

Appendix B – Customer Journey Key Performance Indicators (statutory) for the Period 1 January to 29 February 2024

Function/Task	Indicator	Month	% Within Target	Comments
Provide basic scheme information to new joiners.	2 months from date of joining or member's request.	January February	60 85	The Pension Service is 100% within target for meeting the SLA of 2 months from the record being created on Altair which is dependent upon the receipt of the employer i-connect file. Reasons why the cases would not be completed within the statutory target are ¹ : <ul style="list-style-type: none"> • Arrears of pay resulting from a late agreed pay award. • Notifications of new starters received from employers within monthly i-connect files where the member's start date was already more than 2 months ago. • Payroll provider changes.
Provide transfer details for transfer in.	2 months from date of request.	January February	37 48	Reasons why the cases would not be completed within the statutory target are ² : <ul style="list-style-type: none"> • Interfund in - Further information is required from the previous LGPS pension fund. • Transfer in – Further information is required from the member, the previous scheme, or the employer.
Provide details of transfer value for transfer out.	3 months from date of request.	January February	80 81	Reasons why the cases would not be completed within the statutory target are ³ : <ul style="list-style-type: none"> • Interfund out - Further information is required from the employer prior to finalising the deferred benefit and there is a backlog in these cases due to the volumes. • Transfer out – Further information is required from the employer prior to finalising the deferred benefit.
Provide a CETV quotation for divorce purposes.	Within 3 months of the request (or shorter deadline as specified in a court order).	January February	100 64	In February, the performance was below target due to the clearance of the backlog relating to McCloud. Certain cases were previously placed on hold awaiting the new guidance from LGA, this has been released at the end of January allowing for older cases to be processed.

¹ Reports are being developed to identify any arrears of pay cases in advance, the software provider is investigating solutions to identify new starter records that are created as a result of arrears as soon as the data is received on the system.

² An investigation into whether automated reporting can be developed to carry out the analysis required without any manual intervention is currently being undertaken.

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Inform members who leave the scheme before retirement age of their rights and options.	As soon as practical and no more than 2 months of leaving.	January February	n/a 44	<p>The Pension Service provided statutory information within 10 working days of being notified of a leaver for 100% of cases in February.</p> <p>The Pension Service has 10 working days to issue an options letter from the date an employer notifies the Fund of a leaver. Employer failures are therefore defined as any notification that has not been received by the Service within 46 days of a member leaving employment.</p>
Inform members who leave the scheme at or after retirement age of the benefits due.	Within 2 months of retirement date where the member retires before normal pension age.	January February	33 63	<p>Multiple factors contribute to the member experience for this indicator, this includes the type of information required (e.g. leavers details, certificates, forms) and the party responsible for supplying the information (employer, payroll provider, member). There is also the processing time required for the administrator to issue the award once all the information is received.</p> <p>For January, in 67% of the cases outside of target information was not provided by the scheme employer to allow the Pensions Service at least 10 working days to process the benefit.</p> <p>For February, in 83% of the cases outside of target information was not provided by the scheme employer to allow the Pensions Service at least 10 working days to process the benefit.</p> <p>Analysis will be undertaken, and any persistent trends addressed accordingly.</p>
Inform members who leave the scheme at or after retirement age of the benefits due.	Within 1 month of retirement date where the member retires on or after normal pension age.	January February	57 10	<p>Multiple factors contribute to the member experience for this indicator, this includes the type of information required (e.g. leavers details, certificates, forms) and the party responsible for supplying the information (employer, payroll provider, member). There is also the processing time required for the administrator once all the information is received.</p>

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				<p>For January, in 100% of the cases outside of target information was not provided by the scheme employer to allow the Pensions Service at least 10 working days to process the benefit.</p> <p>For February, in 78% of the cases outside of target information was not provided by the scheme employer to allow the Pensions Service at least 10 working days to process the benefit.</p> <p>Analysis will be undertaken, and any persistent trends addressed accordingly.</p>
Calculate and notify dependant(s) of amount of death benefits.	As soon as possible, but in any event no more than 2 months of date or becoming aware of death.			A new death process is due to be created to enable reporting on this KPI. This is not currently possible as a separate case is set up on the member and the dependant.
Notify implementation information after receiving a pension sharing order (and no outstanding information)	Within 21 days of the later of, the date of receipt of the pension sharing order or the day on which the order takes affect or the date of receipt of the relevant documents / information.			No pension sharing order cases have been finalised in January 2024 and February 2024. In the coming weeks, DLUHC will be issuing new actuarial guidance on divorce debits and credits which will be needed to process a pension sharing order for a member protected by the McCloud remedy.

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