



Internal Dispute Resolution Policy

May 2025- 2026

Internal dispute resolution procedure (pensions appeals)

Before you start the formal appeal procedure, you should contact your employer to express your concerns. It may be possible to resolve some issues informally, where there are errors of fact for example.

The Internal Dispute Resolution Procedure is the mechanism by which:

- A prospective scheme member
- A scheme member
- The beneficiary or personal representative of a scheme member
- A person who is no longer a scheme member, but left the scheme within six months leading up to the date of their complaint

Can dispute a decision, discretion, or failure to reach a decision by an employer or the pension fund in relation to:

- Scheme membership
- Award or non-award of benefits
- The amount of benefits being paid
- A decision regarding ill health retirement
- Or any other pension matter

If you are appealing a decision in relation to ill health you should be aware that this is a review of the initial decision and therefore an appeal may result in any previous decision to grant ill health retirement being removed.

The process has 3 steps to follow:

Step 1

You should write to the Chair of the Trustees within 6 months of the date of the notification of the decision or the act or omission about which you are complaining.

You should include:

- Your name
- National insurance number
- Details of the decision that you disagree with
- The reason why you think the decision is incorrect
- Any documentation that supports your case.

The trust's specified person is:

Chair of Trustees, Walbottle Village Primary School, The Green, Walbottle, Newcastle upon Tyne, NE15 8JL. On receipt of the information above the specified person will hold a formal appeal panel which could include; a member of the Occupational Health Department, a member of HR and line management where necessary. However the trust's specified person will make the final decision.

The specified person will review your case and will write to you with a decision within 2 months of receiving your letter.

If you are dissatisfied with that decision, you may, within six months of the date of the decision, apply to your local pension fund administrator to have it reconsidered, under Step 2.

Step 2

Write to the Tyne and Wear Pension Fund's Panel of Appointed Persons. An appointed person will consider your case and write to you with their decision within 2 months of receiving your letter.

You should send your letter to:

Secretary to the Panel of Appointed Persons

Tyne and Wear Pension Fund

The Pensions Office

PO Box 212

South Shields

NE33 9ER

If you are unhappy with the appointed person's decision, you can begin Step 3.

Step 3

Write to the Pensions Ombudsman. The Ombudsman is an independent person who settles disputes between pension scheme members and pension schemes.

You can contact the Pensions Ombudsman at:

The Pensions Ombudsman, 11 Belgrave Road, London, SW1V 1RB.

Please note that the Pensions Ombudsman will not usually investigate a complaint until The Pensions Advisory Service (TPAS) has been consulted.

It is important that you follow all of these steps. If you miss any of the steps, it might delay your appeal.

You can contact the Pensions Advisory Service for help at any time at:

TPAS, 11 Belgrave Road, London, SW1V 1RB

Telephone: 0845 601 2923

Website: www.pensionsadvisoryservice.org.uk

Review date May 2026