

Appendix A - Areas of Improvement

Area	Affected Team	Aim	Target Completion Date	Comments added 08042022	Comments added 17012023	Comments added 30032023
Member Self Service	Continued Improvements	To increase number of scheme member registrations, by raising awareness through online demos, articles and targeted comms with various categories of members, e.g. pensioners, deferreds, actives.	On-going	A further 13 employers have been contacted since the last update.	50 employers have been contacted in total and articles are being added periodically to employer intranets	Employers continue to be regularly contacted and articles provided promoting MSS for use on employer intranets.
Member Self Service	Continued Improvements	To use MSS facilities to allow letters to be uploaded to members to reduce postage, and allow for them to return their forms in the same way.	On-going	Work continues on these documents.	Online Retirement Process is being worked on for deferred members approaching retirement. Further detail in the main report.	Online Retirement Process is being worked on for deferred members approaching retirement. This is expected to be launched on a trial basis during April.
Governance	Continued Improvements / Payments and Taxation / Employers and iConnect	Examine areas of governance, including the implementation of the recommendations made by SAB's 'Good Governance' Project, ensuring that the section is compliant in all areas	On-going	Guidance expected later this year.	Guidance still outstanding	Guidance still outstanding. More detail in main report.
McCloud Project Phase 1	McCloud / Continued Improvements	Employers to provide member data to Pensions, i.e. hours changes and service breaks covering the period April 2014 to March 2022, which we will need to upload to our records prior to implementation of the 'remedy' once confirmed, to assess whether pension benefits will need to be adjusted in light of the McCloud/Sargeant ruling.	30/06/22	Update is expected on this from Heywood at the end of April.	Separate report provided on this topic.	Work on-going with this exercise.
McCloud Project Phase 2	McCloud / Continued Improvements	Implementation of the 'remedy', including the recalculation and amendment of benefits, plus communication to scheme members of the changes. Remedy may also include other aspects, e.g. possible option for members to aggregate any separate records, yet to be confirmed.	31/12/22	Regulations expected this year.	Regulations expected this year.	Regulations expected this summer.
Data Quality Issues	Continued Improvements	Data Errors raised through the annual Common Data / Scheme Specific Data reports need to be cleared in order to improve the TPR 'Data Score'. Other data errors raised through Hymans' Data Portal as part of preparation for Mid Term Valuation Exercise.	TPR Reports 31/7/2021: Mid Term Valuation Exercise 30/9/2021	As per the main report, Current Common and Scheme Specific Data scores to be included each report. Figures as at 6th April 2022 are: <b>Common Data: 97.2%; Scheme Specific Data: 97.59%</b>	Latest figures as at 10th January 2023 are: <b>Common Data: 97.3%; Scheme Specific Data: 97.84%</b>	Latest figures as at 30th March 2023 are: <b>Common Data: 97.3%; Scheme Specific Data: 97.75%</b>
Internal Processes	Aggregation Process	Review of Aggregation Process underway with the aim of simplifying Processes and reducing outstanding cases	On-going			Details provided in main report.

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