

Appendix 1

Description	Target time/date as per Partnership Agreement (working days)	Target	Actual Score October	Total No of completed cases	No of cases late	Actual Score November	Total No of completed cases	No of cases late	Actual Score December	Total No of completed cases	No of cases late
Pension Administration											
Death Benefits Write to dependant and provide relevant claim form	5 days	100%	90%	21	2	95%	14	1	100%	14	0
Set up any dependants benefits and confirm payments due, including concluding any under or overpayments.	10 days	100%	68%	25	8	40%	35	21	89%	27	3
Retirement Notification request for retirement acknowledged, recorded and documentation sent to member	10 days	100%	62%	69	26	78%	45	10	85%	46	7
Retirements New retirement benefits processed for payment following receipt of claim forms	7 days	100%	31%	16	11	56%	19	10	71%	14	4
Deferred retirement benefits processed for payment following receipt of claim forms	7 days	100%	50%	24	12	87%	39	17	63%	24	9
Refunds of Contributions Refund paid following receipt of claim form	10 days	100%	84%	87	14	87%	70	9	88%	41	5
Deferred Benefits Statements sent to member following receipt of leaver notification	20 days	100%	75%	135	34	29%	119	119	39%	125	76
Estimates Early Retirement requests from employer	10 days	100%	100%	6	0	100%	167	0	60%	5	2
Projections Requests from employees	10 days	100%	50%	2	1	20%	14	4	50%	2	1
New Joiners New starters processed	30 days	100%	100%	107	0	100%	5	0	100%	46	0
Transfers In Quote estimate to scheme member (includes interfunds)	20 days	100%	41%	17	10	42%	57	33	63%	52	19
Transfers In Transfers-in payments processed	20 days	100%	80%	45	9	78%	32	7	74%	34	9
Transfers Out Transfers-out quotations processed (includes interfunds)	20 days	100%	63%	32	12	70%	43	13	68%	38	12
Transfers Out Transfers out payments processed	20 days	100%	65%	20	17	62%	13	5	83%	12	2
No of complaints received within the month	n/a	100%	N/a	0	0	N/a	0	0	N/a	0	0
No of complaints resolved within the month	30 days	100%	N/a	0	0	N/a	0	0	N/a	0	0
No of compliments received within the month	n/a	N/a	N/a	0	0	N/a	0	0	N/a	0	0
Helpdesk Volumes											
Total Queries Handled	First Point Fix										
Jan 21 - 436	79%										
Feb 21 - 487	79%										
Mar 21 - 595	89%										
Apr 21 - 485	92%										
May 21 - 419	92%										
Jun 21 - 419	92%										
July 21 - 584	92%										
August - 518	95%										
Sept - 458	92%										
Oct 21 - 584	87%										
Nov 21 - 549	86%										
Dec 21 - 411	84%										