

Data Improvement Plan 2026/27 – Northamptonshire Pension Fund

	Activity	Risk	Action	Number of affected records	Resolution timescale	Resource required																				
1	<p>Improve the presence and accuracy of common data (Basic details about the scheme member such as full names, date of birth, national insurance number, address – email address)</p>	<p>If basic personal details such as date of birth are incorrect benefit entitlement may be calculated incorrectly which may adversely impact the scheme member, scheme employer or Fund.</p> <p>If a correct home address is not held scheme members may also not receive important communications about their benefits.</p> <p>Members using the Pensions Dashboard (when they become available) may not get instant access to their membership data if any of their personal data that they enter does not match with the information held on their pension records. Such incidents will result in additional work in matching the member to their data and may fail turnaround times as directed by the Pensions Dashboard Programme, and reportable to, the Pensions Regulator.</p>	<p>Most of the scheme’s common data fails are missing or incorrect addresses so the focus will be on this area. Ensuring that all returned items of post are followed up by using the Fund’s Address Tracing service to obtain the correct address for the scheme member.</p> <p>Ensuring all personalised (non-bulk) communications where no address is held on the record for the individual are traced through the Fund’s Address Tracing service.</p> <p><i>(In the past it has not proved to be cost or time effective to conduct large scale bulk address tracing exercises).</i></p>	<p>Approx. 5631 (as of 31/12/2025)</p> <table border="1"> <thead> <tr> <th>Failure Description</th> <th>Number of Records</th> </tr> </thead> <tbody> <tr> <td>Address Failures</td> <td>3915</td> </tr> <tr> <td>Date Commenced Failures</td> <td>1</td> </tr> <tr> <td>Invalid Data View Failures</td> <td>1384</td> </tr> <tr> <td>Name Failures</td> <td>0</td> </tr> <tr> <td>NI Number Failures</td> <td>238</td> </tr> <tr> <td>Sex & DOB Failures</td> <td>0</td> </tr> <tr> <td>Status Failures</td> <td>90</td> </tr> <tr> <td>Valid DV Failures</td> <td>3</td> </tr> <tr> <td>Grand Total</td> <td>5631</td> </tr> </tbody> </table>	Failure Description	Number of Records	Address Failures	3915	Date Commenced Failures	1	Invalid Data View Failures	1384	Name Failures	0	NI Number Failures	238	Sex & DOB Failures	0	Status Failures	90	Valid DV Failures	3	Grand Total	5631	Ongoing	All Officers within the Pensions Service (and in bulk via activities 3 and 4).
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2	<p>Unprocessed leaver records (backlog)</p> <p>The Fund has a number of records where a member has left a period of pensionable employment, is not entitled to immediate payment of pension benefits, but is entitled to either a refund of contributions, aggregation with another period of pensionable membership and/or a deferred pension award.</p>	<p>These cases need to be resolved to ensure that members receive timely information on the benefits that they are entitled to. A significant number of these records are in progress for a variety of reasons, including outstanding information required from the employer. Any case which is older than 6 months since the point of notification is classed as a backlog. The number of backlog cases is reported in each business plan update report.</p> <p>Members with unprocessed future benefits are not able to access the Fund's online portal and would not be able to see the value of their benefits on the Pensions Dashboard for that period of membership only until that benefit is fully processed.</p>	<p>In 2026/27 and 2027/28, the backlog will be reduced by 2,000 cases each year. The aim is to bring the backlog down to a baseline level of 500–1,000 cases.</p>	5,501 as of 2 nd January 2026	March 2028	Officers from the Projects Team
3	<p>Single Source AVC Data update</p> <p>AVC information must be recorded within each</p>	<p>Failure to accurately record members' AVC data will result in incorrect pension values being displayed on the Pension Dashboard, which</p>	<p>Collect and update members' AVC values each month to ensure the pension figures shown on the Pension Dashboard remain accurate.</p>	Less than 1000	All member records containing AVC data will be fully	Systems Analyst and Officers from the

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	member's employment-level record to support correct retrieval and display of AVC values on the Pension Dashboard.	would not meet statutory compliance obligations.			updated before the Pension Dashboard goes live on 31/10/2026.	Systems Team
4	<p>Membership details of other previous Public Service Pension Schemes</p> <p>Member's individual records (at employment level) need to hold details of any previous Public Service Pension Schemes (PSPS) membership to enable accurate assessments of whether the member qualifies for the McCloud underpin protection.</p>	If members records are not accurately updated with previous PSPS membership their annual benefit statements will not reflect the information needed for the McCloud underpin that is a statutory requirement for 2024/25 benefit statements.	Any previous public service pension scheme membership that the member has not elected to transfer into their LGPS benefits held in this Fund need to be collated from the scheme member and verified with their previous scheme and recorded as unaggregated membership. Members will have one final opportunity at the point they transfer or receive payment of accrued benefits to update their record with this information.	Unknown – depends on responses from scheme members	We have contacted members regarding their PSPS membership, and we will now be approaching other schemes to confirm their membership details by 31 March 2026. All LGPS funds have been contacted, and we are currently awaiting 24 responses.	Officers from the Projects Team

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					Our aim is to obtain the remaining information by the end of March 2026.	
5	Employer Data Checker Create a checker to enable scheme employers to check the quality of data being submitted through the i-Connect portal, reducing the number of data quality issues impacting pension records and the volume of data queries	If poor quality member data is provided by scheme employers it can impact the timeliness and accuracy of pensions administration, and create additional workloads for administrators.	Checker to be developed, tested and rolled out to scheme employers.	All active records receive monthly data flows	We are aiming to deploy Employer Data Checker during scheme year 2026/2027.	Pensions Systems Analysts and Systems Team Officers
6	Check McCloud Provisional Guaranteed Amounts	If unaddressed a small number of active records may have uncorrected underlying data issues.	Check identified active records	88	By end of 2026-27	Projects Team

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	<p>(PGAs) on active records Earlier analysis of pensioner and deferred records identified a small number of data issues that led to false reporting of PGAs (or Final Guaranteed Amounts (FGAs) on pensioner records). Active records with a PGA should be checked to ensure the accuracy of the record and, therefore, PGA.</p>					