Retirement Administration Service Center

UCRS Advisory Board Meeting

June 17, 2022

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Retirement Update

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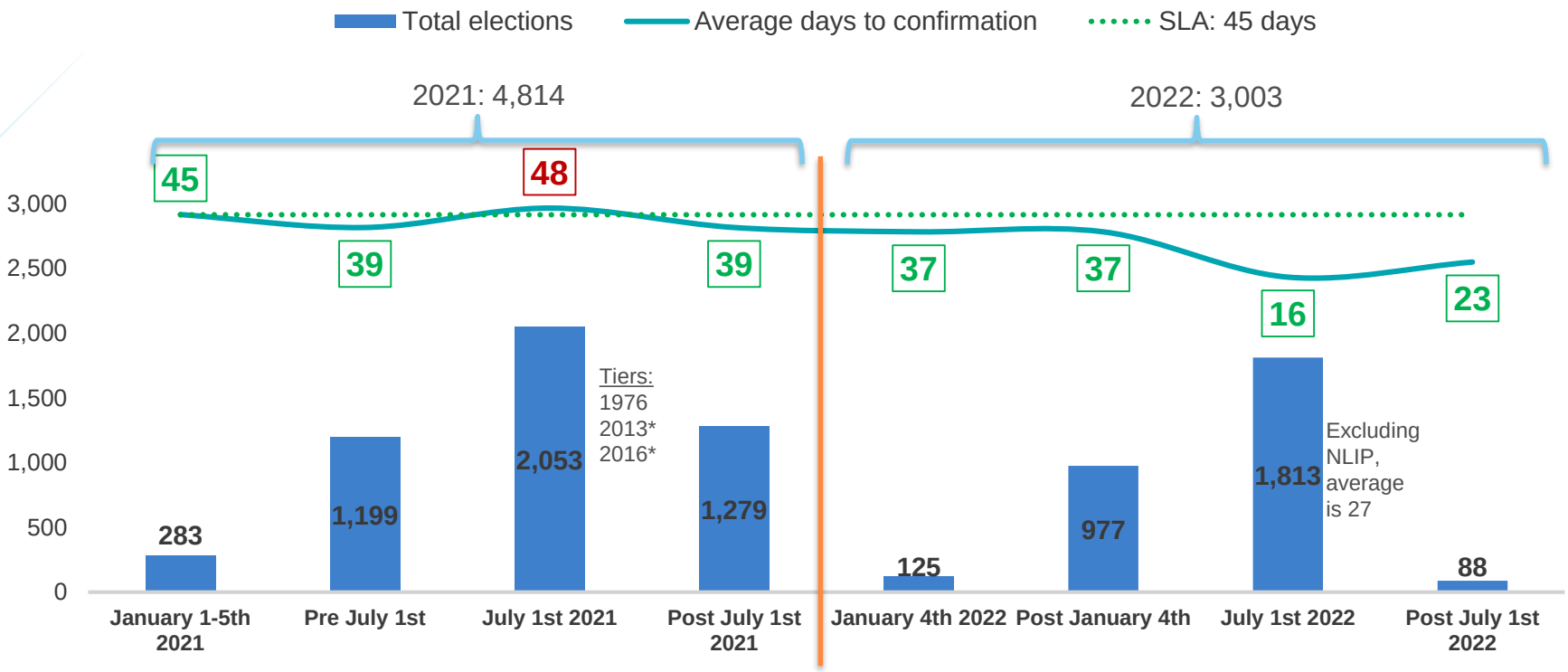
Retirement processing: year over year comparison

