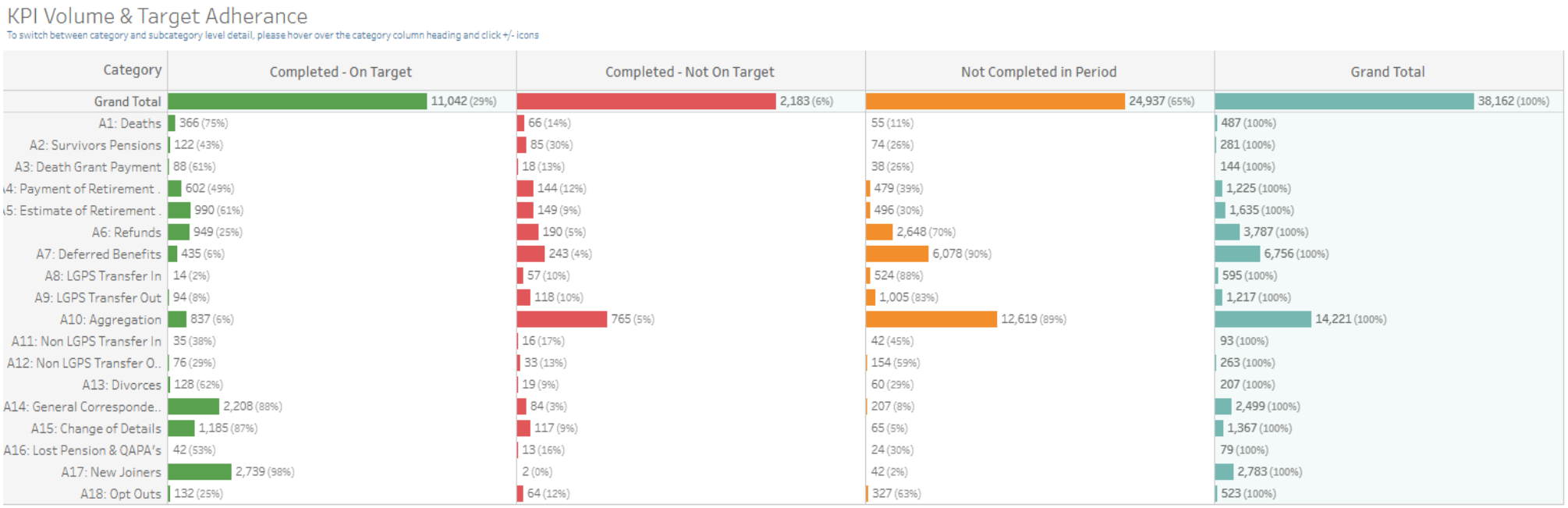
Appendix 1 - July to September 2026 – Casework Analysis

a)



KPI Volume & Target Adherance

To switch between category and subcategory level detail, please hover over the category column heading and click +/- icons

Category	Completed - On Target	Completed - Not On Target	Not Completed in Period	Grand Total
Grand Total	11,042 (29%)	2,183 (6%)	24,937 (65%)	38,162 (100%)
A1: Deaths	366 (75%)	66 (14%)	55 (11%)	487 (100%)
A2: Survivors Pensions	122 (43%)	85 (30%)	74 (26%)	281 (100%)
A3: Death Grant Payment	88 (61%)	18 (13%)	38 (26%)	144 (100%)
A4: Payment of Retirement .	602 (49%)	144 (12%)	479 (39%)	1,225 (100%)
A5: Estimate of Retirement .	990 (61%)	149 (9%)	496 (30%)	1,635 (100%)
A6: Refunds	949 (25%)	190 (5%)	2,648 (70%)	3,787 (100%)
A7: Deferred Benefits	435 (6%)	243 (4%)	6,078 (90%)	6,756 (100%)
A8: LGPS Transfer In	14 (2%)	57 (10%)	524 (88%)	595 (100%)
A9: LGPS Transfer Out	94 (8%)	118 (10%)	1,005 (83%)	1,217 (100%)
A10: Aggregation	837 (6%)	765 (5%)	12,619 (89%)	14,221 (100%)
A11: Non LGPS Transfer In	35 (38%)	16 (17%)	42 (45%)	93 (100%)
A12: Non LGPS Transfer O..	76 (29%)	33 (13%)	154 (59%)	263 (100%)
A13: Divorces	128 (62%)	19 (9%)	60 (29%)	207 (100%)
A14: General Corresponde..	2,208 (88%)	84 (3%)	207 (8%)	2,499 (100%)
A15: Change of Details	1,185 (87%)	117 (9%)	65 (5%)	1,367 (100%)
A16: Lost Pension & QAPA's	42 (53%)	13 (16%)	24 (30%)	79 (100%)
A17: New Joiners	2,739 (98%)	2 (0%)	42 (2%)	2,783 (100%)
A18: Opt Outs	132 (25%)	64 (12%)	327 (63%)	523 (100%)

b)

