

Annex 1 Overall Performance by Case Type

		Cases Last Quarter				
		Measured Against SLA				
		Total Processed	Total Processed in Target	Percentage Processed within Target	Total Processed within 5 days of Target	Percentage Processed within 5 days of Target
Death Notification	5 Days	136	102	75.0%	22	91.2%
Death - Act/Def/Pen - Payment	10 Days	118	94	79.7%	8	86.4%
Retirement (Active) - Quote	15 Days	361	100	27.7%	15	31.9%
Retirement (Active) - Actual	15 Days	285	212	74.4%	11	78.2%
Retirement (Deferred) - Quote	30 Days	539	162	30.1%	68	42.7%
Retirement (Deferred) - Actual	15 Days	304	247	81.3%	28	90.5%
Divorce - Quote	45 Days	51	45	88.2%	1	90.2%
Divorce - Actual	15 Days	4	4	100.0%	0	100.0%
Refund - Quotes	10 Days	1368	155	11.3%	102	18.8%
Refund - Actual	10 Days	184	119	64.7%	13	71.7%
Deferred Benefits	30 Days	471	147	31.2%	101	52.7%
Transfer In (Active) - Quote	10 Days	50	12	24.0%	3	30.0%
Transfer In (Active) - Actual	10 Days	29	6	20.7%	8	48.3%
Transfer Out (Active/Deferred) - Quote	10 Days	74	13	17.6%	4	23.0%
Transfer Out (Active/Deferred) - Actual	10 Days	21	18	85.7%	1	90.5%
Employer Estimate - Quote	15 Days	29	19	65.5%	1	69.0%
Member Estimate - Quote	15 Days	96	83	86.5%	8	94.8%
Joiner	40 Days	4357	4316	99.1%	5	99.2%

RAG Key	
Red	Less than 75%
Amber	75 - 89%
Green	90 - 100%

Annex 2

Case No's vs Target

		Tasks Last Quarter										
		Actual Days to Process										
	Average Days to Process	0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31 to 40	41 to 45	46 to 59	60+	
Death Notification	5 Days	6	102	22	5	5	0	0	1	0	0	1
Death - Act/Def/Pen - Payment	10 Days	9	68	26	8	5	1	2	2	3	3	0
Retirement (Active) - Quote	15 Days	27	45	35	20	15	21	26	52	22	59	66
Retirement (Active) - Actual	15 Days	17	160	38	14	11	9	8	5	1	4	35
Retirement (Deferred) - Quote	30 Days	35	53	14	20	15	34	26	68	22	84	203
Retirement (Deferred) - Actual	15 Days	17	169	52	26	28	7	4	2	0	1	15
Divorce - Quote	45 Days	29	5	6	4	5	7	10	8	0	1	5
Divorce - Actual	15 Days	34	0	4	0	0	0	0	0	0	0	0
Refund - Quotes	10 Days	71	73	82	102	32	13	16	50	21	56	923
Refund - Actual	10 Days	33	69	50	13	16	18	5	7	0	2	4
Deferred Benefits	30 Days	50	46	27	17	24	10	23	101	21	41	161
Transfer In (Active) - Quote	10 Days	24	11	1	3	3	3	3	6	1	1	18
Transfer In (Active) - Actual	10 Days	38	4	2	8	3	1	1	0	0	2	8
Transfer Out (Active/Deferred) - Quote	10 Days	44	10	3	4	3	3	3	7	7	10	24
Transfer Out (Active/Deferred) - Actual	10 Days	33	14	4	1	0	0	0	0	0	0	2
Employer Estimate - Quote	15 Days	15	10	7	2	1	3	0	2	1	2	1
Member Estimate - Quote	15 Days	8	57	17	9	8	0	1	1	0	0	3
Joiner	40 Days	4	1955	1119	760	315	119	37	11	5	9	27