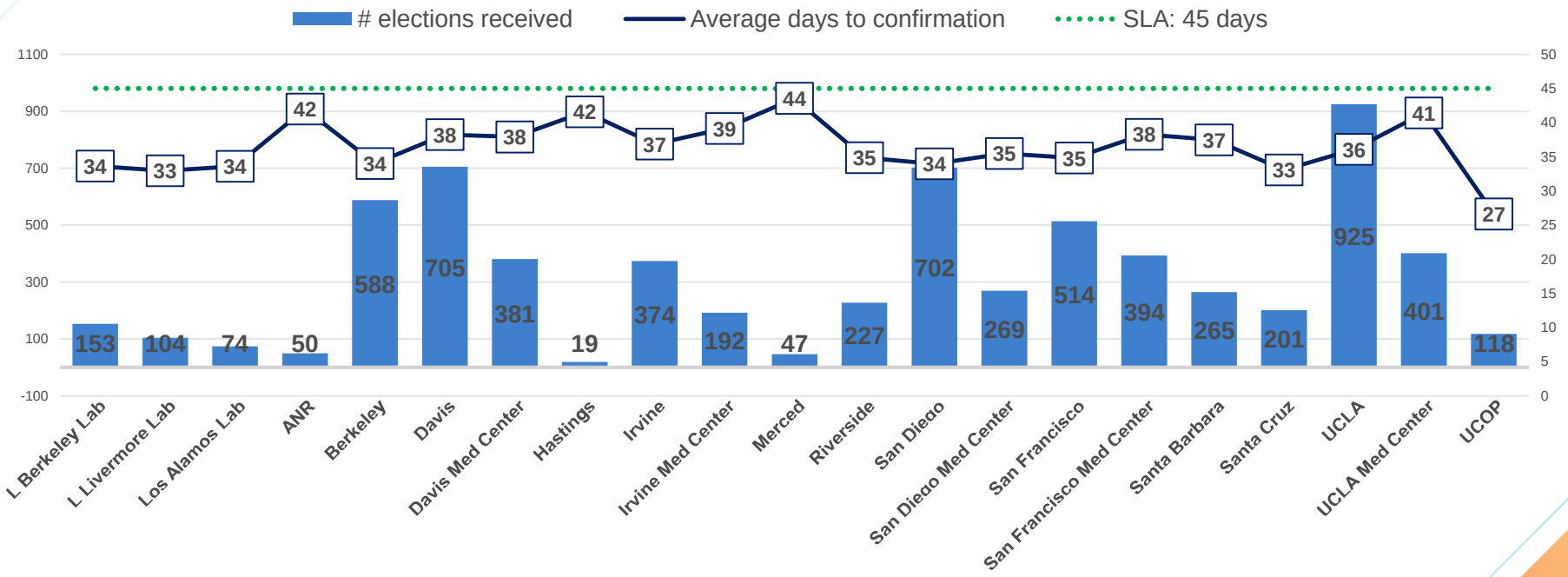


From the election receipt date to confirmation

UNIVERSITY OF CALIFORNIA Results as of June 8th

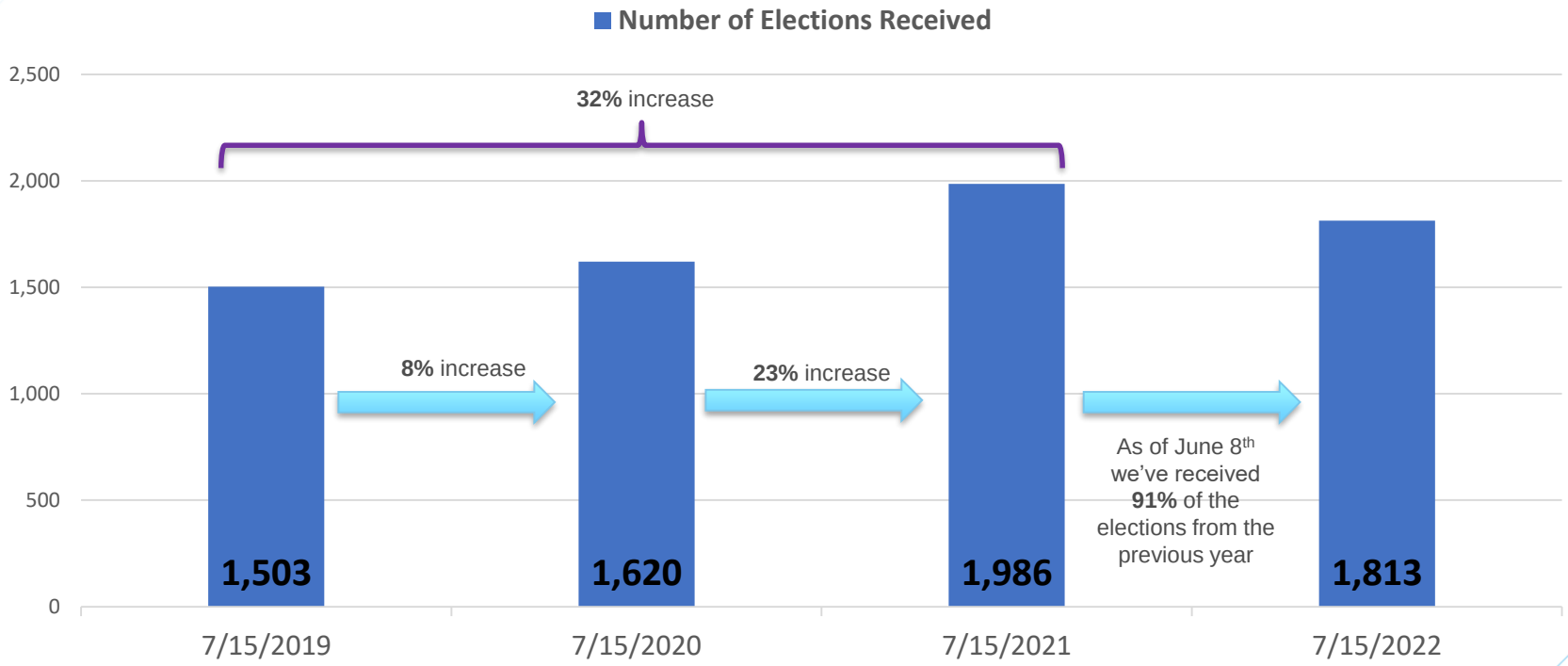
Retirement performance results by campuses

Retirement elections from July 1st, 2021 through June 8th, 2022



UNIVERSITY OF CALIFORNIA Results as of June 8th

July 1st peak seasons - Year over year comparison



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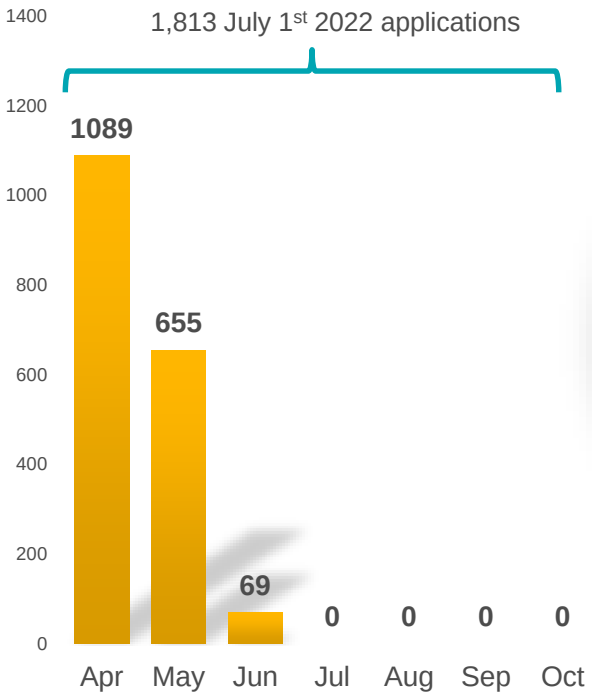
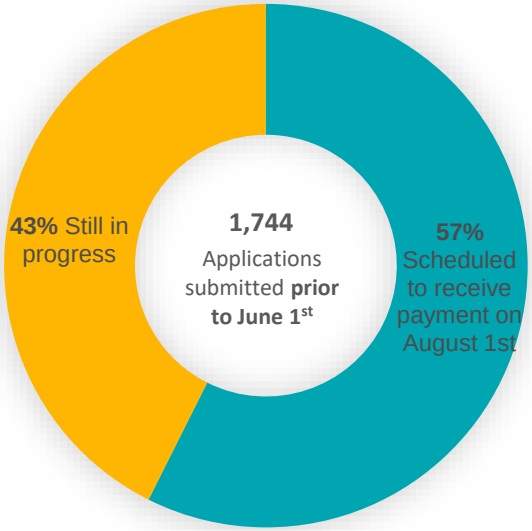
July 1st 2022 peak season

Applications received per month

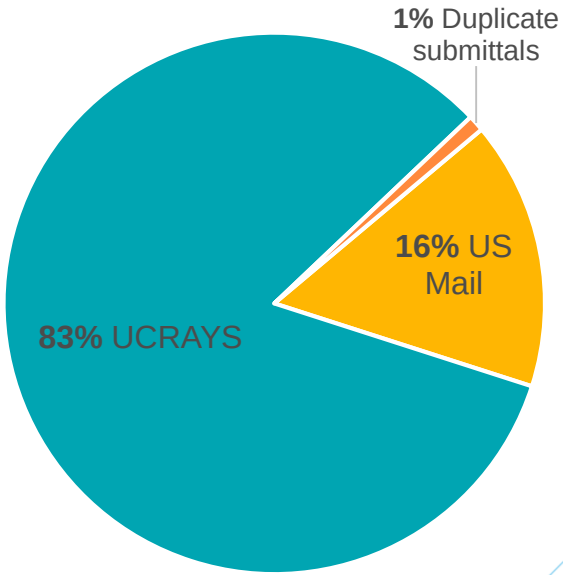


Total applications received by June 1st



*June 1st represents 45 days prior to the 15 day waiting period and before the July 1st payment date

