

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	150	69	46.0%	57	84.0%
Death - Act/Def/Pen - Payment	10 Days	99	79	79.8%	6	85.9%
Retirement (Active) - Quote	15 Days	494	142	28.7%	53	39.5%
Retirement (Active) - Actual	15 Days	248	201	81.0%	17	87.9%
Retirement (Deferred) - Quote	30 Days	578	132	22.8%	61	33.4%
Retirement (Deferred) - Actual	15 Days	400	221	55.3%	33	63.5%
Divorce - Quote	45 Days	67	39	58.2%	7	68.7%
Divorce - Actual	15 Days	1	1	100.0%	0	100.0%
Refund - Quotes	10 Days	888	409	46.1%	49	51.6%
Refund - Actual	10 Days	374	41	11.0%	45	23.0%
Deferred Benefits	30 Days	603	167	27.7%	89	42.5%
Transfer In (Active) - Quote	10 Days	79	18	22.8%	3	26.6%
Transfer In (Active) - Actual	10 Days	29	10	34.5%	2	41.4%
Transfer Out (Active/Deferred) - Quote	10 Days	140	12	8.6%	4	11.4%
Transfer Out (Active/Deferred) - Actual	10 Days	18	18	100.0%	0	100.0%
Employer Estimate - Quote	15 Days	50	42	84.0%	4	92.0%
Member Estimate - Quote	15 Days	219	188	85.8%	12	91.3%
Joiner	40 Days	3079	3007	97.7%	4	97.8%

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	69	57	16	4	2	1	0	1	0	0
Death - Act/Def/Pen - Payment	10 Days	9	64	15	6	8	0	2	2	0	2	0
Retirement (Active) - Quote	15 Days	27	54	55	33	53	38	17	41	24	37	142
Retirement (Active) - Actual	15 Days	17	106	74	21	17	11	7	5	2	1	4
Retirement (Deferred) - Quote	30 Days	35	24	14	23	20	21	30	61	48	139	198
Retirement (Deferred) - Actual	15 Days	17	93	65	63	33	26	30	62	8	15	5
Divorce - Quote	45 Days	29	2	6	4	0	1	7	11	8	7	21
Divorce - Actual	15 Days	34	1	0	0	0	0	0	0	0	0	0
Refund - Quotes	10 Days	71	255	154	49	77	65	39	11	1	12	225
Refund - Actual	10 Days	33	14	27	45	42	21	21	78	40	56	30
Deferred Benefits	30 Days	50	48	14	37	21	23	24	89	41	74	232
Transfer In (Active) - Quote	10 Days	24	11	7	3	6	1	2	12	4	9	24
Transfer In (Active) - Actual	10 Days	38	6	4	2	0	5	2	4	0	3	3
Transfer Out (Active/Deferred) - Quote	10 Days	44	8	4	4	6	8	6	5	6	18	75
Transfer Out (Active/Deferred) - Actual	10 Days	33	14	4	0	0	0	0	0	0	0	0
Employer Estimate - Quote	15 Days	15	15	16	11	4	1	2	1	0	0	0
Member Estimate - Quote	15 Days	8	117	47	24	12	3	1	3	3	1	8
Joiner	40 Days	4	530	629	373	463	800	170	42	4	13	55

