

SURREY LGPS PENSION FUND - ADMINISTRATION  
PERFORMANCE REPORT

Description	Performance standard	Tolerable performance	QUARTER 4 21/22 (Jan - Mar)											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			6-12mths	1-2 yrs	2+ yrs
			No. on reply due	No. reply received	No. where task is overdue												
<b>Total Caseload</b>			8642	7209	9382	7572	6214	1358		37	6690	1338	220	5132	344	1289	2461
<b>DEATH NOTIFICATION (tPR)</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%	3	210	213	211	210	1	100%	1.48	0	0	0	0	0	0	0
<b>SURVIVOR'S PENSIONS (tPR)</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%	43	88	114	114	101	13	89%	28.33	17	5	0	12	0	0	0
<b>DEATH BENEFITS PAYABLE (tPR)</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%	12	57	57	57	52	5	91%	17.00	12	5	1	6	0	0	6
<b>BALANCE OF PAYMENTS (tPR)</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%	31	240	284	238	221	17	93%	31.67	16	16	0	0	1	0	0
<b>RETIREMENT (COMPLETE) (tPR)</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%	222	544	490	449	414	35	92%	8.33	257	225	12	20	0	0	0
<b>ILL HEALTH RETIREMENT (COMPLETE) (tPR)</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%	3	16	14	12	11	1	92%	3.67	4	2	0	2	0	0	0
<b>REFUNDS (tPR)</b> Check the record, calculate the refund due and make payment	20 working days	80%	336	1125	1242	1066	969	97	91%	17.00	229	84	6	139	8	2	0
<b>RETIREMENT (INITIAL NOTIFICATION)</b> Calculate pay, membership and retirement benefits and send initial letter and forms to member.	15 working days	80%	72	983	918	697	680	17	98%	8.33	143	69	5	69	2	0	0
<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%	3	10	13	13	10	3	77%	15.67	0	0	0	0	0	0	0
<b>DEFERRED STATUS</b> Calculate pay, check membership, calculate deferred benefits, update Altair and issue a benefit statement.	2 months	80%	5631	1605	3140	2578	1913	665	74%	263.33	4122	243	102	3777	223	1142	1997
<b>EMPLOYER ESTIMATE</b> Upon request, provide employer with early retirement estimate.	10 working days	80%	2	73	66	57	55	2	96%	3.67	10	6	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%	980	887	1139	735	576	159	78%	48.67	762	249	53	460	59	42	228
<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%	610	56	383	327	204	123	62%	132.33	285	151	14	120	12	5	161
<b>LGPS TRANSFER OUT (ESTIMATE)</b> Send deferred benefit statement to the new employer.	20 working days	80%	123	215	220	166	142	24	86%	19.33	116	56	4	56	10	7	21
<b>NON-LGPS TRANSFER OUT (ESTIMATE)</b> Upon request send transfer quotation and discharge forms.	20 working days	80%	105	183	186	57	51	6	89%	13.67	100	51	8	41	4	14	46
<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%	347	699	676	591	451	140	76%	27.33	512	147	10	355	22	74	0
<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%	43	55	58	52	34	18	65%	25.33	39	12	3	24	1	0	0
<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%	59	140	146	135	107	28	79%	24.00	51	10	0	41	1	0	1
<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%	17	23	23	17	13	4	76%	14.67	15	7	2	6	1	3	1
<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.	20 working days	80%				2174											
<b>MEMBER CORRESPONDENCE</b> Respond to member queries (Helpdesk)	30 working days	80%				11,324 calls received											

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