

Service Delivery Legacy Project Update

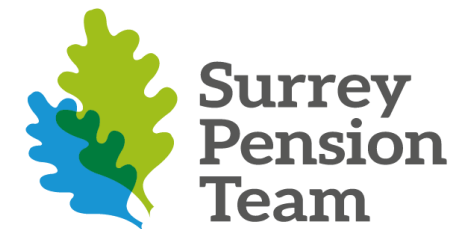
Legacy Project

Quarterly Update (April – June 2024)



1. As part of the phase 2 work, whereby transfers and aggregations are the key focus, the team have initially concentrated on interfund and intrafund quotations.
2. There have been several training sessions in flight, developing the Legacy Team's knowledge in this area.
3. This has included the creation of new training material and guidance documents to ensure there is consistency in the approach taken.
4. There has been a progress completion increase of **10%** in this quarter.
5. It was anticipated during the early stages of phase 2 that progress would plateau due to:
 - i. Team training
 - ii. Case analysis
 - iii. Changes to tasks / workflows
 - iv. Waiting periods for member responses (4 weeks)
 - v. During this waiting period, the team will continue processing:
 - a. Aggregations
 - b. Deferred (which now have data from employers)
 - c. Refunds

Legacy Project Progress Breakdown

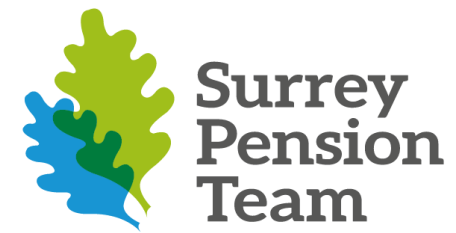


Project Phase	Case Category	Number of Cases Completed	Number of Cases Terminated	Number of Open Cases	% Complete (inc Terminated)
Phase 1	Deferred - Actual	4,379	1,451	656	89.89%
	Refund	1,183	567	7	99.60%
	Transfers IN	106	8	2	98.28%
	Pending Allocation	0	0	628	0.00%
Phase 2	Concurrent	131	247	1,032	26.81%
	Transfers IN	669	430	983	52.79%
	Transfers OUT	62	72	135	49.81%
	Pending Allocation	8	4	203	5.91%
Total		6,538	2,780	3,646	72.88%

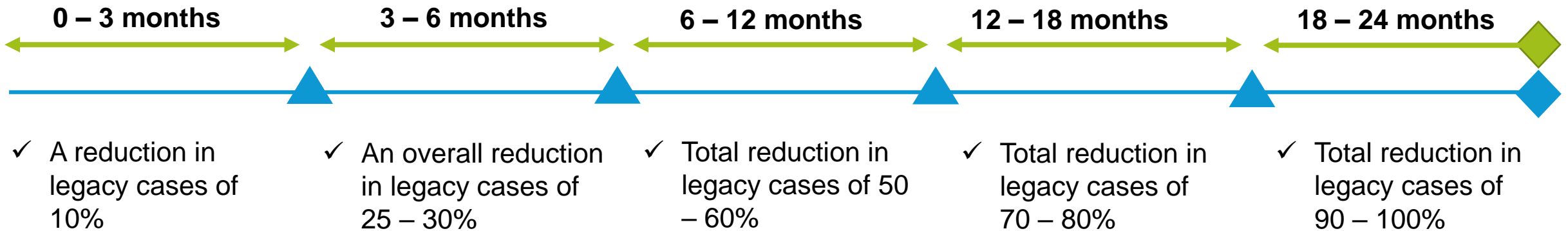
*Terminated cases form part of completion rates due a case assessment having been made.

Legacy Project Deliverables

Below is a summary of the proposed completion rates versus actual completion rates. You will see from the milestone plan, the team are ahead of the original time frames



Proposed Completion Progress



Actual Completion Progress

