

To submit or not to submit: Leaver notifications for members that have TUPE transferred employment.



- Scenario 1: Member(s) transferring to another employer- pension scheme details unconfirmed i.e. transfer from a participating WMPF scheme employer to a new admission body under an admission agreement

Web S4 is only required if the new employer participates in a different LGPS Fund (not WMPF) or any other broadly comparable scheme. If the details are unknown, obtain clarification from the scheme employer, whom awarded the initial contract, prior to the submission of a Web S4 notification.

Initially, we require details of member/s involved in the transfer*, in the form of a [bulk transfer file](#). Both the former and new employer are to submit this information to allow us to ensure the transferring member files correspond.

- Scenario 2: Member(s) transferring to an employer outside of the WMPF e.g. in the case of outsourcing to a contractor that participates in a different LGPS scheme

Web S4 to be submitted via the Web Portal.

Initially, we require details of member/s involved in the transfer in the form of a [bulk transfer file](#) (this allows us to monitor S4 submission, required within 30 days of month end date of leaving, and provides the necessary information about members leaving the scheme which is then confirmed to our actuary).

We require individual S4s because it is not an internal transfer (transfer between two WMPF scheme employers). Each member record will need to be processed as a leaver and will no longer be an active contributor to the WMPF.

- Scenario 3: Member(s) transferring to a participating WMPF scheme employer e.g. transfers to another academy or district council

Web S4 not required.

Initially, we require details of the member/s involved in the transfer* in the form of a [bulk transfer file](#). Both the former and new employer are required to submit this information to allow us to ensure the transferring member files correspond.

Please note, any members that are not subject to the transfer and subsequently leaving employment will require the submission of a Web S4 form.

**As a result of a recent policy change, all eligible employees, that have previously opted out of the LGPS, should be confirmed in the bulk transfer file (with an indication that the member/s are not currently contributing to the LGPS). These employees will be quoted on the admission agreement to allow them the option to become a member of the scheme at a later date, if they so wish.*