



















2017 Division of Retirement Services Scorecard

Services to Members	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	Year	Trending- future outlook
Annual Reconciliation: <ul style="list-style-type: none"> Standard: 90% of employers submit annual file by Jan 31 each year, complete in mid-March Completed in mid-March, ahead of schedule 		N/A	N/A	N/A		
Daily Transactions from Employers: <ul style="list-style-type: none"> Standard: < 1000 suspended Status: 446 average 						
Separation Benefits-Wait Time <ul style="list-style-type: none"> Within 1 month of receipt of all required info (includes employer reports) Status: 30 calendar days 						
Phone Call-Average Speed of Answer <ul style="list-style-type: none"> Standard: 90% of calls < 3 min. Status: 2.29 minutes 						
Phone Call-Abandonment <ul style="list-style-type: none"> Standard: < 10% of calls Status: 5.36% average 						

<p>Phone Call-Quality (survey results)</p> <ul style="list-style-type: none"> • Standard: 90% favorable rate • Status: 99% 						
<p>Email-Speed of Response</p> <ul style="list-style-type: none"> • Standard*: 2 days • Status: Within 1 day (.92) 						
<p>Beneficiary Designation-Wait Time</p> <ul style="list-style-type: none"> • Standard: <ul style="list-style-type: none"> ○ 5 days ○ < 500 backlog • Status: <ul style="list-style-type: none"> ○ 7.15 days ○ 438.6/weekly backlog 						
<p>Presentations:</p> <ul style="list-style-type: none"> • Public: 20/yr. • Group Presentations: 245/yr. • Webinars: 180/yr. • Status: Achieved 						
<p>Retirement Estimates-Wait Time</p> <ul style="list-style-type: none"> • Standard: Within 15 business days • Status: 13 days 						

<p>Appointments:</p> <ul style="list-style-type: none"> • Standard: <ul style="list-style-type: none"> ○ Group: Within 5 days ○ Individual: Within 15 days • Status: <ul style="list-style-type: none"> ○ Group: 7 days ○ Individual: 21 days 						
<p>Appointments-Quality (survey results)</p> <ul style="list-style-type: none"> • Standard: <ul style="list-style-type: none"> ○ 90% favorable rate • Status: <ul style="list-style-type: none"> ○ 98.1% favorable rate 						
<p>Annuitant Payroll</p> <ul style="list-style-type: none"> • Standard: Generally, put annuitant on payroll when desired • Status: 100%; no delays <ul style="list-style-type: none"> ○ 1,295 annuities set-up 						
<p>Final Calculations for Annuities:</p> <ul style="list-style-type: none"> • Standard: <ul style="list-style-type: none"> ○ Within 5 months ○ No more than 5,000 pending • Status: <ul style="list-style-type: none"> ○ 4 months ○ 2,713 pending 						

<p>Processing Death Benefits:</p> <ul style="list-style-type: none"> • Annuitant: Within 10 days <ul style="list-style-type: none"> ○ 7 days currently • Non-Annuitant: Within 10 days (adjusted standard) <ul style="list-style-type: none"> ○ 7 days currently • Set-up of monthly and lump sum benefits: Within 1 month (after death notification) <ul style="list-style-type: none"> ○ 30 days • Processing death notices/stopping benefits: Within 2 days (after death notification) <ul style="list-style-type: none"> ○ 2 days 	★	★	★	★	★	↔
--	---	---	---	---	---	---

Legend:

Green Star – Standards were met or exceeded

Yellow Circle – Results were within 5% of standards

Red X – Results were $\geq 5\%$ below standards



Future Outlook-based on what we project next quarter

Status-based on quarterly total

Yearly Total-standard vs. total of all four quarters

*Means we adjusted standard vs. last scorecard