

SURREY LGPS PENSION FUND - ADMINISTRATION  
PERFORMANCE REPORT

Description	Performance standard	Tolerable performance	QUARTER 2 21/22 (July - Sept)											Age of cases (6 months plus) that are open at the end of the quarter			Commentary		
			No of cases open at beginning of the quarter	No of cases received	No of cases completed (including terminated cases)	No of cases completed (excluding terminated cases)	No of cases completed within SLA	No of cases not completed within SLA	% of cases completed within SLA (column H/G)	Average no of days to complete cases	Number of cases open at the end of the quarter (= M+N+O)	Of the cases open at the end of the quarter			6-12mths	1-2 yrs		2+ yrs	
												No. on reply due	No. reply received	No. where task has a future completion date or is overdue					
<b>Total Caseload</b>			10262	4899	5627	4398	3570	828	82%	65	9534	1547	381	7606	1223	778	4912		
<b>NEW STARTER</b> 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%				1495													
<b>DEATH NOTIFICATION (IPR)</b> When notified of a death, Pension Services should cease any pension payments (if applicable), send a condolences letter, request details of any Survivor's eligible for a pension, request details of any beneficiaries eligible for a share of the death grant and request the details of the Personal Representative to resolve any balance of payments due to or from the estate.	5 working days	90%	7	169	165	162	160	2	99%	9	11	1	0	10	0	0	0	Currently now 5 cases in the Workflow, all with a future completion date	
<b>SURVIVOR'S PENSIONS (IPR)</b> Upon receipt of completed claim forms, relevant certificates and supporting documents/evidence, Pension Services should set up any survivor's pension(s) on the payroll and write to each survivor to confirm payment.	10 working days	90%	23	73	79	79	68	11	86%	28.5	17	14	1	2	4	0	10	Completion of backlog cases has pushed down performance	
<b>DEATH BENEFITS PAYABLE (IPR)</b> Upon receipt of completed claim forms, details of potential beneficiaries, relevant certificates and supporting evidence, the Death Grant payment should be paid to the beneficiaries. Pension Services should notify the relevant parties of any payments and/or decisions in writing.	10 working days	90%	13	47	48	48	40	8	83%	27	12	10	2	0	1	1	4	Completion of backlog cases has pushed down performance	
<b>BALANCE OF PAYMENTS (IPR)</b> Upon receipt of completed claim forms, service must arrange for payment of the balance of pension due to the estate. A letter of confirmation to be sent to the executor. Upon receipt of details of the Personal Representative of the estate, the service should write off any pension overpayment that does not exceed the Fund's discretionary limit. Upon receipt of details of the Personal Representative of the estate, the service should write to recover any pension overpayment that exceeds the Fund's discretionary limit.	10 working days	90%	40	187	198	189	184	5	97%	10	29	23	2	4	2	4	8		
<b>RETIREMENT (COMPLETE) (IPR)</b> 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%	96	690	531	447	409	38	91%	27	255	102	31	122	0	0	0	Currently now 316 cases in the Workflow. 135 of these are on Reply Due. 170 have a future completion date. 11 are overdue	
<b>ILL HEALTH RETIREMENT (COMPLETE) (IPR)</b> 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%	2	7	8	4	3	1	75%	25.5	1	0	0	1	0	0	0	Completion of backlog cases has pushed down performance	
<b>REFUNDS (IPR)</b> Check the record, calculate the refund due and make payment	20 working days	80%	247	774	686	585	557	28	95%	15	335	79	45	211	19	53	2	Currently now 378 cases in the Workflow. Of these 81 are on Reply Due. 143 are overdue and 154 have future completion dates	
<b>RETIREMENT (INITIAL NOTIFICATION)</b> Calculate pay, membership and retirement benefits and send initial letter and forms to member.	15 working days	80%	170	974	1047	714	658	56	92%	23.5	97	34	0	63	0	2	1		
<b>ILL HEALTH RETIREMENT (INITIAL)</b> Upon receipt of all the relevant documents, send an estimate and the claim forms and request the certificates.	15 working days	90%	5	23	21	14	13	1	93%	24.5	7	3	0	4	0	0	0	Currently now 8 in the Workflow. 3 of these are on Reply Due. 2 have future completion dates. 3 cases are overdue but all relate to the same member	
<b>DEFERRED STATUS</b> Calculate pay, check membership, calculate deferred benefits, update Altair and issue a benefit statement.	2 months	80%	6856	697	1078	777	562	215	72%	323	6475	247	76	6152	998	587	3757	Completion of backlog cases has pushed down performance	
<b>EMPLOYER ESTIMATE</b> Upon request, provide employer with early retirement estimate.	10 working days	80%	13	62	71	47	43	4	91%	18	4	0	0	4	0	0	0		
<b>LGPS TRANSFER IN (ESTIMATE)</b> 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%	1339	359	695	502	282	220	56%	177	1003	379	116	508	53	71	552	Completion of backlog cases has pushed down performance	
<b>NON-LGPS TRANSFER IN (ESTIMATE)</b> 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%	638	52	72	44	41	3	93%	91	618	432	53	133	4	28	485		
<b>LGPS TRANSFER OUT (ESTIMATE)</b> Send deferred benefit statement to the new employer.	20 working days	80%	143	177	188	160	131	29	82%	75	132	55	11	66	9	2	31		
<b>NON-LGPS TRANSFER OUT (ESTIMATE)</b> Upon request send transfer quotation and discharge forms.	20 working days	80%	143	161	157	121	96	25	79%	69	147	59	13	75	14	9	55	Currently now 147 cases in the Workflow. 62 are on Reply Due. 46 are overdue and 39 have a future completion date	
<b>LGPS TRANSFER IN (ACTUAL)</b> Check that the membership and payment received is correct, update Altair and send a service statement to the member.	20 working days	80%	407	257	389	342	205	137	60%	106	275	62	11	202	115	20	0	Completion of backlog cases has pushed down performance	
<b>NON-LGPS TRANSFER IN (ACTUAL)</b> Check that the payment and the details are correct, update Altair and send a service statement to the member.	20 working days	80%	34	54	52	45	32	13	71%	62	36	13	8	15	1	0	1	Currently now 39 in the Workflow. 12 are on Reply Due. 8 are overdue and 19 have a future completion date	
<b>LGPS TRANSFER OUT (ACTUAL)</b> Make payment to the new administering authority after twelve months / upon receipt of membe's election and update Altair.	20 working days	80%	64	113	112	97	74	23	76%	61	65	29	9	27	1	1	4	Currently now 61 in the Workflow. 28 are on Reply Due. 12 are overdue and 21 have a future completion date	
<b>NON-LGPS TRANSFER OUT (ACTUAL)</b> Check that all the discharge forms have been completed correctly, check tPA register, make payment and update Altair.	20 working days	80%	22	23	30	21	12	9	57%	71	15	5	3	7	2	0	2	Completion of backlog cases has pushed down performance	
<b>MEMBER CORRESPONDENCE</b> Respond to member queries (Helpdesk)		70%				9915 no of calls received			91%										

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