Appendix C: Review of Aggregation Processes Plan

Item no.	Detail	Responsibility	Actions Taken	Deadline
1	Reintroduce 'Aggregation Days' and target completing 65+ cases per week across the Early Leavers Team.	Early Leavers Team Manager	Introduced in January 2023	This is now BAU.
2	To generally develop Aggregation 'Workflow' processes in Altair and switch reliance away from the existing checking spreadsheet which is a duplication of functionality already available within Altair.	Pensions Project Manager/ Early Leavers Team Manager	Developments to include possible addition of task notes instead of AGGCALC document and to auto-allocate cases to individuals work trays based on alpha split and generally use tasks more.	May 2023.
3	Ensure Early Leavers Team members are using automated calculation process within Altair for aggregation scenarios AGG1, AGG2 and AGGSAME and then remove the requirement for the completion of manually entered cross-checking forms.	Early Leavers Team Manager	Confirmed, and manually entered forms now removed from process, except where newer staff continue to use them as an aide memoire.	This is now BAU.
4	Check the Heywood 'known error' log and factor these into to checking processes where required.	Pensions Project Manager	Known error log checked and issues factored in to checking process	Completed January 2023.
5	Liaise with Derbyshire Pension Fund and discuss how they deal with AGGSAME scenarios for certain payroll providers	Early Leavers Team Manager / Employers and i-Connect Team Manager	Met colleagues from Derbyshire in February to discuss possible options. Suggestion was to liaise with	June 2023.

	whose processes result in a high number of such cases.		relevant employers and investigate possible changes to their processes. This issue has also been raised with Heywood at the February 2023 User Group.	
6	Investigate and trial triage-ing more complex cases - where administrator refers or liaises with Team Managers for guidance on how to process these cases.	Early Leavers Team Manager	Assistant Team Manager investigates complex cases and adds guidance to notes on the record.	This is now BAU.
7	Provide Early Leavers Manager with access to 'Insights' reporting to access more in-depth reporting facilities to assist with the management of Aggregation workloads.	Employers and i-Connect Team Manager	Access now provided.	January 2023 – completed.
8	Liaise with Hymans and Finance colleagues to explore more efficient way of processing and tracking CETV data across Employers.	Pensions Manager / Pensions Project Manager / Early Leavers Team Manager	Agreed to delay any changes to this process pending the introduction of new functionality expected to be introduced to Altair.	Expected by March 2024.
9	Review existing Aggregation documentation for consistency and clarity.	Early Leavers Team Manager / Pensions Project Manager	Some initial changes have been made but awaiting revised Aggregation templates from LGA before updating our letters. Templates expected May 2023.	December 2023.