Developments & projects

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Pensions Data Collection (PDC)

Rob Hughes, Business Analyst

What we're trying to achieve?

Teachers' Pensions aims to:

- Implement a slick modernised pensions data collection solution, which reduces the administrative burden on employers/suppliers
- We want to work with employers/suppliers to ensure that the final solution is right for everyone
- Ensure that the data collected each month is consistent across all organisations, to offer confidence to stakeholders that everyone is offered the same level of benefit
- Further develop Employers/Suppliers relationships, through the success of the PDC project.

The Employer/Supplier Perspective…

An employer/supplier event was held in Leeds on 20/08/13.

We understand that previous attempts to implement a monthly data collection has created "some frustration" amongst employers and payroll providers but…

PDC is being developed with this feedback in mind.

We know:

Employers/Providers find the TR6, TR8, Annual Service Return and Re-employment certificates to be cumbersome, creating significant overheads.

Employers want us to commit to implementing changes which are future proof, with a long term vision.

Why is PDC Different?

PDC will be a slick modernised solution because:

- A full end to end project will be implemented, taking a phased approach to implement a more substantial monthly data collection – working collaboratively with employers/suppliers
- This phased approach will assess the viability of replacing the Re-employment certificate, TR6, TR8 and ASR or alternatively, using the PDC to reduce the burden on employers of completing these forms through modernisation
- Employers will be provided with a detailed Specification for the monthly data collection extract and a full project plan to illustrate how this will be achieved
- CEB aim to be a trailblazer in pensions by aiming to achieve a slick, modernised monthly data collection solution. If the most ambitious solution is targeted initially, it can always scaled back if needed.

Employer/Supplier role

PDC can only be implemented with the support of employers and suppliers:

- Teachers' Pensions want a commitment from employers and suppliers to support the full end to end project, including volunteers to take part in a pilot exercise
- There will be development required within your organisation – but we will provide a detailed data specification document to support this work
- We'll also need employers/suppliers to support other activities including activities like internal training and communications
- A key point of contact and/or project leads from each organisation.

What are the benefits?

PDC presents significant benefits to employers and suppliers:

- A more modernised approach to data exchange
- PDC could, potentially, replace a number of existing products, creating efficiencies within your organisation
- Member information will be accurate and up to date
- Increased automation of existing processes
- A strengthened, more collaborative relationship between employers/suppliers and Teachers' Pensions.

What's your view?

Your feedback is vital to implementing a solution that benefits everyone. Please tell us:

- What are your thoughts on PDC?
- What do you see as the key components of this project?
- What do you think is achievable and realistic?
- How do you want to be communicated? Who are your key contacts?
- What do you want to see from Teachers' Pensions?
- Do you understand the role of employers and suppliers?

Teachers' Pensions

Data Management Strategy

What we're trying to achieve?

Teachers' Pensions aims to:

"Ensure its data is accurate and current, through a rigorous data management approach, adhering to strict data principles to deliver the best possible service to its customers."

This will be achieved through a set of strategies delivered by a phased project, and governed by a set of robust principles. Teachers' Pensions will:

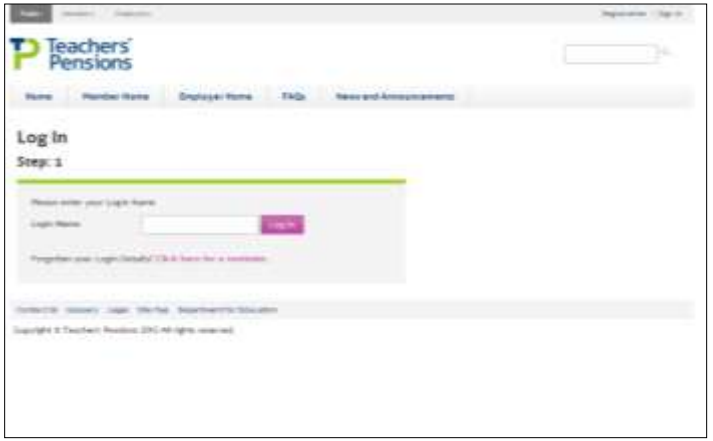
- Ensure data is fit for purpose and accurate
- Understand data is an asset
- Ensure data is compliant with law and regulations
- Ensure data is secure
- Ensure everyone is accountable for data management.

Over-arching strategies

A set of over-arching data management strategies will be embedded at the outset of the Data Management project, designed to provide a solid foundation on which to manage data moving forward.

These include:

- Embedding data management into the change lifecycle
- Establishing a Data Controller/Data working group
- Ensuring quality controls are in place
- Clear communications and stakeholder engagement
- Embedding a minimum data set
- Process Improvement
- Employer data management.



