

Highlight Report – Legacy Removal & prevention – Project Phase: In delivery

Date of Report:	17 th January 2020	Upcoming Milestones		
Period covered	19.12.19 – 24.01.2020	Item	Due (* = estimated)	Status
Prepared by:	Amy Wallace	Aggregation Sign off	30/11/19	Complete
Proposed RAG Status	Green	Status 2 process change	31/12/19	Complete
Project Scope		ITM data analysis	31/12/19	Complete
Due to the size of the known backlog in deferred cases and unprocessed Altair cases this has been outsourced to JLT. JLT will work through the cases as agreed by each fund.		Proposal for legacy reduction plan	28/02/20	On schedule
In order to reduce the possibility of future backlog an analysis of Altair records and categorisation reports will be carried out. This has been outsourced to ITM. This will enable the size of the backlog and number of each case type to be determined.				

Project Summary

We have reached the end of January with **8492** Cases completed.

- There is still spot checking taking place on the cases listed on the invoices received. There are some errors on this which are being investigated by Kelly Sedgeman and JLT. These cases are predominantly whereby JLT have received leaver forms direct, which means our admin team could not validate fully. All leavers forms are now with admin so this can be checked further. Once these have been rectified the invoice will be paid.
- The SAP extract is being used for standard cases but is being tweaked by Linda Whiteman's team to allow for 'Under 365 days' service' to be scaled correctly. There is currently a SAP freeze until the end of January 2020 so will be amended after this date.
- Chewie the SCC Deferred Robot is being developed by Matt Smith to run cases directly from the SAP extract. This is being tested and will hopefully be signed off shortly so it can be implemented. This will then support the removal of single member deferred cases, which should bring about some significant savings if successful.
- The process for not using status 2s has been reworked and signed off. It is now ready for implementation to avoid future backlog.

- ITM have completed their analysis for Surrey and Hillingdon records. They are putting together a proposal on their suggestions for the next steps.
- JLT are currently working on Auto-aggregation & concurrent cases; the breakdown of which is shown below. There were a little over 2300 initially to undertake, with 1000 processed so far. Aggregations are shown in a separate table, concurrencies have been moved back into the main table and are in internal check zone.

Until 17/01/2020														
Fund Name	Fund Code	Cases Received	Cases yet to Processed	Case sent for internal	Case queried passed to client	Cases Processed (Waiting to be checked)	Cases checked & Completed	Cases Completed by Orbis	Orbis cases to Review and process	Query with UK	Duplicate Cases	Investigated, queried and closed cases	Possible autoconcurrency cases	Possible Autoaggregation-pending (ringfenced)
Royal Borough of Kensington and Chelsea	K01	499	5	27	45	8	367	15	16	5	0	2	9	0
London borough of Hillingdon	N01	2122	15	145	134	15	1512	95	48	1	42	0	111	4
Surrey CC fund (LGPS)	S01	10542	1097	1141	720	141	5752	253	93	4	144	69	1113	15
L B Hammersmith and Fulham	H01	652	8	26	135	6	388	20	37	1	0	1	30	0
Councillors (Kensington and Chelsea)	K11	1	0	0	0	0	0	0	1	0	0	0	0	0
SCC- Non LGPS (injury only or TPS Comp)	S97	16	0	0	1	0	2	0	0	0	8	5	0	0
Westminster City council	W01	606	0	4	20	0	469	74	19	4	0	1	15	0
Surrey CC Members (CM closed) (LGPS)	S11	23	0	0	0	0	1	0	3	0	0	19	0	0
Surrey firefighter new Scheme (NFPS)	SFR	6	0	0	0	0	0	0	0	0	0	6	0	0
Surrey firefighter Scheme (Closed)(FPS)	SFX	2	0	0	1	0	0	0	0	0	0	1	0	0
Grand Total		14469	1125	1343	1056	170	8491	457	217	15	194	104	1278	19

Aggregation breakdown

	New Aggregation Completed	Aggregation Ring fenced Completed	Aggregation Ring fenced Letter pending	New Aggregation Letter pending	Total
K01	6	1	0	0	7
N01	32	21	0	0	53
S01	302	157	0	0	459
H01	6	2	0	0	8
W01	7	10	0	0	17
Grand Total	353	191	0	0	544

Key Risks & Issues

Item	RAG	Detail	Action/Update
Invoices		There are still some discrepancies between admin QA and JLT cases being investigated. A lot of this is due to the leaver form being sent direct to JLT as part of the query management.	QA undertaken by admin team, these are now sent to JLT to check. No invoices have been paid to date.

This page is intentionally left blank