

SURREY LGPS PENSION FUND - ADMINISTRATION
PERFORMANCE REPORT

Description	Performance standard	Tolerable performance	QUARTER 3 21/22 (Oct - Dec)											Age of cases (6 months plus) that are open at the end of the quarter			
			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	Average no of days to complete cases	Number of cases open at the end of the quarter	Of the cases open at the end of the quarter					
			No. on reply due	No. reply received	No. where task is overdue	6-12mths	1-2 yrs	2+ yrs									
Total Caseload			9613	7320	8298	6055	5360	695		58	8635	1541	383	6711	1262	1079	3998
DEATH NOTIFICATION (IPR) 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%	11	164	173	172	169	3	98%	6	2	0	0	2	0	0	0
SURVIVOR'S PENSIONS (IPR) 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%	17	105	79	79	76	3	96%	27	43	16	1	26	1	3	10
DEATH BENEFITS PAYABLE (IPR) 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%	12	26	27	27	27	0	100%	17	11	6	2	3	1	1	4
BALANCE OF PAYMENTS (IPR) 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%	39	202	220	207	204	3	99%	7	21	14	1	6	2	2	6
RETIREMENT (COMPLETE) (IPR) 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%	252	644	669	584	520	64	89%	31	227	151	12	64	0	0	0
IL HEALTH RETIREMENT (COMPLETE) (IPR) 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	14	13	13	13	0	100%	14	3	2	0	1	0	0	0
REFUNDS (IPR) Check the record, calculate the refund due and make payment	20 working days	80%	342	1516	1514	1315	1273	42	97%	11.5	344	83	27	234	24	57	3
RETIREMENT (INITIAL NOTIFICATION) Calculate pay, membership and retirement benefits and send initial letter and forms to member.	15 working days	80%	110	1084	1125	749	710	39	95%	23.5	69	39	3	27	1	0	0
IL 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%	2	18	17	15	12	3	80%	191.5	3	1	0	2	0	0	0
DEFERRED STATUS Calculate pay, check membership, calculate deferred benefits, update Altair and issue a benefit statement.	2 months	80%	6447	1768	2580	1558	1310	248	84%	168	5635	223	114	5298	1043	892	2943
EMPLOYER ESTIMATE Upon request, provide employer with early retirement estimate.	10 working days	80%	3	42	43	36	36	0	100%	9	2	1	0	1	0	0	0
LGPS 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%	1020	671	713	434	313	121	72%	117	978	346	121	511	44	72	464
NON-LGPS 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%	659	33	82	27	25	2	93%	47	610	418	55	137	12	10	487
LGPS TRANSFER OUT (ESTIMATE) Send deferred benefit statement to the new employer.	20 working days	80%	126	216	218	160	136	24	85%	80	124	53	10	61	7	3	22
NON-LGPS TRANSFER OUT (ESTIMATE) Upon request send transfer quotation and discharge forms.	20 working days	80%	150	142	188	123	100	23	81%	81	104	58	10	36	4	11	52
LGPS 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%	300	472	436	383	306	77	80%	75	336	81	10	245	122	26	0
NON-LGPS 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%	44	58	60	56	40	16	71%	68	42	22	6	14	1	0	1
LGPS 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%	65	117	122	106	82	24	77%	71	60	21	6	33	0	0	4
NON-LGPS TRANSFER OUT (ACTUAL) Check that all the discharge forms have been completed correctly, check IPA register, make payment and update Altair.	20 working days	80%	12	28	19	11	8	3	73%	56	21	6	5	10	0	2	2
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.	20 working days	80%				3104											0
MEMBER CORRESPONDENCE Respond to member queries (Helpdesk)	30 working days	80%	0	0	0	9653 no of calls received	0	%	86%	0	0	0	0	0	0	0	0

This page is intentionally left blank