

# QMS SYSTEM DEVELOPMENT RECORDS / REPORT / REVIEW

## REQUIREMENTS, REVIEWS, CHANGES & OUT OF SCOPE ITEMS

Description	Category	Statuses: <i>(Completed / Pending / In Progress / Defer to other phases)</i>	Comment
	<i>(Initial Requirement / Review / Change / Out of Scope)</i>		
<b>1. SYSTEM INTEGRATION</b>			
SIMPLIFIED INTEGRATION WITH EVEREST	<i>Innitial Requirement</i>	Completed	
DATA EXTRACTION FROM EVEREST	<i>Innitial Requirement</i>	Completed	
· Member profile information	<i>Innitial Requirement</i>	Completed	
· Beneficiary information	<i>Innitial Requirement</i>	Completed	
· Transaction Records: Contributions	<i>Innitial Requirement</i>	Completed	
· Member Exit information	<i>Innitial Requirement</i>	Completed	
· Claim status	<i>Innitial Requirement</i>	Completed	
DATA UPDATE TO EVEREST	<i>Innitial Requirement</i>	In Progress	Update Via Back Office
<b>2. FULL SINGLE MEMBER VIEW</b>			
DATA TABLES: ASSUMPTIONS	<i>Innitial Requirement</i>	Completed	
· Member profile information	<i>Innitial Requirement</i>	Completed	
· Beneficiary information	<i>Innitial Requirement</i>	Completed	
· Transaction Records: Contributions	<i>Innitial Requirement</i>	Completed	
· Member Exit information	<i>Innitial Requirement</i>	Completed	
· Claim status	<i>Innitial Requirement</i>	Completed	
· Menber Info Update	<i>Innitial Requirement</i>	Completed	
<b>3. QUERY MANAGEMENT</b>			
<b>3.1 QUERY TYPES</b>			
<b>CLAIM TYPES</b>			
Unclaimed benefit	<i>Innitial Requirement</i>	Completed	
Current	<i>Innitial Requirement</i>	Completed	
Death	<i>Innitial Requirement</i>	Completed	
Death Current	Change / Out of Scope	Completed	
Death Unclaimed	Change / Out of Scope	Completed	
Funeral	<i>Innitial Requirement</i>	Completed	
Payment Stages	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation

Assessment: Pass / Fail / In progress	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation
Tax Verification: Pass / Fail / In progress	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation
Bank Verification: Pass / Fail / In progress	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation
1st Authorisation: Pass / Fail / In progress	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation
2nd Authorisation : Pass / Fail / In progress	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation
3rd Authorisation :Pass / Fail / In progress	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation
Declines	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation
Reversals	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation
Partly Paid	<i>Document Review</i>	Deferred	Deferred to Phase II - Automation
<b>MEMBER INFO UPDATE</b>			
Member Details Update	<i>Initial Requirement</i>	Completed	
<b>COMPLAINTS</b>			
FSB	<i>Review</i>	Deferred	Deferred to Phase II
PFA	<i>Review</i>	Deferred	Deferred to Phase II
Client Services	<i>Review</i>	Deferred	Deferred to Phase II
<b>GENERAL</b>			
Benefits Statement Dispute	<i>Initial Requirement</i>	Completed	
Balance enquiries	<i>Initial Requirement</i>	Completed	
Proof of payments	<i>Initial Requirement</i>	Completed	
IRP5 requests	<i>Initial Requirement</i>	Completed	
Member information updates	<i>Initial Requirement</i>	Completed	
General enquiries	<i>Initial Requirement</i>	Completed	
None existing Member	<i>Initial Requirement</i>	Removed	Temporarily removed, Deferred to Phase II
Documents Follow-ups	<i>Initial Requirement</i>	Completed	
Documents Submission	<i>Initial Requirement</i>	Completed	
Maintenance Order	<i>Initial Requirement</i>	Completed	
Divorce Order	<i>Initial Requirement</i>	Completed	
Physical Tracing	<i>Initial Requirement</i>	Completed	
Home Loans	<i>Initial Requirement</i>	Completed	
Report Rejected by Trustee	<i>Initial Requirement</i>	Completed	
Social Media Queries	<i>Initial Requirement</i>	Completed	
Unclaimed PFA	<i>Review</i>	In Progress	
System Support	<i>Review</i>	Completed	
IT Support	<i>Review</i>	Completed	