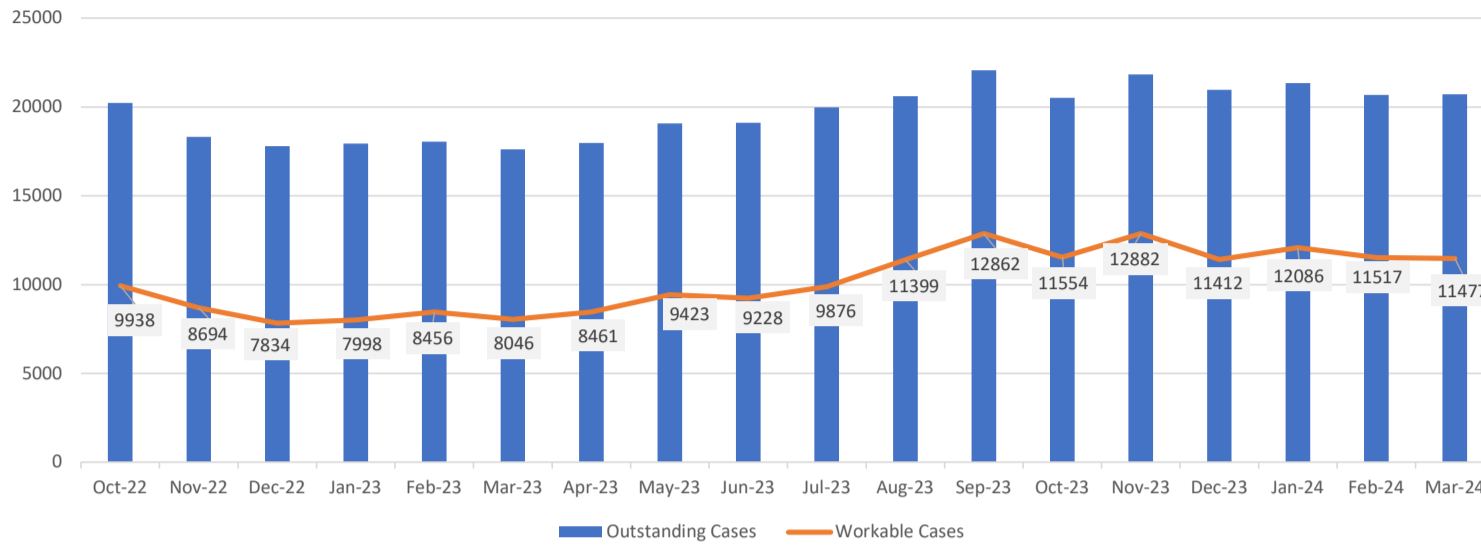
Annex 3 Trend in Overall Performance

Work Type	Target Processing SLA	Q2	Q3	Q4	Q1	Trend
		Apr-23 to Jun-23	Jul-23 to Sep-23	Oct-23 to Dec-23	Jan-24 to Mar-24	
Death Notification	5 Days	73.8%	57.1%	75.0%	46.0%	
Death - Act/Def/Pen - Payment	10 Days	65.3%	72.5%	79.7%	79.8%	
Retirement (Active) - Quote	15 Days	44.0%	52.1%	27.7%	28.7%	
Retirement (Active) - Actual	15 Days	62.5%	75.1%	74.4%	81.0%	
Retirement (Deferred) - Quote	30 Days	70.1%	49.8%	30.1%	22.8%	
Retirement (Deferred) - Actual	15 Days	66.9%	71.4%	81.3%	55.3%	
Divorce - Quote	45 Days	90.9%	80.2%	88.2%	58.2%	
Divorce - Actual	15 Days	50.0%	0.0%	100.0%	100.0%	
Refund - Quotes	10 Days	1.7%	33.1%	11.3%	46.1%	
Refund - Actual	10 Days	29.4%	49.0%	64.7%	11.0%	
Deferred Benefits	30 Days	39.4%	54.0%	31.2%	27.7%	
Transfer In (Active) - Quote	10 Days	2.3%	23.5%	24.0%	22.8%	
Transfer In (Active) - Actual	10 Days	12.5%	40.0%	20.7%	34.5%	
Transfer Out (Active/Deferred) - Quote	10 Days	33.3%	32.8%	17.6%	8.6%	
Transfer Out (Active/Deferred) - Actual	10 Days	45.5%	51.4%	85.7%	100.0%	
Employer Estimate - Quote	15 Days	82.4%	55.3%	65.5%	84.0%	
Member Estimate - Quote	15 Days	87.1%	92.0%	86.5%	85.8%	
Joiner	40 Days	99.3%	98.6%	99.1%	97.7%	

