

Service Performance, Quality & Standards Monthly Update

March 2024



**Money &
Pensions
Service**

Contents

Monthly Overview.....	2
March 2024 Update Summary	2
Advice Services.....	2
Guidance Services	2
Previous Updates	2
Debt Advice Updates	3
Voice of Customer (VoC) Reports	3
Advice Assessor Toolkit and Calibration Feedback	3
Notification of Assessment Approach Changes to DRO Eligibility	3
SLA Update	4
Calibration Sessions	4
Money Guidance & Pension Guidance Updates.....	5
Guidance MS Form.....	5
KPIs Introduced for HGS	5
Changes to Grant Agreements	5

Monthly Overview

March 2024 Update Summary

As a brief overview, here is what you will find in our March SPQS update:

Advice Services

- [Voice of Customer](#) (VoC) Reports for [Quarter 3](#) have been issued to all delivery partners. These will be reviewed at the [Quarterly Review Meetings](#) scheduled throughout May 2024.
- The [Advice Assessor Toolkit](#) and [Calibration Feedback](#) has been reviewed internally and final editing will be released by the end of [March 2024](#).
- Confirmation of what will be considered in relation to [DRO](#) eligibility [changes](#) when cases are assessed against the MaPS Standards.
- Submission [SLAs](#) have been agreed from [April 2024](#) to [March 2025](#).
- Consideration of the structure of future [Calibration sessions](#) has been discussed. Variance between the 'Met' and 'N/A' outcomes are being reviewed by Quality Managers. Variances of this nature are also eligible for [appeal](#).

Guidance Services

- The single [Guidance MS Form](#) that was raised in last month's comms has been submitted to further test interactions by some delivery partners and we aim to release this on [1st May 2024](#)
- [KPIs](#) are being introduced to MoneyHelper provider, [HGS](#).
- Changes have been made to [Grant Agreements](#) for [Pension Wise](#). Changes include amendments to the reporting structure on the Standards.

Previous Updates

If you have missed any of our previous updates, you can find them here on our quality website:

[MaPS SPQS Quality Website - Latest Quality Updates](#)

Queries & Feedback

Please continue to send queries and feedback to the MaPS Quality email address: mapsquality@maps.org.uk or speak to your MaPS Quality Manager.

Thank you for your continued support.

The Service Performance, Quality and Standards Team

Debt Advice Updates

Voice of Customer (VoC) Reports

Delivery partners will have received the [Quarter 3 VoC Reports](#). These will be discussed at the next Quarterly Review Meetings scheduled throughout May 2024.

Advice Assessor Toolkit and Calibration Feedback

The latest [Advice Assessor Toolkit](#) and [Calibration Feedback](#) has now been reviewed internally and responses provided. These are in final editing and will be released by the end of [March 2024](#).

Based on the outcome of appeals, AAT feedback and calibration feedback, an update of the AAT is scheduled and will be shared with delivery partners and IQAS in due course.

Notification of Assessment Approach Changes to DRO Eligibility

As there are upcoming changes to the [DRO eligibility](#) which were outlined in the spring budget we are confirming to MaPS delivery partners and the Independent Quality Assessment Service (IQAS) what will be considered in relation to this when cases are assessed against the MaPS Standards. Link outlining the changes in Spring Budget: <https://www.moneyhelper.org.uk/en/blog/everyday-money/what-the-spring-budget-means-for-you.html>

As our delivery partners will be ensuring that customers are fully advised of their options, including the potential to defer their DRO until:

- a. There is no fee to pay and/or
- b. The eligibility criteria for a DRO can be met after 28th June and/or
- c. They can retain a vehicle to the value of £4,000.

Cases opened since the changes were announced will factor in the following:

- Where a DRO is an available and suitable option, the customer has been made aware of the change to fee from [6th April 2024](#) and the change to the eligibility criteria from [28th June 2024](#).
- As with any other element of the debt advice journey, if there are potential consequences to the customer if they choose to defer, these are made clear to the customer and evidenced in the case record.
- The evidence confirms that the customer has made their choice understanding the full advantages and disadvantages of that choice based on their personal circumstances.

