

KPI Performance: April - June 2023

Case Type	Performance standard	Tolerable performance	A % completed within SLA	B Case opening balance	C New cases received	D Cases completed	F Closing balance	E Terminated Cases	G Future Workload (days)
DEATH NOTIFICATION (tPR)	5 working days	90%	92%	6	217	205	2	44	0.5
SURVIVOR'S PENSIONS (tPR)	10 working days	90%	69%	15	108	68	23	37	20
DEATH BENEFITS PAYABLE (tPR)	10 working days	90%	79%	27	70	58	24	6	25
BALANCE OF PAYMENTS (tPR)	10 working days	90%	86%	69	244	218	59	5	16
RETIREMENT (COMPLETE) (tPR)	15 working days	85%	79%	264	452	330	288	65	52
ILL HEALTH RETIREMENT (COMPLETE) (tPR)	15 working days	90%	94%	6	17	16	4	6	15
REFUNDS (tPR)	20 working days	80%	96%	132	1,357	1,140	280	251	15
RETIREMENT (INITIAL NOTIFICATION)	15 working days	80%	83%	343	754	563	409	143	44
ILL HEALTH RETIREMENT (INITIAL)	15 working days	90%	70%	7	11	7	8	-	69
DEFERRED STATUS	40 working days	80%	89%	3,888	1,261	1,090	3,846	453	212
EMPLOYER ESTIMATE	10 working days	80%	71%	18	74	42	29	42	41
LGPS TRANSFER IN (ESTIMATE)	20 working days	80%	86%	573	383	284	578	177	122
NON-LGPS TRANSFER IN (ESTIMATE)	20 working days	80%	100%	136	6	6	133	35	122
LGPS TRANSFER OUT (ESTIMATE)	20 working days	80%	89%	126	290	172	198	63	69
NON-LGPS TRANSFER OUT (ESTIMATE)	20 working days	80%	90%	68	59	9	115	45	125
LGPS TRANSFER IN (ACTUAL)	20 working days	80%	85%	528	616	369	678	85	110
NON-LGPS TRANSFER IN (ACTUAL)	20 working days	80%	60%	54	30	28	33	18	71
LGPS TRANSFER OUT (ACTUAL)	20 working days	80%	75%	111	183	66	185	59	168
NON-LGPS TRANSFER OUT (ACTUAL)	20 working days	80%	90%	13	9	9	3	25	20
NEW STARTER	30 working days	80%			874	874			
TOTAL CASE NUMBERS			83%	6,384	7,015	5,554	6,895	1,559	

Summary

Investigations into the Survivors Benefits process has been launched to understand what is impacted results in this area.

An improvement plan will be implemented to address this area of concern

Death benefit payments and Ill Health Retirements are being monitored. The vacancy in this area has now been filled and is expected to provide resilience in this team.

LGPS & Non LGPS Transfer Out estimate cases have been affected by recent changes to SCAPE and some placed on hold.

Team working through these daily to reduce the number where the new factors have been updated in the system.

Performance Table Key

% Completed within SLA	A	Percentage of cases completed in period within SLA.
Case Opening Balance	B	Total cases open at the start of the period (this may vary from the previous month closing balance due to terminated cases).
New cases received	C	Total cases received in reporting period (including terminated). Not all cases are due for completion within period.
Cases completed	D	The total cases completed during period (excluding terminated cases)
Terminated Cases	E	Cases terminated in period due to duplication or set up incorrectly
Closing Balance	F	Cases remaining from period less terminated cases ($F = B+C-D-E$)
Future Workload	G	Total number of estimated days to process closing balance cases ($F/D*60$ working days)
Assumed tolerance of performance SLA		Green = tolerable performance measure met Amber = within 10% of tolerable performance measure Red = more than 10% of tolerable performance measure
Future workload tolerance		Green = less than 1 times the performance standard Amber = within 1 - 2 times more than the performance standard Red = more than 2 times the performance standard