Retirement **A**dministration **S**ervice **C**enter

CUCRA CUCEA Conference:
Open Enrollment planning

October 26, 2022

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New vendor partner 1

Open Enrollment 2

Member contact strategy 3

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The issues we are facing

- Members are unable to reach RASC:
  - **Incoming call volumes** have **increased** an average of **29%** from the previous year
  - Following the implementation of Navitus we received **19,277** calls during the month of **January**
    - Volumes are **trending down in recent months**, with **11,786 calls** received in **September, but remain higher than 2021**

- RASC is not staffed to support the incoming call volume. As a result:
  - Members are experiencing **extensive hold times** to speak with a representative
  - Members who elect a **callback** are experiencing **significant delays**
  - Members are **reaching out across the system** to get support to reach RASC

- We are unable to timely hire approved vacancies to reduce the above impacts prior to:
  - Upcoming **open enrollment** and **post-open enrollment** periods
  - **2023 new year activities** (W2s, 1099, etc.)

UNIVERSITY OF CALIFORNIA Results as of October 25th

1. We are leveraging Call Experts for **proactive outreach** and call support

2. We are **expanding functionality** within **Roots**:
    –   Expanding access for campus support (HCFs, Benefit Professionals and Retirement Centers)

3. We are in active discussions with **current UC vendors** who specialize in **large scale recruitment**:
    –   Accelerate hiring and onboarding for 67 vacancies

4. We are contracting with **UnifyHR** who will provide **incoming and outbound call support**:
    –   Engagement begins mid-October with Open Enrollment
    –   Transition to Tier one incoming call support

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Call Center Services

Benefits for people, by people

We do more than administer benefits and compliance services. We provide partnership with a higher purpose – simplifying life for employers, and helping participants make the most of their benefits and save for healthcare needs.

Our expert team is supported by advanced technology that ensures ease and efficiency. The result is a simple, smooth experience employers and plan participants can count on. That's our promise as we aspire to make a difference for others, every day.

Our Goal

- **Seamless support**

- **Expand call capacity to reduce call hold times**

- **Telephony call routing and two-way system integration**

- **Limited Roots system access to assist callers**

- **Improved call documentation in UnifyHR system for enhanced call analytics**

- **Allow UC RASC team to focus on more complex issues**

Call Center Expectations

Service Description	Open Enrollment Support	Year-Round Support
Purpose	• Call Triage • Password Resets • Annual Election Verification/Confirmation • Caller redirects (complex questions to RASC)	• Call Triage • Password Resets • Document Receipt Verification • Tax Form Requests • General Inquiries • Caller Redirects (complex questions to RASC) Proactive outreach campaigns of various UC sponsored themes as time permits
Service Hours	7:00am – 4:30pm PT (Mon – Fri)	7:00am – 4:30pm PT (Mon – Fri)
Average Speed to Answer	2 minutes	2 Minutes
Anticipated Handle Time	8 minutes	TBD
Projected Daily Call Volume	500 Inbound calls per day	300 Inbound call per day - Outbound TBD

