















## 2017 Division of Retirement Services Scorecard

Services to Members	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	Year	Trending-future outlook
<b>Annual Reconciliation:</b> <ul style="list-style-type: none"> <li>Standard: 90% of employers submit annual file by Jan 31 each year, complete in mid-March</li> <li>Completed in mid-March, ahead of schedule</li> </ul>		N/A				
<b>Daily Transactions from Employers:</b> <ul style="list-style-type: none"> <li>Standard: &lt; 1000 suspended</li> <li>Status: 259 average</li> </ul>						
<b>Separation Benefits-Wait Time</b> <ul style="list-style-type: none"> <li>Within 1 month of receipt of all required info (includes employer reports)</li> <li>Status: 14 calendar days</li> </ul>						
<b>Phone Call-Speed of Answer</b> <ul style="list-style-type: none"> <li>Standard: 90% of calls &lt; 3 min.</li> <li>Status: 3:37 min. average</li> <li>Note: Were 6 vacant positions, which are now filled</li> </ul>						
<b>Phone Call-Abandonment</b> <ul style="list-style-type: none"> <li>Standard: &lt; 10% of calls</li> <li>Status: 9.57% average</li> </ul>						

<p><b>Phone Call-Quality (survey results)</b></p> <ul style="list-style-type: none"> <li>• Standard: 90% favorable rate</li> <li>• Status: 99%</li> </ul>	★	★				↔
<p><b>Email-Speed of Response</b></p> <ul style="list-style-type: none"> <li>• Standard: 4 days</li> <li>• Status: Within 1 day (.62)</li> </ul>	★	★				↔
<p><b>Beneficiary Designation-Wait Time</b></p> <ul style="list-style-type: none"> <li>• Standard: <ul style="list-style-type: none"> <li>○ 5 days</li> <li>○ &lt; 500 backlog</li> </ul> </li> <li>• Status: <ul style="list-style-type: none"> <li>○ 7.92 days</li> <li>○ 632/weekly backlog</li> </ul> </li> </ul>	✘	✘				↔
<p><b>Presentations:</b></p> <ul style="list-style-type: none"> <li>• Public: 20/yr.</li> <li>• Group Presentations: 245/yr.</li> <li>• Webinars: 180/yr.</li> <li>• Status: On pace</li> </ul>	★	★				↔
<p><b>Retirement Estimates-Wait Time</b></p> <ul style="list-style-type: none"> <li>• Standard: Within 15 business days</li> <li>• Status: 18 days</li> </ul>	✘	✘				↔

<p><b>Appointments:</b></p> <ul style="list-style-type: none"> <li>• Standard:             <ul style="list-style-type: none"> <li>○ Group: Within 5 days</li> <li>○ Individual: Within 15 days</li> </ul> </li> <li>• Status:             <ul style="list-style-type: none"> <li>○ Group: 2 days</li> <li>○ Individual: 20 days</li> </ul> </li> </ul>	★	●				↓
<p><b>Appointments-Quality (survey results)</b></p> <ul style="list-style-type: none"> <li>• Standard:             <ul style="list-style-type: none"> <li>○ 90% favorable rate</li> </ul> </li> <li>• Status:             <ul style="list-style-type: none"> <li>○ 96.43% favorable rate</li> </ul> </li> </ul>	★	★				↔
<p><b>Annuitant Payroll</b></p> <ul style="list-style-type: none"> <li>• Standard: Generally, put annuitant on payroll when desired</li> <li>• Status: 100%; no delays             <ul style="list-style-type: none"> <li>○ 3,270 annuities set-up</li> </ul> </li> </ul>	★	★				↔
<p><b>Final Calculations for Annuities:</b></p> <ul style="list-style-type: none"> <li>• Standard:             <ul style="list-style-type: none"> <li>○ Within 5 months</li> <li>○ No more than 5,000 pending</li> </ul> </li> <li>• Status:             <ul style="list-style-type: none"> <li>○ 3 months</li> <li>○ 2,621 pending</li> </ul> </li> </ul>	●	★				↑

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

**Green Star** – Standards were met or exceeded

**Yellow Circle** – Results were within 5% of standards

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