Completed Cases by Interval to Complete

Category	Completion Time Interval						
	0 to 5 days	6 to 10 days	11 to 15 days	16 to 20 days	21 to 30 days	31+ days	Grand Total
A1: Deaths	233 (53.94%)	133 (30.79%)	34 (7.87%)	15 (3.47%)	14 (3.24%)	3 (0.69%)	432 (100.00%)
A2: Survivors Pensions	19 (9.18%)	29 (14.01%)	74 (35.75%)	48 (23.19%)	27 (13.04%)	10 (4.83%)	207 (100.00%)
A3: Death Grant Payment	25 (23.58%)	29 (27.36%)	26 (24.53%)	8 (7.55%)	13 (12.26%)	5 (4.72%)	106 (100.00%)
A4: Payment of Retirement Benefits	75 (10.05%)	190 (25.47%)	173 (23.19%)	164 (21.98%)	107 (14.34%)	37 (4.96%)	746 (100.00%)
A5: Estimate of Retirement Benefits	269 (23.62%)	235 (20.63%)	337 (29.59%)	149 (13.08%)	113 (9.92%)	36 (3.16%)	1,139 (100.00%)
A6: Refunds	514 (45.13%)	262 (23.00%)	78 (6.85%)	16 (1.40%)	45 (3.95%)	224 (19.67%)	1,139 (100.00%)
A7: Deferred Benefit	93 (13.72%)	86 (12.68%)	49 (7.23%)	54 (7.96%)	80 (11.80%)	316 (46.61%)	678 (100.00%)
A8: LGPS Transfer In	3 (4.23%)	2 (2.82%)	2 (2.82%)	7 (9.86%)	6 (8.45%)	51 (71.83%)	71 (100.00%)
A9: LGPS Transfer Out	50 (23.58%)	21 (9.91%)	11 (5.19%)	12 (5.66%)	15 (7.08%)	103 (48.58%)	212 (100.00%)
A10: Aggregation	347 (21.66%)	52 (3.25%)	13 (0.81%)	14 (0.87%)	22 (1.37%)	1,154 (72.03%)	1,602 (100.00%)
A11: Non LGPS Transfer In	2 (3.92%)	10 (19.61%)	10 (19.61%)	13 (25.49%)	9 (17.65%)	7 (13.73%)	51 (100.00%)
A12: Non LGPS Transfer Out	12 (11.01%)	21 (19.27%)	23 (21.10%)	20 (18.35%)	17 (15.60%)	16 (14.68%)	109 (100.00%)
A13: Divorces	12 (8.16%)	15 (10.20%)	27 (18.37%)	20 (13.61%)	51 (34.69%)	22 (14.97%)	147 (100.00%)
A14: General Correspondence	1,737 (75.79%)	369 (16.10%)	102 (4.45%)	60 (2.62%)	14 (0.61%)	10 (0.44%)	2,292 (100.00%)
A15: Change of Details	1,144 (87.86%)	41 (3.15%)	20 (1.54%)	66 (5.07%)	7 (0.54%)	24 (1.84%)	1,302 (100.00%)
A16: Lost Pension & OAPA's	24 (43.64%)	14 (25.45%)	2 (3.64%)	2 (3.64%)	9 (16.36%)	4 (7.27%)	55 (100.00%)
A17: New Joiners	2,490 (90.84%)	49 (1.79%)	163 (5.95%)	14 (0.51%)	43 (1.57%)	2 (0.07%)	2,741 (100.00%)
A18: Opt Outs	117 (59.69%)	7 (3.57%)	3 (1.53%)	5 (2.55%)	22 (11.22%)	42 (21.43%)	196 (100.00%)
Grand Total	7,166 (54.19%)	1,565 (11.83%)	1,147 (8.67%)	687 (5.19%)	614 (4.64%)	2,066 (15.62%)	13,225 (100.00%)

c)

Cases Not Completed In Period

Category	5+ Days Under Target	Days Under Target					Due Today	Days Over Target					5+ Days Over Target	Grand Total
		5	4	3	2	1		1	2	3	4	5		
A1: Deaths	20	6	5	2	1				2		1	1	17	55
A2: Survivors Pensions	37	8	1	4		2	1	2	2	1			16	74
A3: Death Grant Payment	19			3			1	2	1				12	38
A4: Payment of Retirement Benefits	254	25	15	25	10	20	21	11	9	10	3	8	68	479
A5: Estimate of Retirement Benefits	260	7	2	6	6	5	2	8	2	3	3	2	190	496
A6: Refunds	928	3	3		2	4	5	3	2	1	2		1,695	2,648
A7: Deferred Benefits	1,791	5	4	13		3	6	5	6	3	1	8	4,233	6,078
A8: LGPS Transfer In	38	1	3	1		4	3	1		1	5		467	524
A9: LGPS Transfer Out	125	3	4	3	1	1	6	5	2	5	2	4	844	1,005
A10: Aggregation	3,453	7	6	21	18	28	20	15	26	47	21	16	8,942	12,619
A11: Non LGPS Transfer In	23	1	1	1						2	2		12	42
A12: Non LGPS Transfer Out	62		2	2	3	3	2	3	1	4	1		71	154
A13: Divorces	44	4		1	1	1				1			8	60
A14: General Correspondence	74	7	4	15	9	18	6	7	7	7	3	4	46	207
A15: Change of Details	6	22	7	1		1	1	2	2			1	22	65
A16: Lost Pension & QAPA's	15		4	2				2					1	24
A17: New Joiners	40					1							1	42
A18: Opt Outs	105	1	1	1			1	4				1	213	327
Grand Total	7,294	100	62	101	51	91	75	70	62	85	44	45	16,858	24,937