

# Customer Experience and Quality

March 2026 Update



Money &  
Pensions  
Service



## In this month's newsletter

This month's newsletter covers several important updates and areas of focus. There is a lot in here, please do cascade this and consider the contents carefully as there are some new announcements to take note of.

Within this publication we will provide:

- an update on **access issues**, including how we will support you during this period of time whilst the new Portal is being built
- a section on **getting ready for go live**, including an important update for April
- a short note on the accompanying **excel version of the toolkits** which we have provided debt delivery partners
- an update on the **proposed representative sampling split** which will be sent later today (Friday 6 March)
- how we intend to **record detriment** over the next few months; and
- a brief update on the new **MaPS Standards Portal** and share engagement session dates for those who wish to participate.



## Access Issues

We wanted to acknowledge the issues that some of you have been experiencing with our systems when attempting to access or update your Control Self-Assessment (CSA) and when trying to view your end of month Customer Facing Assessment (CFA) dashboards.

First however, regardless of the technical challenges we're having with the old system, we wanted to say that your experience hasn't been good enough and wanted to apologise for any frustration and inconvenience caused.

We've discussed how to address this as a team and given the new platform is already in build and due to go live in July, any investment in time trying to fix these ongoing issues around access would be counterproductive. Especially as some of these are out of our control and due to Microsoft's authentication protocols.

**Here's how we will work around this**

### Control Self-Assessments

It has been reported that some colleagues have not been able to log in to the SharePoint site. This is due to Microsoft's requirement for changing passwords if you have not logged in within the last 30 days and is something we cannot change. We have already shared that in the short term we recommend that there are only essential changes made to the Controls Library. This is to reflect that the updated Standards go live from April and Control Self-Assessments relaunch in July. For the next month, if you need to make any significant changes to your controls - due to a

new service, journey or updating out of date supporting materials, please contact your Quality Manager directly who will do so on your behalf. This also ensures that we have a clear picture of your Control Self-Assessment content that we need to pre-load into the new system for you.

**Action required:**

- only update the controls library with essential changes before end of March
- where you currently face access issues, contact your Quality Manager directly for any changes
- do not make any changes to the Control Self-Assessments after 1 April until the new platform launches; and
- use the new platform to review and update Control Self-Assessments when it launches in July.

**Dashboards**

Whilst some people can access the dashboards showing the end of month results, others are getting messages that they need to purchase a licence. To reduce the frustration and ensure that you have timely access to your results we will support by sending out a screenshot of the dashboard along with the accompanying spreadsheet you already get. You may get this twice in a month - once when the initial results are complete and secondly after any appeals have been heard if the KPI has changed. This will come to you directly from your Quality Manager.

**Action required:**

- if you have an access issue, do not try to access the Power Bi dashboard or raise with MaPS or your Quality Manager
- receive via email the end of month results - which will be in the form of an image for the dashboard summary and an accompanying spreadsheet (which you currently get); and
- also receive a second image and spreadsheet following the outcome of any appeals, where a change of KPI becomes evident.

Whilst these manual workarounds are not ideal, this lifts the burden from Delivery Partners in the short term whilst we focus on delivering a far better more robust MaPS Standards Portal.

Please do let us know if there are any concerns with the above.



## Getting ready for 'Go Live'

We have listened to your feedback to date on the timescales to implement the updated MaPS Standards and process improvements. To accommodate this, some changes including supporting materials and guidance are being developed and shared iteratively over the coming weeks and months, rather than as a single release. This approach allows us to incorporate feedback, refine content where needed and ensure materials provide practical support for delivery.

### April Sample

Additionally, we will not require CFA for April (case submission would have taken place in March). The expectation is that this time is instead focused on Delivery Partners understanding the updated Standards and changes that will become effective from 1 May.

During this interim period, to support Delivery Partner understanding and implementation, we wanted to take this opportunity to outline the activity we will facilitate (some of which has already started):

Name	Description
Engagement sessions	Socialisation of early or in progress approach or process development for feedback and to support refinement of finalised processes.
Spotlight on the MaPS Standards sessions	Specific and focused content on a Standard/group of standards. Intended to support detailed understanding by emphasising or reiterating the minimum threshold of compliance contained within the toolkits.
Process Onboarding sessions	Detailed walk-through of finalised processes ahead of 'go live'.

