Area	Affected Team	Aim	Target Completion Date	Comments added 04072023	Comments added 20092023	Comments added 02012024	Comments added 22032024
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 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%**	Latest figures as at 2nd January 2024 are: **Common Data: 97.4%; Scheme Specific Data: 97.7%**	Latest figures as at 22nd March 2024 are: **Common Data: 98.0%; Scheme Specific Data: 97.61%**
Review of Deaths and Retirements Processes	Continued Improvements	Following on from the successful implementation of new payroll functionality, officers from pensions and payroll to review how the new facilities can help to streamline the existing process relating to the creation of new pensioners. This will then link to a broader review of the retirements and deaths processes.	On-going			Initial meetings including officers from Pensions and Payroll scheduled for the end of January 2024.	Initial meeting delayed following McCloud and EA2P bedding in but rescheduled for end of April 2024.
Employer Discretions	Continued Improvements	Conduct a review of current discretionary policies in place for scheme employers and refresh related documentation.	30/09/23			New discretionary policy template and guide issued to scheme employers for completion by 31/3/2024. Employers invited to login to a Teams Q and A session in mid-January to aid completion of new template.	**28** Policies received so far (as at 27th March 2024). Reminder was uploaded to the employer website on 22nd March 2024.
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	Guidance still outstanding	Guidance still outstanding	Good Governance guidance still outstanding, but Code of Practice due to go live at the end of March - details in the main report.
Checking Processes	Continued Improvements/PAT Team/Early Leavers	Following the 2023/24 Pension Creation exercise, Officers created a "Checking Process" document following a recommendation from Audit that formalised the process officers follow when checking retirements and deaths.	On-going			Document to be kept under review and expand contents to eventually cover all areas of checking.	-
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	A small number of cases have been processed through the online process and the trial will continue throughout July.	Trial temporarily on hold whilst Heywood are reviewing functionality around online retirements with further developments expected.	_	_

This page is intentionally left blank