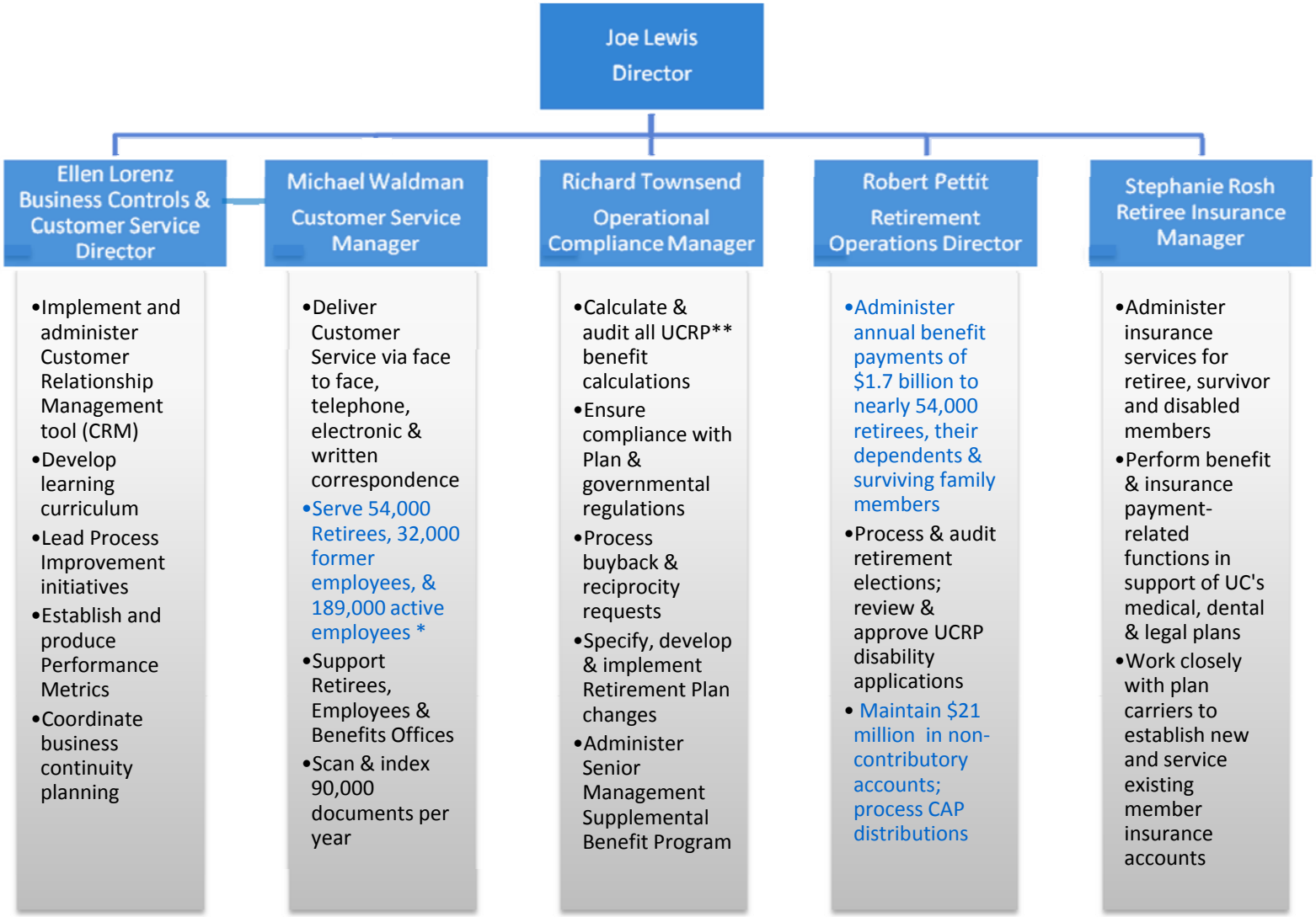
Retirement Administration Service Center (RASC)

RASC Annual Report

UCRS Advisory Board Meeting

February 22, 2013

RASC Organizational Overview



* Retirement counseling for 8 Locations by 7/1/13; full service support for 1,500 Oakland-based OP employees

