Retirement Administration Service Center

UCRS Advisory Board Meeting
Retirement Administration Service Center Update

March 3rd, 2023

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Agenda

1. Retirement Performance
2. Survivor Intake

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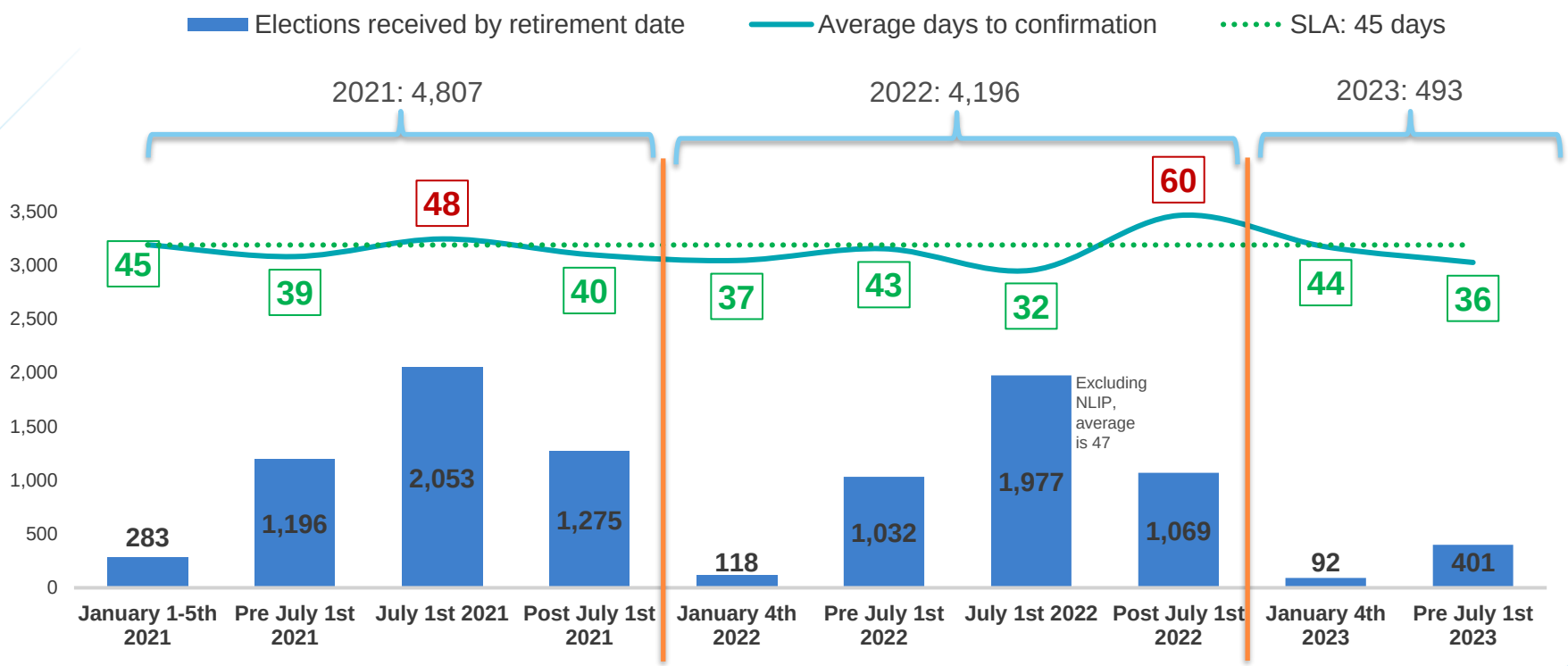
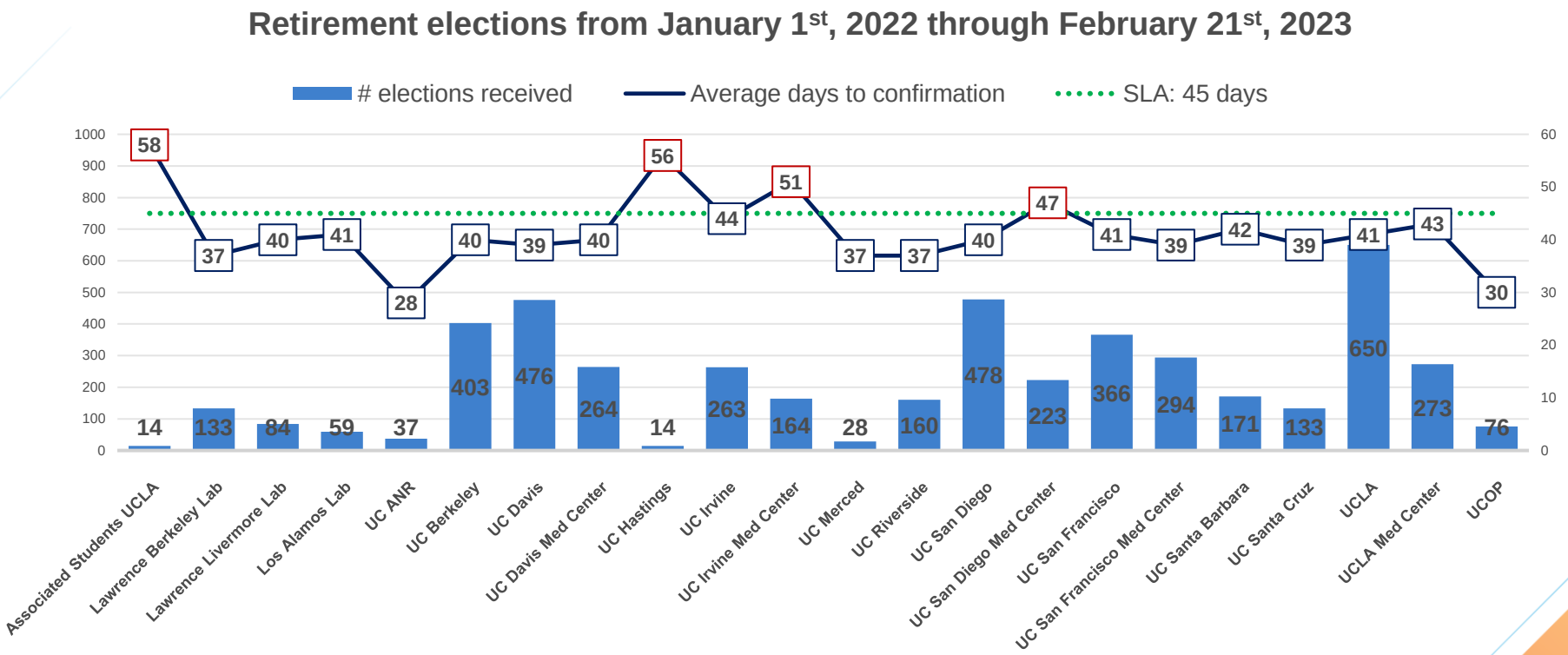
Retirement processing: year over year comparison