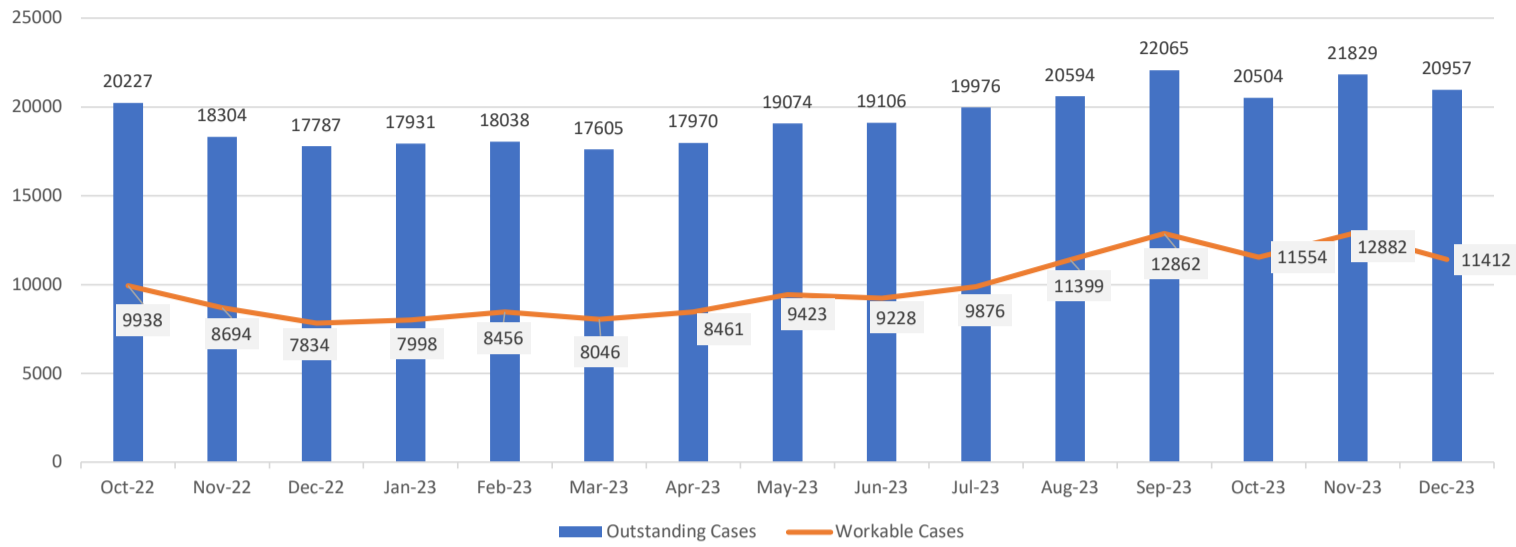
Annex 3 Trend in Overall Performance

Work Type	Target Processing SLA	Q1 Jan-23 to Mar-23	Q2 Apr-23 to Jun-23	Q3 Jul-23 to Sep-23	Q4 Oct-23 to Dec-23	Trend
Death Notification	5 Days	86.4%	73.8%	57.1%	75.0%	
Death - Act/Def/Pen - Payment	10 Days	90.7%	65.3%	72.5%	79.7%	
Retirement (Active) - Quote	15 Days	63.3%	44.0%	52.1%	27.7%	
Retirement (Active) - Actual	15 Days	76.1%	62.5%	75.1%	74.4%	
Retirement (Deferred) - Quote	30 Days	84.7%	70.1%	49.8%	30.1%	
Retirement (Deferred) - Actual	15 Days	80.5%	66.9%	71.4%	81.3%	
Divorce - Quote	45 Days	96.9%	90.9%	80.2%	88.2%	
Divorce - Actual	15 Days	100.0%	50.0%	0.0%	100.0%	
Refund - Quotes	10 Days	41.0%	1.7%	33.1%	11.3%	
Refund - Actual	10 Days	63.9%	29.4%	49.0%	64.7%	
Deferred Benefits	30 Days	52.6%	39.4%	54.0%	31.2%	
Transfer In (Active) - Quote	10 Days	55.1%	2.3%	23.5%	24.0%	
Transfer In (Active) - Actual	10 Days	51.1%	12.5%	40.0%	20.7%	
Transfer Out (Active/Deferred) - Quote	10 Days	49.3%	33.3%	32.8%	17.6%	
Transfer Out (Active/Deferred) - Actual	10 Days	73.1%	45.5%	51.4%	85.7%	
Employer Estimate - Quote	15 Days	74.5%	82.4%	55.3%	65.5%	
Member Estimate - Quote	15 Days	76.4%	87.1%	92.0%	86.5%	
Joiner	40 Days	99.7%	99.3%	98.6%	99.1%	

