CUCRA/CUCEA
Fall Meeting

Ellen Lorenz, Director
Michael Waldman, Manager
Retirement Administration Service Center
October 26, 2016

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OPEN ENROLLMENT Oct. 27–Nov. 22, 2016

The RASC leverages continuous improvement, enhanced technology and self service to increase our members' ability to understand, plan for and access retirement plan and retiree health benefits.

Annually, the RASC supports…

67,000
Retirees, dependents and surviving family members

34,000
Former employees

$2.8 billion
Annual benefit payments

110,000
Telephone calls answered

20,000
Pieces of written correspondence answered

5,000
Annual retirement elections processed

90,000
Documents scanned and indexed per year

Retirement Season Snapshot

Personal Retirement Profiles (PRPs): April 1 – July 31

2016	1,200 Actives
	200 Inactives
	1,400 Total

Retirement Elections Processed

July 2016	2,100
July 2015	2,200
FY 2015-16	5,067
FY 2014-15	5,344

70% of July active retirements were supported by the RASC for retirement counseling and document preparation services

or

1,200 of 1,800 July 2016 active retirements

2016 Retirement Choice Program Readiness

- Developed RASC-specific overview training
- Presented weekly RASC-specific training
- Leveraged OptionFinder polling tool quizzes that provide instant feedback on learning
- Attended all-day systemwide training (all RASC staff)
- Delivered UCRP basics training to Fidelity
- Reviewed Retirement Benefits Decision Guide, Fact Sheet and other publications with staff
- Updated retirement estimator and modeling tools
- Documented operating instructions in Customer Relationship Management (CRM) tool

Preparing for Retirement
RASC Presentations

On-site, in-person – since mid 2015

- Delivered 18 presentations reaching 1,400 employees
- On average, 96% of respondents were either Very Satisfied or Satisfied with the presentation (20% response rate)

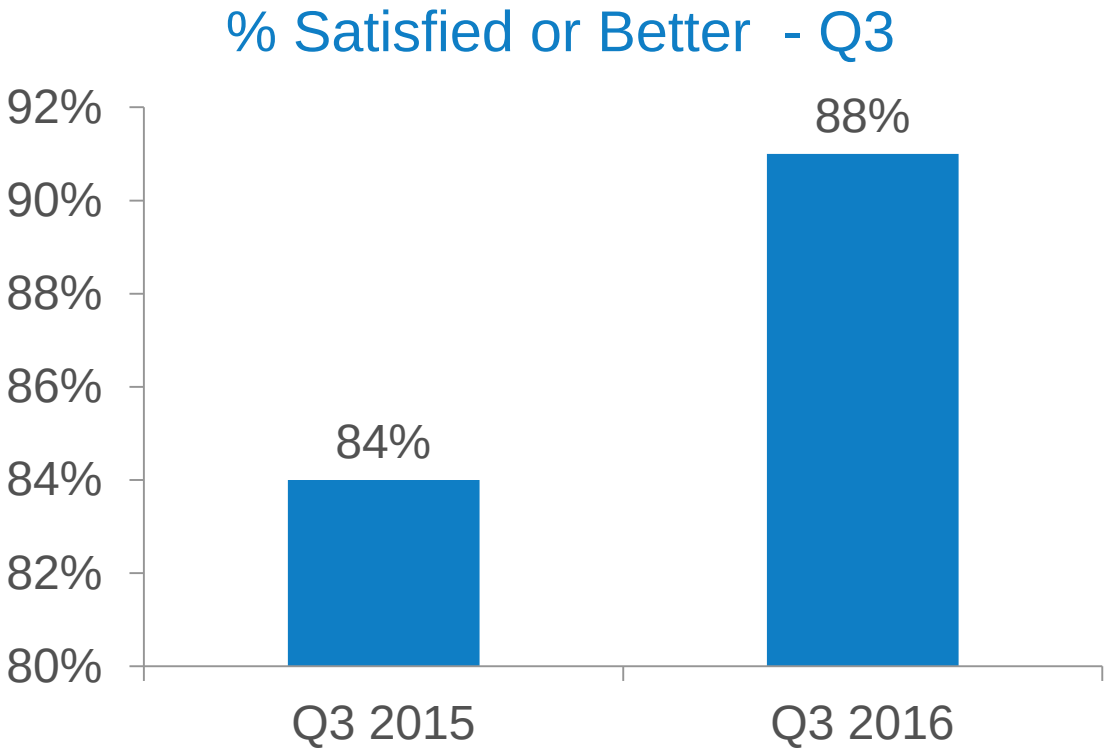
Webinar (hosted)

- Offered on second and fourth Tuesdays of every month from 10:00 a.m. to 12:30 p.m. Pacific

On-demand web

- Available on UCnet (Compensation & Benefits, Preparing for Retirement)

Customer satisfaction is trending up



47% of responses are from current faculty or staff

18% survey response rate

1,470 responses received
8,095 invitations sent

Open Enrollment Update

- Hired six TOPS staff
- Completing onboarding and training

Questions?

