

Main Category	Sub Category (if applicable)
General Requirements of the Provider	Client relationship management Performance and reporting Project Management/Implementation Upgrade Services  Training and system guidance General Consultancy
Data Requirements	Bulk Data Load
Document Management	
Workflow and Workload Management	
Reporting	
Audit and Authorisation	
Benefit Calculations	Aggregations Aggregations Transfers in APCs AVCs  Annual Allowance/scheme pays debits Pension sharing Refunds/Deferreds Death Benefits Voluntary Retirement Flexible Retirements Other Retirements Transfer out Deferred into payment Pension adjustments
Bulk Processing	Civica Known Error Log  Annual Pensions Increase CARE Revaluation

Payroll and Payroll Interface

Online Portals/Self Service

System Environment, Security and IT

Microsoft Compatability

Summary of improvements needed to comply with Specification o

Reference (if applicable)	Current Status of Compliance
	Meets requirements
3.3.2	Partially meets requirements
	Meets requirements
3.5.9	Partially meets requirements
3.5.10	Partially meets requirements
3.6.8	Partially meets requirements
3.7.2	Not currently provided
	Not currently provided
	Not currently provided
5.1.4	Partially meets requirements
5.1.8	Partially meets requirements
	Meets requirements
	Meets requirements
8.3.6	Partially meets requirements
	Meets requirements
12.2.1	Partially meets requirements
	Partially meets requirements
12.2.2	
	Meets requirements
12.2.4	
12.2.7	Not currently provided
12.2.8	Partially meets requirements
12.2.10	Partially meets requirements
Various	Partially meets requirements
12.2.12	Partially meets requirements
12.2.13	Partially meets requirements
	Meets requirements
12.3.2	Partially meets requirements
12.3.5	Partially meets requirements
12.4.1	Partially meets requirements
Not listed	
11.2.1	Partially meets requirements
11.3	Partially meets requirements

13.1.6	Partially meets requirements
13.4.4	Partially meets requirements
13.6.4	Not currently provided
13.9.2	Partially meets requirements
13.9.4	Not currently provided
	Meets requirements
15.8.2	Partially meets requirements

---

## f Requirements

Summary of improvements needed/comments
May need to improve reporting on issues identified below. Visibility on errors/ommissions reported by other clients
Need to treat errors in upgrade implementation as priority fixes
Upgrade documentation needs to be comprehensive and include full details of all new, improved or amended functionality
Comprehensive user manuals needed in some areas
Comprehensive back up and maintenance plans for SQL databases
System Health checks
Advice on database housekeeping to ensure optimal performance
Enhance data load facility by producing errors and warnings prior to system update
Improve functionality for system to continue to be used during bulk loading/interfacing (e.g. MDC)
Note that auto allocation of work still to be tested so evaluation may be subject to change
Need ability to report reliably on TPR common and conditional data (currently done by DART)
Multiple calculation and write-back errors to be resolved
Also issues with subsequent benefit calculations.
Number of known errors to be resolved - affects small numbers of cases.
Certain update fields missing.
A large number of deficiencies. Functionality included in latest release (in test) but a number of significant gaps identified.
Number of known errors to be resolved - affects small numbers of cases.
Number of known errors to be resolved - affects small numbers of cases.
Number of known errors to be resolved for death from different status types.
2 known errors to be resolved.
System can not calculate partial flexible retirement.
Significant number of known errors.
6 known errors to be resolved.
Known errors with retirement recalculations
Contains significant number overall of known issues (many included above). Many will impact small numbers of cases.
Development work required on Pensions Increase program
Number of identified errors with CARE Revaluation

Pre-RTI submission checks and reports required.  
Improve functionality to update GL for stopped or rejected payments  
Calculation of net overpayments (e.g. on deaths) and updating payroll  
Reconciliation of pensioner numbers between payrolls  
Individual payroll result calculations

Requires further enhancements but acknowledged these require joint and bespoke agreement outside of basic specification

Need to ensure compatability with latest MS software as caused issues in past.