West Midlands Pension Fund - Key Performance Indicators (KPIs)



					2
K	KPI Summary	KPI Description	Frequency	KPI Target	9
	Refund Notification	Notify member of Refund within 10 days of receiving required information	Monthly	90%	94
R	Refund Payment	Refund payments processed within 5 days of receiving required information	Monthly	90%	98
R	Retirement Quote	Notification of Estimated Benefits within 15 days of retirement date	Monthly	90%	9.
R	Retirement Notification	Notification of the actual benefits within 5 days of receiving member	Monthly	90%	6
		option form (Retirement Notification) Payment of lump sum and creation of payroll record within 5 days of	,	90%	
	Retirement Payment	receiving election form (Retirement) Issue quote letter within 30 days of the members eligible payment date	Monthly		9
D	Deferred Retirement Quote	or receipt of request from member	Monthly	90%	7
D	Deferred Retirement Notification	Notification of the actual benefits within 5 days of receiving member option form (Deferred Retirement Notification)	Monthly	90%	9
D	Deferred Retirement Payment	Payment of lump sum and creation of payroll record within 5 days of receiving election form (Deferred Retirement)	Monthly	90%	9
T	Fransfer In Quote	Transfer in quotations processed within 10 days of receiving all the required information	Monthly	90%	9
Tr	Transfer In Payment	Transfer notification of transferred in membership to be notified to the scheme member within 10 days of receiving payment	Monthly	90%	9
T	Fransfer Out Quote	Transfer out quotations processed within 20 days of receiving required information	Monthly	90%	9
т	Fransfer Out Payment	Transfer out payments processed within 20 days of receiving required information	Monthly	90%	9
D	Deaths Acknowledgement	Acknowledgement of a death within 5 days of receiving the notification	Monthly	90%	9
	Deaths Notification of Benefits Payable	Notification of benefits payable to dependents will be issued within 5	Monthly	90%	9
	·	days of receiving the required information Payment of death lump sum will be made within 10 days of receipt of all		90%	
	Deaths Payment	the required information	Monthly	90%	10
Ţ	Pension Services - Service Calls				
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K	KPI Summary	KPI Description	Frequency	KPI Target	
	Customer Services Calls	Calls received to the customer helpline to be answered	Monthly	85%	8
Ei	Employer Services Calls	Calls received to the employer helpline to be answered	Monthly	85%	9
F	Pension Services - Customer Satisfaction				
					2
К	KPI Summary	KPI Description	Frequency	KPI Target	
	Customer Satisfaction	Customer satisfaction	Quarterly	90%	8
	Pension Services - Web Portal	Pagistrations			
	Sum of Difference	Negisti ations			
K	KPI Summary	KPI Description	Frequency	KPI Target	
W	Web Portal Registrations	Web Portal Registrations	Monthly	3000 increase per quarter	
\neg	Operations - Web Portal Availa	bility			
	KPI Summary Web Portal Availability	KPI Description Pensions Portal to be available 95% of the time (based on working hours	Frequency Monthly	KPI Target	
W	Web Portal Availability		Monthly	95%	9
W		Pensions Portal to be available 95% of the time (based on working hours as monitored)			9
W Ei	Web Portal Availability	Pensions Portal to be available 95% of the time (based on working hours as monitored) Employer Portal to be available 95% of the time (based on working hours as monitored)	Monthly	95%	9.
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E F	Web Portal Availability Employer Portal Availability Pension Services - Complaints	Pensions Portal to be available 95% of the time (based on working hours as monitored) Employer Portal to be available 95% of the time (based on working hours as monitored) Vionitoring KPI Description All member complaints to be responded to within 20 working days of receipt	Monthly	95%	9 9
F K	Web Portal Availability Employer Portal Availability Pension Services - Complaints KPI Summary	Pensions Portal to be available 95% of the time (based on working hours as monitored) Employer Portal to be available 95% of the time (based on working hours as monitored) Wonitoring KPI Description All member complaints to be responded to within 20 working days of	Monthly Monthly	95% 95% KPI Target	9 9
KI K	Web Portal Availability Employer Portal Availability Pension Services - Complaints KPI Summary Member Complaints Employer Complaints	Pensions Portal to be available 95% of the time (based on working hours as monitored) Employer Portal to be available 95% of the time (based on working hours as monitored) Wonitoring KPI Description All member complaints to be responded to within 20 working days of receipt All employer complaints to be responded to within 20 working days of receipt	Monthly Monthly Frequency Monthly	95% 95% KPI Target	9 9
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DBS produced for 100% of deferred member records