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

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

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
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 HELPsv 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?