SYSTEMWIDE SHARED SERVICES – RETIREMENT ADMINISTRATION SERVICE CENTER

Joint Benefits Committee

Survivor Benefits

CUCRA–CUCEA | October 28, 2026

Calvin Turner • Bill Perez • Sean Simpson

UNIVERSITY OF CALIFORNIA

Priority is based on impact and case age

Monthly income, health coverage, and aged cases receive focused attention.

01	**Monthly survivor income**	Prioritize continuation of pension benefits
02	**Health-coverage risk**	Coordinate time-sensitive cases with Insurance
03	**Aged cases**	Review cases over 30 days by stage and blocker

Daily aged-case review in place since February 2026

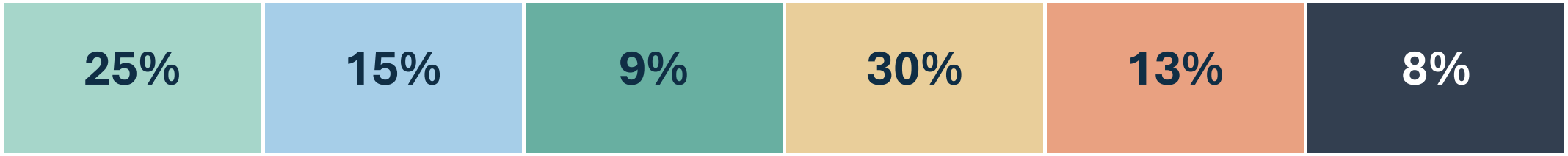
JBC Report - Survivor Processing recommendations 1:A and 1:F

UC Survivor Benefit Continuation

Processing of ongoing UCRP survivor income and contingent annuitant benefits for eligible recipients.

CURRENT STANDARD • 80% WITHIN 90 DAYS

Processing-time distribution:



KPI WITHIN 90 DAYS **49%**

COMPLETED APPLICATIONS **833**

PROPOSED FUTURE • 90% WITHIN 30 DAYS

JBC Report - Survivor Processing recommendation 1:B

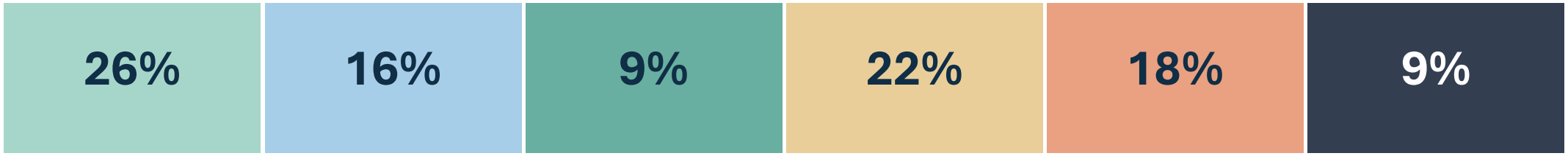
Processing time measured from receipt of all required documentation to benefit initiation.

One-Time Basic Death Benefit

One-time benefits to eligible beneficiaries

CURRENT STANDARD • 80% WITHIN 90 DAYS

Processing-time distribution:



KPI WITHIN 90 DAYS 51%

COMPLETED APPLICATIONS 1,371

PROPOSED FUTURE • 90% WITHIN 60 DAYS

JBC Report - Survivor Processing recommendation 1:B

Processing time measured from receipt of all required documentation to benefit initiation.

Capacity supports sustained improvement

Reduce aged inventory while protecting incoming work.

CAPACITY REQUEST

Additional staffing across all RASC business areas, including Survivor, to improve processing timeliness, reduce aged inventory, and sustain incoming workloads.

SURVIVOR SERVICE EXPERTISE

Introduced dedicated Survivor processing training to all Contact Center staff to provide beneficiaries with accurate and timely assistance.

ONE-TIME DEATH BENEFIT AWARENESS

- **Retiree education**
- **Beneficiary packets**
- **UCNet**
- **New Dimensions**

JBC Report - Survivor Processing recommendations 1:C, 1:D and 1:E

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RASC Performance Metrics

CUCRA–CUCEA | October 28, 2026

Bill Perez | Ming Wung

RASC SERVICE STANDARDS *

Current standards → proposed future commitments

METRIC	CURRENT	FUTURE / PROPOSED
SERVICE RETIREMENT		
Benefit initiation	90% / 30 calendar days	90% / 30 calendar days
SURVIVOR BENEFITS		
Overall initiation	80% / 90 calendar days	Separate by benefit type
Benefit continuation	Combined KPI	90% / 30 calendar days
One-time death payment	Combined KPI	90% / 60 calendar days

METRIC	CURRENT	FUTURE / PROPOSED
CONTACT CENTER — CALLS & CORRESPONDENCE		
Calls answered	85% / 180 sec	80% / 90 sec
Call abandonment	Not specified	Operating-hours rate to be determined
Correspondence response	85% / 2 business days	90% / 2 business days
RETIREMENT READINESS		
Appointment scheduling	Not specified	6-week turnaround time to meet with a counselor

JBC Report — Recommendation 3

* All future service standards will include a Customer Satisfaction (CSAT) component to assess member satisfaction.

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Cybersecurity Update

CUCRA–CUCEA | October 28, 2026

Matt Tindol

Cybersecurity Update

FRAUD MONITORING	No confirmed fraud since last year; suspicious activity remains under investigation.
IDENTITY VERIFICATION	Piloting IDVerse selfie and ID verification in the RASC Contact Center.
ACCOUNT VERIFICATION	Piloting the BNY AVS account verification tool.
RISK ANALYTICS	Consultant review of historical data for pattern identification and future risk scoring.
ACCOUNT SECURITY	Retooling UCRAYS password resets to use one-time passcodes (OTP) only, replacing knowledge-based authentication (KBA).