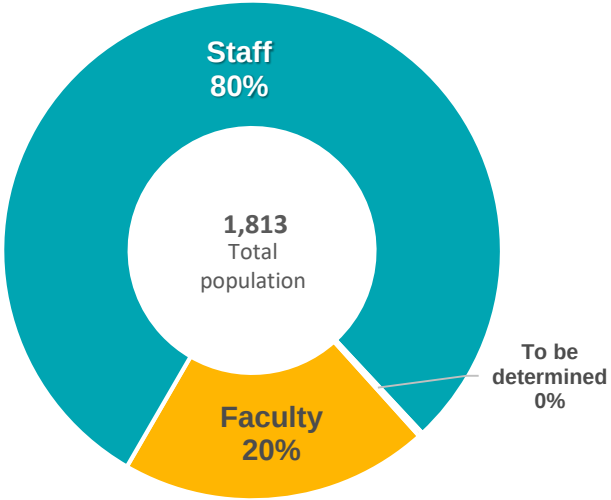
Method of submittal



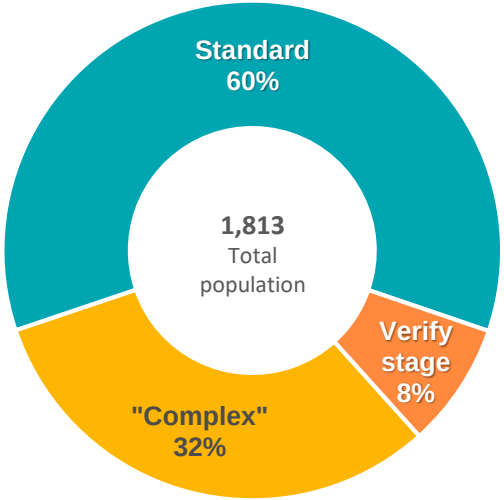
UNIVERSITY OF CALIFORNIA Results as of June 8th

July 1st 2022 Retirement population analysis

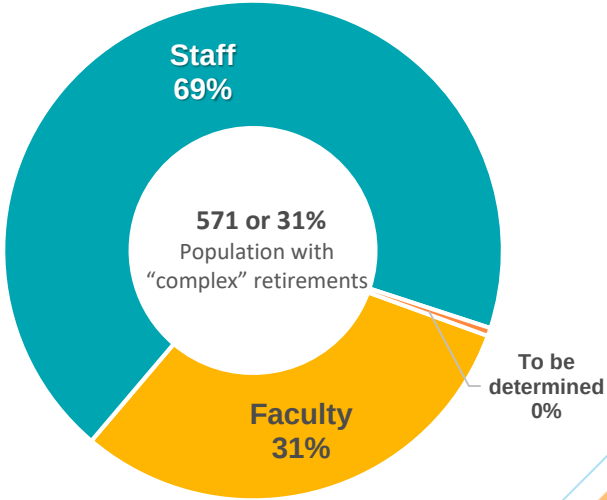
Faculty or Staff



Standard or “Complex”



Faculty or Staff by “Complexity”

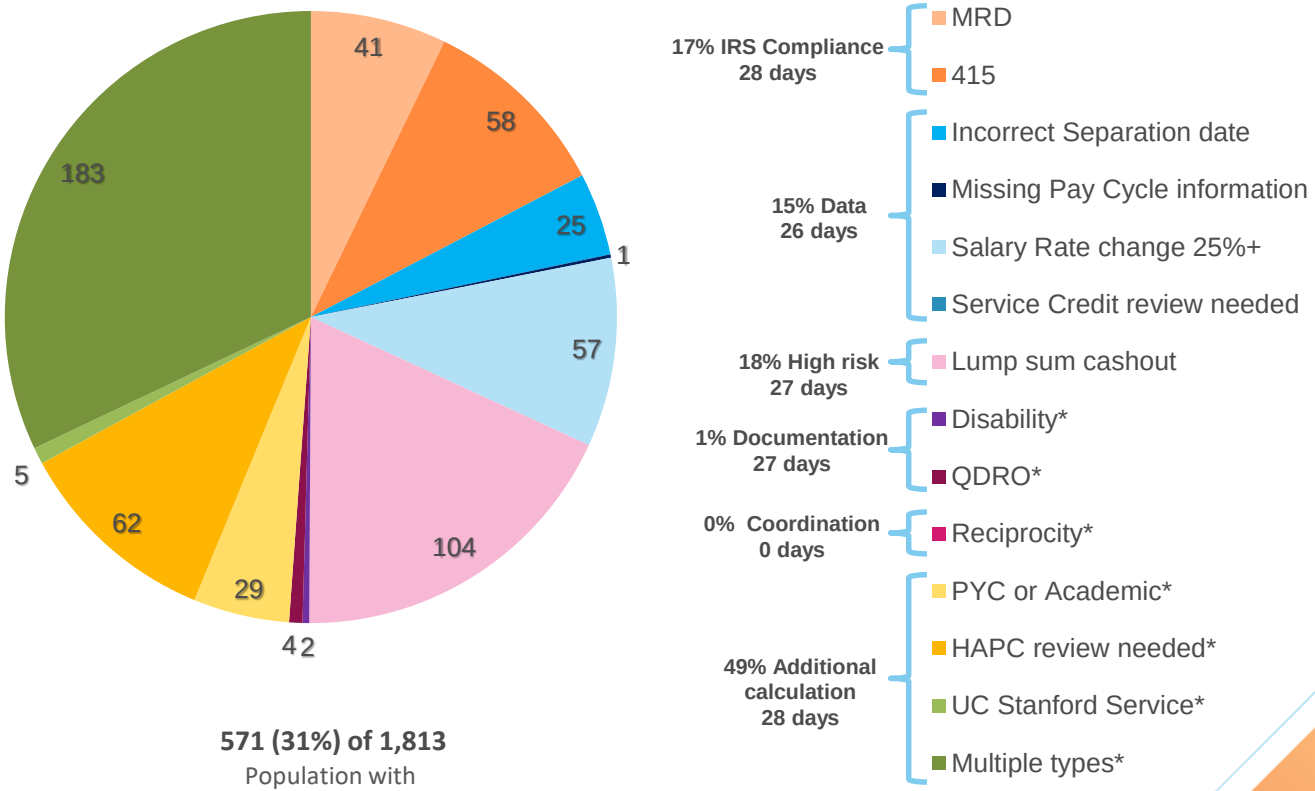


UNIVERSITY OF CALIFORNIA Results as of June 8th

July 1st 2022 - “Complexities” that required longer processing time

Areas of focus:

- Define complex versus Redwood capability
- Better coordination with other retirements systems
- Consistent interpretation of data
- Accept high risk timeline
- Validating HAPC where needed
- Build our internal capability



571 (31%) of 1,813
Population with
“complex” retirements

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Key observations: Retirement processing

Post January 4th 2022:

- **71%** of Pre July 1st 2022 elections have been processed
- There are **287** elections still **in progress**
- These elections have been **38** days in the process

July 1st 2022

- At this point of time we have received **91%** of the elections received the **previous year.**
- Of those, **56%** have been **processed** and are in the **final payment stages**
- As of the same point in time we have received **8% more** retirements applications than last year

All remaining retirements dates

- We continue to process **retirement elections outside of July 1st** and have **6%** in progress.
- Our **current average** to provide a confirmation statement is trending **2 days below the previous year and 8 days below our SLA**

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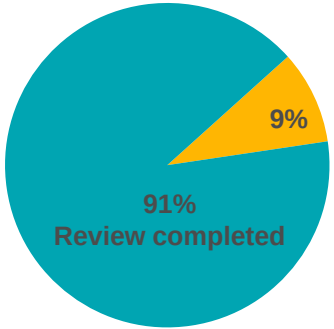
No Lapse in Pay and Benefit Continuation Program

NLIP Opt-in applications:

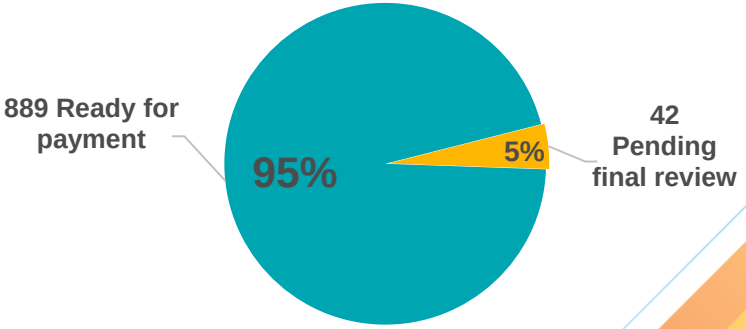
- As of **June 8th**, we have **received 1,310 applications** to opt-in.
- This **represents 72%** of total retirement elections received to date.
- **91%** have been **reviewed for eligibility**
  - Of those reviewed, **22%** are **ineligible**

- As of **June 8th**, **78% or 931 processed opt-in** applications are **eligible.**
  - **95%** are **scheduled for payment** on **August 1st**
- **122** applications remain in the verification stage due to incomplete/insufficient documentation.
- **Processing ends on June 15th**
  - Unverified applications will be notified of ineligibility
  - Cases will progress through normal retirement processing

Opt-in applications processed



Eligible: Scheduled for payment



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Member Contact Strategy

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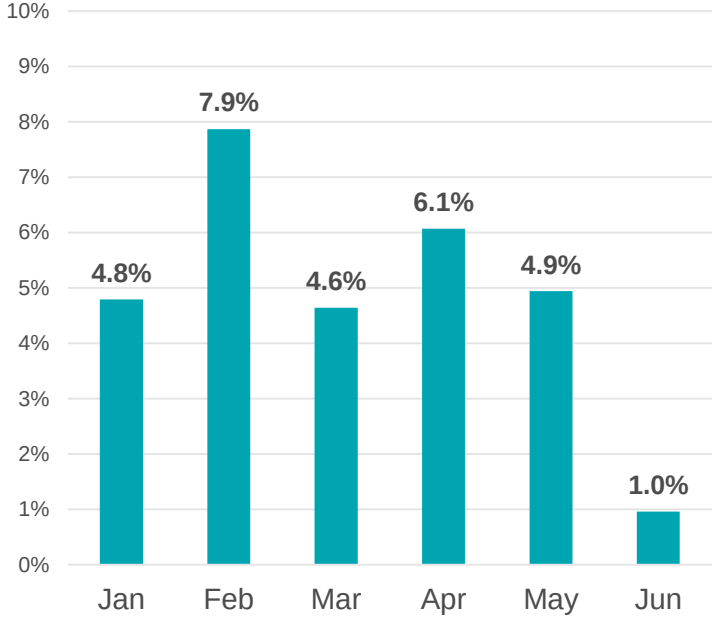
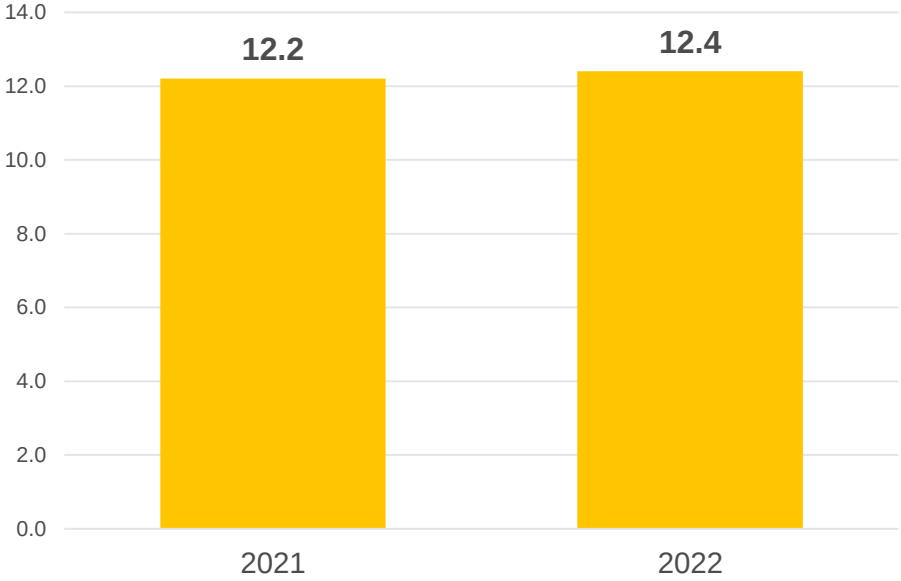
New year activity: Secure Messages

