

Area	Affected Team	Aim	Target Completion Date	Comments added 20092023	Comments added 02012024	Comments added 22032024	Comments added 24062024
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.	On-going	Latest figures as at 22nd September 2023 are: <b>Common Data: 97.4%; Scheme Specific Data: 97.67%</b>	Latest figures as at 2nd January 2024 are: <b>Common Data: 97.4%; Scheme Specific Data: 97.7%</b>	Latest figures as at 22nd March 2024 are: <b>Common Data: 98.0%; Scheme Specific Data: 97.61%</b>	Latest figures as at 24th June 2024 are: <b>Common Data: 98.0%; Scheme Specific Data: 97.05%*</b> (This figure artificially low as we are mid way through year end. Would expect this to rise next quarter)
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.	Work has begun on streamlining the initial Death notification process and flow charts to identify the different steps taken dependant on the method of notification, e.g. Telephone call/ Tell Us Once / Mortality Screening notifications
Employer Discretions	Continued Improvements	Conduct a review of current discretionary policies in place for scheme employers and refresh related documentation.	30/09/24		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.	<b>28</b> Policies received so far (as at 27th March 2024). Reminder was uploaded to the employer website on 22nd March 2024.	<b>46</b> Policies received so far (as at 24th June 2024). Employers now being contacted directly via email to complete and return their document.
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	Good Governance guidance still outstanding, but Code of Practice due to go live at the end of March - details in the main report.	Initial Assessment of Code of Practice conducted. Full details in separate report.

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