



Pre-assessment checklist — 22 check points

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19 certain points, 3 set out with their uncertainty · fictional document

Fictional document — demonstration example

This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

Fictional document, produced for the demonstration. **The checklist does not conclude.** It gives a result, a source and a level of certainty per point, and brings the discrepancies to the surface. **A check that claims certainty on everything is a check people stop reading.**

What is checked

Family of checks	Points	Source
Identity and civil status	3	Career-record application, documents in the file
Consistency between declared and recorded periods	5	Inter-scheme register
Consistency of recorded earnings from year to year	4	Scheme records
Documents required by the situation	3	List by member situation

Family of checks	Points	Source
Quality and legibility of the documents supplied	2	Document management system
Conditions for entitlement	3	The fund's operating rules
Absence of double counting between schemes	2	Inter-scheme register

The three discrepancies in this file

Discrepancy	Finding	What the agent does	Why
Earnings recorded in 2007	Ten times the neighbouring years — probable keying error, one zero out	Flags, does not correct	A silent correction to recorded earnings is exactly what a check must never do
Double counting	Two quarters counted by two schemes for the same period	Sets out the discrepancy with both records	It is the error that costs most to repair once the pension has been awarded
Illegible document	A 1994 certificate scanned crooked	Prepares the request, stating what is illegible and why	So the member does not send back the same document

Degree of certainty, point by point

Level	Points	What the adviser does with them
Certain result	19	Skims them
Result given with its uncertainty and its source	3	Decides — and that is where the profession lies

The adviser opens a file where 19 points are green, 3 are set out and the documents are there. The decision takes ten minutes, and it remains entirely theirs.

The date of the checklist

Element	Rule
Review of the checklist	At every change to the operating rules, with the two regulatory specialists
Display of the review date	On every file — a check with no date is a check nobody knows is current

Last review of the checklist: _____ · Next: _____

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