2016 Division of Retirement Services Scorecard

Services to Members	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	YTD	Trending-future outlook
Annual Reconciliation: • Standard: 90% of employers submit annual file by Jan 31 each year, complete in mid-March • Completed in mid-March	⭐ (green)	N/A	N/A			↔
Daily Transactions from Employers: • Standard: < 1000 suspended • Status: 338 average	⭐ (green)	⭐ (green)	⭐ (green)			↑
Separation Benefits: • Within 1 month of receipt of all required info (includes employer reports) • Status: 30 calendar days • 1,315 processed	❌ (red)	⭐ (green)	⭐ (green)			↔
Phone Call-Speed of Answer • Standard: 90% of calls < 3 min. • Status: 1:17 min. average	❌ (red)	❌ (red)	⭐ (green)			↑
Phone Call-Abandonment • Standard: < 10% of calls • Status: 3.56% average	❌ (red)	🟡 (yellow)	⭐ (green)			↑
Phone Call-Quality (survey results) • Standard: 90% favorable rate • Status: 98.31%	⭐ (green)	⭐ (green)	⭐ (green)			↑

Email-Speed of Response • Standard: 4 days • Status: Within 1 day	⭐	⭐	⭐			⬆

Beneficiary Designation-Wait Time
• Standard:
  o 5 days
  o < 500 backlog
• Status:
  o 2 days
  o 158/weekly backlog
	❌	❌	⭐			⬆

Presentations: • Public: 20/yr. • Group Presentations: 245/yr. • Webinars: 180/yr. • Status: On Pace	⭐	⭐	⭐			↔
Retirement Estimates-Wait Time • Standard: Within 15 business days • Status: 10 days	⭐	⭐	⭐			⬆

Appointments:
• Standard:
  o Group: Within 5 days
  o Individual: Within 15 days
• Status:
  o Group: 4 days
  o Individual: 17 days
	❌	❌	🟡			⬆

Appointments-Quality(survey results) • Standard: o 90% favorable rate • Status: o 98.91%	⭐	⭐	⭐			↔
Annuitant Payroll • Standard: Generally, put annuitant on payroll when desired • Status: 100%; no delays o 2,711 annuitants set-up	⭐	⭐	⭐			↔
Final Calculations for Annuities: • Standard: o Within 5 months o No more than 5,000 pending • Status: o 5 months o 5,463 pending o Note: Met time standard, but not pending volume standard because June/July are very large months	❌	❌	❌			⬆
Processing Death Benefits: • Annuitant: Within 10 days o 7 days currently • Non-Annuitant: Within 5 days o 7 days currently • Set-up of monthly and lump sum benefits: Within 1 month (after death notification) o Meeting standard	❌	🟡	🟡			⬆

Processing death notices/stopping benefits: Within 2 days (after death notification) o Meeting standard					

Legend:
Green Star – Standards were met or exceeded
Yellow Circle– Results were within 5% of standards
Red X – Results were ≥5% below standards