Thank you

Photo of UC Santa Cruz
(UC identity archive)

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CUCRA/CUCEA Fall Meeting

Kris Lange, Director
Benefit Programs Vendor Management
October 26, 2016

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Medical Plan Satisfaction Surveys

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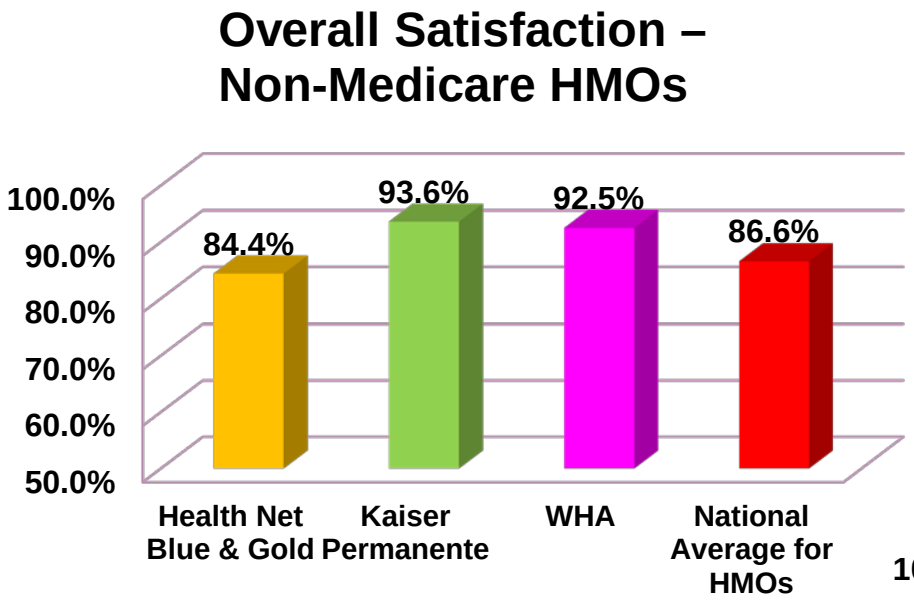
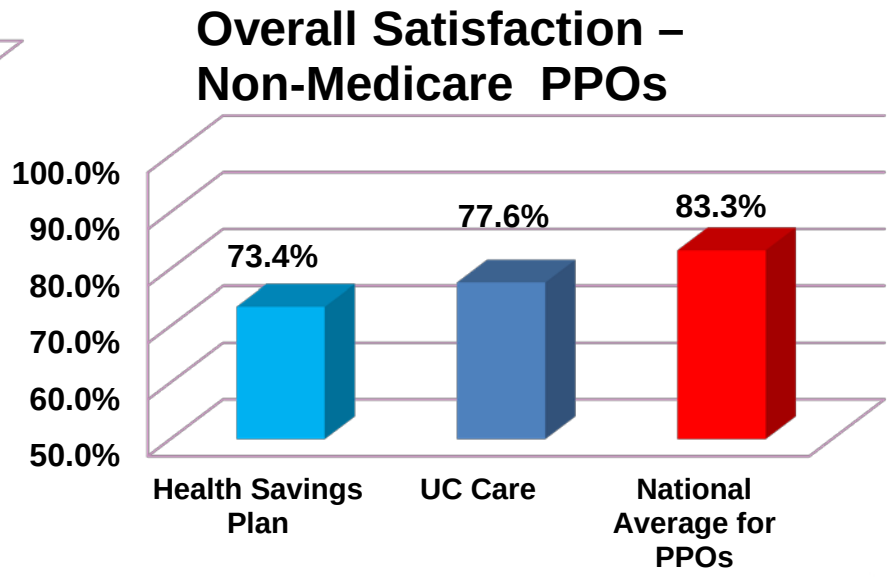
Overall Satisfaction by Health Plan





Survey of Medicare Plan Members

1st time Medicare Members have been surveyed by UC

Plans surveyed:

- **Health Net Seniority Plus**
- **Kaiser Senior Advantage**
- **Blue Shield Medicare PPO & High Option**

56%

response rate

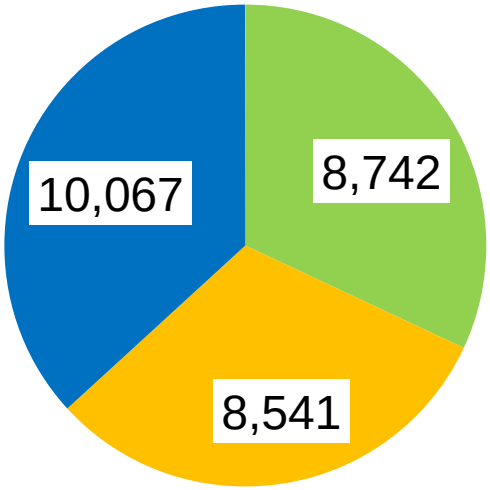
Launch Date: March 10, 2016
End Date: June 5, 2016
First mail: March 10, 2016
Second Mail: April 4, 2016
Phone interviews non-responders: April 21, 2016

