

SAMPLE

Performance measures

Category	Performance measures	Reporting type (Basis of reporting)	Reporting and measurement
Implementation Satisfaction	<p>Customer will be satisfied with the implementation experience as evidenced by a rating of neutral or better on the post-implementation survey.</p> <p>One-time guarantee with \$15,000 at-risk.</p>	Systematic reporting (customer-specific)	Upon completion of implementation
Claimant Satisfaction	85% of Claimants will respond as “Satisfied” with the overall handling of their claim on a survey.	Systematic reporting (Book of Business)	Reported annually, paid annually
Policy Delivery: Amendments	Amended Policies will be delivered within 21 business days following receipt of all necessary information by Lincoln.	Manual reporting (customer-specific)	Reported quarterly, paid annually
Policy Delivery: New Business	Policies will be delivered within 30 business days following receipt of all necessary information by Lincoln.	Manual reporting (customer-specific)	Upon completion of implementation
Service Satisfaction	<p>Customer is satisfied with the effectiveness, responsiveness, and reliability of the Account Manager.</p> <p>Account Management client satisfaction guarantee is based on survey results. Average rating of 4 or higher on a scale of 1-5 will be</p>	Lincoln surveys (customer-specific)	Reported annually, paid annually

	considered a passing score. Guarantee requires customer to respond to all surveys.		
Stewardship Reporting	Account Manager will present reports on account performance, claim trends, and financial results at least annually.	Manual reporting (customer-specific)	Reported annually, paid annually
Short-term disability (STD)			
Timeliness of Determination (STD)	95% of STD claims will be determined within 3 business days of receipt of complete information.	Systematic reporting (Book of Business)	Reported quarterly, paid annually
Timeliness of Initial & Ongoing Payment (STD)	95% of checks will be processed within 1 business day of scheduled payment date.	Systematic reporting (Book of Business)	Reported quarterly, paid annually
Long-term disability (LTD)			
Timeliness of Determination (LTD)	95% of LTD claims will be determined within 10 business days of receipt of complete information.	Systematic reporting (Book of Business)	Reported quarterly, paid annually
Timeliness of Initial & Ongoing Payment (LTD)	95% of checks will be processed within 1 business day of scheduled payment date.	Systematic reporting (Book of Business)	Reported quarterly, paid annually

Life			
Timeliness of Determination (Life)	95% of Life claims will be determined within 3 business days of receipt of complete information.	Systematic reporting (Book of Business)	Reported annually, paid annually
Leave / FMLA			
Timeliness of Determination (FMLA)	95% of FMLA claims will be determined within 3 business days of receipt of complete information.	Systematic reporting (Book of Business)	Reported quarterly, paid annually
Call center			
Claims Intake Abandonment Rate (STD, LTD, & Leave)	Calls pertaining to Disability or Leave coming into Lincoln's Claims Intake Call Center will be abandoned at a rate of 5% or less.	Systematic reporting (Book of Business)	Reported quarterly, paid annually
Claims Intake Average Answer Speed (STD, LTD, & Leave)	80% of calls pertaining to Disability or Leave coming into Lincoln's Claims Intake Call Center will be answered in 30 seconds or less.	Systematic reporting (Book of Business)	Reported quarterly, paid annually based on cumulative results
Intake Customer Satisfaction (STD)	85% of Claimants will respond as "Satisfied" with the handling of the beginning of their claim on a survey.	Systematic reporting (Book of Business)	Reported quarterly, paid annually

Amount at-risk	Performance measures other than implementation satisfaction have a total of 2% of premium and 10% of fees (as applicable) at-risk, not to exceed \$150,000 in a calendar year. The amount at-risk is spread equally among all non-implementation performance measures with penalties paid as described in the Performance Guarantee Agreement.
Example	A customer pays \$750,000 in premium and \$50,000 in fees annually. The total amount at-risk for their performance measures is $(2\% * \$750,000) + (10\% * \$50,000) = \$20,000$. Their performance measure has 5 non-implementation performance measures on it. Each standard has $\$20,000/5 = \$4,000$ at-risk annually.



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