

ADMINISTRATION PERFORMANCE REPORT (1) January 2021

ADMINISTRATION - ONGOING WORKFLOW

1 October - 30 November 2020											
No	Description	Performance standard	Tolerable performance*	No of cases received	No of cases completed	No of cases completed within SLA	Percentages of cases completed within SLA (Score and RAG)	Average time from start to finish to complete cases (in days)	Number of cases outstanding (total backlog) end of previous quarter	Number of cases outstanding (total backlog) end of this quarter	Note: Represents difference in completed cases as data is sourced from 2 separate reports. If figure in column L is debited from outstanding balance, the figures will balance.
OW 1 OVERVIEW											
OW 1.1	TOTAL SURREY CASES Total number of cases in period	N/A		32	28	12	38%	606	93	97	
OW 1.3	SCHEME MEMBERSHIP Number of members in the Surrey LGPS	N/A		1,759							
	Active members	N/A		620							
	Deferred members	N/A		211							
	Pensioner members	N/A		928							
OW 2 CASELOAD DETAIL											
OW 2.1	NEW STARTER New scheme member to be set up on Altair, check payroll details, request any transfers and send a statutory notice sent to the member.	30 working days	80%	2	2	N/A	N/A	N/A	0	0	
OW 2.2	DEFERRED STATUS Calculate pay, check membership, calculate deferred benefits, update Altair and issue a benefit statement.	2 months	80%	4	14	4	100%	456	24	14	
OW 2.3	RETIREMENT (INITIAL NOTIFICATION) Calculate pay, membership and retirement benefits and send initial letter and forms to member.	15 working days	80%	1	0	N/A	N/A	N/A	0	1	
OW 2.4	RETIREMENT (COMPLETE) upon receipt of all the forms and pay the retirement grant, update Altair, set up the pension on the payroll and send a benefit statement to the member.	15 working days	85%	1	0	N/A	N/A	N/A	1	2	
OW 2.5	DEATH NOTIFICATION Stop any pension, send condolences letter, request details of any dependent / beneficiaries and send claim forms for any balance / overpayment / Death Grant.	5 working days	90%	6	4	4	67%	1	3	5	
OW 2.6	SURVIVOR'S PENSIONS Upon receipt of all relevant certificates, forms and supporting evidence set up all survivor's pensions on the payroll and send each beneficiary a pension statement.	10 working days	90%	1	0	N/A	N/A	N/A	0	1	
OW 2.7	DEATH GRANT PAYMENT Upon receipt of all the certificates, claim forms and details of potential beneficiaries the Death Grant and any balance of pension should be paid and the return of any overpayment requested. The Pension Section should notify the relevant parties of any payments / decisions in writing.	10 working days	90%	0	1	1	100%	0	2	1	
OW 2.8	ILL HEALTH RETIREMENT (INITIAL) Upon receipt of all the relevant documents, send an estimate and the claim forms and request the certificates.	15 working days	90%	0	0	N/A	N/A	N/A	0	0	
OW 2.9	ILL HEALTH RETIREMENT (COMPLETE) Upon receipt of all forms / certificates, update Altair, pay the retirement grant, set up the pension on the payroll and update Altair.	15 working days	90%	0	0	N/A	N/A	N/A	0	0	
OW 2.10	MEMBER CORRESPONDENCE Respond to member queries (Helpdesk)	Note: These are all calls taken for Surrey and not split out between LGPS and Fire	70%	2,825	N/A	N/A	FPF = 93%	N/A	N/A	N/A	
OW 2.11	REFUNDS Check the record, calculate the refund due and make payment	20 working days	80%	0	0	N/A	N/A	N/A	0	0	
OW 2.12	FIRE TRANSFER IN (ESTIMATE) Upon receipt of the service statement, check the service details and inform the member of the option to transfer and advise them of the timescales.	20 working days	80%	3	0	N/A	N/A	N/A	3	6	

OW 2.13	FIRE TRANSFER IN (ACTUAL) Check that the membership and payment received is correct, update Altair and send a service statement to the member.	20 working days	80%	1	0	N/A	N/A	N/A	8	9	
OW 2.14	NON-FIRE TRANSFER IN (ESTIMATE) Check the transfer quotation and inform the member of the service / pension credit it would purchase, the option to transfer and the relevant timescales.	20 working days	80%	2	0	N/A	N/A	N/A	25	27	
OW 2.15	NON-FIRE TRANSFER IN (ACTUAL) Check that the payment and the details are correct, update Altair and send a service statement to the member.	20 working days	80%	0	0	N/A	N/A	N/A	0	0	
OW 2.16	FIRE TRANSFER OUT (ESTIMATE) Send deferred benefit statement to the new employer.	20 working days	80%	0	0	N/A	N/A	N/A	3	3	
OW 2.17	FIRE TRANSFER OUT (ACTUAL) Make payment to the new administering authority after twelve months / upon receipt of member's election and update Altair.	20 working days	80%	5	3	3	60%	0	5	7	
OW 2.18	NON-FIRE TRANSFER OUT (ESTIMATE) Upon request send transfer quotation and discharge forms.	20 working days	80%	6	3	0	0%	110	18	21	
OW 2.19	NON-FIRE TRANSFER OUT (ACTUAL) Check that all the discharge forms have been completed correctly, check tPA register, make payment and update Altair.	20 working days	80%	0	1	0	0%	39	1	0	