

## KPI Performance: Jan - Mar 2024

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%	98%	5	328	334	3	8	1
SURVIVOR'S PENSIONS (tPR)	10 working days	90%	85%	10	89	88	14	7	10
DEATH BENEFITS PAYABLE (tPR)	10 working days	90%	72%	25	61	54	27	11	30
BALANCE OF PAYMENTS (tPR)	10 working days	90%	88%	54	279	256	78	13	18
RETIREMENT (COMPLETE) (tPR)	15 working days	85%	85%	275	531	540	227	63	25
ILL HEALTH RETIREMENT (COMPLETE) (tPR)	15 working days	90%	92%	3	8	12	0	1	0
REFUNDS (tPR)	20 working days	80%	99%	171	692	755	75	227	6
RETIREMENT (INITIAL NOTIFICATION)	15 working days	80%	91%	265	742	650	324	164	30
ILL HEALTH RETIREMENT (INITIAL)	15 working days	90%	67%	9	7	9	5	4	33
DEFERRED STATUS	40 working days	80%	90%	699	677	933	327	275	21
EMPLOYER ESTIMATE	10 working days	80%	72%	9	59	46	18	16	23
LGPS TRANSFER IN (ESTIMATE)	20 working days	80%	93%	196	517	508	151	226	18
NON-LGPS TRANSFER IN (ESTIMATE)	20 working days	80%	100%	7	23	18	9	8	30
LGPS TRANSFER OUT (ESTIMATE)	20 working days	80%	99%	69	277	271	64	52	14
NON-LGPS TRANSFER OUT (ESTIMATE)	20 working days	80%	96%	22	48	49	14	14	17
LGPS TRANSFER IN (ACTUAL)	20 working days	80%	83%	233	584	581	321	132	33
NON-LGPS TRANSFER IN (ACTUAL)	20 working days	80%	100%	19	33	34	17	5	30
LGPS TRANSFER OUT (ACTUAL)	20 working days	80%	90%	107	209	197	98	44	30
NON-LGPS TRANSFER OUT (ACTUAL)	20 working days	80%	77%	10	22	22	4	14	11
NEW STARTER	30 working days	80%			874	874			
<b>TOTAL CASE NUMBERS</b>			<b>88%</b>	2,188	6,060	6,231	1,776	1,284	

## Summary

Improvement work has stabilised the retirements process and this is now back at target.

Survivor's pensions has also stabilised, but slightly below target, we will be reviewing this process to ensure it is being applied consistently.

An issue has been identified in Death Benefits, where multiple payments are handled in a single case, this is being investigated to identify how to report on these payments separately

A new employer estimate process was trialled in the quarter and 82 estimates provided in bulk to support a restructuring exercise.

The Death Notification process is now working effectively with notifications sent out within one day on average.

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