Cases opened prior to the announced changes, if an adviser has provided subsequent advice as a result of the changes, case records should clearly reflect:

- The advice provided on the potential change to the customer's options due to the recent announcement, including advantages and disadvantages.
- The potential consequences of any changes to their decision on how they proceed to resolve their debts based on their personal circumstances.

SLA Update

Quality Managers will be working with delivery partners in the coming weeks to agree the [Submissions SLA](#) from [April 2024](#) to [March 2025](#).

We have received feedback from delivery partners and IQAS about what would work best from their own perspective. We have determined submissions dates that provide the best balance we could establish between the needs of all parties.

[November](#) and [December](#) present the greatest challenge and moving the first week's submission into the last week of the previous month has been unavoidable. We must ensure the assessment round is complete prior to Christmas so we can ensure that the [KPI](#) can be reported within the required timelines.

It would be advantageous to review the submission dates ahead of time so that you can be best prepared for any [variances](#) in the days of the week by when submissions are required. This does not negate the ability to continue to submit in advance providing all submissions are dated with the correct submission month. Any occasions where advance submissions will not be accepted, due to updates to [MS Forms](#) or similar, will be notified in advance.

Any [queries](#) relating to the [SLA](#) can be directed to your respective [MaPS Quality Manager](#).

Calibration Sessions

We have been giving consideration to the structure of the next [Calibration Sessions](#) scheduled for April 2024. [Variance](#) between the assessment outcomes of 'Met' and 'N/A' are having an impact on the overall compliance levels. Quality Managers will review the assessment outcomes for the quarter, and where there are instances of these variances between delivery partner and IQAS, they will be tabled for discussion at Calibration.

Please note, variances of this nature are also eligible for [appeal](#).

Many thanks,

The Service Performance, Quality and Standards Team

Queries & Feedback

Please continue to send queries and feedback to the MaPS Quality email address: mapsquality@maps.org.uk or speak to your MaPS Quality Manager.

Thank you for your continued support.

The Service Performance, Quality and Standards Team

Money Guidance & Pension Guidance Updates

Guidance MS Form

The single [Guidance MS Form](#) that was raised in last month's comms has been submitted to further test interactions by some of the delivery partners and we are aiming to [release](#) this new form on [1st May 2024](#). This may be subject to change depending on feedback and ongoing testing. On the release date the previous MS Form will be [closed](#) and no further submissions will be permitted through it.

The form will be updated with [Root Cause](#) options within two months of release and we will be welcoming any feedback over this time.

The SPQS Guidance team continue to work on the [CFA Guidance document](#) for Guidance services to incorporate the feedback we have received and aim to have an expected release date soon. Any changes to the guidance will also be reflected in the [MS Form](#) on the same date as release.

KPIs Introduced for HGS

Our MoneyHelper provider, [HGS](#), will have a number of [KPIs](#) introduced around [Customer Facing Assessment](#), [CSAT](#) and [Outcome scores](#). This will align guidance with the Advice service lines.

We are confident HGS will continue to provide outcomes for our customers and these KPIs will highlight the work being done and the consistently high assessment scores being achieved.

Changes to Grant Agreements

Upcoming changes for the Pension Wise grants include changes to the [reporting structure](#) for the [MaPS Standards](#). The changes also include a change to the Data Sharing agreement in order to allow interactions to be assessed for the purpose of the [Standards Customer Facing Assessment](#). This will allow Customer Facing Assessment of the interactions and will provide further insight into the way Standards apply to our services.

Many thanks,

The Service Performance, Quality and Standards Team

Queries & Feedback

Please continue to send queries and feedback to the MaPS Quality email address: mapsquality@maps.org.uk or speak to your MaPS Quality Manager.

Thank you for your continued support.

The Service Performance, Quality and Standards Team