Create New Member records	<i>Review</i>	Completed	
Employer switch	<i>Review</i>	Completed	
Type Status	<i>Review</i>	Completed	
Merge records	<i>Review</i>	Completed	
Amend Static Data	<i>Review</i>	Completed	
Upload funds	<i>Review</i>	Completed	
<b>CRM activities related Queries:</b>			
Member Education (register & collation of member cell phones numbers)	Change / Out of Scope	Pending	Deffered to Phase II awaiting details.
Retirement counseling	Change / Out of Scope	Pending	
Ad-hog project i.e. t-shirt distribution, newsletter.	Change / Out of Scope	Pending	
<b>3.2 QUERY DETAILS</b>			
Query Type	<i>Innitial Requirement</i>	Completed	
Queue/Team	<i>Innitial Requirement</i>	Completed	
Query Start Date	<i>Innitial Requirement</i>	Completed	
Claim Status (Workflow Step)	<i>Innitial Requirement</i>	Completed	
Query Status	<i>Innitial Requirement</i>	Completed	
Query Completed Date	<i>Innitial Requirement</i>	Completed	
Query Creator	<i>Innitial Requirement</i>	Completed	
Query Allocated To	<i>Innitial Requirement</i>	Completed	
Query Allocation Date	<i>Innitial Requirement</i>	Completed	
Query Escalated To	<i>Innitial Requirement</i>	Completed	
Query Escalation Date	<i>Innitial Requirement</i>	Completed	
Query Source	<i>Innitial Requirement</i>	Completed	
Claim Type	<i>Innitial Requirement</i>	Completed	
<b>3.3 QUERY ESCALATIONS</b>			
Level 1: Team Leader	<i>Innitial Requirement</i>	Completed	
Level 2: Supervisor	<i>Innitial Requirement</i>	Completed	
Level 3: Manager	<i>Innitial Requirement</i>	Completed	
<b>3.4 QUERY HANDLING RULES</b>			
<b>3.5 REPORTING</b>			
1. Daily walk in members (Activities)	<i>Innitial Requirement</i>	Completed	
2. Daily members calls (Activities)	<i>Innitial Requirement</i>	Completed	
3. Daily query Resolved	<i>Innitial Requirement</i>	Completed	
4. Daily query assigned	<i>Innitial Requirement</i>	Completed	

5. Daily query re-assigned	<i>Innitial Requirement</i>	Completed	
6. Daily query In progress	<i>Innitial Requirement</i>	Completed	
7. Total number of queries per claim on monthly basis	<i>Innitial Requirement</i>	Completed	
8. Reasons for Walk Ins and Calls	<i>Innitial Requirement</i>	Completed	
9. Query status report	<i>Innitial Requirement</i>	Completed	
10. Complaints status report	<i>Innitial Requirement</i>	Completed	
<b>4 WORKSTREAM EXECUTION: DEVELOPMENT</b>			
Project Work Plan	<i>Innitial Requirement</i>	Completed	
Functional and Technical Requirements	<i>Innitial Requirement</i>	Completed	
Data Requirements & Integration	<i>Innitial Requirement</i>	Completed	
System Design, Architecture & Integration	<i>Innitial Requirement</i>	Completed	
System Development, Implementation & Configuration	<i>Innitial Requirement</i>	Completed	
a. Development	<i>Innitial Requirement</i>	Completed	
b. Testing	<i>Innitial Requirement</i>	Completed	
c. Training	<i>Innitial Requirement</i>	Completed	
d. Production	<i>Innitial Requirement</i>	Completed	
<b>Interfaces Per Level + Dashboards:</b>			
<i>User</i>	<i>Innitial Requirement</i>	Completed	
<i>Team Leaders</i>	<i>Innitial Requirement</i>	Completed	
<i>Supervisors</i>	<i>Innitial Requirement</i>	Completed	
<i>Managers</i>	<i>Innitial Requirement</i>	Completed	
<i>System Admin/ Support</i>	<i>Innitial Requirement</i>	Completed	
<i>Tech Supporter</i>	Review	In Progresss	
<i>Developers Suppport</i>	Review	Completed	
Migrated Data	<i>Innitial Requirement</i>	Completed	
Tested & Bug Fixing	<i>Innitial Requirement</i>	Completed	
Optimised System	<i>Innitial Requirement</i>	In Progress	
Developed Reports and Analytics	<i>Innitial Requirement</i>	Completed	
Training	<i>Innitial Requirement</i>	Completed	
System User Manual	<i>Innitial Requirement</i>	Completed	
MWPF System in Productive Use - Go-Live	<i>Innitial Requirement</i>	Completed	
Stabilisation & Optimization Services	<i>Innitial Requirement</i>	In Progress	
Post-implementation Support	<i>Innitial Requirement</i>	In Progress	
Product Support & Maintenance	<i>Innitial Requirement</i>	Pending	

<b>5 WORKSTREAM EXECUTION: DEVELOPPED VERSIONS</b>			
V1.0 – Initial release (based on initial proposal/System requirements)	<i>Development Version</i>	Developed	
V1.1 – API Integration (Extraction of relevant encrypted data Everrest)	<i>Development Version</i>	Developed	
V1.2 – Resolved known bugs and successfully integrated the API.	<i>Development Version</i>	Developed	
V1.3 – Changes based on reviewed document with different requirements	<i>Development Version</i>	Developed	
V1.4 – Updates after changes made following demo version release	<i>Demo Version</i>	Showcased	
V1.5 – Final product released to conclude phase I.	<i>Production Version</i>	Released	
V1.6 – Changes/Updates from user experience & system stability	<i>Production Version</i>	Released	
<b>6. OTHER REQUIREMENTS &amp; RESTRUCTURING</b>			
Removal of required fields on Members info Update	Review	Completed	
Super user role for MWPF support team	Review	In Progress	
All users Mapped to view All claims and All queries	Change / Out of Scope	Completed	
Redefining Roles & Permissions in Query Life-cycle	Change / Out of Scope	In Progress	
Roles Re-assigning and Department Shift	Review	Completed	
<b>New Department Creation and New Query Type Definition</b>			
Secretariat Team	Out of Scope	Completed	
Finance team	Out of Scope	Completed	
Executive PA	Out of Scope	Completed	