% of increase secure messages received 2021 - 2022



The percentages are cumulative

Average days to close a case from January 1st – June 6th



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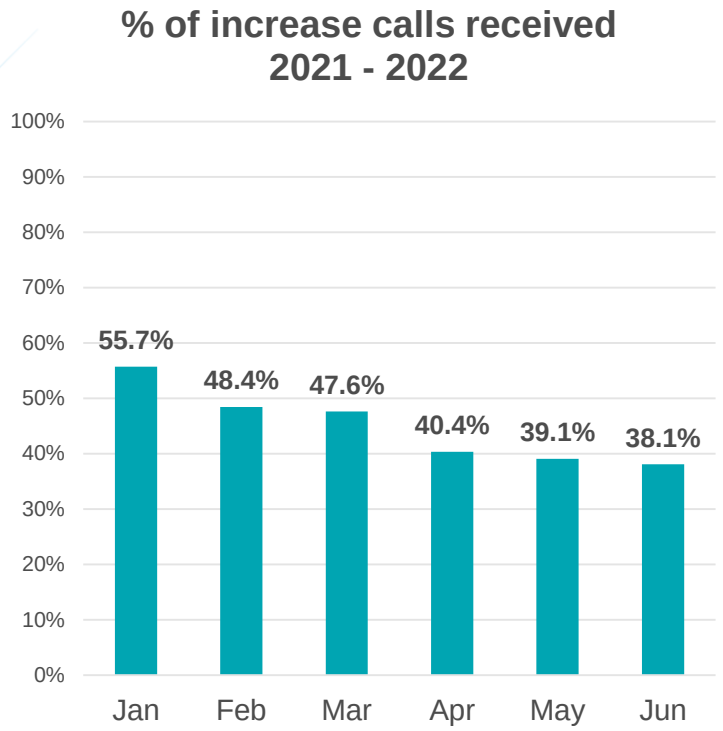
New year activity: Call Center performance



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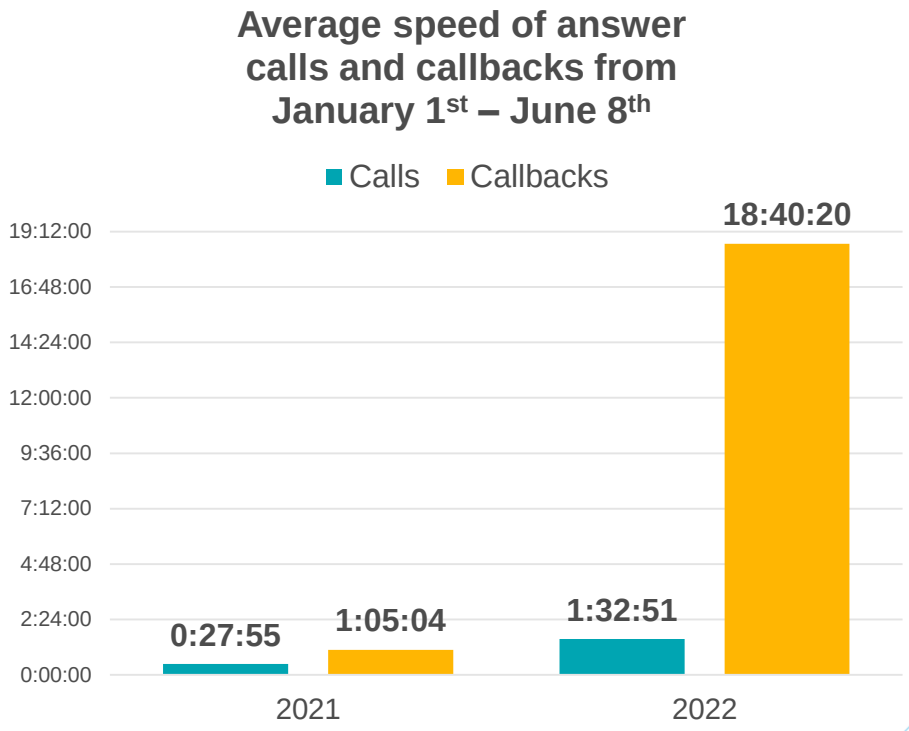

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Member Contact and Support

We are **focused** and are taking **deliberate** steps to **improve** our **Member Contact Strategy**:

Expand our **internal support** and **channels** for **more personal engagement:**

- Implementing teams who will provide direct care and support at the onset

Implement **proactive outreach campaigns:**

- **Monthly outreach campaigns** via outbound phone calls
- Targeting retirement planning, health and welfare, wellness programs and **high impact notices** and/or **initiatives** which may occur with **minimal notice**

Align and Improve skills and **knowledge** of our internal **resources** and **member support** teams

Leverage **new telephony system functionality** to triage calls

Streamline channels for partner and stakeholder queries

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Proactive outreach

- **Our recommended approach for prospective retirees:**

Retirees will receive a call when:

- **Verification:**
  - RASC receive their application and it is within the verification stage
  - Their application have been in verification stage for +15 days
- **Calculation:**
  - Their application moves from verification to calculation
  - Their application have been in calculation for +14 days
- **Final review:**
  - Their application moves to final review (if needed)
- **Confirmation:**
  - Their application is within the plan required 15-day waiting period for review and/or cancellation
- **Payment:**
  - Their application is within the final payment stages with an expected payment date

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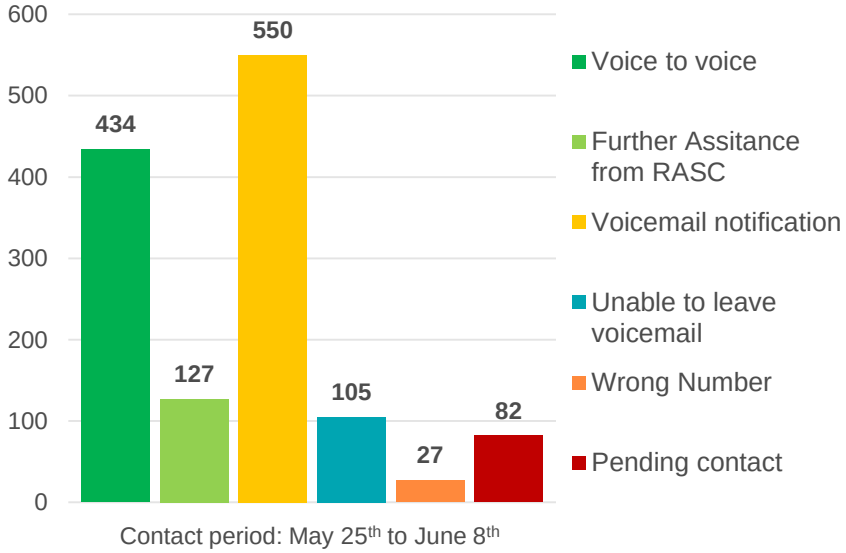
Proactive outreach: Call Experts performance