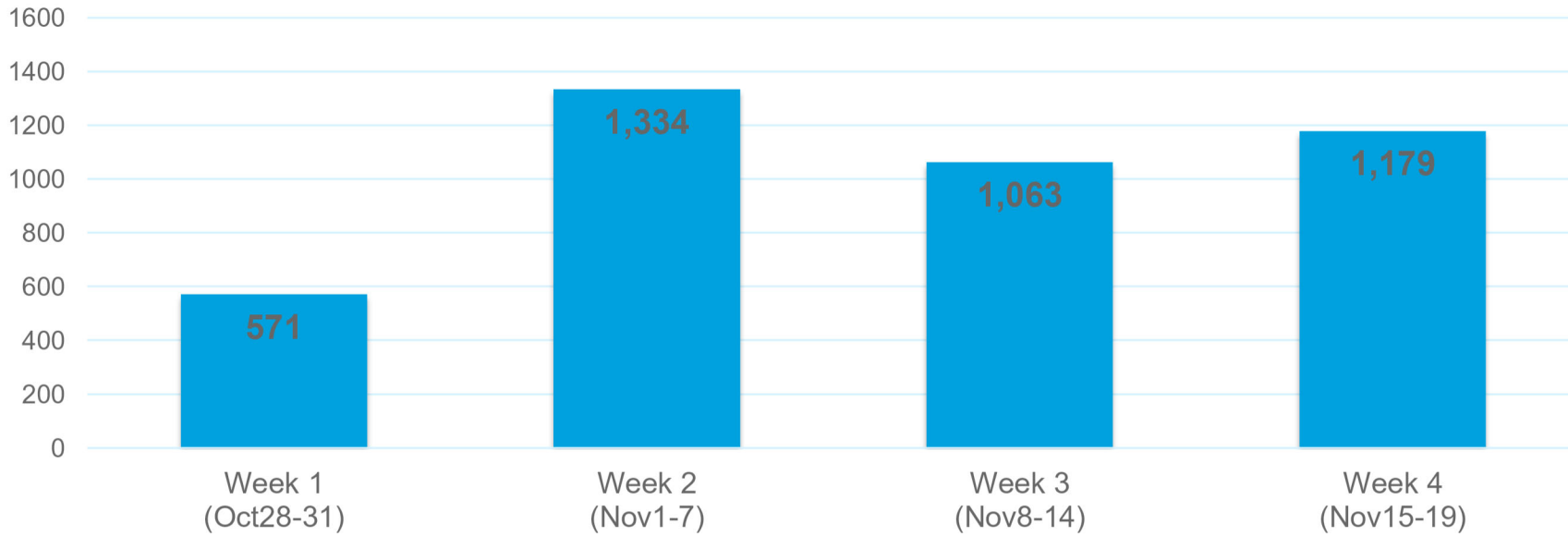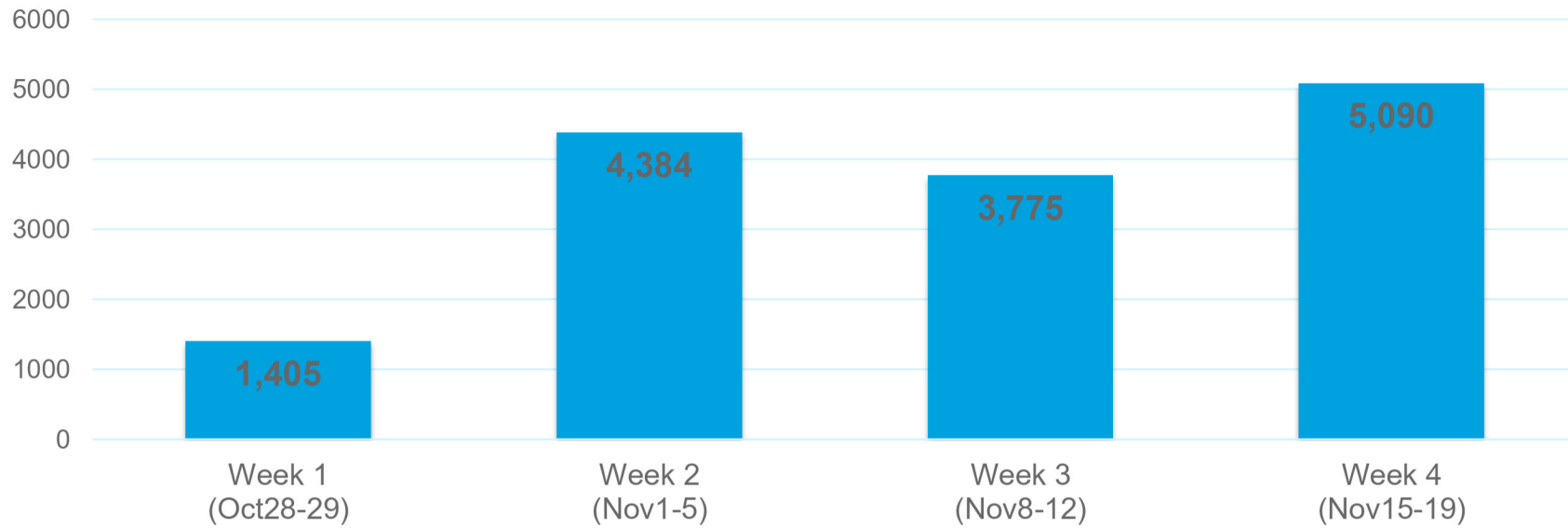1. **New