

MONTHLY RESULTS FOR DECEMBER AND JANUARY BASED ON NEW KPI REPORTING

Description	Target time/date as per Partnership Agreement	No of Cases December	Actual Score Dec	No of Cases January	Actual Score Jan	Comments
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 form	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 run
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 February 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 numbers only show records created manually
TRANSFERS IN						
Non LGPS transfers-in quotations	30 days	2	100%	16	100%	All Quotations issued within statutory timescales. Agreement at meeting between SCC and WCC in Feb 2017 that future reports will identify LGPS transfers as additional measure.
Non LGPS transfers-in payments processed	30 days	NA		NA		
Non LGPS transfers-out quotations processed	30 days	7	86%	20	70%	
Non LGPS transfers out payments processed	30 days	2	100%	4	100%	
ESTIMATES						
1-10 cases	5 Days	9	89%	5	60%	2 cases late in January
11-50 cases	Agreed with WCC	NA	NA	NA	NA	
51 cases or over	Agreed with WCC	80 plus	100%	See Dec entry	See Dec entry	Large exercise carried out on behalf of WCC in Dec and Jan
MATERIAL CHANGES						
Any changes to data which materially affect actual or potential benefits to be processed within 30 days of receiving all necessary data	30 days	44	100%	221	100%	Includes Change of Bank account, address, expression of wish. Large number of bulk bank changes in January.
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%	
Issue of monthly payslips	3 days before pay day		100%		100%	
RTI file submitted to HMRC	3 days before pay day		100%		100%	
BACS File submitted for payment	3 days before pay day		100%		100%	
P35	EOY		Annual		Annual	
Annual Exercises						
ANNUAL BENEFIT STATEMENTS Issued to Active members	31 August each year		Annual		Annual	
ANNUAL BENEFIT STATEMENTS Issued to Deferred members	31 August each year		Annual		Annual	
P60s Issued to Pensioners Non LGPS transfers-in quotations processed within 20 days	31 May each year		Annual		Annual	
Apply Pensions Increase to Pensioners	April each year		Annual		Annual	
Pensioners Newsletter	April each year		Annual		Annual	
CUSTOMER SERVICE						
CORRESPONDENCE						
Acknowledgement if more than 5 days	2 days					e-mail enquiries acknowledged within 24 hours. Information on other enquiries not currently available
Response	10 days	18	89%	28	75%	
3rd party enquires	10 days	Nil		Nil		
Helpdesk Enquiries						
Volumes of Enquiries Handled By Helpdesk	Number of Enquiries Handled	432	79% FPF	561	83%FPF	FPF means enquiries resolved as 'First Point Fix' by Helpdesk team that did not require referral to Operations team
Customer Surveys						
Monthly survey to retirees	Percentage Satisfied with Service		Quarterly		Quarterly	Due at End of March