- Initial population of **1,325 prospective retirees** provided to Call Experts
- **1,243 contacts initiated** from May 25th to June 8th, representing **94%** of the total population:
  - **561** or **45% voice to voice contact** completed
    - **127** requested RASC further assistance.
  - **550** or **44% voicemails notifications** completed
  - **132** or **11% incomplete contact:**
    - **105** unable to receive voicemail
    - **27** wrong numbers
  - **82 or 6%** still pending contact



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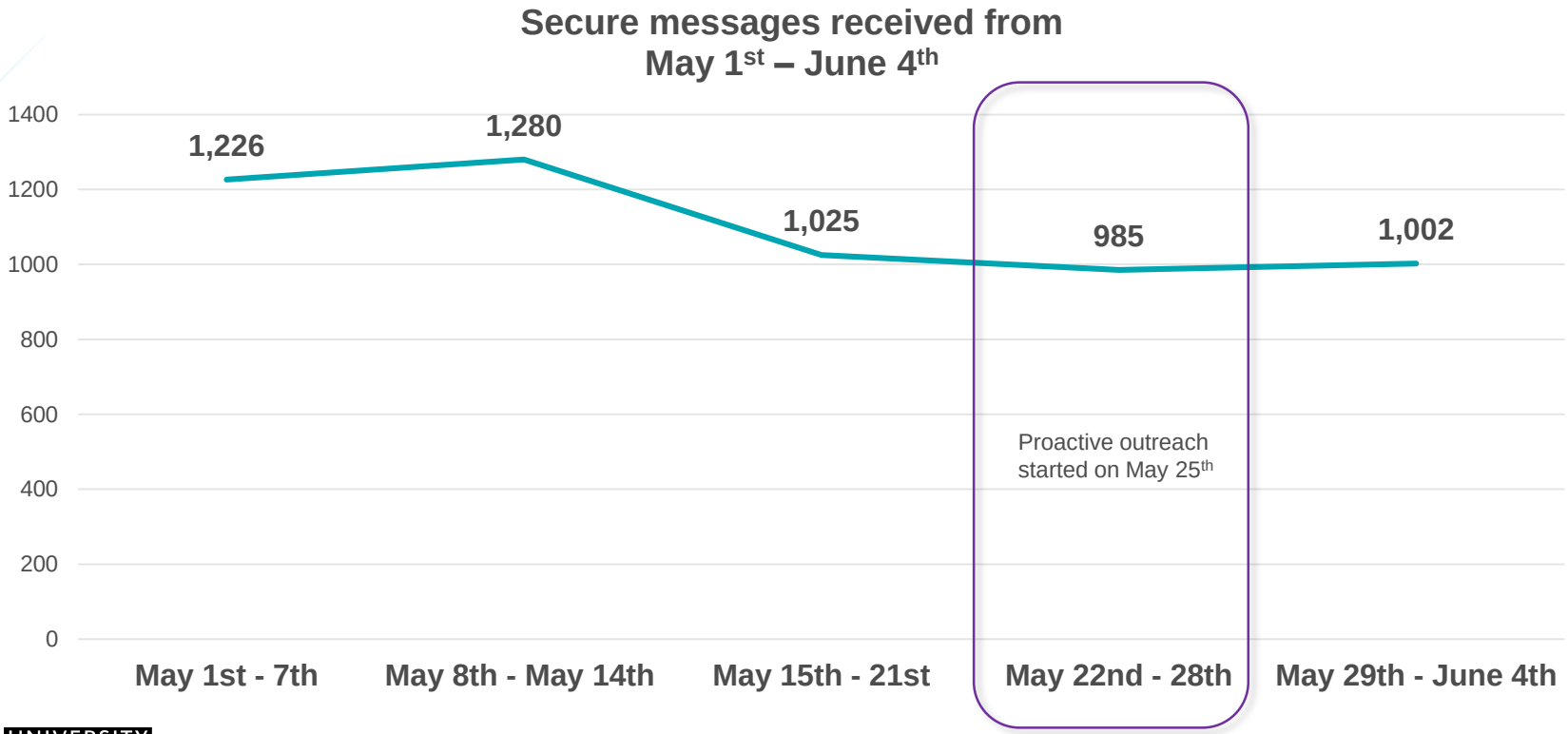
Proactive outreach impact in secure messages



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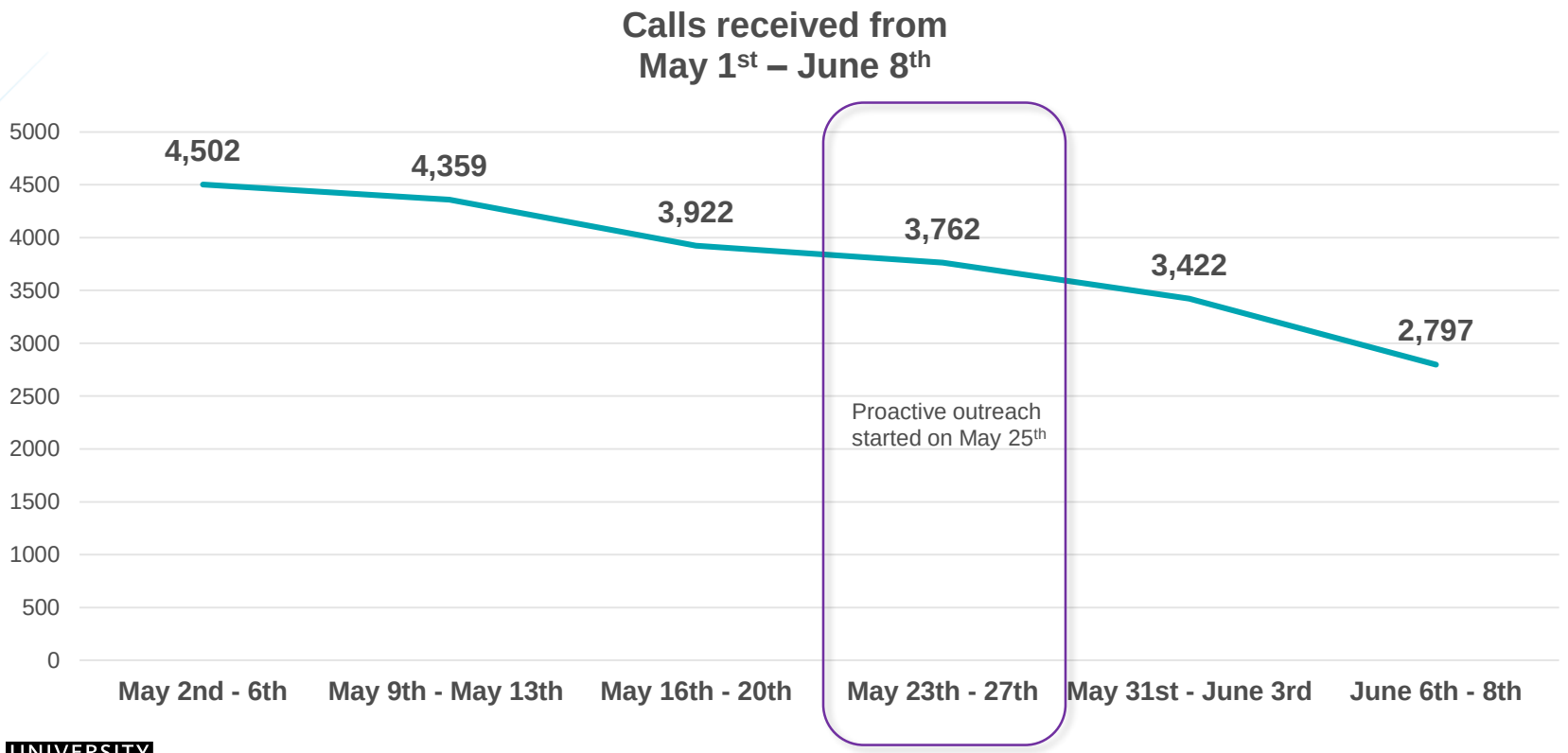
Proactive outreach impact in call center



