

Schedule B

PSS & CSS Defined Benefit Schemes

Service Delivery Standards

This schedule defines the services to be provided on behalf of ARIA to PSS and CSS members. ComSuper is responsible for delivering the services described in the service description to the standards specified and provide reporting on the outcomes of that service delivery as specified.

Service Description	Identifier	Service Standard
1 - Payment of Benefits		
Standard Benefit Entitlements		
<p>PSS & CSS benefits will be processed and paid expeditiously in accordance with the relevant scheme rules and legislation. Members receiving a benefit payment will be provided with the necessary written notification of the benefit payment and exit statement documentation required under legislation.</p> <p>ComSuper will actively follow up with employers and members regarding outstanding documentation or information which prevents the processing of benefit applications</p>	<p>B1.1</p> <p>B1.2</p> <p>B1.3</p> <p>B1.4</p> <p>B1.5</p> <p>B1.6</p> <p>B1.7</p>	<ul style="list-style-type: none"> ◆ 95% of all standard benefit applications to be processed within 5 business days of validation. ◆ 95% of all benefit application documentation (or information) will be assessed and appropriately actioned within 3 days of the date of receipt. ◆ 75% of all non-standard benefit applications to be processed within 15 business days of validation. ◆ ComSuper will manage the 3rd party cheque production process to ensure that cheques for roll-overs are produced in a timely fashion ◆ 95% of standard dependant benefit payments processed within 2 business days of validation ◆ 95% of notification of death referrals actioned within 3 business days of receipt ◆ 95% of assessed case outcomes will be notified to beneficiaries/representatives within 3 business days

Invalidity Benefits		
<p>PSS & CSS invalidity benefit claims will be paid expeditiously in accordance with the relevant scheme rules and legislation. Members receiving a benefit payment will be provided with the necessary written notification of the benefit payment and exit statement documentation required under legislation.</p> <p>The invalidity assessment process will be managed to ensure that all medical information is obtained expeditiously to enable the assessment panel and or delegate</p>	B1.8	<ul style="list-style-type: none"> ◆ 95% of standard invalidity benefits to be paid within 2 business days of receipt of valid application
	B1.9	<ul style="list-style-type: none"> ◆ Assess 95% new invalidity benefit applications for invalidity retirement within 5 business days of receipt of all necessary documentation
	B1.10	<ul style="list-style-type: none"> ◆ 95% of assessment outcomes will be notified to stakeholders (members and employers) within 3 business days of receipt of medical panel recommendation.
	B1.11	<ul style="list-style-type: none"> ◆ 100% of terminally ill invalidity cases to be assessed and processed within 3 business days of receipt of validated application.
PSS Additional Death & Invalidation Claims		
<p>PSS additional death and invalidity claims will be managed with the insurer to ensure that the insurance claim amounts can be paid expeditiously with the primary PSS invalidity or death benefits</p>	B1.12	<ul style="list-style-type: none"> ◆ 95% of all additional death and invalidity amounts to be paid within 3 business days of receiving the payment from the insurer for lump sum cases or on the next available pension payday for pension based benefits

2 - Member Investment Choice

Process member investment switches

Process investment switch requests from CSS members, PSS preserved benefit members and associate members and provide written advice to members confirming details of the switches processed	B2.1	◆ Process all valid switch applications received by the last Friday in a month with effect from the following Wednesday
	B2.2	◆ Dispatch all switch confirmation advices to members within 10 business days of funds being allocated to the members' accounts

3 – Member Enquiries

Telephone Enquiries

Respond to telephone enquiries from members and provide general advice as authorized representatives of the PSS and CSS.	B3.1	◆ 70% of all calls to be answered within 60 seconds
Respond to member telephone enquiries promptly and provide correct and practical information and general advice which satisfies all of the member's enquiries	B3.2	◆ Abandoned rate of no more than 5%

Benefit Estimates

Provide benefit estimates to PSS and CSS members using agreed projected rates of accrual	B3.3	◆ Provide 95% of all auto benefit estimates to members within 4 business days of receiving a valid request
	B3.4	◆ Provide 95% benefit estimates requiring non-standard calculations to members within 15 business days of receiving a valid request

Email & other written enquiries		
Respond to email and other written enquiries and requests from members and provide general advice as authorised representatives on the PSS and CSS	B3.5	◆ Respond to 95% member email enquiries within 5 business days
	B3.6	◆ Respond to 95% member written enquiries within 5 business days
Additional benefit entitlement letters		
ComSuper will send a letter to all CSS members who reach the age of 53 years and 11 months .The letter is intended to alert these members to their benefit options upon reaching retirement age and the availability of member investment choice.	B3.7	◆ Provide 100% of CSS members who reach the age of 53 years and 11 months a benefit entitlement letter by the 15th of each month.

