The Redwood Pension Administration System & Introducing…

UCRAYS

REDWOOD:

A multi-year project to improve operations and your experience with the Retirement Administration Service Center

Expected to be live in 2019

Redwood Objectives:

- Modernize the University's pension administration technology
- Adapt to the changing landscape of retirement programs
- Enhance the member experience

Current System:

uccmvsb (SSL) - A - L30TAAPJ

File Edit View Communication Actions Help

```
UC24   A GO TO=> B       UCRS - DISPLAY MEMBER BASE                    UCMAP24
                                                   DATE 03/30/17 TIME 13.22.30
SOC                 NAME                                MBR-STAT R  RET-CD  U
LOC-EE-NO    09-090724300                               NO-MOS-INACTV   99
PAY-STAT I LAST-PAY-DATE 02-28-83   CREATE-DATE 02-15-83  PLN 00
TO-MRK     W/O-SAL-IND              HW-ELIG-GROUP G2      NBR-403B-BEN 50
BEN-ELEC
      PERSONAL DATA:  USE SHFT/F1 FOR DEM SCREEN
                                                DECEASED-DATE
PREV SOCIAL              NEW SOCIAL             CHANGE-DATE            OPID
PREV-NAME                                       CHANGE-DATE            OPID

      EMPLOYMENT DATA:
ORIG-HIRE 01-01-93     CURR-HIRE 01-01-96   UCRS-ENTRY-DATE
LOA-START                LOA-END                      USHC
SEPARATION-DATA: (LOCATION EMPLOYEE-NO LAST-DATE-WORKED REASON-CODE)  LSC
   -090072430 12-24-94
LIEN-TYPE  Z           PREV-LIEN         CALL-UP-FLAG         CALLUP-DATE
REMARKS: OVERLAPPING/REHIRED R            RET-ST-FLAG          LOAN-FLAG
      PLAN DATA:                          12-88-BAL            NOTEPAD ? Y
03Z 06Z 07Z
                                                     060116 115720 4431 JBC
    ==> CHANGE SOCIAL TO GET ANOTHER RECORD. HIT CLEAR TO END.
ENTER-DSPLY SHFT/F1=DEM F5-MAIN F6-WORK F7-FASTACC F11-NOTE F12-GOTO        -
MA  +   a                                                          03/007
```

uccmvsb.ucop.edu:992 128

REDWOOD

Person ▾ Active Member ▾ Payments ▾ Administration ▾ BPM ▾ Reports and Images ▾ Prototypes ▾

User ID :
Name :

My Basket

No Work
No work items pending

Checklist

Checklist Description

Escalation Me

Mark As R

Read | Me

No

ECM Quick-

Navigator

Person Lookup

Search Criteria

Search Option : By Last 4 Digits of SSN

*Last 4 Digits of SSN : *Last Name : *Date of Birth :

Search Reset

REDWOOD SYSTEM TESTING

Person ▾ Active Member ▾ Organization ▾ Employer Reporting ▾ Payments ▾ Accounting ▾ Administration ▾ BPM ▾ Security ▾ Reports and Images ▾ Communication ▾ Prototypes ▾

User ID : joseph.porathur
Name : Porathur, Joseph

My Basket

No Work
No work items pending

Checklist

Checklist Description	Required	Completed	Completed Date
No records to display.			

Escalation Messages

Mark As Read

Read	Message Type	Message
	Other Task Message	The case sbpRecalculateServicePurchase with case instance id 480386 at step Terminate/Re-calculate is un assigned.
	Other Task Message	The case sbpRecalculateServicePurchase with case instance id 480386 at step Terminate/Re-calculate is delayed whose due date is on 6/17/2016 3:05:00 PM.
	Other Task Message	The case sbpValidateAndPostContributionHeader with case instance id 480476 at step Correct the Validation Errors and Submit for Posting is delayed whose due date is on 8/3/2016 4:01:00 PM.

