To: PCP

Subject: DWP Performance Measurement exercise for your Pension Centre on __/__/2014

Notification of Performance Measurement exercise

PM will begin a measurement exercise for your Pension centre in week commencing __/__/__ and the exercise will last approximately 4 weeks.

The exercise will look at State Pension and the team will be reporting on the Monetary Value of Official Error.

Please see the attached list of cases required for the PM exercise

Roles and Responsibilities

As the PCP you are responsible for ensuring that the cases and documents detailed in the action checklist are provided to the lead MRO at the start of the exercise.

As the PCP please ensure that:

- The Action Checklist is complete
- That all relevant documents are included in the case paper

Roles, responsibilities and best practices for the PCP are fully explained in the Performance Measurement Guide [insert link to PMG]
Sample

As the PCP you are asked to identify and obtain the cases relevant to your Pension centre for the start of the PM check.

The sample size for each exercise can be found on The Pension Service Visiting Programme located in the Performance Measurement Guide.

The cases will be numbered 1 - 400 on the FEMA lists.

Please note that samples are drawn across pension centre codes. PCPs are asked to retrieve the cases relevant to their Pension Centre in descending order.

During the exercise

PM will examine a random selection of State Pension cases. These will be subject to a technical check to ascertain the levels of official error.

Information on any error cases will be passed to you as the PCP. Please ensure that all errors raised are considered and that the PCP approval screen on FREDA is complete to confirm whether the error is agreed or not within the agreed timescales. Further information on the agreement/disagreement and arbitration process is available in the PMG [insert link to PMG]

Outstanding cases

At the end of the PM exercise if there are any cases that are left as incomplete there will be up to 10 weeks to provide the missing/further information. Where the necessary information is not provided within this time, the case may be treated as incorrect and a deemed error recorded. Internal results will include errors recorded under this rule. However, Pension Service reported results will reflect the results from actual cases checked.

To avoid the recording of deemed errors it is essential that all documents required by PM are provided at the start of the measurement exercise. Further information is available in the PMG. [insert link to PMG]

All sampling, reviewing, checking and error methodologies are fully described in the PMG [insert link to PMG]

After the exercise

The data captured during the exercise will be used to report on The Pension Service performance against internal and external targets to be reported to Ministers and Senior Managers.
For the duration of this exercise the PM Team Manager will be                      and can be contacted on the following number                     . The PM Team Manager will make early contact with the Pension Centre to advise you of the lead MRO and will act as the main focal point for issues arising during the exercise.

If you require further information regarding this letter, please ring on 0191 2168034

Thank You

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# ACTION CHECKLIST

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<th>Action to be taken:</th>
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<tr>
<td>1) E-Mail details of the Pension Control Point (PCP), including the pension centre number indicating where the PCP is based, to the PM Admin Team within 5 working days of receipt of the attached letter.</td>
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<td>2) Identify cases from FREDA.</td>
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<td>3) Locate relevant cases on FREDA and ensure that each case contains:</td>
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<td>All documentation and evidence before the decision maker, including all primary documents such as the latest claim form and/or review claim form, all verification documentation (of savings, occupational pension, earnings etc.) including CAM prints or any evidence of an AFIP claim.</td>
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<td>4) Ensure that any transferred out cases are retrieved.</td>
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<td>5) PCPs must ensure that all cases required for mop-up are presented to the PM Team no later than 10 weeks from the date of request.</td>
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**In relation to the CAM and VERINT systems the PCP will:**

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<td>6) Supply a list of all SP CAM cases including the dates of these calls for the PM Multi benefit Review Officer (MRO) before the commencement of the exercise.</td>
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<td>7) Access the PSCS notes box to identify if the case is a CAM case by the notation of CAM PA, which has been entered by the Customer Advisor (CA)/Customer Advisor (Specialist) (CA(S)) during the completion of the case.</td>
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<td>8) Highlight all SP CAM cases on the PM list for ease of access by PM MROs and provide all relevant prints from the CAM system.</td>
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<td>9) Action all non-CAM Cases according to the current guidelines.</td>
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10) Where appropriate send a copy of the PM letter received to the telephony manager, then liaise with the telephony manager for the completion and receipt of access pro-formas to allow for telephony access by the PM MRO. Only one telephony pro-forma per PM MRO is required for the exercise, as opposed to an individual pro-forma for each CA, CA (S) telephony access. Telephony access is to be authorised by the telephony manager and put into place prior to the exercise using a start date and an end date on the pro-forma to cover the four-week exercise.

11) Liaise with the document handler who will access CAM and print off screen prints of contact history to show latest information. The document handler will be required to scroll along the contact history screen and print the “hidden” information which will show the CA/CA (S) ID, claimants name, date and telephone number. This information will be used to identify the call on the telephony recording.