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Resource Strategy

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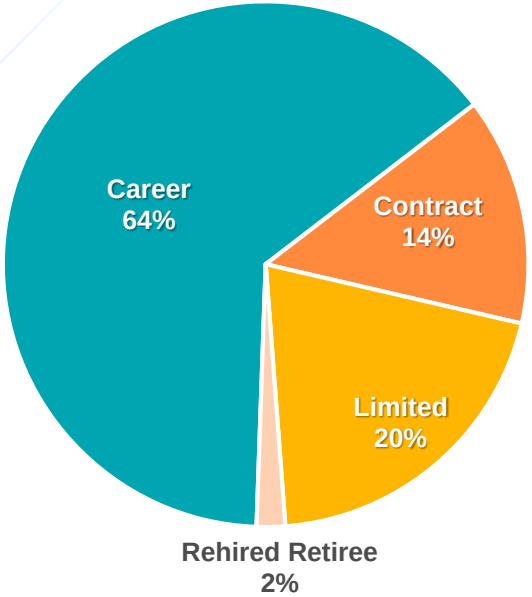
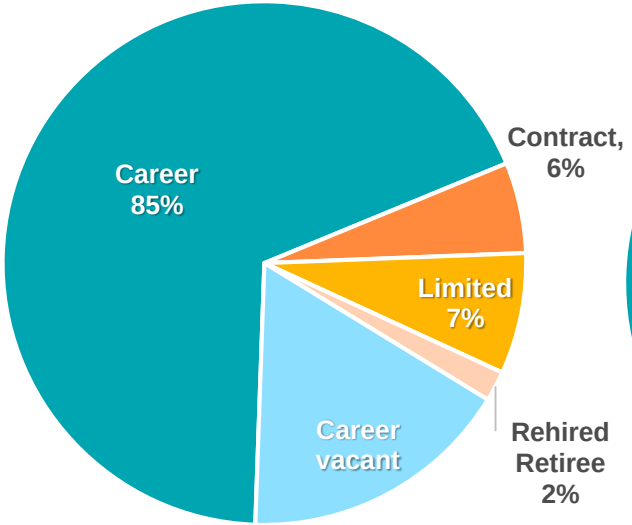
RASC Resource labor distribution with approved Service Enhancements

Starting point
September 2021



- Career: 73
- Contract: 16
- Limited: 23
- Rehired Retiree: 0
- Total: 112

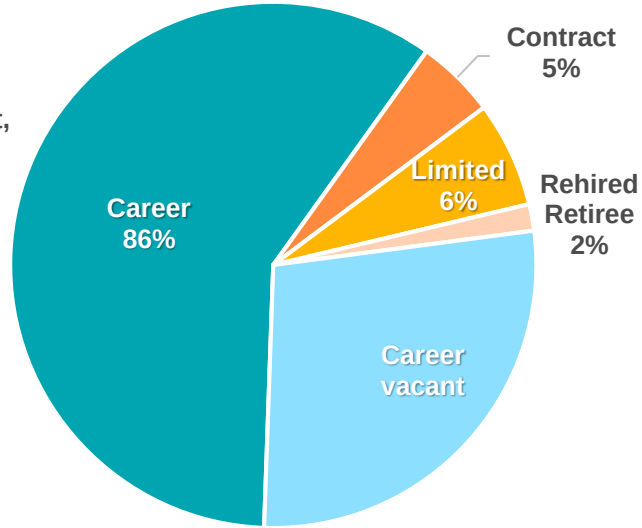
Current state as of
June 1, 2022



91

- Career: 73
- Career vacant: 18
- Contract: 6
- Limited: 8
- Rehired Retiree: 2
- Total: 107

Future state
approved service enhancements



107

- Career: 73
- Career vacancies: 34
- Contract: 6 + 2 vacancies
- Limited: 8
- Rehired Retiree: 2
- Total: 125

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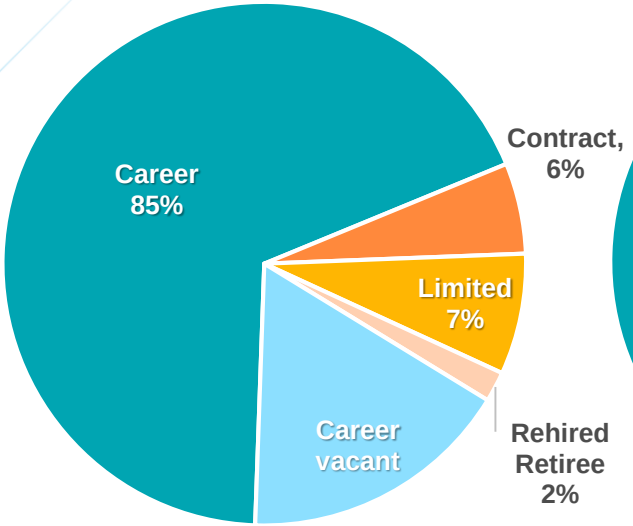
Total includes vacancies and contractors

