Worcestershire Pension Fund Data Improvement Plan   August 2023

Background

Maintaining accurate data is vital to correct benefits being paid out.

The Pensions Regulator (TPR) urges schemes to have effective processes for [maintaining and continually improving data](#).

TPR splits data into two categories: 'Common' and 'Scheme Specific'.

'Common' data is data used so that a member can be uniquely identified and consists of things like National Insurance (NI) number.

'Scheme Specific' data is data used to accurately calculate member benefits and consists of things like date of leaving and contributions.

TPR requires an annual scheme return about the quality of its data. The percentage of our member records passing ALL tests required by TPR on our data extract of 17 November 2022 was:
- Common data 95.4% (our 2021 score was 95%)
- Scheme-specific data 98.3% (our 2021 score was 98.7%)

How we plan to improve our data

We plan to continue to use actuarial valuations to identify missing or incorrect data by undertaking sense-checking of individual data items, for example by interrogating the data for very large pays or ages using tolerance / consistency limits.

We plan to continue to use Heywood's tool, Insights, to not only produce our annual TPR scheme data return, but also through undertaking additional analysis to identify areas to focus on improving, particularly those where our data has worsened since the previous year's TPR return.

We plan to continue to collect a year end return from our employers and to use these returns to identify data inaccuracies and any starters or leavers that we have not yet received notification of, so that we can obtain missing data from their employer.

We plan to continue to collect [monthly CARE data](#) from our employers and to use these returns to identify any starters or leavers that we have not yet received notification of, so that we can obtain missing data from their employer.

We plan to continue to use the LGPS National Insurance Database to check for missing contact information about our members and when processing a transaction, for example when processing the death of a member of the Fund or a refund.

We plan to continue to use the Department of Work and Pensions' (DWP) 'Tell us once' service to check for deceased members' that we are unaware of and their data.

We plan to continue to use data supplied by the National Fraud Initiative (NFI) to take remedial action and to update our records accordingly.

We plan to continue to use mortality screening services to identify any members whose death we are unaware of.

We plan to continue to engage third party data services to find or check members' most recent postal address.

We plan to continue to review that the way in which we maintain our data is in accordance with statutory guidelines.

We plan to continue to use our deferred and employee member annual benefit statement extracts and the annual extract we use for issuing our annual pensioner newsletter to identify missing or incorrect data (that may have prevented us from being able to issue an annual benefit statement) to cleanse those records on our pension administration system.

We plan to continue to seek out addresses from any mail returned to us as undeliverable, for example following the issue of our annual benefit statements.

We plan to provide members with online access to their pension record, so that we can increase the number of emails on our system, thereby providing us with an additional way of keeping in contact with them and a means for them to update some of their personal details.

We plan to develop our KPIs, for example at an employer level, so that we can focus on supporting those employers with data supply issues by developing tailored data improvement plans.

We plan to continue to consult our employers annually on our Pension Administration Strategy, thereby reminding them of their responsibilities.

We plan to continue to use our website and our monthly employer newsletters to explain our requirements of them and to provide tips on data issues / publicise an increased training output to include podcasts and bespoke training sessions, for example on producing a year end return.

We plan to continue to ensure that all data collection processes are clearly documented, regularly reviewed, and supported by an audit programme.

We plan to increase the training we deliver to our staff on data.

We plan to continue requiring an annual certificate of existence from our pensioners who have either a power of attorney in place or who live overseas.

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