



Leicestershire Local  
Government Pension  
Scheme  
Data Improvement Plan  
2025/26

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Leicestershire County Council as the Administering Authority of the Leicestershire Pension Fund is responsible for setting policies, strategies and statements to ensure the Fund's obligations to its members, employees and stakeholders are met. These are available [on the pension fund's website](#).

**This plan was approved by the Pension Committee on 14 March 2025.**

## 1 Introduction

The Pension Regulator's Code of Practice requires funds to have a plan detailing the steps officers will take to improve their quality of data in the year ahead. Going forward, officers will submit a report to the Board annually detailing plans for data improvement in the year ahead.

The overall quality of pensions data remains high. The data quality scores as submitted to The Pension Regulator annually are shown in the appendix and are currently both over 97%.

The Fund actuary recently commented "The data provided by the Leicestershire Fund is of a high standard and has been for several years. From my experience working with the Fund for over 10 years, this is a result of hard work, quality administration staff and rigorous process".

Officers will continue to strive to keep the overall quality high whilst focussing on any areas that need particular attention.

## 2 Business as Usual

The Pension Section already follows a significant number of processes to maintain high quality pension member records and this work will continue throughout 2025-2026. Further details are included in the appendix.

## 3 Plans for 2025-2026

In addition to 'Business as Usual' actions there will be three areas addressed in 2025-26: the 2025 Valuation, Pension Dashboards Programme and the McCloud exercise. These areas will all be included in the Pensions Administration Business Plan 2025-26.

## 4 2025 Valuation

The most significant event of 2025-26 will be the work undertaken in respect of the fund valuation. In addition to the usual annual processes used to ensure that data is of the required standard, Officers will take the following steps.

### Focus on non-stabilised employer record casework

Data for the fund's stabilised employers has already been submitted to Hymans Robertson, the fund actuary, leaving officers to focus on the remaining employers. Team Managers will closely monitor casework in respect of lower priority cases (e.g. deferred benefits and aggregation work) and identify cases that are likely to have the largest impact on the valuation. This would generally be members with the highest level of pension benefits. However, a balance will need to be struck to ensure that other cases are also processed.

### Data Portal

Officers will utilise Hymans' online 'Data Portal' to highlight issues with individual records. The portal is available for use, free of charge at any time and regular use will reduce the

number of queries to resolve immediately prior to the submission of the final data. Officers extract data from Altair, which is uploaded to the portal and any issues are highlighted.

### Advanced Data Review

Officers have arranged for Hymans to conduct an 'Advanced Data Review'. This is an exercise designed to assess how 'valuation ready' the fund's data is and Hymans will provide a plan to help improve any areas where this may be required. The review will also provide employer-level data quality ratings, which will allow officers to work closer with any employers that require more attention and this may also feed into prioritising casework for the non-stabilised employers. Results from the review will be provided to the Board in a future report.

## **5 Pension Dashboard Programme (PDP)**

As the deadline for the introduction of the PDP edges closer, officers are taking steps to check data to ensure it is fit for purpose.

The initial focus relates to analysis of approximately 600 member records that have been rejected by the data upload process that feeds relevant information to the Dashboard ISP. These errors will need to be cleared ahead of Dashboards going live.

Officers have requested a 'Pensions Dashboards Readiness Assessment' from our systems supplier, Heywood. This is a free report that summarises the quality of our data and what actions may be needed to prepare for Dashboards. The summary results will include a score for the following areas:

- Checks on fields that may be used for matching as part of the Dashboard process (name, date of birth, address) to determine whether the data held is present, valid and accurate
- Checking for member which would currently be duplicate matches
- Check that there is data available to be returned to the Dashboards for each member employment

The report will be analysed and will be taken into consideration when planning the most effective way to resolve any issues highlighted.

Officers will also work to ensure that AVC data held by Prudential matches member data held on Altair. Prior to Dashboards going live a new process will be introduced that will upload monthly data from Prudential into Altair, so matching data will be crucial to this running smoothly. Further details regarding this new process will be included in a future report.

## **6 McCloud Exercise**

As the initial work in relation to updating data for members in-scope for the McCloud exercise reaches its conclusion, officers will process bulk uploads of data to these records in respect of the calculation of the McCloud 'underpin'. There is a statutory requirement for underpin

information to be included in the 2025 Annual Benefit Statements which must be produced by 31 August 2025.

## **7 Officers to Contact**

Ian Howe Pensions Manager [ian.howe@leics.gov.uk](mailto:ian.howe@leics.gov.uk)

Stuart Wells Pensions Projects Manager [stuart.wells@leics.gov.uk](mailto:stuart.wells@leics.gov.uk)

## Appendix: Pension Fund 'Business as Usual' Data Cleansing Actions (February 2025)

### Data Quality Insights Reports

Maintain The Pension Regulator's 'Common' and 'Scheme Specific' data scores through Insights reporting tool.

The data scores on **31 December 2024** were:

Common Data: **97.3%**

Scheme Specific: **97.0%**

### Data Correction Alerts

A series of data checks have been set up so that when an issue occurs an email is generated that advises an officer of the case that needs to be corrected.