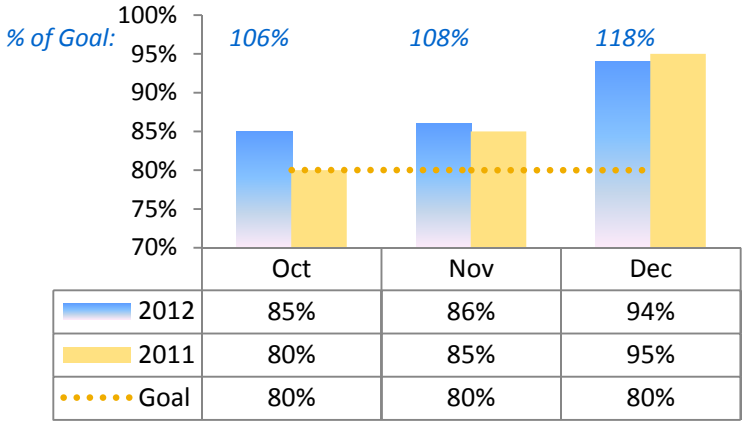
** University of California Retirement Program

2012 Performance Highlights

Customer Service

- **Productivity Highlights**
  - Answered nearly 86,000 calls, a 15% increase over 2011. Reduced abandoned call rate 25% from an average of 8% in 2011, to 6% in 2012.
  - Responded to over 12,500 pieces of correspondence, a 22% increase over 2011.
- **Correspondence Average Turn Time**
  - Reduced correspondence turn time by 2 calendar days, a 33% improvement, comparing the last 3 months of 2012 to the same period in 2011.
- **Customer Satisfaction Survey**
  - 88% of survey respondents rated their satisfaction positively, with ratings of "Satisfied" or better.

% of Calls Answered in 90 Seconds



Retirement Operations

- **Retirement Process Redesign**
  - Implemented 29 Quick Wins in Retirement Administration, and 7 Quick Wins in the Survivor unit. Completed 17 To Be Processes and actively working on 18 others.
- **Pension Record Keeping System Replacement**
  - Received endorsement from Executive Vice President of Business Operations, Nathan Brostrom, Vice President of Human Resources, Duckett, and members of the RASC Management Advisory Board to write an RFP to secure a new pension record keeping system
- **Direct Deposit Campaign Success**
  - 36% fewer retirees are receiving monthly benefit payments via paper check (December 2011 to December 2012). This translates to 1,300 fewer checks being mailed each month, with a corresponding decrease in the number of lost or reissued checks.

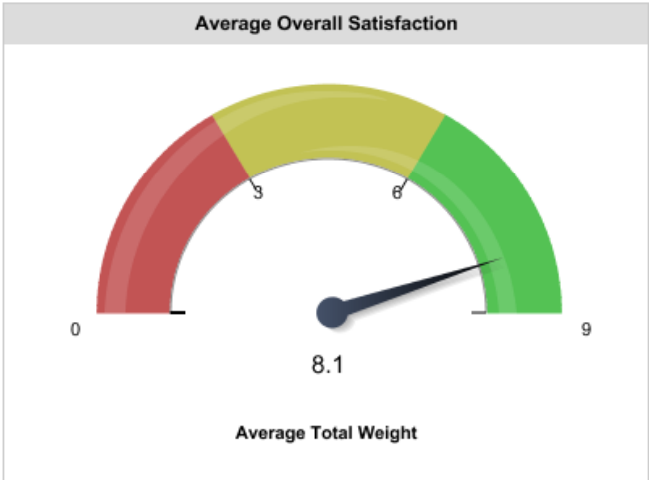
Retirement Payments Activity

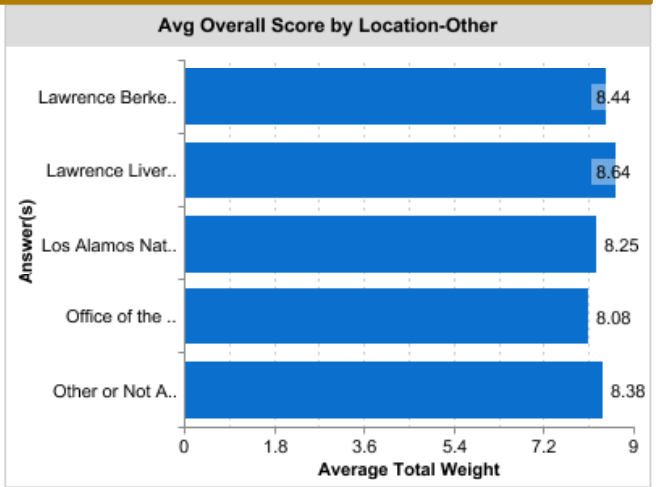
** Payments include UCRS, PERS VERIP, & 415(m)*	Jan 2013	Jan 2012	% Chg
UCRS Benefit Payments * ($)	$164.2 million	$152.9 million	7%
UCRS Benefit Payments * (#)	60,818	58,197	5%
% Payments by Check	3.8%	6.3%	
Disbursements ($)	$3.9 million	$3.2 million	21%
Disbursements (#)	370	238	55%