Strategies

A phased approach will be undertaken to implement the following strategies. At a high level Teacher's Pensions will improve the data it holds, and maintain it moving forward, through the following strategies:

- Use of existing lines of communications – Call centre, Employer Portal, email
- Undertaking Experian data cleanse activities
- Establishing clear training roles and training strategies
- Use of Royal Mail products – including PAF and NCOA
- Implementation of a Monthly Pensions Data collection
- Developing a single employer database/matrix
- Improvements to existing products – the Employer Portal, forms
- Developing stakeholder relationships through focused engagement
- Expanding the data sets we hold.

Employer/Supplier role

Employer and supplier buy-in is vital to the success of any data management strategy. The data held by Teachers' Pensions is only as good as the data provided by employers and members. With this in mind we'll engage employers directly to:

- Achieve buy-in to the data strategy
- Educate employers about the importance of providing accurate data
- Evidence how we will lessen the burden to employers longer term.

Achieving this through

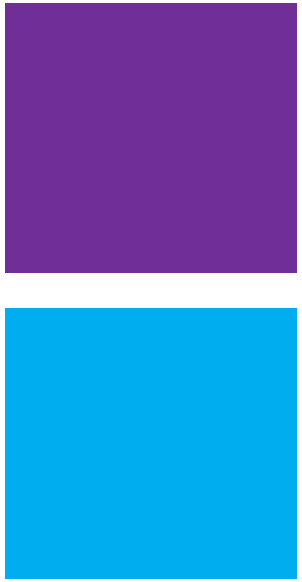
- Effective face to face engagement – ERM team
- Effective communications – Newsletter, email correspondence
- Promoting the improvements that can be made to existing products
- Providing clear and informative information about the benefits of data management
- Reduced employer queries from Teachers' Pensions and members due to data errors.

Benefits

The success of the Teachers' Pensions data management approach presents obvious benefits to the business. But it also presents many benefits to employers and members, and in turn the DfE.

Including:

- Improved engagement
- Potential for increased automation
- More accurate pension data
- Ensuring that providing data is as easy as possible
- Improved employer experience and confidence in Teachers' Pensions
- Improved member experience and confidence in Teachers' Pensions
- The Pensions Regulator data compliance
- Contractual data compliance.



What's your view?

Your feedback is vital to implementing a solution that benefits everyone. Please tell us:

- What are your thoughts on data management?
- How do you want to be communicated?
- Who are your key contacts?
- Would you be willing to sign up a data management agreement?
- What can we do to help employers provide accurate and up to date data?

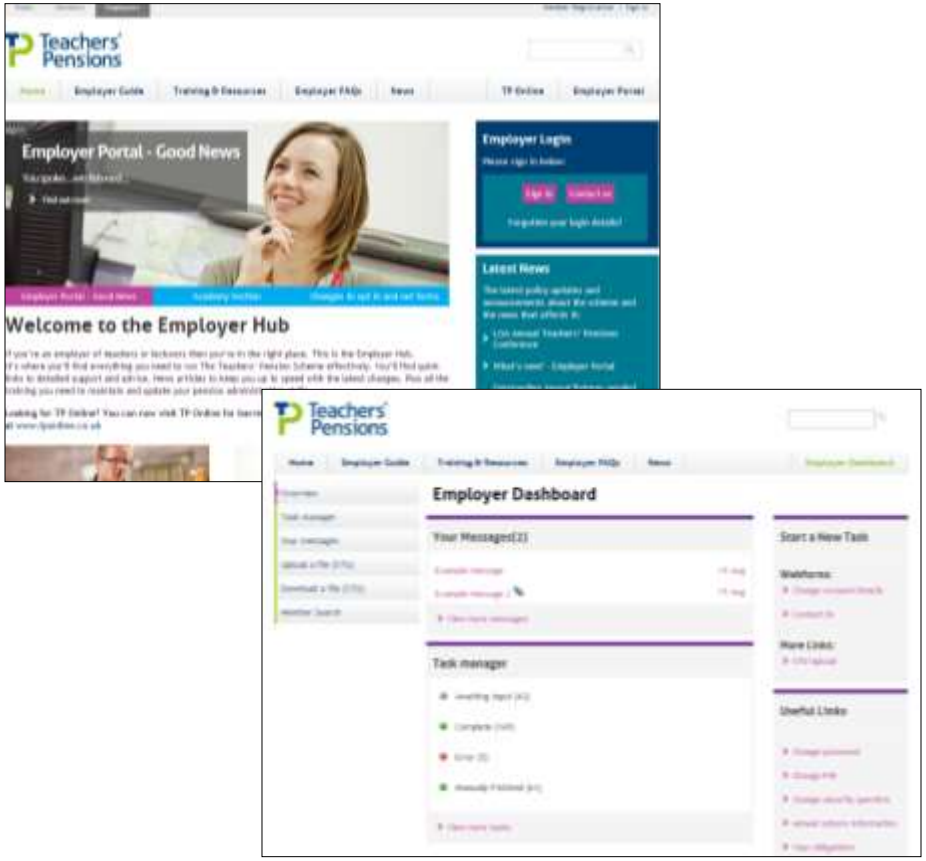
Any questions?

