



GOVERNMENT OF BERMUDA
MINISTRY OF FINANCE

PATI Information Statement

Name of Public Authority: Department of Social Insurance

Introduction:

The Public Access to Information Act (PATI) 2010 was developed to give the public the right to obtain access to information held by public authorities; to increase transparency with regard to these authorities; to increase accountability held by public authorities; and to update and inform the public on the activities and decision-making of these authorities in a sustained and consistent manner.

To aid the provision of information to the public, the Public Access to Information (PATI) Act 2010 requires that each public authority prepares an Information Statement. The purpose of the Information Statement is to provide people wanting access to information held by a public authority a 'window' of the types of documents held by that public authority, what that public authority does, and how a person can access the information they require.

The Department of Social Insurance Information Statement will make the following information available to the public as part of its normal business activities:

- Structure of the organization, and governing legislation;
- Functions, powers, duties and obligations;
- Summary of services provided;
- Classes of records held, in order to facilitate the exercise of right of access;
- Administrative manuals;
- Policies, rules and guidelines used for decision-making;
- Name and contact information of the person designated by a public authority as the person to whom requests for information are to be directed;
- Additional information to aid accessing Information Statement;
- Means of logging concerns or complaints or concerns about accessing information.

Section A: Structure, Organization and Legislation [s5(1)a]

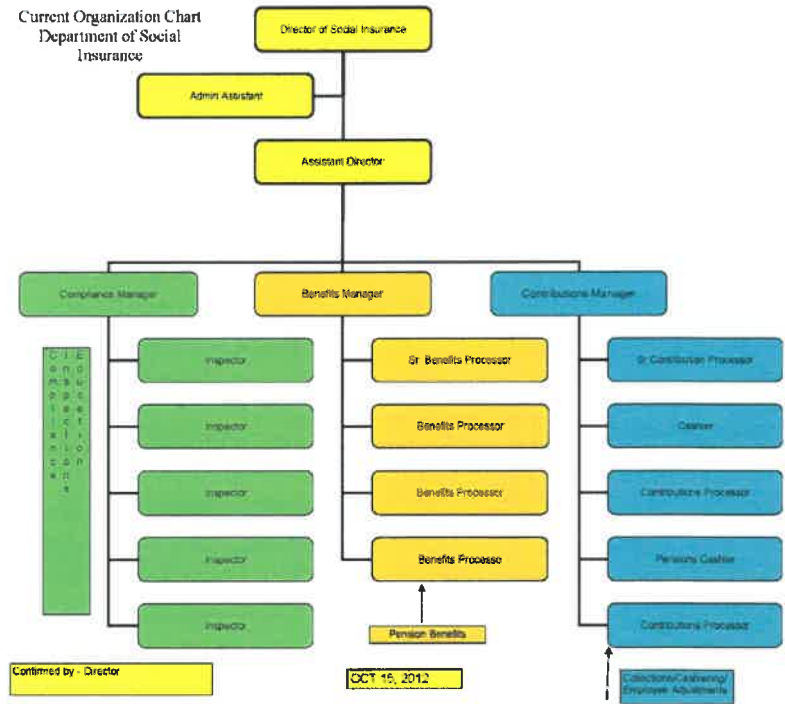
The DOSI is organized in 4 Sections as follows:

- Administration - Responsible for Human Resource, Accounting, Financial Reporting functions
- Benefits - Responsible for processing of all benefit claims and payment of benefits

- Compliance Responsible for monitoring compliance under the Contributory Pension Fund Act 1970 and Regulations.
- Contributions Responsible for issuance of social insurance numbers, maintenance of employer and employee accounts, employer billings and collections.

The DOSI Management Team is as follows:

- Director – Karen J. Daniels [kjaniels@gov.bm](mailto:kjdaniels@gov.bm)
- Acting Assistant Director – Patree Watts pwatts@gov.bm
- Acting Benefits Manager – Shanel Woodley swwoodley@gov.bm
- Acting Compliance Manager – Tonya Hatherley thatherley@gov.bm
- Contributions Manager - Belvina Burt bburt@gov.bm



Legislation

The Department of Social Insurance is governed by the following legislation:

The Contributory Pension Act 1970 (As amended)
Contributory Pensions and Workmen's Compensation (Reciprocal Agreement) Act 1970
Contributory Pensions (Voluntary Payments) Regulations 1968
Contributory Pensions (Exception From Liability For Contributions) Regulations 1973
Contributory Pensions (Widowers' and widows' Allowance) Regulations 1973
Contributory Pensions Validation Act 2000
The Pensions and Gratuities (War Service Act) 1947 as amended.

Section B: 1) Functions, powers, duties of the Authority [s5(1)b]**DOSI Vision Statement**

- To ensure every Bermudian has a pension that meets their basic needs and every contributor receives a benefit.

DOSI Mission Statement

- Through education, best practices and the use of technology the Department of Social Insurance will partner with every resident to enable them to become financially sustainable at retirement.

General Nature of Activities

The Department of Social Insurance is responsible for administering and developing the Government's social insurance programs in accordance with the foregoing legislation.

