

**MONTHLY RESULTS FOR DECEMBER AND JANUARY BASED ON NEW KPI REPORTING**

<u>Description</u>	<u>Target time/date as per Partnership Agreement</u>
<b><u>PENSION ADMINISTRATION</u></b>	
<b>DEATH BENEFITS</b>	
Notify potential beneficiary of lump sum death	5 days
Write to dependant and provide relevant claim form	5 days
Set up any dependants benefits and confirm payments due	14 days
<b>RETIREMENTS</b>	
Retirement options issued to members	5 days
New retirement benefits processed for payment following receipt of all necessary documents	5 days
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run
<b>REFUNDS OF CONTRIBUTIONS</b>	
Refund paid following receipt of claim form	14 days
<b>DEFERRED BENEFITS</b>	
Statements sent to member following receipt of leaver notification	30 days
<b>DEFERRED PAYMENTS</b>	
Notification to members 3 months before payments due	3 months
Lump Sum ( on receipt of all necessary documentation)	5 days
Pension Payment, member to paid on the next available pension payroll following receipt of all necessary documentation	Next available pay run

**MONTHLY RESULTS FOR DECEMBER AND JANUARY BASED ON NEW KPI REPORTING**

<u>Description</u>	<u>Target time/date as per Partnership Agreement</u>
<b>NEW JOINERS</b> New starters processed	30 days
<b>TRANSFERS IN</b> Non LGPS transfers-in quotations	30 days
Non LGPS transfers-in payments processed	30 days
<b>TRANSFERS OUT</b> Non LGPS transfers-out quotations processed	30 days
Non LGPS transfers out payments processed	30 days
Interfunds In - Quotations	30 days
Interfunds In - Actuals	30 days
Interfunds Out - Quotations	30 days
Interfunds Out - Actuals	30 days
<b>ESTIMATES</b>	
<b>1-10 cases</b>	5 Days
<b>11-50 cases</b>	Agreed with WCC
<b>51 cases or over</b>	Agreed with WCC
<b>MATERIAL CHANGES</b>	
<b>Any changes to data which materially affect actual or potential benefits to be processed within 30 days of receiving all necessary data</b>	30 days

**MONTHLY RESULTS FOR DECEMBER AND JANUARY BASED ON NEW KPI REPORTING**

<u>Description</u>	<u>Target time/date as per Partnership Agreement</u>
<b>BUYING ADDITIONAL PENSIONS</b>	
Members notified of terms of purchasing additional pension	15 days
<b><u>Monthly Pensioner Payroll</u></b>	
Full reconciliation of payroll and ledger report provided to WCC	Last day of month
Issue of monthly payslips	3 days before pay day
RTI file submitted to HMRC	3 days before pay day
BACS File submitted for payment	3 days before pay day
<b>P35</b>	EOY
<b><u>Annual Exercises</u></b>	
<b>ANNUAL BENEFIT STATEMENTS</b> Active members	31 August each year
<b>ANNUAL BENEFIT STATEMENTS</b> Deferred members	31 August each year
<b>P60s Issued to Pensioners</b>	31 May each year
<b>Apply Pensions Increase to Pensioners</b>	April each year
<b>Pensioners Newsletter</b>	April each year
<b><u>CUSTOMER SERVICE</u></b>	
<b><u>CORRESPONDENCE</u></b>	
Acknowledgement if more than 5 days	2 days
Response	10 days
3rd party enquires	10 days
<b><u>Helpdesk Enquiries</u></b>	
<b>Volumes of Enquiries Handled By Helpdesk</b>	Number of Enquiries Handled
<b><u>Customer Surveys</u></b>	
<b>Survey to retirees</b>	Percentage Satisfied with Service