31 December 2022

*** 5. How many members within each of the following Single Scheme categories existed in your organisation on 31 Dec 2022?**

(Please enter actual headcount figure as opposed to FTE figure. Enter 0 if none. Active members are those ordinarily on the payroll including those suspended or on approved periods of leave. Deferred members are those members that have vested and ceased pensionable Single Scheme employment.)

Active Members	
Deferred Members	
Pensioners/Beneficiaries in Payment	

*** 6. Does your organisation currently calculate Referable Amounts for Single Scheme members in each pay period via an automated or manual process?**
"Referable Amount" is defined in Circular 11 of 2014 and is calculated based on pensionable pay and work pattern of each member. It is not the same as the amount of contributions paid.
Note: Manual systems include the use of Excel, the Calculation Tool on the Single Scheme website etc. Automated systems would be via the use of a pay or pensions software.

- ◯ Automated
- ◯ Manual
- ◯ Currently not calculating

*** 7. For what years have you calculated Referable Amounts for your Single Scheme members?**

	Yes	No	N/A (no members)
2013	◯	◯	◯
2014	◯	◯	◯
2015	◯	◯	◯
2016	◯	◯	◯
2017	◯	◯	◯
2018	◯	◯	◯
2019	◯	◯	◯
2020	◯	◯	◯
2021	◯	◯	◯
2022	◯	◯	◯

8. If you answered "No" in Question 7 for any year before 2022 in which you had members, when do you expect to have completed calculation of referable amounts for all of these years?

Date

Date

DD/MM/YYYY

9. If you do not currently have an automated system for the calculation of Referable Amounts on a pay period basis, please indicate when an automated system will be in place?

Date

Date

DD/MM/YYYY

*** 10. Does your Organisation currently issue Annual Benefit Statements to Single Scheme members via an Automated or Manual system?**

- ◯ Automated
- ◯ Manual
- ◯ Currently not issuing

*** 11. For what years have you issued Annual Benefit Statements to your Single Scheme members? (These will use the Referable Amount values as referenced in Q.7 above.)**

	Yes	No	N/A (no members)
2013	○	○	○
2014	○	○	○
2015	○	○	○
2016	○	○	○
2017	○	○	○
2018	○	○	○
2019	○	○	○
2020	○	○	○
2021	○	○	○

12. If you answered "No" for any years in Question 11, when will your organisation have issued all Annual Benefit Statements to all members?

Date

Date

DD/MM/YYYY

13. If you do not currently have an automated system for Annual Benefit Statement generation, please indicate when an automated system will be in place?

Date

Date

DD/MM/YYYY

*** 14. Assuming the CPI circular is issued early 2023, when do you expect to issue 2022 Annual Benefit Statements, noting that these should be issued by 30 June 2023?**

Date

Date

DD/MM/YYYY

15. Please comment on any of the timelines you have indicated above in Q8, Q9, Q12 and Q13?

***(Important:** Technical queries should not be included below. Should you have a technical query, please refer to www.singlepensionscheme.gov.ie. If your query is not resolved on review of website content, please e-mail singleschemequeries@per.gov.ie)*

*** 16. Does your Organisation currently issue Leaving Service Options (Leaver Statements) to Single Scheme members via an Automated or Manual system?**

- ◯ Automated
- ◯ Manual
- ◯ Not currently issuing

17. If you are issuing Leaving Service Options (Leaver Statements) do you issue them within 6 months of a member leaving pensionable employment with your Relevant Authority?

- ◯ Yes
- ◯ No

*** 18. In relation to the Single Pension Scheme Purchase and Transfer Facility, have you processed any applications for Purchase of Retirement Benefits (by actual purchase or transfer) for the year 2022?**

- ◯ Yes
- ◯ No

19. If you answered "Yes" in Question 18, please enter number of members who have purchased benefits (by actual purchase or by way of transfer) for each year below:

*** 20. Please indicate what software systems or tools your organisation currently uses for the following areas of work. Please include the version if applicable:**

(If work is carried out manually, then please indicate this)

HR	
Payroll	
Pensions	

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Survey for 31 December 2022

* 21. In relation to Single Scheme communications to members, please indicate

	Yes	No
Have you included a link to the Single Scheme website singlepensionscheme.gov.ie on your intranet page?	○	○
Have you informed Single Scheme members of the availability of a Member Scheme Booklet?	○	○
Have you informed Single Scheme members of the availability of the Single Scheme Estimator Tool?	○	○
Have you included a link to the Single Scheme members Privacy statement?	○	○

22. Has your Organisation considered issuing communications and documents (such as Annual Benefit Statements and Leaving Service Options) by electronic means rather than by physical post?
Link to The Pensions Authority advice on electronic communication.

Electronic	○
Physical Post	○

* 23. Please add your official contact details should we need to seek any clarifications

Name

Email address

Phone number