RASC Resource labor distribution with Fiscal Year Budget Request

Current state as of June 1, 2022



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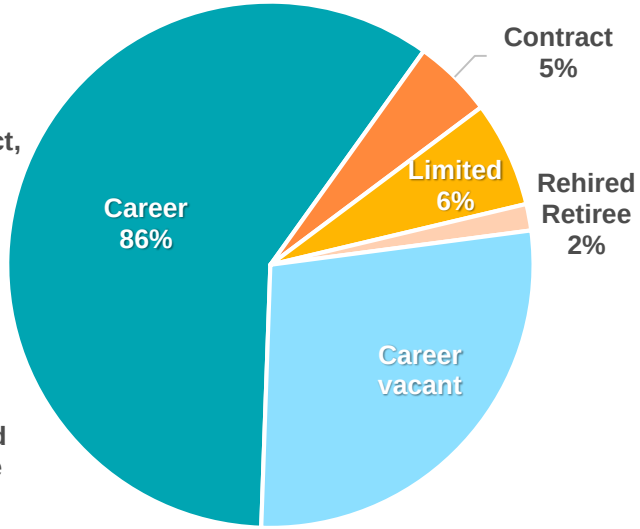
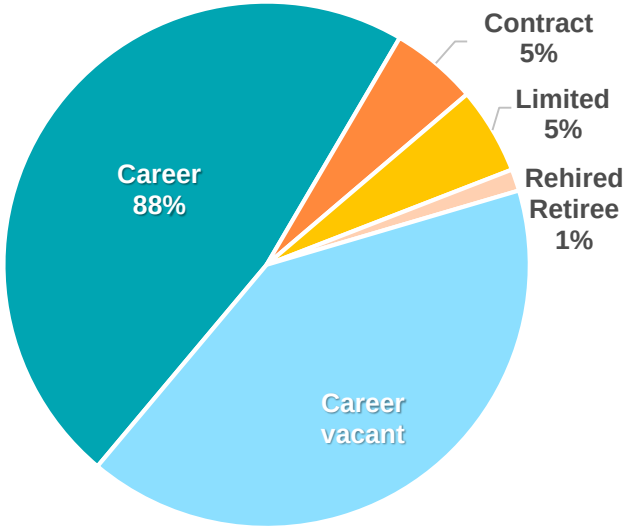
Future state approved service enhancements



107
- Career: 73
- Career vacancies: 34
- Contract: 6 + 2 vacancies
- Limited: 8
- Rehired Retiree: 2

Total: 125

Future state 2022-23 budget request



132
- Career: 73
- Career vacancies: 59
- Contract: 6 + 2 vacancies
- Limited: 8
- Rehired Retiree: 2

Total: 150

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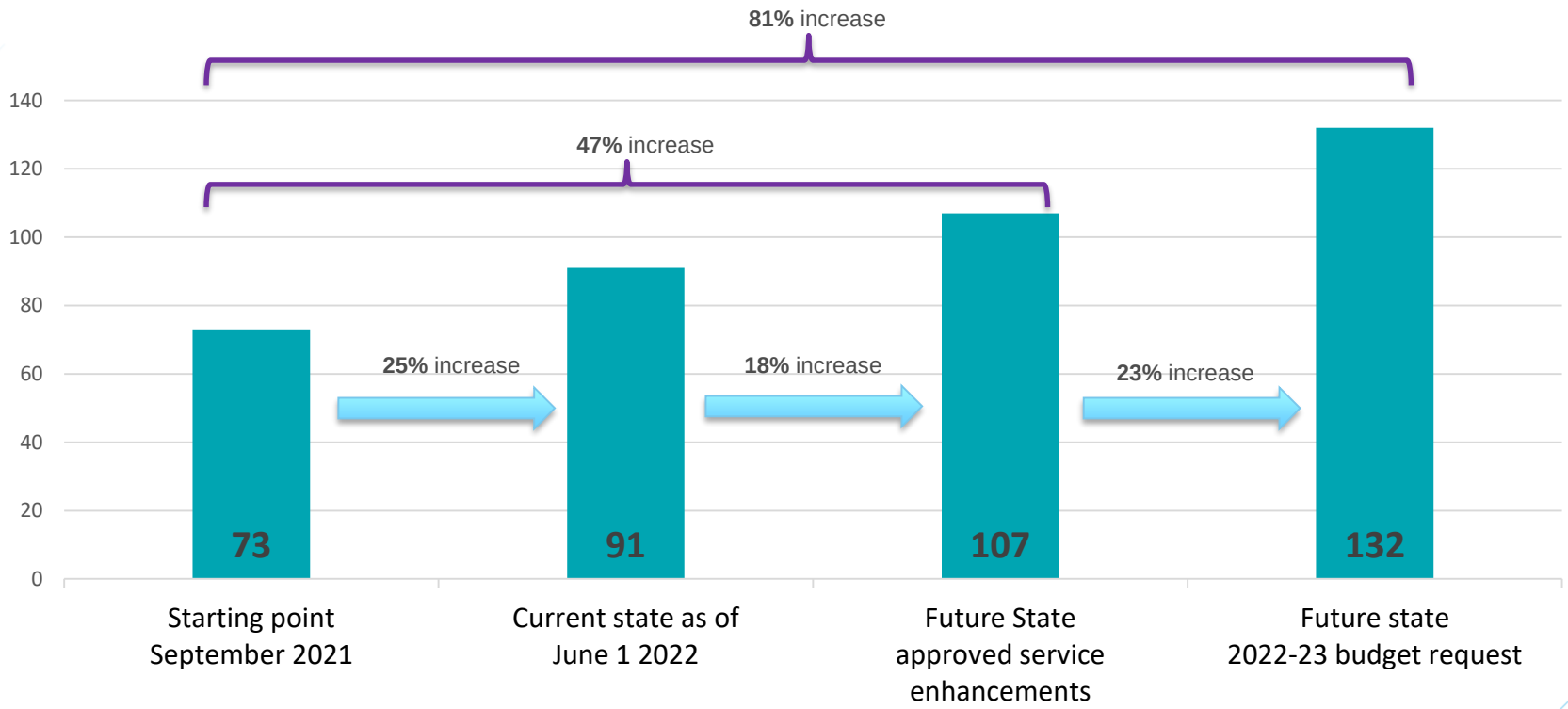
RASC Resource labor distribution: Career roles



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Thank you

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