Redwood Retirement Recordkeeping System Project Update

December 1, 2017

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REDWOOD

Modernizing the University's pension administration technology, adapting to the changing landscape of retirement programs, and enhancing the member experience

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

Expected to be live in 2019

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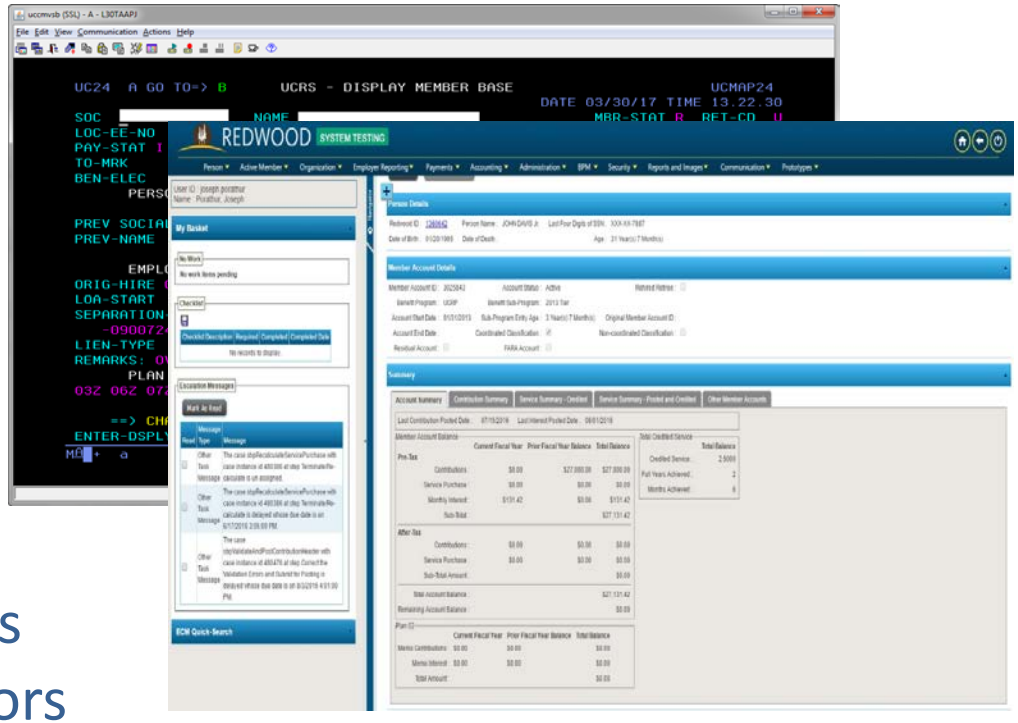
New Business Tools for the RASC