CUCRA/CUCEA request

Enrollment and Survey Highlights

Responders closely reflect enrollments

Total Medicare Enrollment

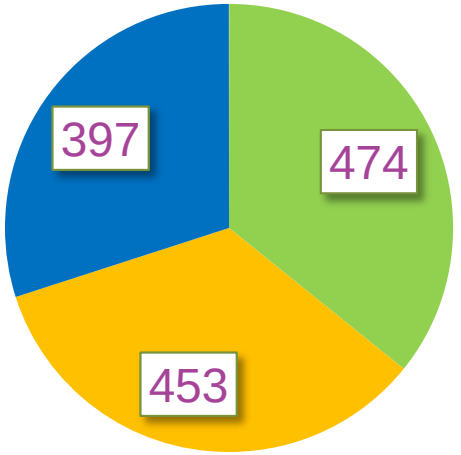


Kaiser Senior Advantage

Health Net Seniority Plan

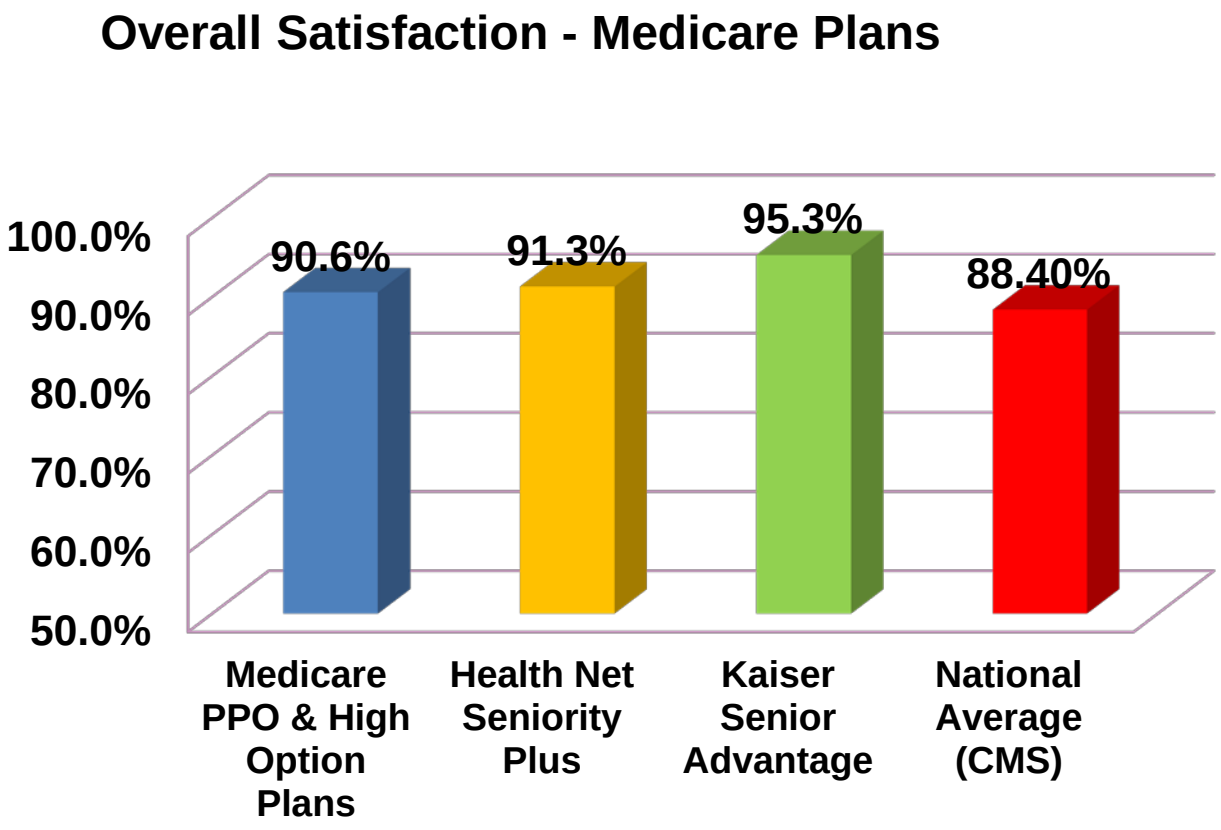