RAG Key	
Red	Less than 75%
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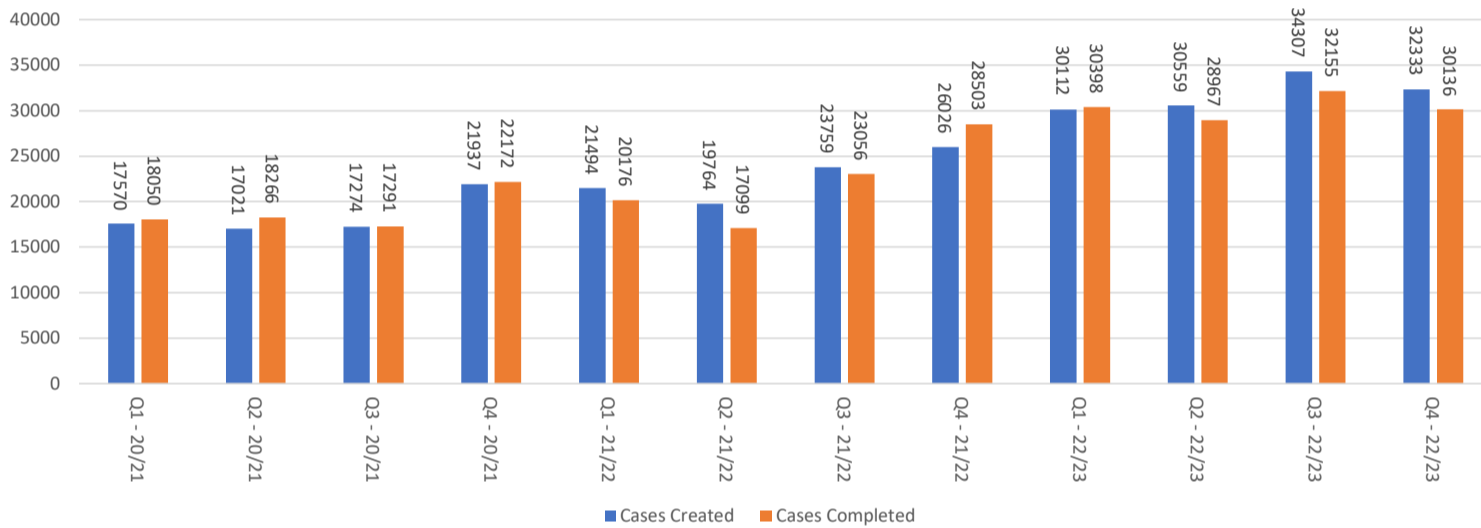
Annex 4

Number of Open Cases as at End of Each Month

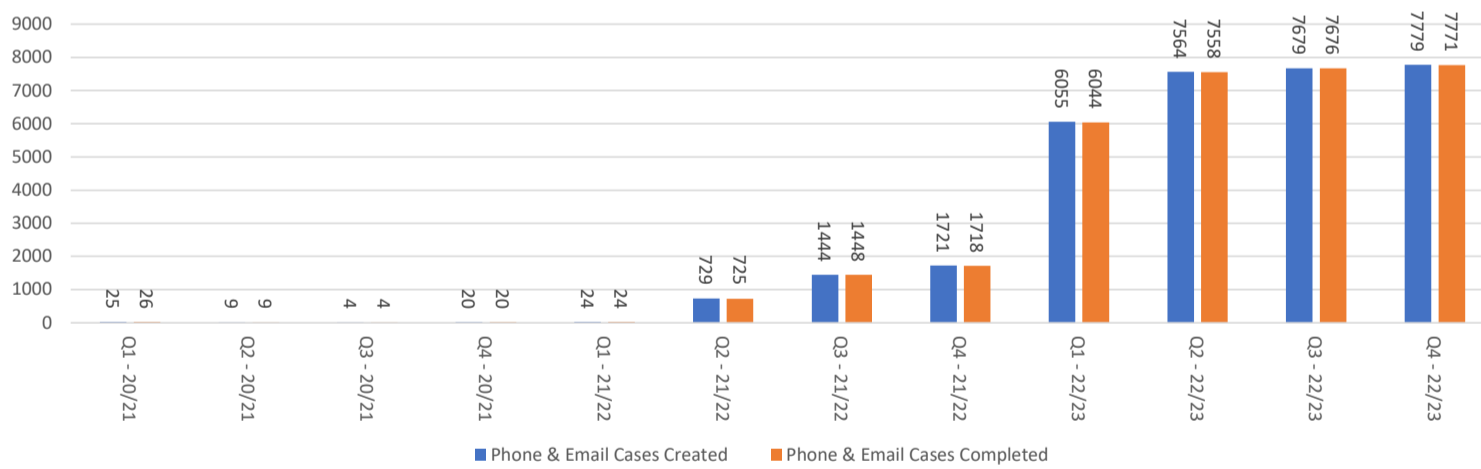


Annex 5

Total Cases Created & Completed



Phone & Email Cases Created & Completed



Total Cases Created & Completed Exc Phone & Email Cases

