

Appendix 1 Pension administration Key Performance Indicators

Description	Target time/date as per Partnership Agreement (working days)	Target	October			November			December			January			
			Actual Score	Total No of completed cases	No of cases late	Actual Score	Total No of completed cases	No of cases late	Actual Score	Total No of completed cases	No of cases late	Actual Score	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	90%	10	1
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	86%	21	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	94%	31	2
Retirements	New retirement benefits processed for payment following receipt of claim forms	7 days	100%	31%	16	11	56%	19	10	71%	14	4	67%	9	3
Deferred retirement	benefits processed for payment following receipt of claim forms	7 days	100%	50%	24	12	87%	39	17	63%	24	9	30%	20	14
Refunds of Contributions	Refund paid following receipt of claim form	10 days	100%	84%	87	14	87%	70	9	88%	41	5	100%	17	0
Deferred Benefits	Statements sent to member following receipt of leaver notification	20 days	100%	75%	135	34	29%	119	119	39%	125	76	84%	43	7
Estimates	Early Retirement requests from employer	10 days	100%	100%	6	0	100%	167	0	60%	5	2	80%	5	1
Projections	Requests from employees	10 days	100%	50%	2	1	20%	14	4	50%	2	1	100%	2	0
New Joiners	New starters processed	30 days	100%	100%	107	0	100%	5	0	100%	46	0	100%	33	0
Transfers In	Quote estimate to scheme member (includes interfunds)	20 days	100%	41%	17	10	42%	57	33	63%	52	19	81%	47	9
Transfers In	Transfers-in payments processed	20 days	100%	80%	45	9	78%	32	7	74%	34	9	78%	27	6
Transfers Out	Transfers-out quotations processed (includes interfunds)	20 days	100%	63%	32	12	70%	43	13	68%	38	12	65%	17	6
Transfers Out	Transfers out payments processed	20 days	100%	65%	20	17	62%	13	5	83%	12	2	88%	16	2
No of complaints received within the month															
		n/a	100%	N/a	0	0	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	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	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%															