Scope of activities

The scope of the DOSI's activities is as follows:

- Support for the Financial Secretary and the Minister of Finance in administering the overall Department
- Issue and maintain a unique Social Insurance number for every person engaged in covered employment
- Collect Social Insurance Contributions from every registered employee and employer
- Pay Social Insurance Benefits to all eligible beneficiaries
- Conduct the monitoring of compliance of employers and employees within the provisions of the Contributory Pensions Act 1970.
- Conduct the administering of benefits on behalf of the War Pension Commissioners in accordance to the Pensions & Gratuities (War Service) Act 1947

Section B: 2) Obligations under PATI Act [s5(1)b]

To provide an **information statement** for the public and promulgate it [s5],

- To provide **other information** to the public so that the public needs only to have minimum resort to the use of the Act to obtain information [s6]. This includes:
 - General information, e.g. activities of the Authority

- Log of all information requests and their outcome
- Quarterly expenditure (upon request) [s6(5)]
- Contracts valued at \$50,000 or more.
- To **respond to information requests** in a timely manner [s12-16]
- To **track information requests**, and provide this data to the Information Commissioner
- To respond to requests from the Information Commissioner [s9]
- To **amend personal information** held by the Authority that it is wrong or misleading following a written request by the person to whom the information relates [s19]
- To conduct an **internal review** if formally requested [part 5]
- To give evidence for **review by the Information Commissioner** [part 6, 47(4)], or for **judicial review** [s49], if required
- To provide an **annual written report** to the Information Commissioner of the status of information requests [s58 (3)].
- **To do anything else as required** under the PATI Act and subsequent Regulations [s59, 60], including:
 - **Fees** for Requests for information
 - Management and maintenance of **records**
 - **Procedures** for administering the Act
- To **train staff and make arrangements** so as to facilitate compliance with the Act [s61]
- To **designate one of its officers** to be the person to whom requests are directed [s62]

Section C: Services and Programmes [s5(1)c]

The DOSI provides the following services and programmes to the participants of the Contributory Pension Fund:

Services:

Client	Service	Cost	Delivery Standard
Employers:	Registration	Free	Within 3 working days of receipt
	Maintenance of accounts	Free	Changes within 24 hours of Receipt
	Online account administration	Free	Via web site
	Monthly billings	Free	Prepared within the first 5 working days of the following month
	Reconciliation of accounts Private consultations	Free Free	Upon request Upon request
Employees	Issue Social Insurance Numbers	Free	Within 3 working days of Receipt
	Provide contribution history	Free	Upon request
	Investigate contribution violations by employers	Free	Within 10 working days
	Private consultations	Free	Upon request

Beneficiaries	Payment of pensions	Free	On 15 th of each month
	Birthdays card at 65 th birthday with pre-retirement briefing Package	Free	Within 6 weeks of 65 th birthday.
	Processing of benefit applications	Free	By 15 th of month following 65 th birthday (subject to receipt by 7 th of month and complete documentation)
	Payment of war veteran medical claims	Free	Within 15 working days of receipt

Programmes:

The DOSI provides the following programmes to the Bermudian public:

Public awareness briefings	Free	Upon request
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Section D: Records and documents held [s5(1)d]

The DOSI maintains an electronic depository of the following records and documents:

Employers

- Application for Registration forms
- Account adjustment request forms
- Account billings
- Payments on account
- Employer inspection reports
- Employer correspondence

Employees

- Application for Registration for Social Insurance Forms
- Member account change request forms

Beneficiaries

- Application for Benefit forms
- Records of benefit payments
- Continuation of benefit certification
- Records of medical claims payments

Section E: Administration (all public access) manuals [s5(1)e]

Section F: Decision-making documents [s5(1)f]

How we make our decisions

Decisions and recommendations

Decisions and recommendations are made in accordance with the governing legislation along with policy decisions made by both DOSI and the Ministry of Finance.

Requests for copies of the following documents may be made to the Information Officer:

- Budget Briefs
- Ministerial Statements
- Audited accounts of the Contributory Pension Fund

Our policies and procedures

Policies and Procedures

Requests for copies of the following documents may be made to the Information Officer:

- Collective Bargaining Agreement between the Government of Bermuda and the Bermuda Public Services Union
- Dignity at Work Policy
- Financial Instructions
- Government of Bermuda: Conditions of Employment and Code of Conduct
- Government of Bermuda: Internet and Email Policy Information Management Policy Government of Bermuda: Supplementary Summary of Terms and Conditions of Service

Section G: The Information officer [s5(1)g]

*Karen J. Daniels
Director
Department of Social Insurance
P.O. Box HM 1537
Hamilton HM FX
Email: kjdaniels@gov.bm
Tel: (441) 297-7888 or
(441) 295-5151 ext 1888*

Section H: Any Other Information [s5(1)h]

- *Benefits paid under the Contributory Pension Fund Act cannot be subjected to lien or assignment.*

Section I: Any Other Information To be Provided? [s5(1)i]

Section J: Information Statement: Copies and Updates [s5(2,3,4,5)]

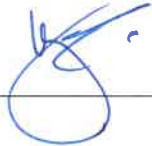
Every public authority shall update its information statement at least once a year, and make it available for inspection by the public at reasonable times by [s5(1-5), PATI Act]:

Date Information Statement was updated: *March 12, 2018*

Locations of Information Statement:

- [Government Administration Building, 30 Parliament Street, Hamilton](#) Y
- The Bermuda National Library; Y
- The Bermuda Archives; Y
- Available electronically, Y
- Website for public authority (www.gov.bm). Y
- Have you published a notice in the Gazette indicating the places where the information statement is available for the public? N
- With the Information Commissioner. Y

Sign and Date:



March 12, 2018