2012 Operational Highlights

Customizable reports and dashboards measure:

- Sources of work
  - Channel
  - Member type
  - Issue type
- Aging / Turn Times
- Productivity
- Survey results

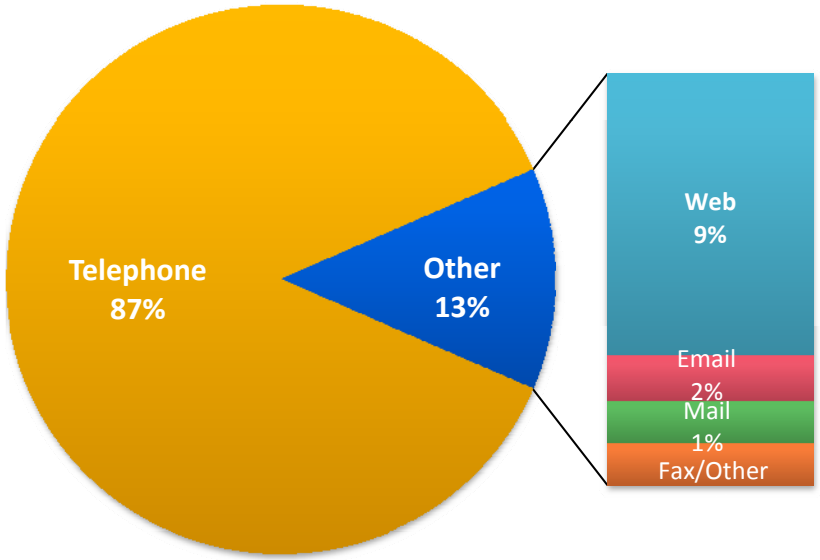




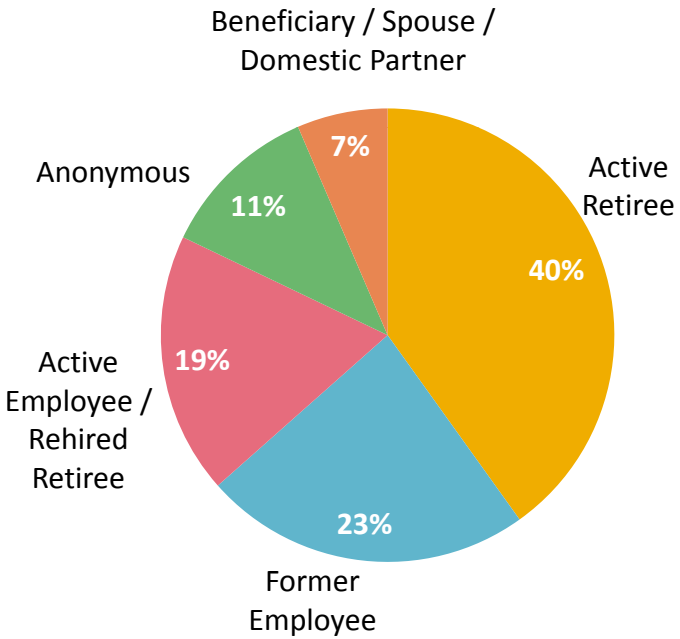
Category	Description	# Cases Completed	% of Total
UCRP	Benefit Income Statements, Retirement Elections & Estimates, Address Changes	41,905	46%
Health & Welfare	Medical Plans, Medicare Enrollment	17,650	20%
At Your Service	Password reset assistance, general inquiries	13,985	15%
Financial	Direct deposit, tax withholding, lost/missing checks	8,183	9%
Miscellaneous	Inquiries and Document Requests	5,084	6%
Retirement Savings Programs	Fidelity, Retirement Savings Plan inquiries	2,376	3%
HR Benefits	General inquiries, benefits counseling	1,298	1%
Grand Total 1/1 – 12/31/12		**90,481**	

Customer Service Member Profile

Contact Method



Customer Profile



Customer Relationship Management Tool (CRM)

Authentication protects Customer privacy

Assign Case Member

Create Non-Authenticated Case

Create Case for Non-Authenticated M

Search for Member

SSN

4 Digit SSN

Name

SSN

Search for Member

Member

KATHERINE M

Member Detail

Add Note

Demographic Information

Member Name KATHERINE M

Mailing Address

Foreign Address

Location

Sub-Location

Deceased

Date Of Death

Membership Information

Retirement Information

Health & Welfare Information

Employment Information

System Information

Cases

Action | Case | Subject

Edit | Cls | 00006745 | [UCRP] A

HTML Email Status

No records to display

Dependents

UC R·A·S·C

Home | Cases | Members | Case Instructions | Solutions | Reports | Dash

Create New...