Medicare PPO/High Option

Numbers of Survey Responders



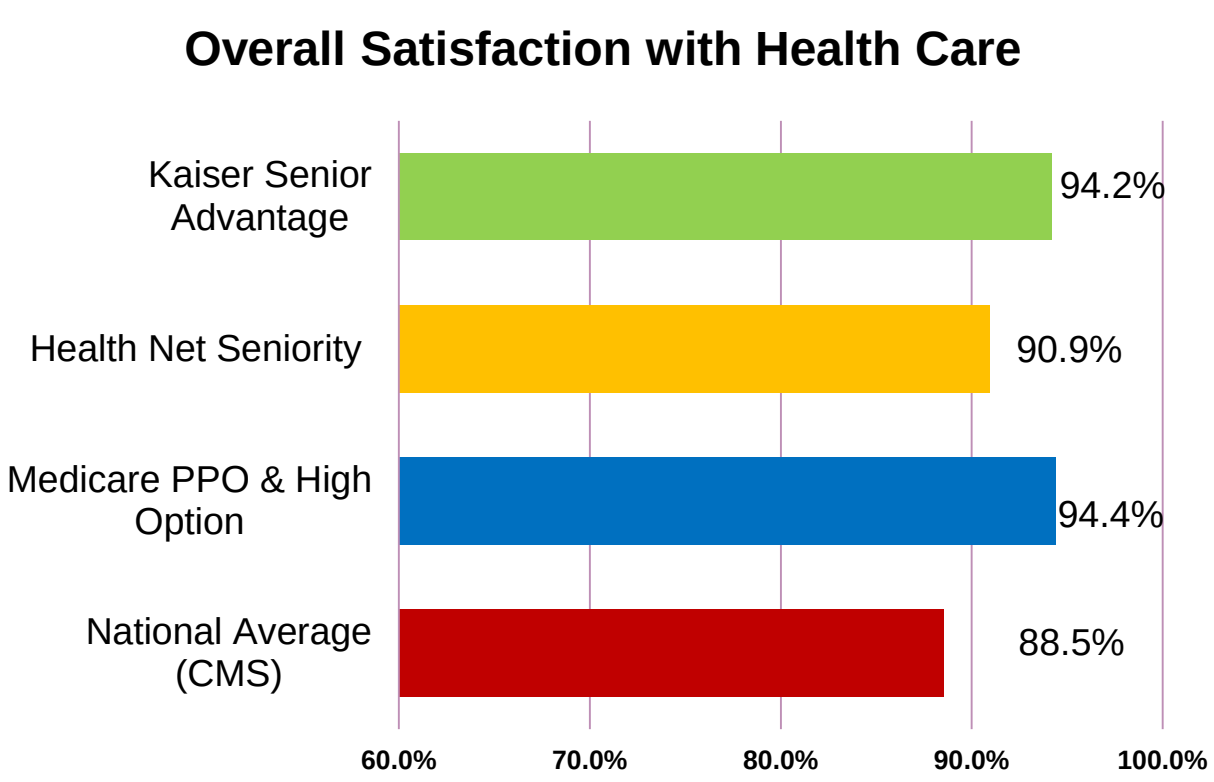
UC Medicare Plans Survey Results

Overall Satisfaction by Health Plan



All UC Medicare plans are above the National Average

