

Terminated Case Overview

Summary of where cases have been closed (not completed) and re-set up on the correct case type.
Includes categories where 50 or more have been closed in this period.

KPI Category	Case Numbers
Deferred Status	381
Refunds	201
LGPS Transfer In (Estimate)	184
Concurrent Service	89
LGPS Transfer In (Actual)	88
Retirement (Initial Notification)	86
LGPS Transfer Out (Estimate)	75
Total	1104

Summary

- a. Deferred and refund cases are most commonly set up under this status however, upon further examination of the case when being processed, it can be found to be an aggregation, concurrent or transfer case.
- b. Transfer estimates have found to be set up in error when in fact it can be processed as an actual and, vice versa. In some cases additional information is required before an actual quote can be processed or, the member has sent the form to the incorrect fund for processing.
- c. Retirement Notifications have been set up where it should be a Retirement Estimate request

The Trainees set up the majority of cases and there is a number of new staff within this team undergoing training. The Management Team have carried out internal training to reduce the number of cases being set up on an incorrect workflow, which has seen the numbers halve in December when compared to the previous month.

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