

### Local Pension Board - Performance Indicators - February Monthly Report

No	Case Type	Performance Standard Schedule 1		Minimum Target	Brought Forward	Received	Completed	Completed On Time	% On Time	Carried Forward	Average Elapsed Time	Average Completed Time	Comments
1	HV01	Provide welcome letter to new members within 3 working days of notification of joining.		95%	54	57	63	63	100	48	9	0	Annual Report standard is 10 working days
	HV01W		online		41	88	99	99	100	30	3	0	
2	HV02A	Calculate transfer in calculations within 4 working days of receiving required documentation	IFA	95%	6	3	0	0	0	9	0	0	Annual Report standard is 15 working days
	HV03A		TVI		3	1	1	1	100	3	63	0	
3	HV09A	Calculate and pay transfer out calculations within 5 working days of receiving required documentation	IFA	90%	1	2	3	3	100	0	3	0	Annual Report standard is 15 working days
	HV010A		TVO		2	1	1	1	100	2	72	0	
4	HV04A	Act upon request for payment of additional contributions within 10 working days		90%	1	1	1	1	100	1	19	0	
5	HV24 HV24A HV24G HV24K HV24M HV24V	Respond to general queries/correspondence including updates for, but not limited to, change of address, change of bank account details, Member Self-Service registrations within 5 working days or within timescales set out in Appendix 1		90%	51	80	72	72	100	59	16	9	Split into 6 different case types on CMS - Totals/averages used
6	HV11	Calculate deferred benefit entitlement on leaving within 4 working days of receiving necessary notification of leaving or date of leaving, whichever is later		90%	207	41	32	32	100	217	65	11	Annual Report standard is 15 working days
	HV11W		online		44	50	40	40	100	54	10	0	
7	HV12 HV12P HV12Z	Calculate and pay retirement benefits, including deferred into payment within in 5 days of receiving all required documentation from employer and/or member or date of entitlement, whichever is later.	DB in pay	95%	57	40	18	18	100	79	52	3	
	HV14		Ret		28	6	11	11	100	23	97	7	
	HV14W		Ret Online		36	12	19	19	100	29	25	0	

10	HV08	Respond to member requests for estimates of benefits within 5 working days following receipt of request		90%	19	45	39	39	100	25	6	0	
11	HV22	Respond to employer requests for estimates of benefits within 5 working days following receipt of request	online	90%	3	3	6	6	100	0	14	0	Annual Report standard is 10 working days
	0				0	0	0	0	0	0	0		
12	HV34E	Provide information on request in respect of pension sharing on divorce within legislative timescales (within 5 days of receipt of all relevant information). (a charge to the member will be levied in line with pension sharing on divorce legislation)		100%	2	1	2	2	100	1	5	0	
13	HV34A	Implement pension sharing orders within legislative timescales (within 5 days of receipt of all relevant information)		100%	0	1	0	0	0	1	0	0	
14		Provide annual benefit statements to active and deferred members within legislative timescales		100%									100% achieved prior to 31/08/18 deadline
15		Act upon and implement pension increase orders by next available payment date		100%									Pensions increase implemented in April for pensions and August for additional PI on lump sums
16	HV15	Implement changes to pensioner circumstances by next available payment date		100%	8	0	2	2	100	6	254	177	
17		Respond to requests for information for reports from DWP, HMRC, DCLG, GAD within legislative timeframes		100%									All reports/information received in time to meet deadlines
18		Reporting – Provide monthly and quarterly reports to client highlighting performance against SLA's, membership statistics, Annual planner, Technical updates and any other information relevant to the ongoing running of the service within 5 working days after the start of each month and within 10 working days of the end of		100%									Need to monitor
19		Number of cases in backlog											To be provided a/w report
20		Complaints			0	1	0	0	0	0	0	0	