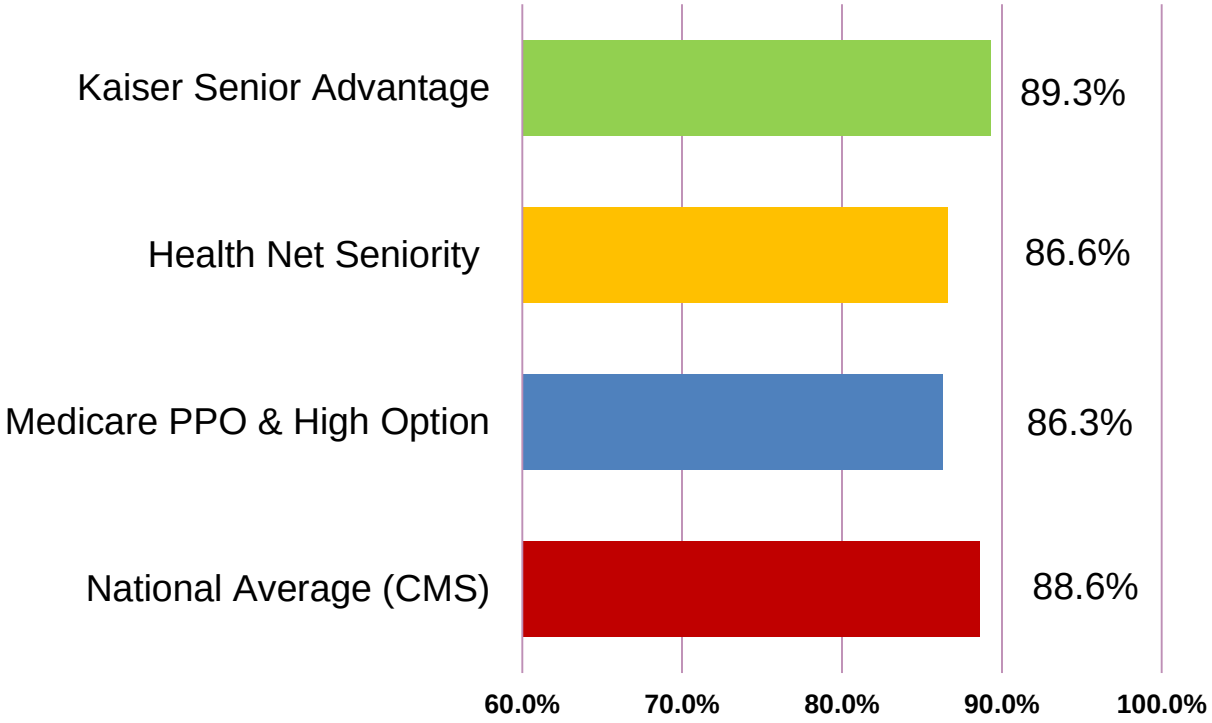
Overall Satisfaction with Health Care



All our members are satisfied with their Health Care

Specialist Experience

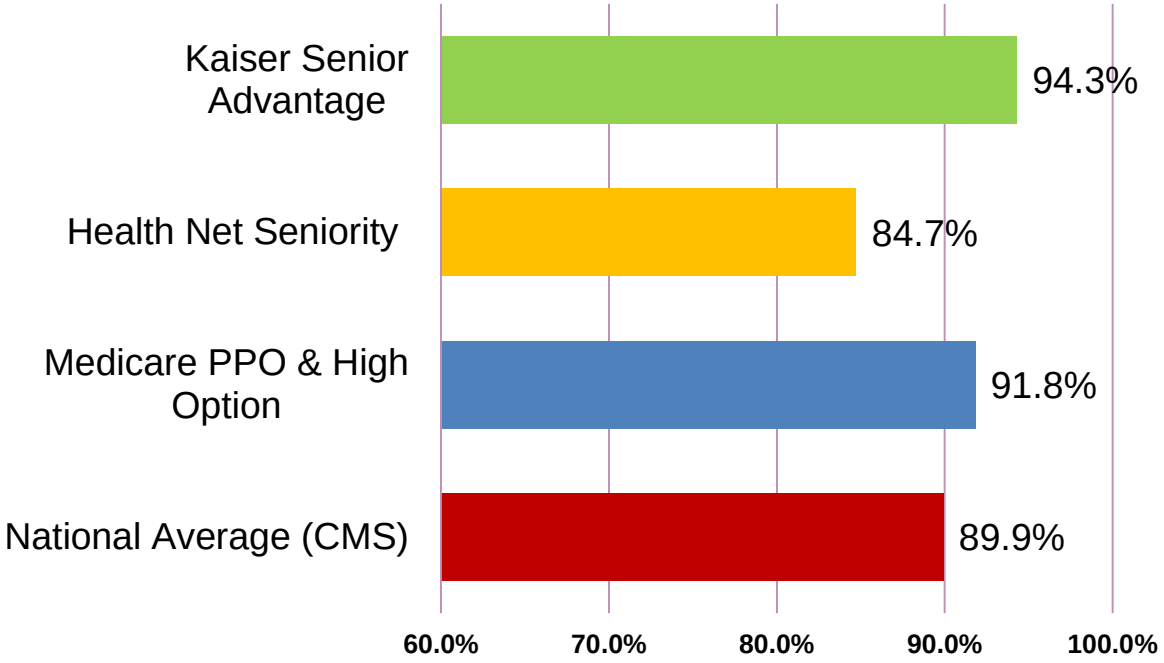
How Easy to Get Appointments with Specialists