Modern interface

- Reduced training time

Modern technology

- Weekly vs. monthly updates with health & welfare vendors

Workflow

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

Key design is now done

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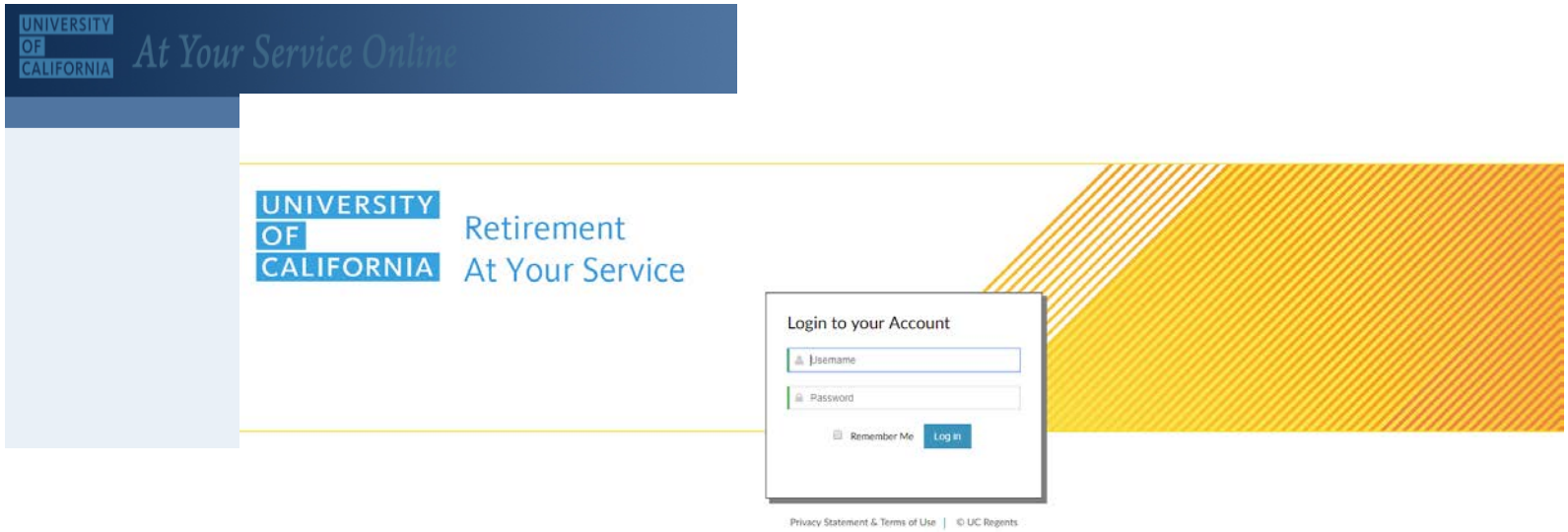
New UCRAYS Member Self-Service for Employees and Retirees



Enhanced member portal

- Ability to support more online transactions
- Additional security and accessibility features

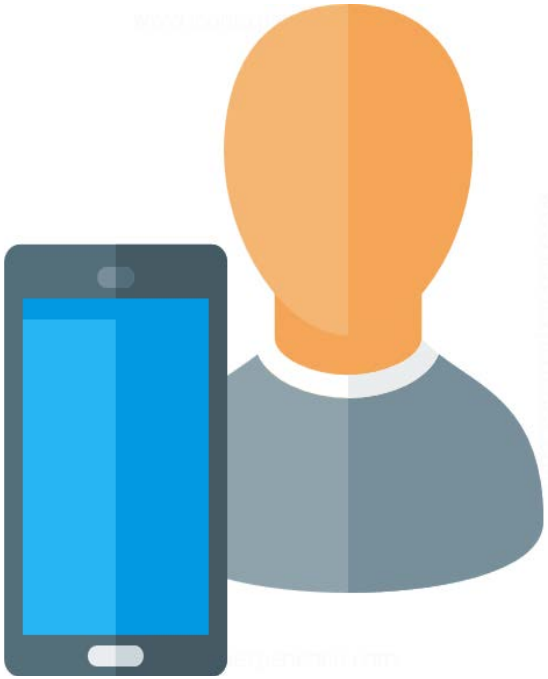
Learning from Our Employees and Retirees as We Develop UCRAYS