Employer Portal

Allan Downing, Employer Relationship Manager

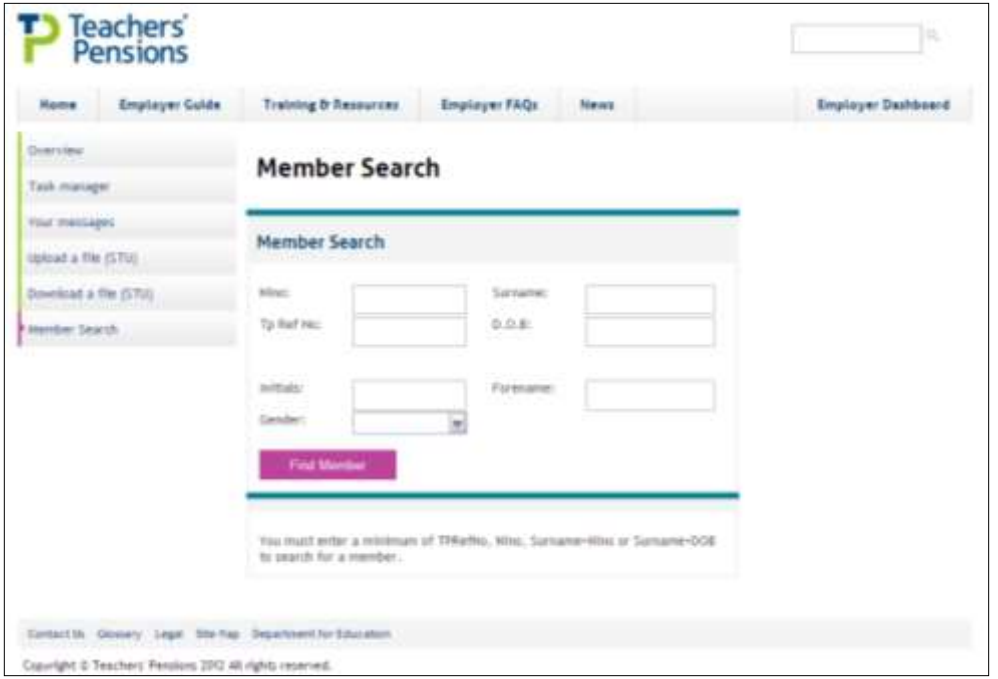
Overview

- Ability to unlock web forms
- Stability and speed improvements
- Multiple account access
- Single area for the most up to date templates
- Form print button added to all forms
- QQ NI Number issue resolved
- All in one place.



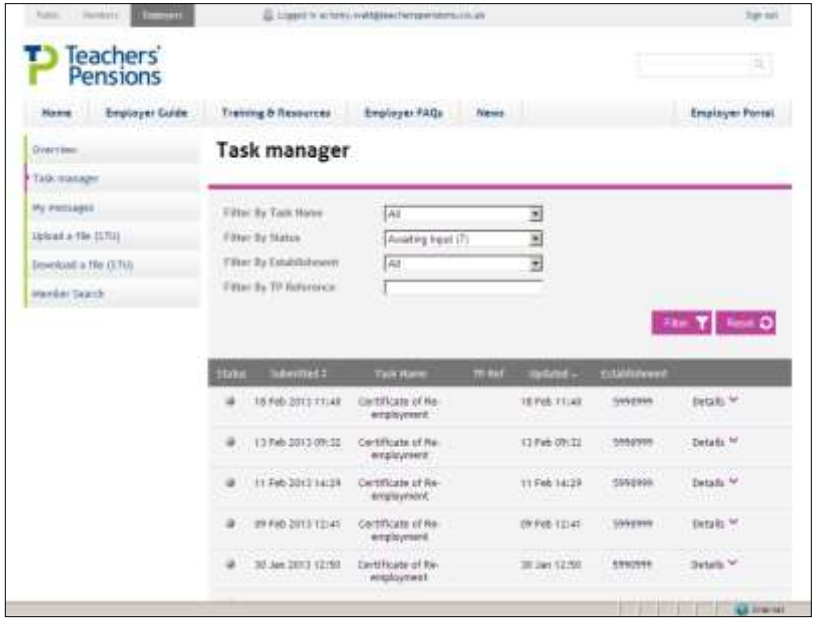
Enhanced Member Search

- In line help
- Integrated functionality
- Instant member prints
- Ability to edit and update Teacher details.



Evolving Task Manager

- List of outstanding forms
- Additional information fields within the Task Manager
- Automated email updated with addition information
- Ability to view submitted forms.



Future

- Data centre selection module - ability to choose a default data centre
- Online registration process
- Online account management – add new users
- Reviewing web form for Monthly Contributions
- Assessing form save functionality
- Quick find an ERM
- Tailored dashboard messaging
- Online quick video guides.

Any questions?