



Data Improvement Plan
November 2024

Summary

This improvement plan primarily aims to address the key issues identified in the Fund's Annual Data Quality review which took place in October 2024 and demonstrates the appropriate steps the Fund is taking to tackle the issues raised in the review and how it will improve the data held.

The Fund also undertakes additional measures to ensure that accurate pension benefits are communicated and paid to the correct member or beneficiary.

The Fund procured mortality and tracing services in 2024. Regular exercises will be made to trace addresses for our "lost" members.

The next generation of member online portal, known as Engage (renamed from TME), has been released by Heywood Pensions Technologies. Due to other workloads the Fund was unable to progress with the plan to upgrade to Engage during 2024. However, procurement is proceeding and implementation expected early 2025.

A revised staged connection timetable for The Pensions Dashboard Programme has been released and all public sector pension schemes will be required to connect by 31 October 2025. As well as progressing with procurement of an Integrated Service Provider to achieve connection the Fund will also undertake several member data cleansing exercises in preparation for matching to member find requests and return value data.

Plan Objectives

- ❖ Maintain complete and accurate records to ensure the timeously payment of correct pension benefits.
- ❖ Identify members with "gone-away" status and undertake tracing exercises to locate new addresses.
- ❖ To prevent and detect fraudulent claims.
- ❖ Improve the member online experience by expanding their self-service capabilities.
- ❖ Engage with employers to improve the timeliness and quality of member data.
- ❖ Data cleansing in readiness for onboarding to the Pensions Dashboards eco-system.

Outcomes

| Objective | Action | Measure | Resource | Timescale |
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| Maintain complete and accurate records to ensure the timeously payment of correct pension benefits | Keep the data quality dashboard under monthly review. Rectifying issues and pinpointing any training requirements. | Outperform the internal performance indicator of 95% for both common and scheme-specific TPR data quality scores. | Lothian Pension Fund Staff Data analytical tool | September 2025 |
| | Identify potential data errors utilising the actuary's fund valuation data cleansing tool on a quarterly basis | Aim to keep number of critical issues below 1,000 | Lothian Pension Fund Staff Actuarial data cleansing tool | Quarterly - ongoing |
| Identify members with "gone-away" status and undertake tracing exercise to locate new address | The Fund will carry out annual bulk exercises and online case by case investigations to trace "lost" members. | Reduction in number of members with "gone-away" status | Lothian Pension Fund Staff Mortality and tracing service | September 2025 |
| To prevent and detect fraudulent claims | The Fund will participate in the biennial National Fraud Initiative | Complete investigation of cases specified by 2022/23 initiative | Lothian Pension Fund Staff NFI Portal | Next Initiative 2024/25 |
| | The Fund will use a biometric authentication solution for proof of life | Results will be used to suspend or stop pension payments | Lothian Pension Fund Staff Crown Agents | ongoing |

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| | verification for our overseas pensioners | | | |
| | The Fund will submit data to the annual Club Vita exercise for analysis | Results will be used to investigate “suspicious” payments and cleanse longevity data | Lothian Pension Fund Staff Club Vita portal | September 2024 |
| | The Fund will receive Daily Updates from Tell Us Once | Results will be used to suspend or stop pension payments | Lothian Pension Fund Staff TUO portal | ongoing |
| | The Fund will submit monthly data to the LGPS NI Database | Checks will be performed for benefits held with other funds to ensure benefit are paid in compliance with legislation | Lothian Pension Fund Staff LGPS NI Database | Monthly - ongoing |
| Improve the member online experience by expanding their self-service capabilities | The Fund will propose new development ideas to the software provider and promote the benefits of the latest enhancements to members. | Increase in self service traffic with corresponding reduction in estimate requests | Lothian Pension Fund Staff Heywood programme developers | Ongoing collaboration |
| | Complete upgrade to next generation portal TME | Existing member users transferred over | Lothian Pension Fund Heywood Pensions Technologies | December 2024 |
| Engage with the employers to improve the timeliness | The Fund will provide quarterly Pension | Analyse the results and identify employers of concern. Deliver training | Lothian Pension Fund staff Employer Staff | Quarterly - ongoing |

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| and quality of member data | Administration Strategy statistics to employers | where improvement required | | |
| | The Fund will arrange and attend regular meetings with employers to discuss issues and improvement plans | Improved PAS statistics | Lothian Pension Fund staff Employer Staff | ongoing |
| | The Fund will provide ongoing employer support in the provision of monthly submissions | Increase in percentage of returns submitted by due date. Reduction in manual rectification work | Lothian Pension Fund staff Employer Staff | Monthly - ongoing |
| Data cleansing in readiness for onboarding to the Pensions Dashboards eco-system | Complete a data sense check on data required for Pensions Dashboard and rectify discrepancies | Records dashboard ready | Lothian Pension Fund staff ISP Analysis tools | October 2025 |