MONTHLY RESULTS DECEMBER TO MAY BASED ON NEW KPI REPORTING

FEBRUARY AND MARCH REPORTING

APRIL AND MAY REPORTING

Description	<u>Target time/date as per Partnership</u> <u>Agreement</u>	<u>No of Cases</u> December	<u>Actual Score</u> <u>Dec</u>	<u>No of Cases</u> January	Actual Score Jan	<u>Comments</u>	
PENSION ADMINISTRATION DEATH BENEFITS							
Notify potential beneficiary of lump sum death grant	5 days	NA	100%	NA	100%		
Write to dependant and provide relevant claim	5 days	1	100%	1	100%		
Set up any dependants benefits and confirm payments due	14 days	5	60%	2	50%	3 cases late in total but paid on next available payroll runy	
RETIREMENTS Retirement options issued to members	5 days	2	50%	10	80%	3 late cases but we have increased resourcing in this area from February 2017 to avoid any future delays	
New retirement benefits processed for payment following receipt of all necessary documents	5 days	7	72%	3	100%	2 cases late in Dec	
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run	7	100%	3	100%		
REFUNDS OF CONTRIBUTIONS Refund paid following receipt of claim form	14 days	4	100%	9	100%		
DEFERRED BENEFITS Statements sent to member following receipt of leaver notification	30 days	9	89%	7	71%	Volumes expected to increase once leaver forms received from BT and from other scheme employers	
DEFERRED PAYMENTS Notification to members 3 months before payments due	3 months	8	Average 2 weeks in advance	11	Average 2 weeks in advance	Work process amended from Februar 2017	
Lump Sum (on receipt of all necessary documentation)	5 days	8	50%	10	50%	We have increased resourcing in this retirement area from February 2017 to avoid any future delays	
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run	8	100%	10	100%		
NEW JOINERS New starters processed	30 days	20	100%	1	100%	Awaiting interface from BT so number only show records created manually	
TRANSFERS IN Non LGPS transfers-in quotations	30 days	2	100%	16	100%		
Non LGPS transfers-in payments processed	30 days	NA		NA		All Quotations issued within statutor	
FRANSFERS OUT Non LGPS transfers-out quotations processed	30 days	7	86%	20	70%	timescales. Agreement at meeting between SCC and WCC in Feb 2017 th future reports will identify LGPS transfo	
Non LGPS transfers out payments processed	30 days	2	100%	4	100%	as additional measure.	
Interfunds In - Quotations	30 days						
Interfunds In - Actuals	30 days						
nterfunds Out - Quotations	30 days						
nterfunds Out - Actuals	30 days						
ESTIMATES							
L-10 cases	5 Days	9	89%	5	60%	2 cases late in January	
11-50 cases	Agreed with WCC	NA	NA	NA	NA		
				See Dec		Large exercise carried out on behalf o	
51 cases or over	Agreed with WCC	80 plus	100%	entry	See Dec entry	WCC in Dec and Jan	
MATERIAL CHANGES Any changes to data which materially affect						Includes Change of Bank account,	
actual or potential benefits to be processed within 30 days of receiving all necessary data	30 days	44	100%	221	100%	address, expression of wish. Large number of bulk bank changes in Janua	
BUYING ADDITIONAL PENSIONS							
Members notified of terms of purchasing additional pension	15 days	0	100%	1	100%		
Monthly Pensioner Payroll Full reconciliation of payroll and ledger report provided to WCC	Last day of month		100%		100%		
ssue of monthly payslips RTI file submitted to HMRC	3 days before pay day 3 days before pay day		100% 100%		100% 100%		
BACS File submitted for payment P 35	3 days before pay day EOY		100% Annual		100% Annual		
Annual Exercises ANNUAL BENEFIT STATEMENTS ssued to Active members	31 August each year		Annual		Annual		
ANNUAL BENEFIT STATEMENTS Issued to Deferred members	31 August each year		Annual		Annual		
ssued to Deferred members P60s Issued to Pensioners	31 May each year		Annual		Annual		
Apply Pensions Increase to Pensioners	April each year		Annual		Annual		
Pensioners Newsletter	April each year		Annual		Annual		

FEBRUARY AND MA	RCH REPORTING	
Actual Score Feb and March	No of Cases Feb and Mar	<u>Comments</u>
100%	2	
100%	6	
100%	8	
89%	49	Large increase in volume of cases processed. 5 cases late
96%	27	Large increase in volume of cases processed. 1 case late
100%	27	
100%	12	
85%	26	Volumes expected to increase once leaver forms received from BT and from other scheme employers. 4 cases late.
New cases 2 months in advance.	89	Large increase in volume of cases processed following review. New cases now up to 2 months in advance.
96%	26	1 case late.
100%	26	
NA	NA	Awaiting interface from BT so numbers only show records created manually
100%	8	
NA	NA	
86%	30	4 cases late
NA	NA	
100%	9	New measure.
100%	2	New measure.
86%	21	New measure. 3 cases late
100%	8	New measure.
83%	6	1 case late
NA	NA	
NA	NA	
100%	141	
NA	NA	
100%		
100% 100%		
100% 31-Mar-17		
Annual	NA	
Annual	NA	
100%		Issued April 2017
100%		

Actual Score April and May	<u>No of Cases Apr and</u> <u>May</u>	Trend	<u>Comments</u>				
100%	4						
100%	7						
100%	7						
96%	23						
			1 case late				
100%	44		Large increase in volume of cases processed.				
100%	44						
100%	12						
56%	30	-	13 cases late Performance not representative of SCC as these are late cases caused by late submissions of data from payroll providers				
New cases 2 months in advance.	9						
94%	36		2 cases late				
100%		\rightarrow					
100%	26		Awaiting interface from BT so numbers only show records created manually				
100%	2						
NA		NA					
86%	15	\rightarrow	2 cases late				
100%	2						
100%	4						
100%	2						
100%	2						
100%	4						
100%	9						
NA		NA					
NA		NA					
100%	145						
NA	NA	NA					
100%							
100% 100% 100%							
31-Mar-17							
Annual	NA	NA					
Annual	NA	NA					
			Issued April 2017				

Pensioners Newsletter	April each year		Annual		Annual	100%		Issued April 2017				Issued April 2017
CUSTOMER SERVICE												
CORRESPONDENCE												
Acknowledgement if more than 5 days	2 days								100%	50		Via Helpdesk
Response	10 days	18	89%	28	75%	76%	67		82%	50		
3rd party enquires	10 days	Nil		Nil		NA	NA		NA	NA	NA	
Helpdesk Enquiries												
Volumes of Enquiries Handled By Helpdesk	Number of Enquiries Handled	432	79% FPF	561	FPF means enquiries resolved as 'First 83%FPF Point Fix' by Helpdesk team that did not require referral to Operations team	82% FPF	1347		87% FPF	1074		
Customer Sum Jour								82% FPF rate.				87% FPF rate.
Customer Surveys							Describer second					
Survey to retirees	Percentage Satisfied with Service		Quarterly		Quarterly Due After End of March		Pending report					To send Q1