vendor partner**
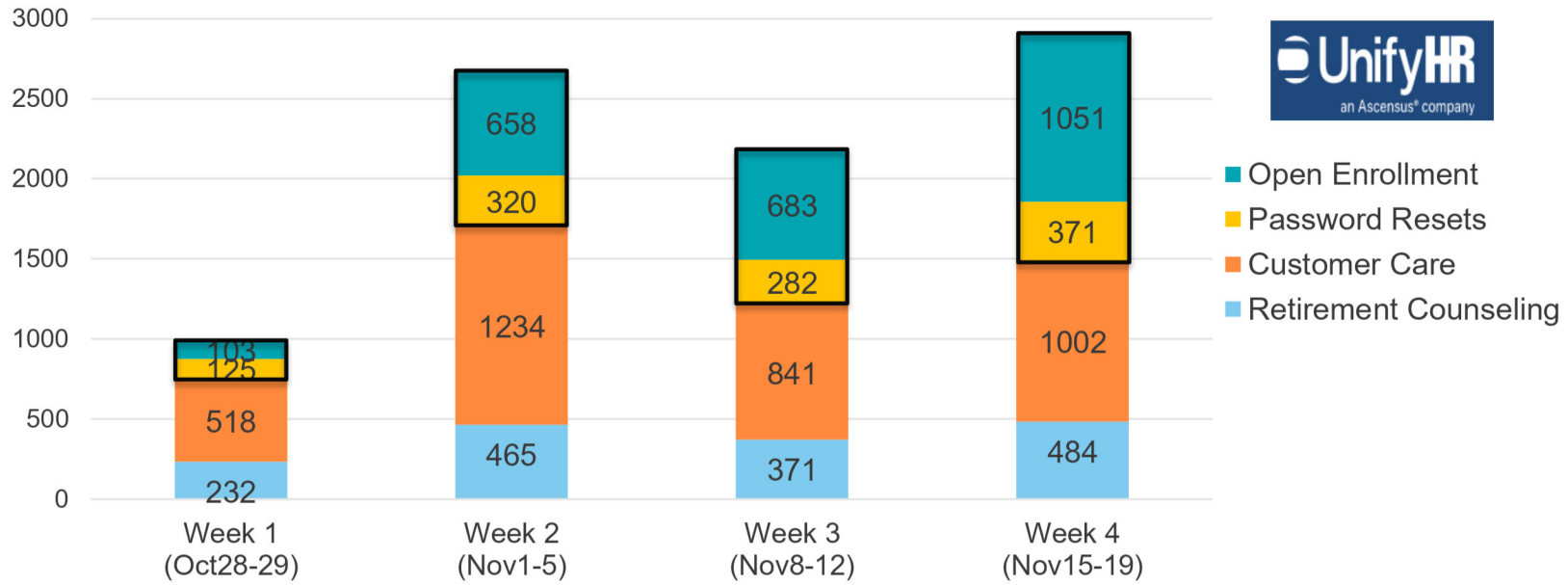
2. **Open Enrollment**