A opportunity for improvement

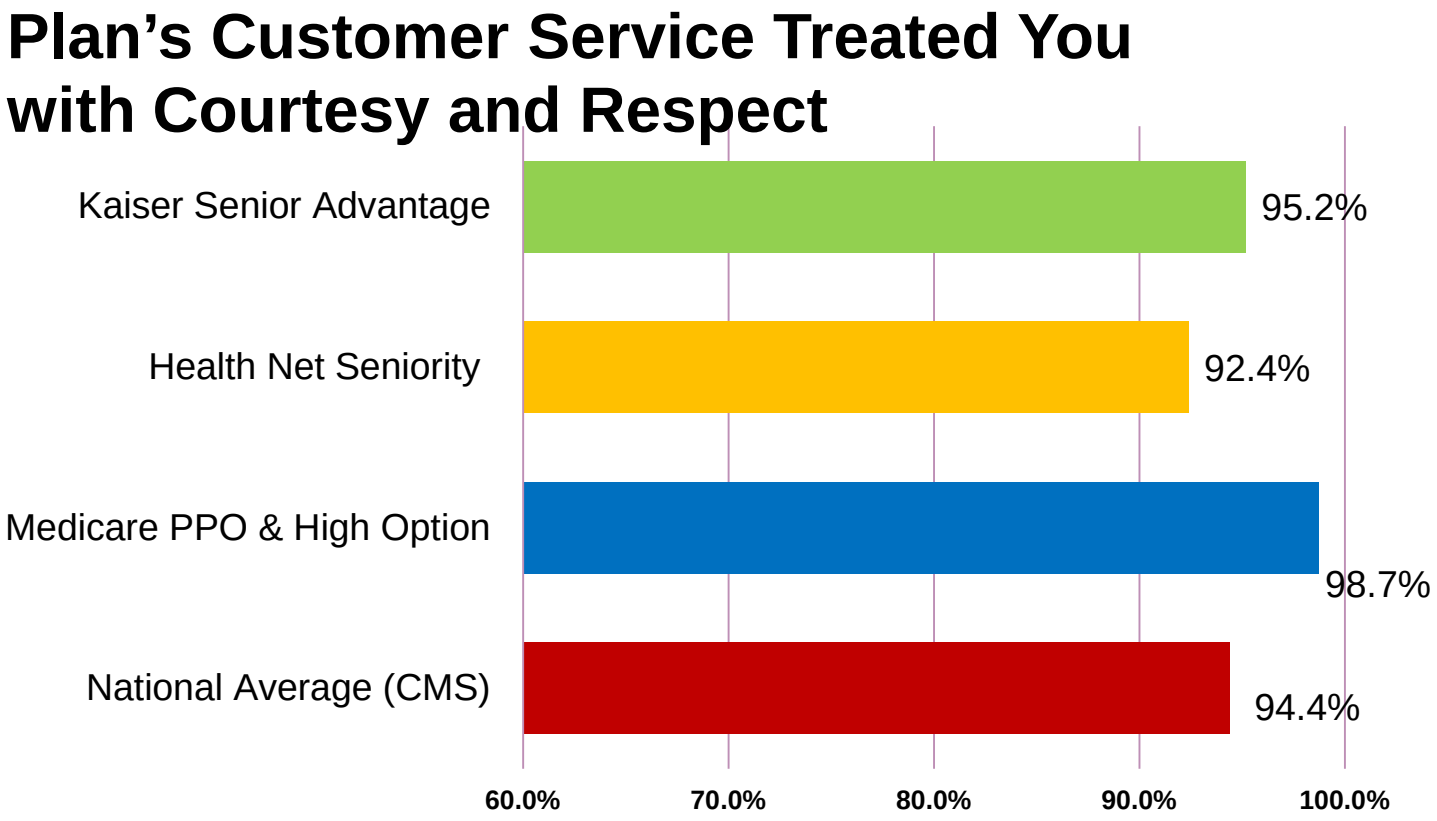
Getting Needed Care

Get Care As Soon As Needed

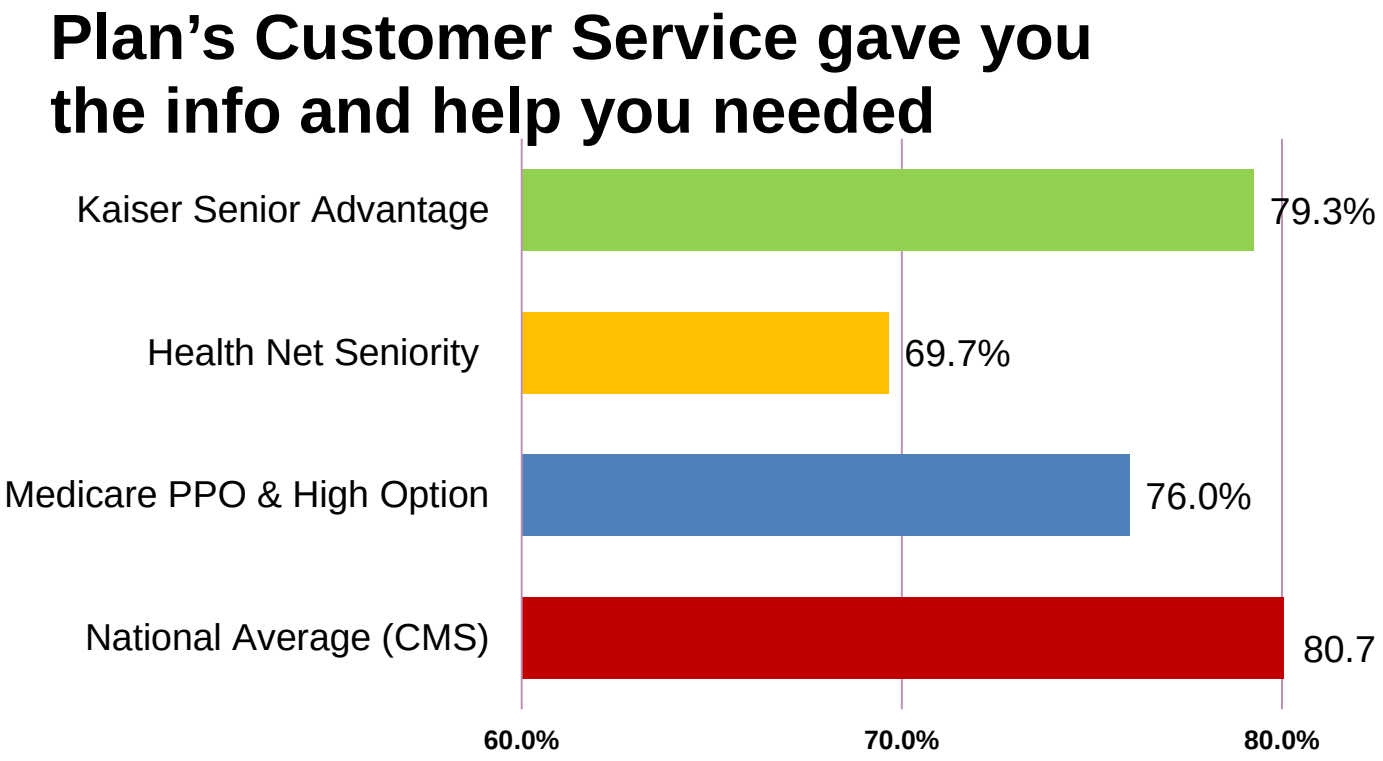


Health Net is below the national average

Customer Service Experience

