

| Area | Affected Team | Aim | Target Completion Date | Comments added 30032023 | Comments added 04072023 | Comments added 20092023 |
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| 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 | Online Retirement Process is being worked on for deferred members approaching retirement. This is expected to be launched on a trial basis during April. | A small number of cases have been processed through the online process and the trial will continue throughout July. | Trial temporarily on oldwhilst Heywood are reviewing functionality around online retirements with further developments expected. |
| 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 still outstanding. More detail in main report. | Guidance still outstanding | Guidance still outstanding |
| 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 | Latest figures as at 30th March 2023 are: Common Data: 97.3%; Scheme Specific Data: 97.75% | Latest figures as at 30th June 2023 are: Common Data: 97.1%; Scheme Specific Data: 97.36% | Latest figures as at 22nd September 2023 are: Common Data: 97.4%; Scheme Specific Data: 97.67% |
| Internal Processes | Aggregation Process | Review of Aggregation Process underway with the aim of simplifying Processes and reducing outstanding cases | 30/09/23 | Details provided in main report. | A revised set of letters relating to aggregations is being worked on by the LGA to act as templates for funds to use. Once these are available we will review our current letters and update where appropriate. Meanwhile training of team members continues to expand their knowledge of the various types of cases. | LGA templates were reviewed but no changes have currently been made to existing letters. Review now completed. |
| Payroll Conversion Project | Continued Improvements | Upgrades to payroll facilities to increase automation relating to monthly pensions processes and other payments | Autumn 2023 | | Work on this project has begun again following a temporary halt to focus on other areas. Heywood are upgrading the system 'build' in 'test' versions of payroll to allow testing to resume on cases. | final testing is on-going with go-live expected late October. |

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| Letter improvements | Continued Improvements | Examine estimate and retirement option letters with the aim of reducing the amount of manual input required. | 31/12/23 | | Initial work is in respect of the standard estimate letter. Testing and development on-going. | Estimate letter has been updated and this improved process is live. Exploration of multiple retirement option letters to begin in October with the aim of automating several fields that currently require manual input. |
| Overpayment Processes | Continued Improvements | Improving process in respect of outstanding invoices relating to overpaid pensions | 31/10/23 | | | New process in place where closer monitoring of outstanding debts is being managed by Pension Officers on a monthly basis. Completed. |
| Bank Account Verification Improvements | PAT/Early Leavers Team | Expanding use of Bank Account Verification wherever possible. | 31/10/23 | | | Already in use for PAT team, now being rolled out to Early Leavers team in respect of the payment of contribution refunds. Also now using NatWest's "Confirmation of Payee" facility to verify business bank accounts for payment of transfers to other schemes or LGPS funds. Completed. |