Case

00006745

Hot News

Last Updated: 5/23/2011 8:25 AM

Hi everyone,

Keep up the good work!

Here are the latest stats (Friday 5/20) for the Customer Service Center:

Total Calls Offered: 216

Total Calls Answered: 208

Abandoned calls: 8

Service Level: 95.35%

Case Detail

Case Number	00006745 [View Hierarchy]	Case Owner	Fulfillment [Change]
Parent Case		Status	New
Member Name	KATHERINE M	Issue Type	UCRP
Case Origin	Telephone	Issue Sub-Type	Address Change - Retiree R
Contact Type	Beneficiary	Priority	Medium
Resolution Method			
Resolution Channel			

Web-to-Case Information

Case Details

Subject [UCRP] Address Change - Retiree Receives Paper Check

Confirm the contact is receiving monthly retirement income from UCRP. Check the Member Details page.

Ask for new address & telephone number.

Inform contact that UC cannot change addresses based upon a phone call if the member does not have Direct Deposit.

The employees like the easy-to-use screens

Customer Relationship Management Tool (CRM)

Routes cases to Operational workflows

UC R·A·S·C

Log · Help & Training · Logout

Home | Cases | Console | Case Instructions | Solutions | Reports | Dashboards | Documents

Cases | All Open Cases | [Refresh] | Create New... | Mass Action | Recent Items | Search | Go!

Case Number	Member Name	Issue Type	Issue Sub-Type	Date/Time Opened	Owner Name

Case Number	00024719	Case Owner	CRM [Change]
Member Name	[redacted]	Status	Pending – Other
Case Origin	Telephone	Issue Type	Health & Welfare
Contact Type	Active Retiree	Issue Sub-Type	Medicare - Part B Premium
Resolution Method	Answered Question	Priority	High
Resolution Channel		Fulfillment Comment?	

Web-to-Case Information

SSN	
Birthdate	

Case Details

Subject: [Health & Welfare] Medicare - Part B Premium

Case Instructions: UC's policies regarding a Medicare Part B reimbursement are based upon:

- the plan selected,
- the types of dependents covered (adult or child),
- whether the retiree and/or family members are enrolled in Medicare, and
- if the retiree is subject to Graduated Eligibility

...'s maximum per member resulting in a reimbursement
...ll not be affected by the income related increase in your Part B
...portant to note that Social Security determines this increase

...determined by Social Security, and will not affect the amount

Member Type	Active Retiree
Member SSN	[redacted]
Birthdate	[redacted]
Gender	F
Mailing Address	[redacted] SAN FRANCISCO, CA 94122
Home Phone	
Direct Deposit	N
Medical Plan	High Option-1270-BH
Medical Coverage	Self (Medicare)-M-25
Dental Plan	Delta Dental PPO-5400-D1
Dental Coverage	Self-U-21
Graduated Eligibility	N
Insurance Calc Factor	-
Medicare Offset	-
Medicare	Part A & B-C
Legal Plan	-

Cases

Case	Subject	Date Opened	Status	Owner
00024715	[Health & Welfare] Medical - Suspending Coverage	8/22/2011	Closed	Suzanne Renigen

Trusted sites | 100%

Knowledge database promotes consistent answers

Customer Relationship Management Tool (CRM)

Free form text field records notes and instructions

Action | Public | Comment

Make Public

Created By: Alicia Armendariz (2/13/2013 2:03 PM)
Spouse was wanting to confirm if ABC Medicare Part D form was received. LM for RI rep and called ABC. Per ABC, spouse is showing eligible under Part D. ABC rep advised that spouse should call ABC to request ID and group #. Provided contact info to spouse.