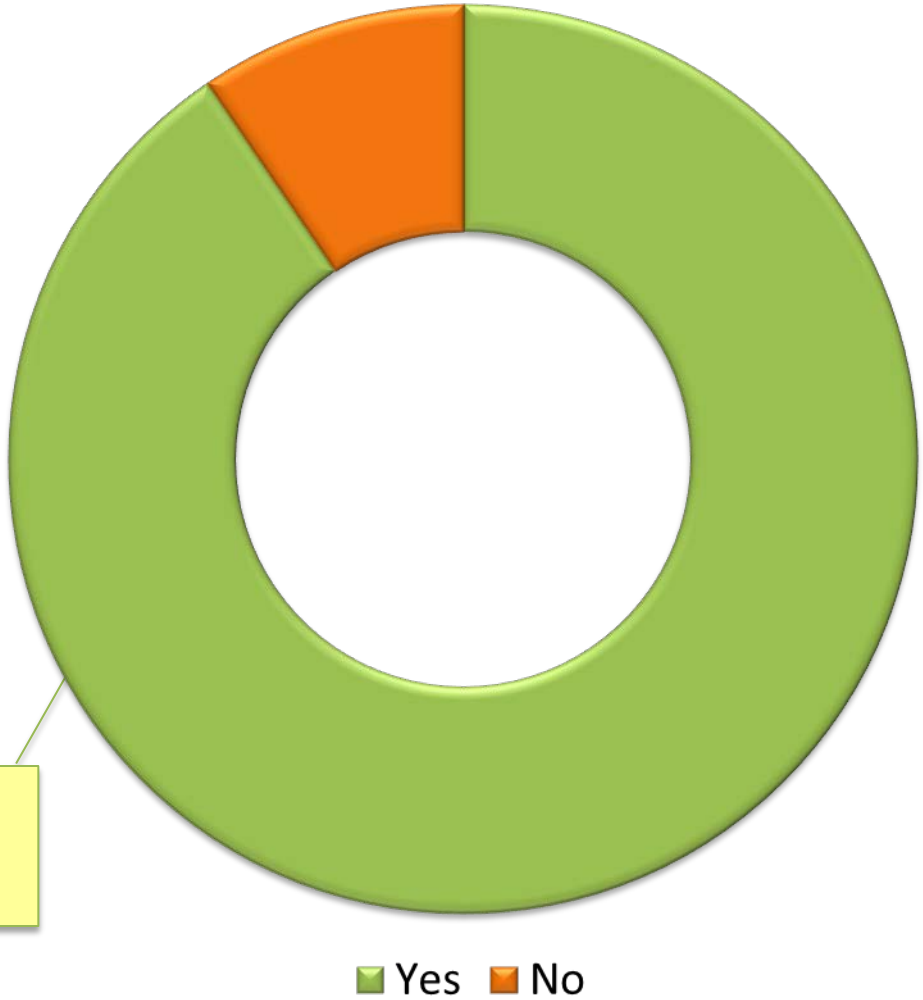
Purpose

To better understand the current and emerging use of technology by our community

- Survey recent UC retirees
- Focus groups
  - Retirees from various UC locations
  - Employees from UC San Francisco and UC Davis

Survey: Do recent retirees use smartphones?





90% of respondents answered yes

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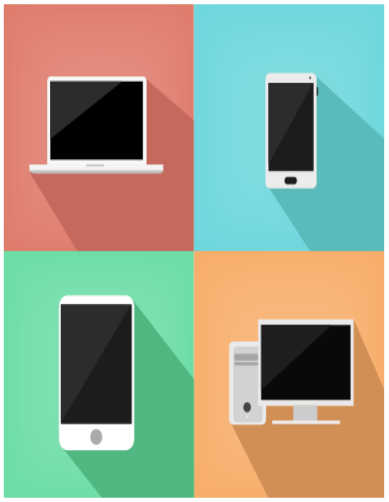
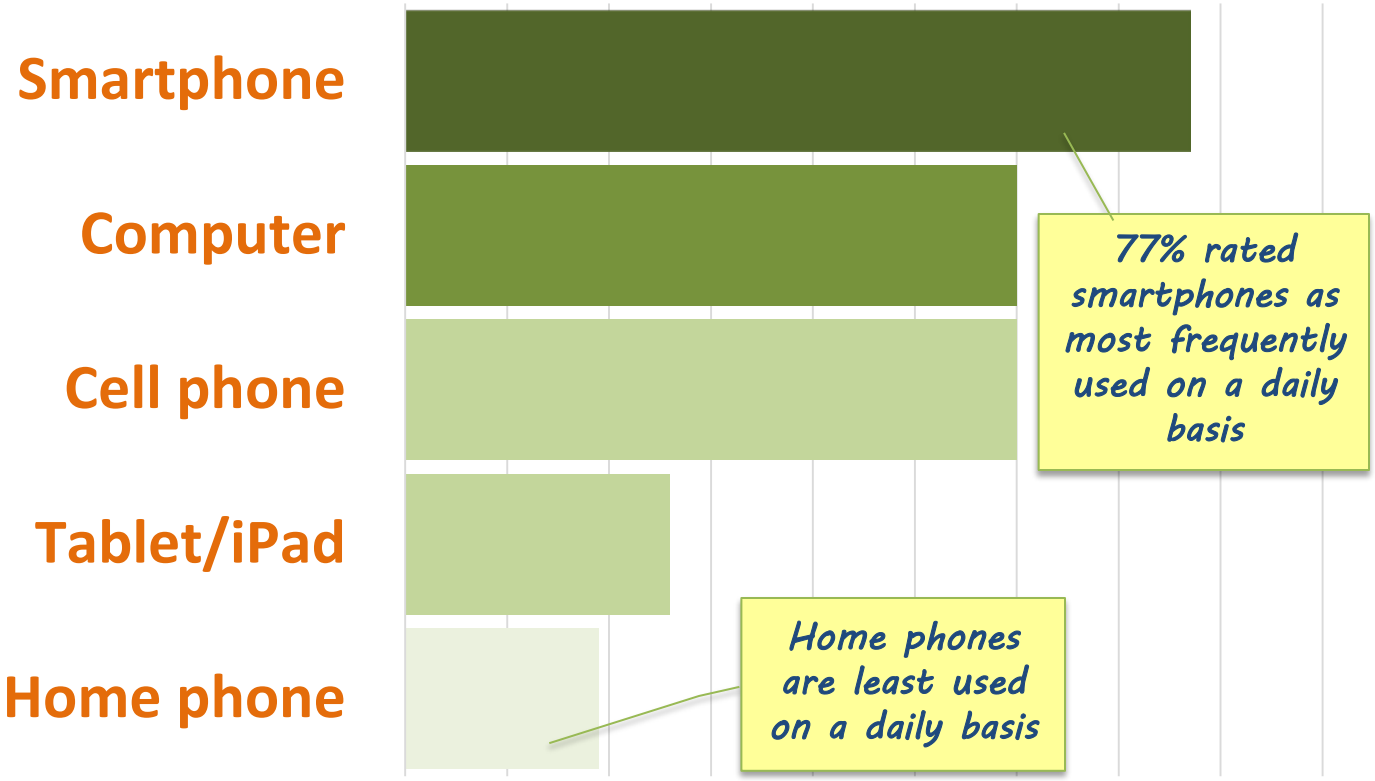
Q1 2017 survey of recent UC retirees