From the election receipt date to confirmation

UNIVERSITY OF CALIFORNIA Results as of February 21st

Retirement performance results by campuses



UNIVERSITY OF CALIFORNIA Results as of February 21st

No Lapse in Pay and Benefit Continuation: Window opens April 1st to May 13th

Eligible Retirees/Requirements

- New retiree with a **July 1st - 2023** retirement date
- Completed and submitted election documents and any required documentation
- Completed and submitted the No Lapse in Pay Form (UCRS 168) stating they wish to receive a provisional benefit payment between their retirement date and the first date of their fully audited and confirmed MRI
- UCRP service credit in more than one tier
- PYC (Partial Year Career)
- QDRO with no adverse claims (court approved FL 180 on file, or if accounts have been approved and split)

Ineligible Retirees/Exclusions

- Lump sum cashout
- Eligibility for reciprocity
- Disability Crossover
- Eligibility for Minimum Required Distributions (MRD)
- MDIB
- Multiple Classification (ex: safety)
- UCRP Tier Two
- Rehired Retiree
- Plan 02, 401-a, or 415 Limited
- Qualified Domestic Relations Order (QDRO) **with an adverse claim**
- Incomplete Election Documentation
- Retirement in Calculation, Review, or Confirmation

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Service Enhancements: Dedicated Survivor Intake team

- **Go-Live:** Survivor Intake March 1st
  - Dedicated phone line with links from general voicemail (soft launch)
  - Mid-March Survivor Intake publicity campaign: UCnet, HRB to campuses, Board announcements and newsletters
- **Dedicated Team:** Onboarding and training began on February 13th
  - Phone line: 1-888-825-6833 or 1-888-UCLOVED
- **Benet:** Ready for go-live with prospective activity
- **Case Status:** New report providing visibility on survivor cases
- **Data:** New dashboards for case status and daily team progress
- **Processes:** Documented & signed off, finalizing work instructions
- **Scripts:** Developed to support Survivor Intake team and Call Team
- **In Queue work:** Dedicated team focused on cases already in progress

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Thank you

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