Documents expected — by member situation

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Rebuilt from 9,400 real files · fictional document

Fictional document — demonstration example

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Fictional document, produced for the demonstration. **This list does not say what the procedure provides for: it says what actually made it possible to award without reopening**, situation by situation, across the 9,400 files of the past year.

The documents genuinely needed, by situation

Situation	Share of files	Documents requested before	Documents genuinely needed
Single-scheme career, no unusual period	**41%**	**8**	**2**
Member belonging to several schemes	38%	8, including the other schemes' records	**2 — the records are obtained by the fund from the inter-scheme register**
Career including assimilated periods	14%	8	**1, and it is nearly always already in the document system**

Situation	Share of files	Documents requested before	Documents genuinely needed
Periods completed abroad	5%	8	**Variable by country — immediate referral to the regulatory specialist**
Individual hard cases	2%	8	Determined by the specialist

Assimilated periods are periods not worked but counted, such as compensated unemployment or sickness. **A document the fund can obtain on its own is not asked of a 62-year-old** — that is the rule that produced most of the gain.

What the list by situation changed

Measure	Before	After	For the member
Files put on hold for want of a document	**1 in 6 — 1,567 a year**	**1 in 28 — 336 a year**	**1,231 chasers avoided**
Cost of one hold	**24 days of waiting and a second letter**	Removed in 1,231 cases	**1,231 members who did not have to wonder why their file was going nowhere**
Pre-assessing a file	**60% of the handling — 1 hr 40**	**10% — 17 minutes**	—
Annual pre-assessment workload	**15,600 hours**	**2,700 hours**	The time given back goes to support appointments

The next step proposed

Action	Expected effect	Who decides

LINDBERGH FORMATION — Blue Lemon Agent — Companies register (RCS) Évry 817 946 114 —
Legal notice (in French): bluelemonagent.ai/mentions-legales

Push the list by situation into the online claim form	The documents arrive with the claim — the first hold no longer exists	The head of the department
Review the list at every change to the operating rules	A list that does not age in silence	The regulatory specialists

Publication of the list by situation in the form — decided on: _____

Request a demo with your own documents

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https://bluelemonagent.ai/en/secteur-public/metiers/agent-ia-conseiller-retraite

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