Survey: What is their most frequently used technology?

Top 5 ranking:





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Q1 2017 survey of recent UC retirees

Survey: What is their preferred method of submitting documentation?

- 48% Scan and email
- 32% Photo via Smartphone
- 30% US Mail
- 24% Fax
- 14% Certified Mail/Delivery Service

Least preferred options are: Fax and Certified Mail/Delivery Service

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Q1 2017 survey of recent UC retirees

Focus Group: Use of home phone v. smartphone

- Most are using smartphones and using them often
- Majority no longer maintain a home phone (landline); trend more prominent with employees

Key reasons cited for maintaining a landline:
- *Spotty cell service at home*
- *911 emergency calls*
- *Elderly family member has the number memorized*
- *Don't use it, but haven't bothered to get rid of it*

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Focus Group: Preference between using a browser v. applications on a smartphone

1)

Frequent Use

2)

Ease of use

- Features on an app do not necessarily match the website
- Responses were mixed

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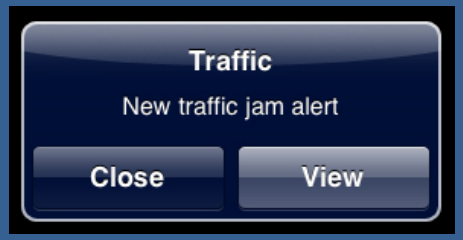
Focus Group: Familiarity with smartphone features such as push notifications

- *Need to balance between interest and quantity of notifications*
- *Want messages that are important and time sensitive*

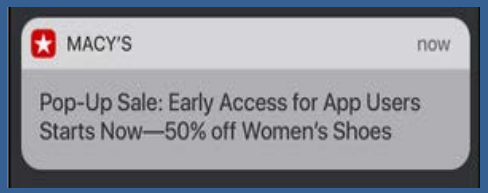
- *Want ability to suppress push notifications*
- *Notifications may drain smartphone battery*

Travel

Traffic



Flash Sale



Key Activities over the Next Year

- Further design to include Federal, State, and University-mandated changes introduced since the RFP was released
- Operational Readiness
  - Organizational Change Management
  - Training
- Testing, Testing, Testing
- Cutover Planning

More updates to come…

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