The current checks are:

- Irregular characters in Surname, Job Title, Address
- Invalid characters within email addresses
- Pensioner records with a "Pay-ID" field but no address (meaning this could prevent payment of a pension)
- Payroll cost code does not start with L or P
- Current scheme member records without an address
- Validation of Reference held on AVC screen
- Missing "No PI Ind" field on record for any Pensioner aged under 55 (legacy regs)
- "Retirement Basic Details" displayed on pensioner record but member not on payroll
- Active members over 75 still paying into LGPS

### Address Checks

We check with the Fund's address tracing provider for the last known address in respect of the following categories:

- Deferred members where their pension is due to be paid unreduced
- Deferred members who have reached the age of 55
- Pensions that have been suspended (for a variety of reasons)
- Members who left 5 years ago with an entitlement to a refund
- Deferred members

Where a letter has been issued and returned, marked 'not known at this address', or in the case of a deferred member where their pension is due to be paid unreduced, a letter and a reminder have not been responded to, a check on the current address is performed.

Checks are carried out in bulk every other month.

#### Pensioner to payroll monthly reconciliation

A report is produced each month for officers to check cases where pension values held on Administration and Payroll records differ.

#### Mortality Screening Processes

Monthly Report provided by Mortality Screening Provider. This is matched against our records on a monthly basis to identify members who have recently died.

National Fraud Initiative exercise: A standard 'NFI' report is provided to the Fund every two years. In addition, NFI also provide an additional report every six months (as requested by the Fund). These are used for further checks on any deceased members that officers may not have been notified of.

#### National Insurance Database

The National Insurance database is utilised to identify members who have previous LGPS membership in other funds. This allows officers to:

- Prevent refunds being paid if member isn't entitled
- Inward transfers from other LGPS funds to be investigated where members haven't declared previous membership
- Check the database for previous membership as this can impact on the calculation of a Death Grant in some circumstances

#### i-Connect

Monthly submissions of data from all employers through the Heywood i-Connect portal.

Daily/Weekly/Monthly Checks:

Balancing: Comparing amounts paid over to i-Connect figures.

i-Connect Starters warnings: Records displaying start dates outside of the relevant period are highlighted and if necessary queried with employers.

i-Leaver tasks: An i-leaver task is created when a leaving date or where applicable an opt out date has been applied to the record.

Officers are automatically notified of all error events and these are investigated and followed up.

Deceased records checks: A report is regularly run to identify changes made to deceased records following an i-Connect submission.

When submission are overdue these are chased up with the relevant employer.

In addition, the following checks are built into i-Connect as standard:

Validation errors: Submissions with validation error cannot be processed without being authorised and so now errors need to be clarified before being processed. This should pick-up new starters missing a start date or members over age 75 for example.

Tolerance failures: Submissions with data displayed outside of system ‘tolerances’ cannot be processed without being authorised and so now errors need to be clarified before being processed. This can identify issues with employer rates and overinflated figures.

Balancing: Payments made must balance with i-Connect period figures or if not a reason must be provided (see screenshot below)

Employer rate discrepancies: Employer rate is stored in i-Connect, rate is applied to the pay figure and if there is a discrepancy it is flagged in red (see screenshot below)

Omitted members list: This can be processed without authorisation but when there are validation errors or a balancing discrepancy we can query the case.

Recent Activities								
File Name	Period End Date	Expected Submission Date	Submission Date	Submission Type	Status			
Leicester I-Connect August 24 to upload.csv	31-08-2024	31-08-2024	15-11-2024 15:03:16	Payroll Upload	Pending			
Submission Statistics								
Total Number of Payroll Members Tracked by i-Connect					635			
Omitted Payroll Members (present on a previous submission, and no leaver event processed)					5			
Total Number of Potential Single Continuous Employments					18			
Payroll Members Submitted	631	Payroll Members in Error	1	Accepted for Processing	630			
Pay Summary		Contributions This Period		Contributions Year To Date (YTD)				
Pensionable Pay (Period)	£621,943.67	Employee Main Contributions	£46,937.55	Employee Main Contributions	£229,131.75			
Main CARE Pay (YTD)	£3,978,385.06	Employee 50/50 Contributions	£239.52	Employee 50/50 Contributions	£1,147.86			
50/50 CARE Pay (YTD)	£37,737.38	Employer Contributions	£225,808.43	Employer Contributions	£1,103,352.14			
		Add Conts/ARCs	£0.00	Add Conts/ARCs	£0.00			
		Shared Cost APCs	£0.00	Shared Cost APCs	£0.00			
		Employee APCs	£0.00	Employee APCs	£0.00			
		Secondary Contributions	£0.00	Secondary Contributions	£0.00			
				AVCs	£950.00			
<a href="#">View schedule of rates</a>		Expected Employer Contributions (Period)	£224,536.82	Expected Employer Payments (YTD)	£1,333,631.75			
		Difference	+£1,271.61					
		Total Payments Due (Period)	£273,065.50	Total Payments (YTD) (excl. AVCs)	£1,333,631.75			
		Total Payments Provided (Period)		Reason for difference (if given)				
		Payment Difference						
Submitted By User: C.Carrigan123								
2 tolerance failures and validation errors for 1 member(s) detected for this submission. <a href="#">Click here to view the failures and errors.</a>								
Events	Total	Pending	Submitted	Completed	Failures	Errors	Suppressed	Progress
New Starter	47	47	0	0	0	0	0	
Opt In	0	0	0	0	0	0	0	

Year End Work / Annual Benefit Statements

Final Pay tolerance checks (for post 2014 service members only)

Period total matches March Year to Date

Cases missing March 202\* CARE data are queried