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## April - Sept 2019

Key Activities	April and May	June and July	August and Sept
 <b>Governance</b>	 Setup Review Group  OPG communication and Action Plan	 Collaborating with Adult Social Care on best practice  Workshops with Environmental Health, Registrars re Death in Community	 Death in Community Resolve responsibilities/ duties  Escalation protocols in revised policies
 <b>Policy, Process &amp; Procedure</b>	 Call Routing IVR and SLA Current state analysis  Map priority processes, Deaths and Payments	 Write policies  Map all processes (liaison with Legal)  Key controls, caseload management, allocations, deaths	 Agree policy documents and communicate to ASC  Refine policy/ procedure documentation
 <b>People</b>	 Source additional deputy resource  Secure change management resource	 Temporary Team leader step up  Tighten operational management, caseloads etc  Allocate caseload to new recruit and train	 Allocate caseload to new recruit and train
 <b>Technology</b>	 Staff training and Familiarisation with system  Stop and Check	 Plan approach with LL/ Controc Team	 Requirements to Controcc Team to Configure System
 <b>Legacy Issues/ Bank Reconciliation</b>	 Cash handling procedures	 Interim improved Nat West a/c control measures  Legacy files remedial work, file standards	 Test Market for Dedicated Client Accounts - Banks  Transfer of accounts from Natwest to DCAs  Client personal belongings; policy for retention and disposal (moveable property)

# Outline Plan for Client Finance Support Review

## Oct 2019 – Jan 2020

Key Activities	Oct and Nov	Dec and Jan	Beyond
 <b>Governance</b>	 Initial Manual Performance framework  Review Group revision to Terms of Reference		
 <b>Policy, Process &amp; Procedure</b>	 Audit – Control environment checks  Legal – Final Duties/ powers checks  Fees & Charges policy and sustainability		
 <b>People</b>	 Revise Job roles & Descriptions, volumes  Finalise Structure, Job descriptions, skills  Training Needs Analysis; Develop CPD Programme		
 <b>Technology</b>	 Configure System  User acceptance Testing and Training – communicate changes to ASC  Backload of data by team	 Handle post go live issues  Performance framework	 Stage 2 - Plan Configuration for Bank Reconciliation
 <b>Legacy Issues/ Bank Reconciliation</b>	 Transfer of accounts from Natwest to Dedicated Client Accounts	 Continued transfer from Natwest to DCA	 Continued transfer from Natwest to DCA