RAG Key	
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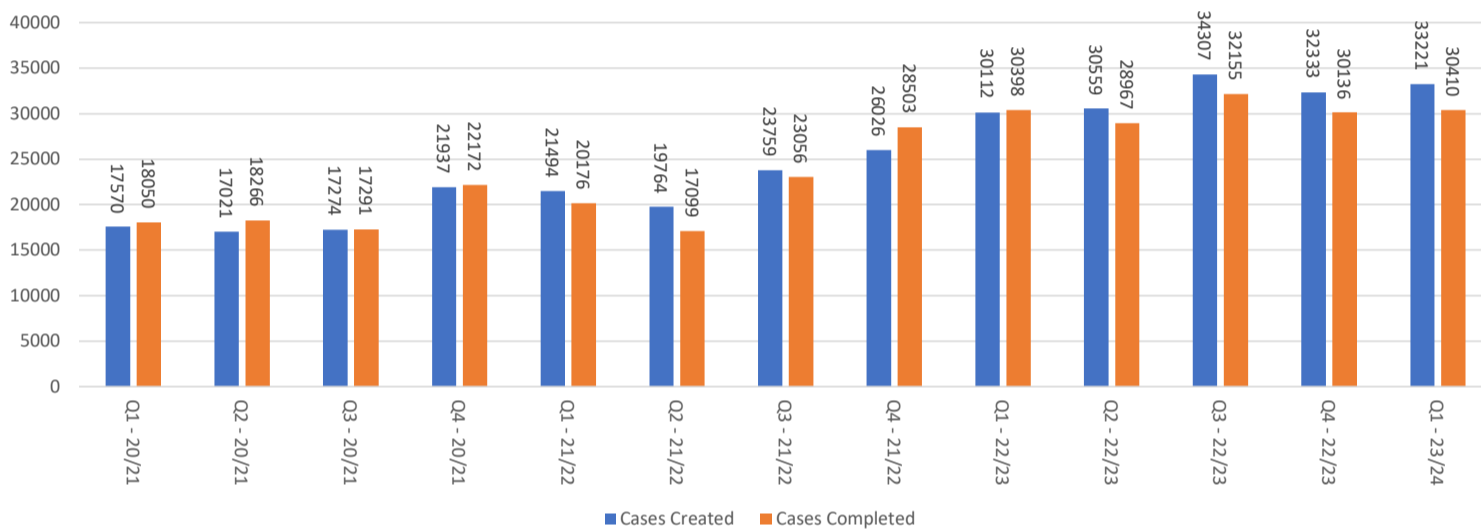
Annex 4

Number of Open Cases as at End of Each Month

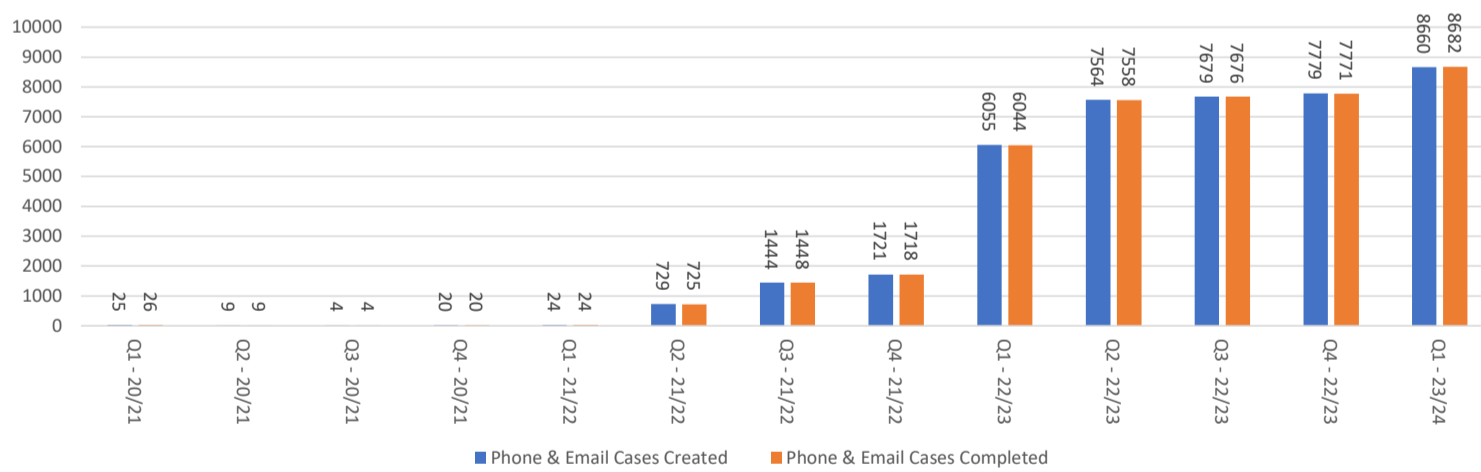


Annex 5

Total Cases Created & Completed



Phone & Email Cases Created & Completed



Total Cases Created & Completed Exc Phone & Email Cases

