



# Member Services

Board of Trustees Update - December 7, 2018

# Agenda

- ▶ Department Organization - A quick overview
- ▶ Team Updates
  - ▶ Year-end preparation
  - ▶ Accomplishments

# Department Overview

- ▶ Largest Department in TMRS
  - ▶ 29 Full-time employees / 1 Temporary Part-timer
- ▶ 3 Managers / 4 teams
  - ▶ Membership (Contributions)
  - ▶ Retirement (Payments)
  - ▶ Support Services (Special Handling)
  - ▶ Call Center (Incoming Calls / Online Support)
- ▶ Business Process Analyst
- ▶ Administrative Aide

# Membership Team

- ▶ 6 Membership Analysts
- ▶ Contribution Allocation
  - ▶ Just under 900 payrolls processed each month
- ▶ City Portal/City Contacts
  - ▶ Strong partnership with cities
  - ▶ Ongoing communication to decrease paper and convert to electronic payroll reporting and contribution payments
- ▶ Service Credit Adjustments
  - ▶ Buybacks, Restricted Prior Service Credit, Military Service
  - ▶ Corrections
- ▶ Member Account Maintenance
  - ▶ Address/Name changes
  - ▶ Beneficiary updates

# Membership Team



- ▶ Preparing for year-end
  - ▶ Data clean-up (missing dates of birth/gender)
  - ▶ Late/missing payrolls
  - ▶ Increased communication with cities to submit November and December payrolls as soon as possible.
  
- ▶ Recent accomplishments:
  - ▶ Converted paper-driven payroll process to electronic workflow
  - ▶ Work-from-Home pilot expanded to include 2 analysts
  - ▶ Converted 33 cities to electronic payroll submission

# Retirement Team

- ▶ 6 Retirement analysts
- ▶ Benefit payments
  - ▶ Retirement applications - over 3500 in 2017
  - ▶ Refund applications
  - ▶ ACH returns
  - ▶ Check Replacements
- ▶ Deaths
  - ▶ Retiree, member and beneficiary deaths
- ▶ Retiree account maintenance
  - ▶ Address/Name changes
  - ▶ Beneficiary updates
  - ▶ Withholding updates
  - ▶ Direct deposit updates

# Retirement Team

## ▶ Preparing for year-end

- ▶ Expecting 900+ new retirement applications in Dec/Jan
- ▶ Address data cleaned-up for statement and 1099 mailings
- ▶ Proof-of-life project



## ▶ Recent accomplishments

- ▶ Expanded direct deposit functionality to include lump-sum payments, back-payments, replacement payments and supplemental refunds to retirees
- ▶ Proof-of-life project complete

## ▶ New Project

- ▶ Converting paper retirement application process to an electronic workflow

# Support Services Team

- ▶ 4 Support Services Analysts

- ▶ Domestic Relations Orders

- ▶ Pre/post retirement divorces
- ▶ Spousal / child support orders

- ▶ Garnishments / Assignments

- ▶ IRS Levies
- ▶ HELPS insurance premium payments  
(Healthcare Enhancement for Local Public Safety)

- ▶ Special Death Processing

- ▶ Estate issues
- ▶ Beneficiary issues
- ▶ Contested benefits

- ▶ Endorsement Issues

- ▶ Powers of Attorney
- ▶ Direct Deposit Trusts



# Support Services Team



## ▶ Preparing for year-end

- ▶ HELPS insurance premium changes - over 2000 changes
- ▶ Manual COLA adjustments
- ▶ IRC 415 adjustments
- ▶ Increased number of deaths and divorces around holidays

## ▶ Recent Accomplishments

- ▶ Completed direct deposit solicitation for cities receiving HELPs payments from TMRS - Approximately half of the payments paid to cities are issued via direct deposit
- ▶ Completed research and followed-up on over 400 legacy retirement deaths

# Call Center

- ▶ 7 Call Center Analysts
- ▶ All incoming calls
  - ▶ Over 86,000 calls in 2018
  - ▶ Live voice / One-stop shop
- ▶ Annuity / Account balance verification
  - ▶ Social Security
  - ▶ IRS
  - ▶ Financial institutions
- ▶ Address / Name changes
- ▶ MyTMRS / City Portal tech support
  - ▶ Login issues
  - ▶ Password resets
- ▶ Estimates - desktop faxing
- ▶ Email Correspondence
  - ▶ 5000 web emails
  - ▶ 2000 proportionate service verification
- ▶ Miscellaneous mail

# Call Center



## ▶ Preparing for year-end

- ▶ Increased call volume December - March
- ▶ 1099 / COLA calls in January
- ▶ Statement calls in March

## ▶ Recent accomplishments

- ▶ Implemented work-from-home program

# Management Team

## ▶ Team Management

- ▶ Call Center Manager
- ▶ Membership Manager
- ▶ Retirement / Support Manager

## ▶ Administrative Aide

- ▶ Front desk reception
- ▶ Supplies Inventory
- ▶ Member Services support

## ▶ Business Process Analyst

- ▶ SOC1 / Financial audit engagements - new auditors
- ▶ Internal Audit
- ▶ PAS Assessment
- ▶ TMRS Direct Initiatives
- ▶ Business Continuity Initiatives
- ▶ Business Process Analysis

# Management Team

## ▶ Preparing for year-end

- ▶ Year-end reports
- ▶ Work completion
- ▶ Data clean-up
- ▶ Actuary / Audit inquiries

## ▶ Ongoing /Future Initiatives

- ▶ Strategic Goals
  - ▶ Online services/ Surveys
  - ▶ Call Center Assessment
  - ▶ Real-time statistics and analysis
- ▶ Security enhancements



Questions?