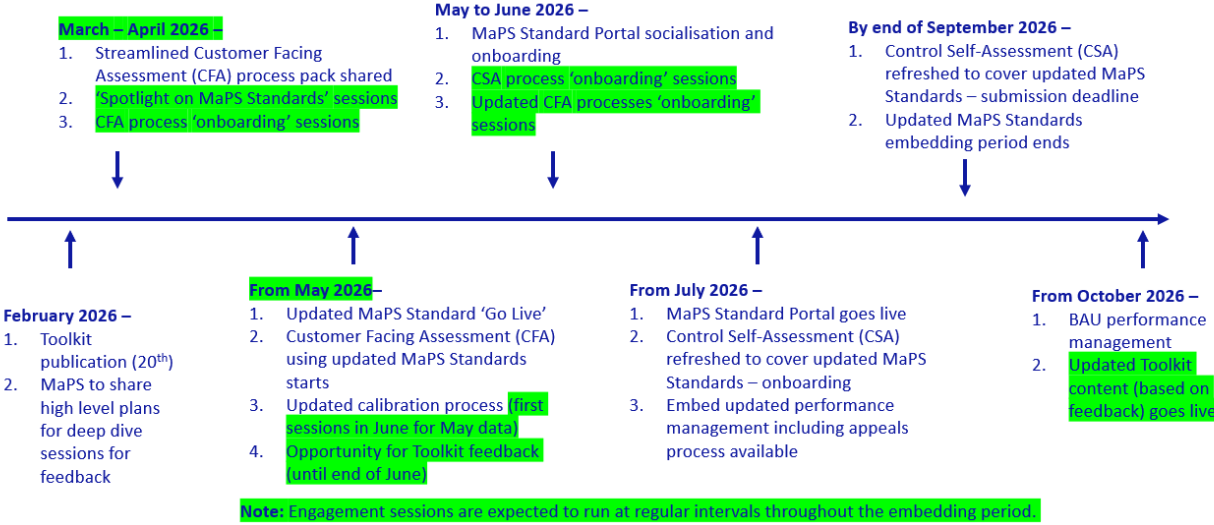
To support your planning, we have provided a roadmap on the next page outlining key milestones with the above activities now included.

**We want to reassure Delivery Partners that there is no expectation to implement everything at once.**

Instead, the milestones are intended to help organisations plan how and when updates may be incorporated into existing systems and processes. This includes cascade and embedding across supply chains where applicable.

We encourage Delivery Partners to review the materials as they are released and consider how they can be integrated into your existing frameworks in a manageable and proportionate way, aligning changes with your own internal systems.

# Revised: High Level Milestones - 2026



Note: changes or updated for clarity highlighted in green for ease of reference.

To confirm, Delivery Partners will need return to assessment and CFA submission in line with the SLA document from the end of April.

## Toolkits Excel version (debt only)

To further support debt Delivery Partners, we have produced an Excel version of the Standards Toolkits. This is aimed to provide further ways to enable teams to map across existing controls and processes to assure themselves of that they are meeting the new MaPS Standards. This is the first time we have tried to do this, so please do provide feedback on whether you find it useful. The Excel spreadsheet is attached to the same email as this newsletter. If you require another copy, please contact your Quality Manager.

Just like the Toolkit itself, this version is only intended to apply until October 2026 (noting the change in the roadmap above) after which the Toolkit will be updated with any learnings putting it in practice May – September (for example if minor edits are required for clarity).



## Sampling for next year (Debt Only)

As you know we take a risk-based approach to calculating the number of cases that Delivery Partners need to provide whilst also considering different channels. MaPS reserves the right to adjust these targets where risk profiles change (in accordance with the CFA Sampling Methodology v1.4). Overall sample sizes for 26/27 were confirmed in January.

### Representative Sampling

**Later today (Friday 6 March) we will confirm the proposed representative sampling split by Delivery Partner.**

This builds on recent engagement on improving how samples can represent the services delivered. Please find below a summary of changes we are making to enrich the representation:

- Channel *required* (in proportion to delivery volumes)
- Journey Type *monitored* (sampling criteria will be expanded to include 'Limited Debt Advice')
- Where applicable, Supply Chain *monitored*

Required fields will have expected volumes outlined. Monitored variables will not be prescribed but fields for all relevant variables will be included in MS forms, or equivalent, to allow for monitoring.

