


















2016 Division of Retirement Services Scorecard

Services to Members	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	YTD	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 		N/A				
Daily Transactions from Employers: <ul style="list-style-type: none"> • Standard: < 1000 suspended • Status: 313 average 						
Separation Benefits: <ul style="list-style-type: none"> • Within 1 month of receipt of all required info (includes employer reports) • Status: No delays since effective rate published • 1,384 processed 						
Phone Call-Speed of Answer <ul style="list-style-type: none"> • Standard: 90% of calls < 3 min. • Status: 4:30 min. average 						
Phone Call-Abandonment <ul style="list-style-type: none"> • Standard: < 10% of calls • Status: 13.8% average 						
Phone Call-Quality (survey results) <ul style="list-style-type: none"> • Standard: 90% favorable rate • Status: 98% 						

<p>Email-Speed of Response</p> <ul style="list-style-type: none"> • Standard: 4 days • Status: 1 day 	★	★				↑
<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"> ○ 5 days ○ 872/weekly backlog 	★	★				↑
<p>Presentations:</p> <ul style="list-style-type: none"> • Public: 20/yr. • Group Presentations: 245/yr. • Webinars: 180/yr. • Status: On Pace 	★	★				↔
<p>Retirement Estimates-Wait Time</p> <ul style="list-style-type: none"> • Standard: Within 15 business days • Status: 11 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: 6 days ○ Individual: 23 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"> ○ 98.965% 	★	★				↑
<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"> ○ 3,619 annuitants 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 ○ 5,808 pending ○ Note: Met time standard, but not pending volume standard because June is very large month 	★	★				↑
<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 5 days <ul style="list-style-type: none"> ○ 7 days currently 	★	★				↑

<ul style="list-style-type: none">• Set-up of monthly and lump sum benefits: Within 1 month (after death notification)<ul style="list-style-type: none">○ Meeting standard• Processing death notices/stopping benefits: Within 2 days (after death notification)<ul style="list-style-type: none">○ Meeting standard						
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Legend:

Green star – Standards were met or exceeded

Yellow star – Results were within 5% of standards

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