3. **Member contact strategy**

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Number of calls received per week

We will:

- Begin taking calls at **7 am**

- Have a dedicated Open Enrollment queue

- Partner with the **UnifyHR team**, who will:
  - Support incoming **open enrollment calls**
  - Support **password reset** and **unlock requests**

- Continue to focus on **normal business operations** and **complex open enrollment queries** as needed

We are asking our campus and location partners to:

- **Direct all open enrollment questions and password reset requests to: 1-800-888-8267!**

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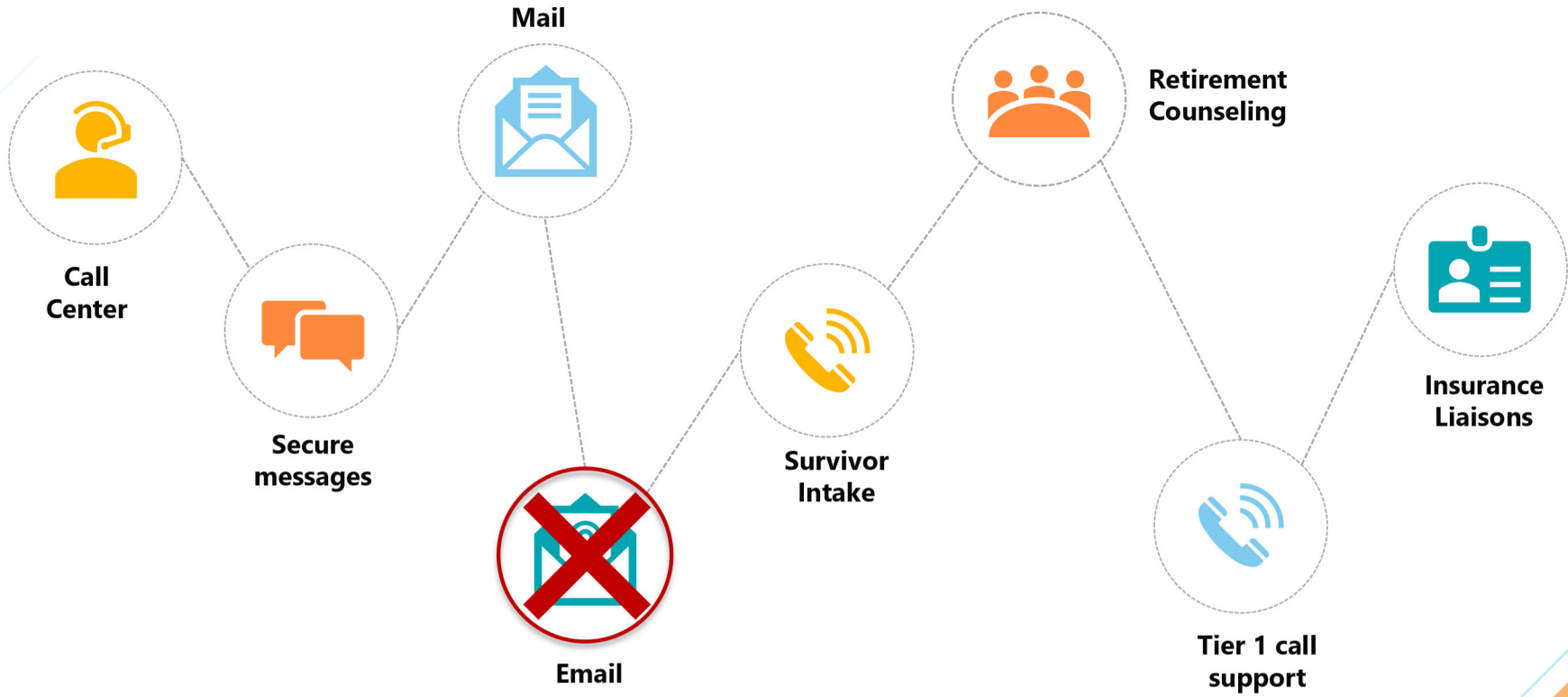**New vendor partner**

1

Open Enrollment

2

Member contact strategy

3

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- Strategic Goals:

  - **Member Services & Customer Satisfaction**: Provide trustworthy communications and an exceptional contact experience to our members
  - **Quality**: Deliver accurate and timely results through highly skilled team members
  - **Technology**: Adopt and embed existing and new technologies into our daily work and culture
  - **Relationships**: Build strong, collaborative relationships & partnerships with campuses; our partners and stakeholders
  - **Execution**: Encourage and drive high performance to achieve timely and optimal outcomes

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Member contact channels update

Once fully implemented, members will have **expanded channels to connect with RASC**:

- We are reinstituting **retirement counseling** with a dedicated team to support prospective retirees
- We are developing a new **survivor intake** process with a **dedicated team**
- We are hiring **insurance liaisons** to support members with **emerging insurance queries**

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Future state: More channels for member contact

Incoming calls
RASC Call center: Tier 2

UCRAYS
Secure messages

Document receipt
Incoming mail and fax

Dedicated phone line
Survivor intake

Scheduled appointments
Retirement Counseling

Tier 1 call support
UnifyHR

Direct contact
Insurance Liaisons

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Thank you

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