**These changes will apply from May 2026.**

### Random Sampling

We have listened to your feedback in relation to how 'random' sampling might be introduced. We recognise there is still further detailed insights we require to ensure we operationalise process changes in a proportionate and manageable way with 1<sup>st</sup> line QA approach dependency considered. As such we will continue to work with you to explore options and aim to introduce further improvements to our sampling approach to include randomisation from July.



## Detriment update

Following the FCA's review in 2023 which set out that the existing definition of detriment did not take into account any harm which was wider than financial and where risk of detriment may have occurred, MaPS has been working to provide a more holistic measure.

Over the last few months in particular we have been testing new ways to find a balanced approach which removes as much subjectivity as possible. This is an area that your feedback has told us can occasionally lead to disagreement between Delivery Partners and independent assessment.

We will bring this new measurement into place from July with the new MaPS Standards Portal, but until then we require an interim way to describe the assessment outcomes, including detriment on the existing CFA (Microsoft Forms) sheet.

There were three options that we considered:

1. **do nothing** – leave the assessment outcomes for each question as met, not met (no impact), not met (detriment), not met (with impact), n/a
2. **move to a new measure which is closer to where we want to get to** – requiring a change in the assessment outcomes for example: met, not met (financial detriment – actual), not met (financial detriment – likely), not met (wider detriment – actual), not met (wider detriment – likely), n/a; or
3. **accelerate the development of the longer term approach** and seek to apply that from May.

Given the above clarity that we will not be asking for CFA submissions against the updated Standards in April and the new portal due to go live in July, we believe that **option 1 provides the least impact to Delivery Partners and independent assessment**. And therefore we will not be making any changes to the assessment outcomes in the CFA prior to the new Portal going live.

The added benefit of this delay is that we will have more time to consider the impact of detriment on the updated Standards. We will be communicating further on the new detriment approach as we get closer to July's Portal launch.



## Portal update and invite

Following recent updates about our new MaPS Standards Portal, We'd like to update you on the progress and ask for your help.

We have recently begun working with Decision Focus who will be helping us to greatly enhance the tools we use for capturing Customer Facing Assessments, our Controls Self-Assessments and reporting on our performance against the Standards. This new system will also centralise all questions and calibration information in one place.

What's truly exciting is that these improvements aren't just about providing better access to live performance data or highlighting potential risks, they're also designed with you and your teams in mind, with a real focus on reducing the amount of administrative activity currently required. We want to make things simpler, clearer and more efficient for everyone involved.

Currently, we are in the development phase for both the Customer Facing Assessment (CFA) and Controls Self-Assessment (CSA) elements. To ensure these tools consider/meet your needs, we would like to involve some of you directly in this process. If you have colleagues within your organisation responsible for CFA or CSA, or even both, we encourage them to volunteer and attend the relevant sessions. Those who work on both elements are more than welcome to join both workshops.

We are looking for representation from each Delivery Partner, a minimum of one volunteer per session, a maximum of two if those responsible for CFA and CSA are different.

If you have already told us you would like to support with this work, we will automatically invite you to all three sessions unless you have specifically notified/told us otherwise.

Here are the dates for our engagement sessions:

- **Controls Self-Assessment: 17th March 2026 at 10am** – This session will cover adding controls, aligning them to individual standards, and applying RAG ratings.
- **Customer Facing Assessment: 24th March 2026 at 11am** – This workshop will walk through the end-to-end process of CFA submission, including how to manage submissions returned due to eligibility issues.
- **Dashboard and Reporting: 25th March 2026 at 10am** – In this session, we'll look at reporting outputs, ensuring the system supports both Delivery Partners and MaPS in effective performance management.

After these sessions, you'll have access to a test environment where we'll be asking volunteers to submit a small number of fictional test cases and add controls to the library. These contributions will help us build a robust set of test data to feed into the Dashboard and Reporting part of the system as well as hear directly from you about the user experience of the system - ensuring we design it in a way which is most effective for delivery partners.

If you're interested in volunteering or would like colleagues to take part and have not yet told us, please let us know which sessions they'd like to attend so we can tailor the invitations appropriately.

We're looking forward to working closely with you on this development.