4 – Family Law		
Receive and process orders and requests for information in relation to family law matters		
Receive and provide information to relevant parties in relation to requests for information (Form 6) for Family Law matters and also receive and process Family Law Court Orders/Superannuation Agreements for a payment split of a PSS or CSS superannuation interest. These actions must be completed within the timeframes as specified in the relevant legislation	B4.1	◆ Respond to 95% of Form 6 requests from members and non-member spouses within 28 calendar days of receipt.
	B4.2	◆ Process all Family Law Orders or Agreements and provide Payment Split Notices to relevant parties within 28 business days of receipt.
	B4.3	◆ Provide all Payment Split Notices to the relevant parties within 28 calendar days of the latter of the operative time or receipt of Family Law orders or agreements

5 – Annual Member Statements

Issuing annual statements to members

Workings in partnership with the ARIA Communications Team calculate and provide data for the production and issue of annual member statements both in hard copy and online. Compliance with service standards will rely on ARIA providing required inputs in accordance with the project timetable	B5.1	◆ Annual member statements pack to be issued to members by 30 September for all automatic calculation cases subject to ARIA providing ComSuper the required inputs within the project timetable and external providers such as printers and Australia Post adhering to agreed schedules.
	B5.2	◆ Annual member statements pack to be issued to members by 20 December for all manual calculation cases subject to ARIA providing ComSuper the required inputs and within the project timetable

6 – Member Account Maintenance

Receive, record and apply contributions and other remittances for PSS and CSS members - Collect, record and maintain membership data

Receive and process contributions, rollovers and other remittances and related membership data amendments onto membership records so as to accurately record all membership details	B6.1	◆ 95% of all unallocated entries in PSS and CSS accounts to be resolved within 5 business days of month end
	B6.2	◆ 98% of contributions which cannot be accepted under SIS to be refunded or transferred within 90 days.
	B6.3	◆ 95% of agencies who fail to submit contributions by the applicable date will receive follow up contact within 2 Business days.
	B6.4	◆ 95% of all employer contributions will be reconciled and agencies notified of any discrepancies with 28 days of receipt.

7 –Transfers & Rollovers In

Manage transfers in from other superannuation funds

Receive and process transfers and rollovers in to the PSS and CSS from other superannuation entities for members and provide written advice to members confirming details of transfers received and processed. Deal with other superannuation entities as required to confirm or clarify details of amounts transferred	B7.1	◆ 95% of all valid transfers in to the PSS and CSS and allocate to relevant membership records within 4 business days of receipt.
	B7.2	◆ 98% of contributions which cannot be accepted under SIS to be refunded or transferred within 90 days.

8 – Pensioner Services

Payment of pensions and maintenance of pensioner records

<p>ComSuper will manage the fortnightly payments to PSS and CSS pensioners including the:</p> <ul style="list-style-type: none"> ▪ Deduction and remittance of taxation ▪ Adjusting tax deductions, TFN's and Medicare Levy exemptions ▪ Updating payment method, name and address details ▪ Assessing eligibility for and commencement of reversionary pensions and the cessation of pensions on death of a pensioner and administering payments to estates ▪ Deductions (e.g. child support) ▪ Suspensions & recommencements ▪ Maintenance of student entitlements ▪ Investigation and reissue of returned payments ▪ Payment summary and CPI reprint requests. 	B8.1	<ul style="list-style-type: none"> ◆ Commence all reversionary pensions on the next available pension payday following the receipt of a validated application, identification documentation and where eligibility is clearly met
<p>ComSuper will also provide both a contact centre and online services for pensioners.</p>	B8.2	<ul style="list-style-type: none"> ◆ Make changes to all pension payment arrangements including new financial institution and changed taxation for the next available payday following receipt of request
<p>ComSuper will run regular death matching processes to identify and cease pensions where notification of death of a pensioner has not occurred</p>	B8.3	<ul style="list-style-type: none"> ◆ Run regular death matching process and cease pensions as appropriate
<p>ComSuper will also provide both a contact centre and online services for pensioners.</p>	B8.4	<ul style="list-style-type: none"> ◆ CPI to be processed on the first payday in January and July each year and pension advices to be sent prior to the payday of effect
<p>ComSuper will run regular death matching processes to identify and cease pensions where notification of death of a pensioner has not occurred</p>	B8.5	<ul style="list-style-type: none"> ◆ Payment summaries to be mailed within 10 business days of the end of the financial year
<p>ComSuper will manage the bi-annual pension increase process ensuring pensioners receive their increases on the relevant pension payday and receive their notification in a timely way and provide payment summaries in the July mail-out</p>	B8.6	<ul style="list-style-type: none"> ◆ Student review eligibility process to be conducted annually

9 –On-line Services

Provide secure on-line services to PSS and CSS members

Provide online services so that PSS and CSS members can transact and enquire online including:

- Updating their contact details
- Access to i-estimator
- View their member statements
- Facilitate Bpay payments

B9.1

◆ Provide a range of online services for PSS and CSS members with access **95%** of the time