Kent Pension Fund GMP Rectification - High Level Project Plan

Project Task	Task owner	Action to Commence	Actual Completion	February 2023	March 2023	April 2023	May 2023	June 2023	July 2023	August 2023
Planning phase										
Kick off meeting held between Kent and ITM	**ITM / Kent**	**February 2023**	**07/02/2023**							
Issue rectification approach document	**ITM**	**February 2023**	**07/02/2023**							
Establish rectification database	**ITM**	**February 2023**	**13/02/2023**							
Review of rectification approach document	**ITM / Kent**	**February 2023**	**22/03/2023**							
Issue detailed rectification specification using ITM and LGPS standard specification basis	**ITM**	**February 2023**	**13/02/2023**							
Agree rectification specification	**ITM / Kent**	**February 2023**	**22/03/2023**							
Issue draft decisions log	**ITM**	**February 2023**	**16/02/2023**							
Agreement of under / overpayments administration approach	**Kent**	**February 2023**	**22/03/2023**							
Tool configuration, test case production for all scenarios, for recalculation of benefits	**ITM**	**March 2023**	**31/03/2023**							
Produce and agree draft member communications materials	**ITM / Kent**	**March 2023**								
Send test cases to Kent for review	**ITM**	**April 2023**	**03/04/2023**							
Meeting to review test cases	**ITM / Kent**	**April 2023**	**18/04/2023**							
Kent review and sign off test cases	**Kent**	**April 2023**	**18/04/2023**							
Data extract inclusive of 2023 PI provided by Kent	**Kent**	**April 2023**	**13/04/2023**							
Load data extract	**ITM**	**April 2023**								
Data queries raised with Kent following receipt of extract	**ITM**	**April 2023**								
Response to data queries received	**Kent**	**May 2023**								
Confirm population requiring rectification	**ITM**	**May 2023**								
Recalculate pension benefits year by year since GMP date / date of death at provisional rectification date (dry run)	**ITM**	**May 2023**								
Provide summary report	**ITM**	**June 2023**								
Provide test data output files	**ITM**	**June 2023**								
Test data load to Altair	**ITM / Kent**	**June 2023**								
Review individual files for exceptional cases where required, to obtain additional data and validation	**Kent**	**June 2023**								
Live phase										
Present dry run results to pensions committee	**ITM / Kent**	**June 2023**								
Make decision on where the trivial threshold will be set	**Kent**	**June 2023**								
Decisions log updated following Kent review and approval	**Kent**	**June 2023**								
Perform live processing run following files reviews and final decisions at rectification date	**ITM**	**July 2023**								
Provision of final consolidated output and removal of recently processed cases	**ITM / Kent**	**July 2023**								
Produce the live run summary report and project closure report	**ITM**	**August 2023**								
Produce and distribute communications in advance of benefit changes to all impacted members	**ITM / Kent**	**August 2023**								
Loading of corrected excess pension elements data for pensioner and dependants	**ITM / Kent**	**August 2023**								