ECM Quick-Search

Person Details

Redwood ID : 1360642 Person Name : JOHN DAVIS Jr. Last Four Digits of SSN : XXX-XX-7687
Date of Birth : 01/20/1985 Date of Death : Age : 31 Year(s) 7 Month(s)

Member Account Details

Member Account ID : 3025843 Account Status : Active Rehired Retiree :
Benefit Program : UCRP Benefit Sub-Program : 2013 Tier
Account Start Date : 01/31/2013 Sub-Program Entry Age : 3 Year(s) 7 Month(s) Original Member Account ID :
Account End Date : Coordinated Classification : Non-coordinated Classification :
Residual Account : FARA Account :

Summary

Account Summary | Contribution Summary | Service Summary - Credited | Service Summary - Posted and Credited | Other Member Accounts

Last Contribution Posted Date : 07/15/2016 Last Interest Posted Date : 08/01/2016

Member Account Balance

	Current Fiscal Year	Prior Fiscal Year Balance	Total Balance
Pre-Tax			
Contributions :	$0.00	$27,000.00	$27,000.00
Service Purchase :	$0.00	$0.00	$0.00
Monthly Interest :	$131.42	$0.00	$131.42
Sub-Total :			$27,131.42
After-Tax			
Contributions :	$0.00	$0.00	$0.00
Service Purchase :	$0.00	$0.00	$0.00
Sub-Total Amount :			$0.00
Total Account Balance :			$27,131.42
Remaining Account Balance :			$0.00

Total Credited Service

	Total Balance
Credited Service :	2.5000
Full Years Achieved :	2
Months Achieved :	6

Plan 02

	Current Fiscal Year	Prior Fiscal Year Balance	Total Balance
Memo Contributions :	$0.00	$0.00	$0.00
Memo Interest :	$0.00	$0.00	$0.00
Total Amount :			$0.00

Modern interface

- Reduced training time

Modern technology

- Weekly vs. monthly updates with health & welfare vendors, including Medicare

Workflow

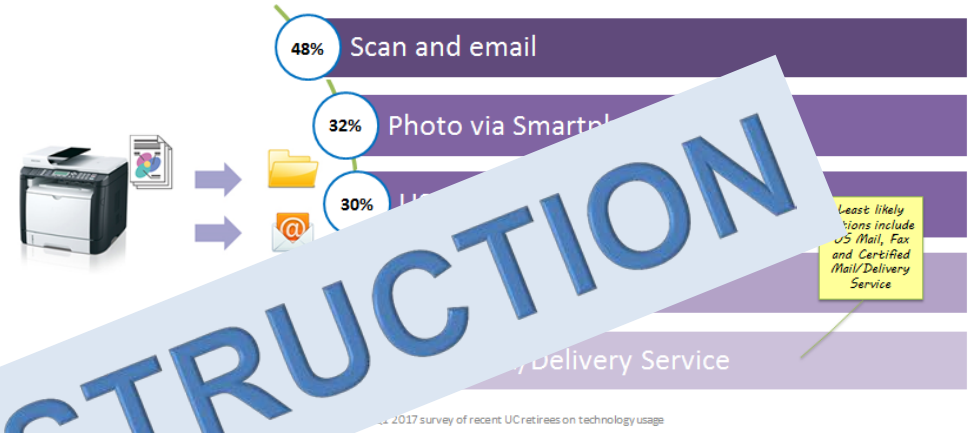
- Increased visibility and better tracking of work
- Faster processing of retirements and survivor benefits

Enhanced member portal

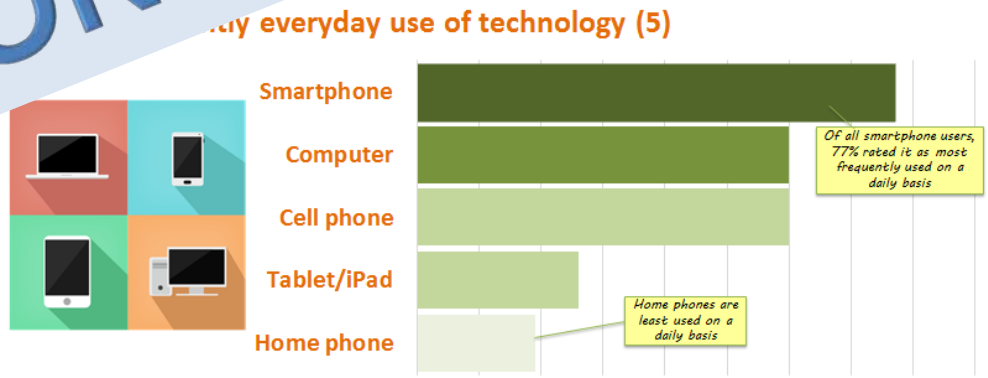
- More transactions via the web

Introducing UCRAYS:

UC Retirement At Your Service



their everyday use of technology



UNDER CONSTRUCTION

From a Q1 2017 survey of recent UC retirees on technology usage

Key Steps for the Next Year

- Organizational Change Management
- System testing
- Interface testing (payroll, health and welfare vendors, banks)
- Trainings

More information to come!

UNIVERSITY
OF
CALIFORNIA