Solutions — in All Solutions — Find Solution

No Solutions Attached

Emails — Send an Email

No Emails Available

Activity History — Mail Merge — Send an Email

No records to display

Attachments

No records to display

Case History

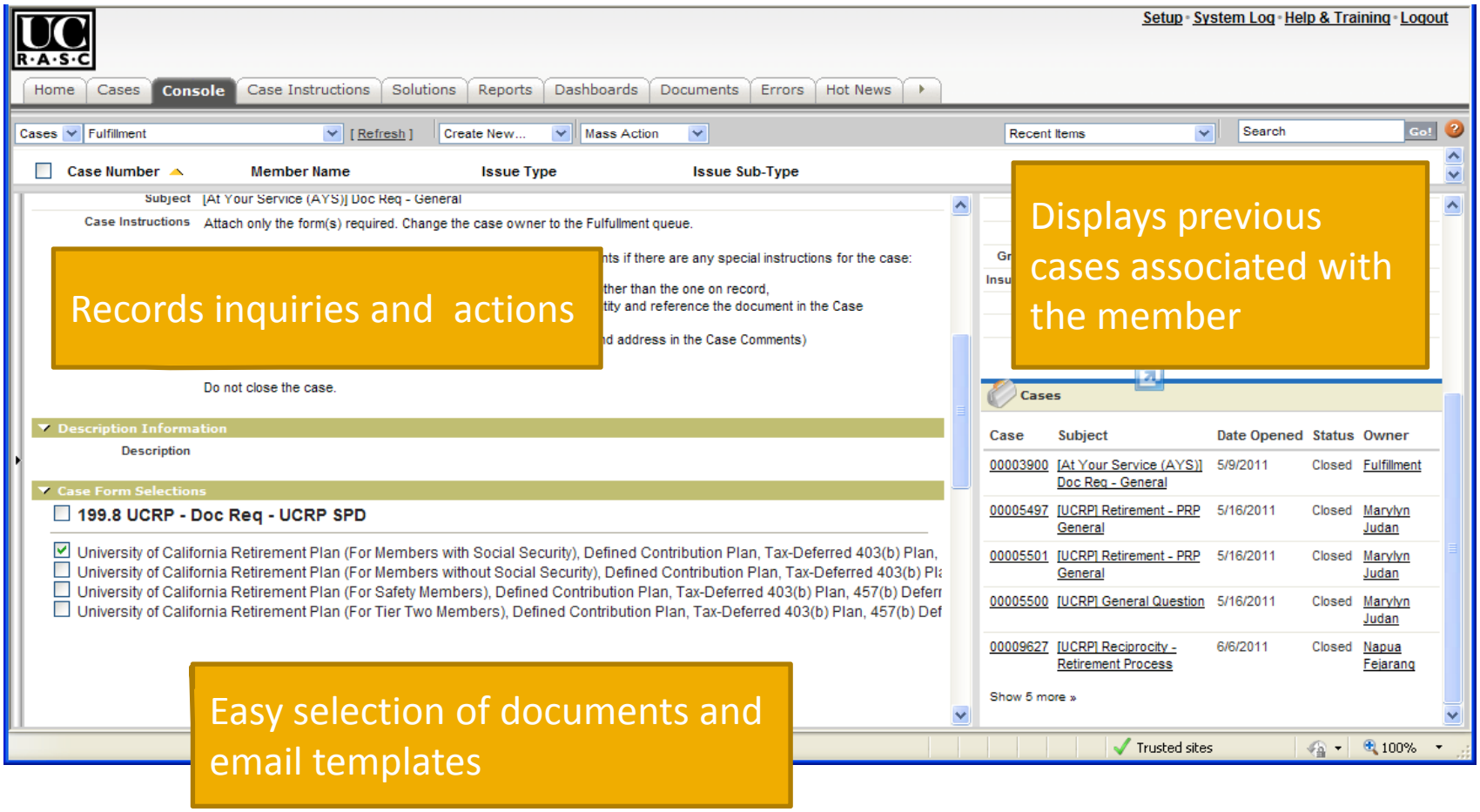
Date	User	Action
2/13/2013 2:04 PM	Alicia Armendariz	Changed **Resolution Channel** to
		Changed **Resolution Method** to
		Changed **Status** from New to **Closed**.
		Closed.
2/13/2013 2:02 PM	Alicia Armendariz	Changed **Subject** to **[Health & Welfare] Medicare - Aging In (Information Request)**

Compiles 150+ fields for employees and retirees

Member Detail — View

Member Name	[redacted]
Member Type	Active Retiree
Member SSN	[redacted]
Birthdate	
Gender	F
Home Phone	[redacted]
Mailing Address	MISSION VIEJO, CA 92692
Direct Deposit	Y
Medical Plan	Anthem Blue Cross PPO-1260-BP
Medical Coverage	Self + Adult-UA-23
Dental Plan	Delta Dental PPO-5400-D1
Dental Coverage	Self + Adult-UA-23
Graduated Eligibility	N
Insurance Calc Factor	-
Medicare Offset	-
Medicare	No information
Legal Plan	ARAG Legal Plan-6300-J2

Cases

Case	Subject	Priority	Date Opened	Status	Owner
00159654	[Health & Welfare]	Medium	2/13/2013	Closed	Alicia

Customer Relationship Management Tool (CRM)