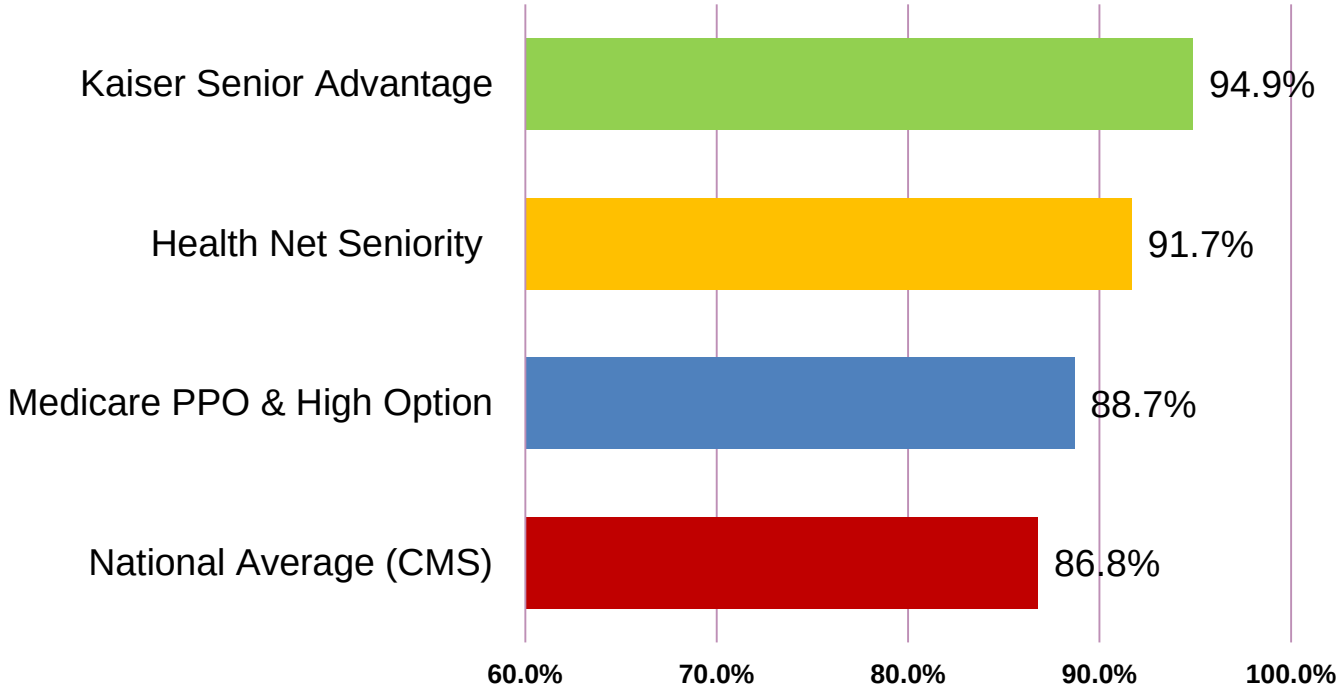


Customer Service Experience



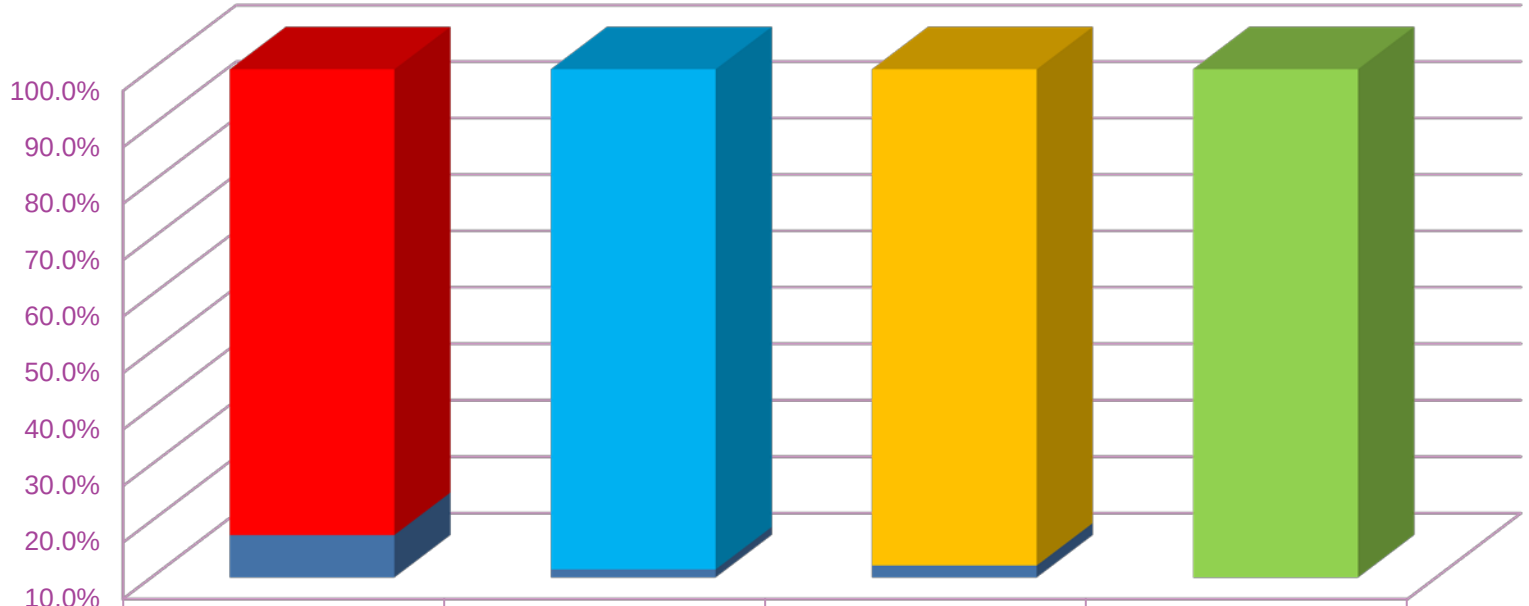
Prescription Plan

Overall Satisfaction with Drug Plan



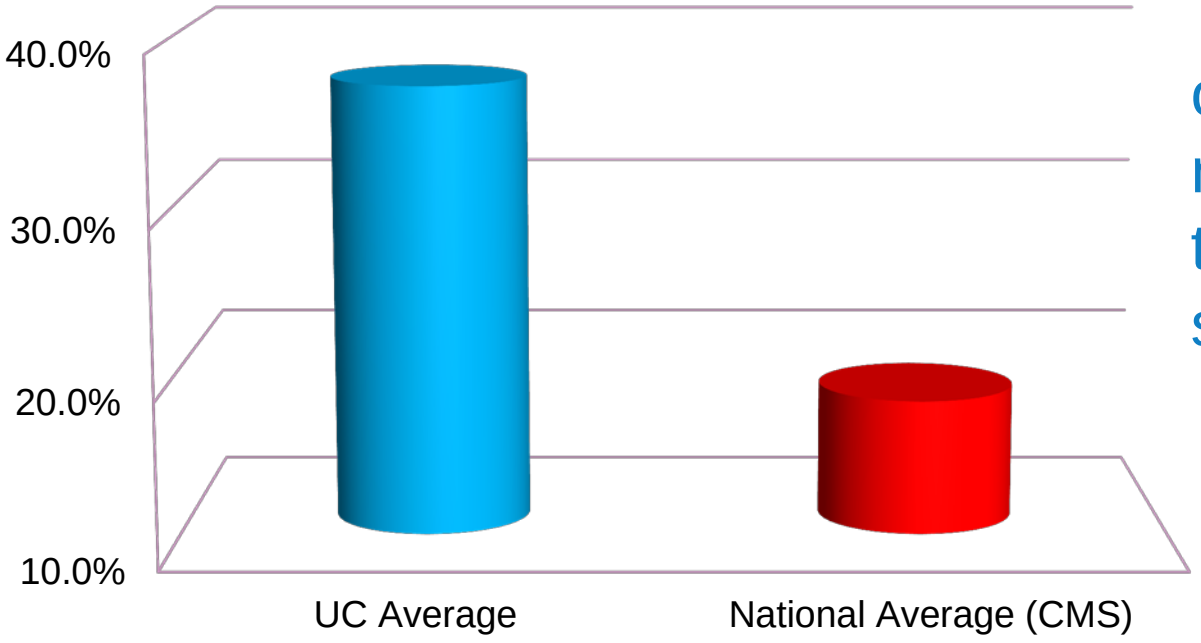
Prescription Plan

Your Prescriptions were covered by plan



	National Average (CMS)	Medicare PPO & High Option	Health Net Seniority Plus	Kaiser Senior Advantage
Yes	82.5%	88.6%	87.9%	98.5%
No	17.5%	11.4%	12.1%	1.5%

Prescription Plan –
Mail Order Usage



37.2%

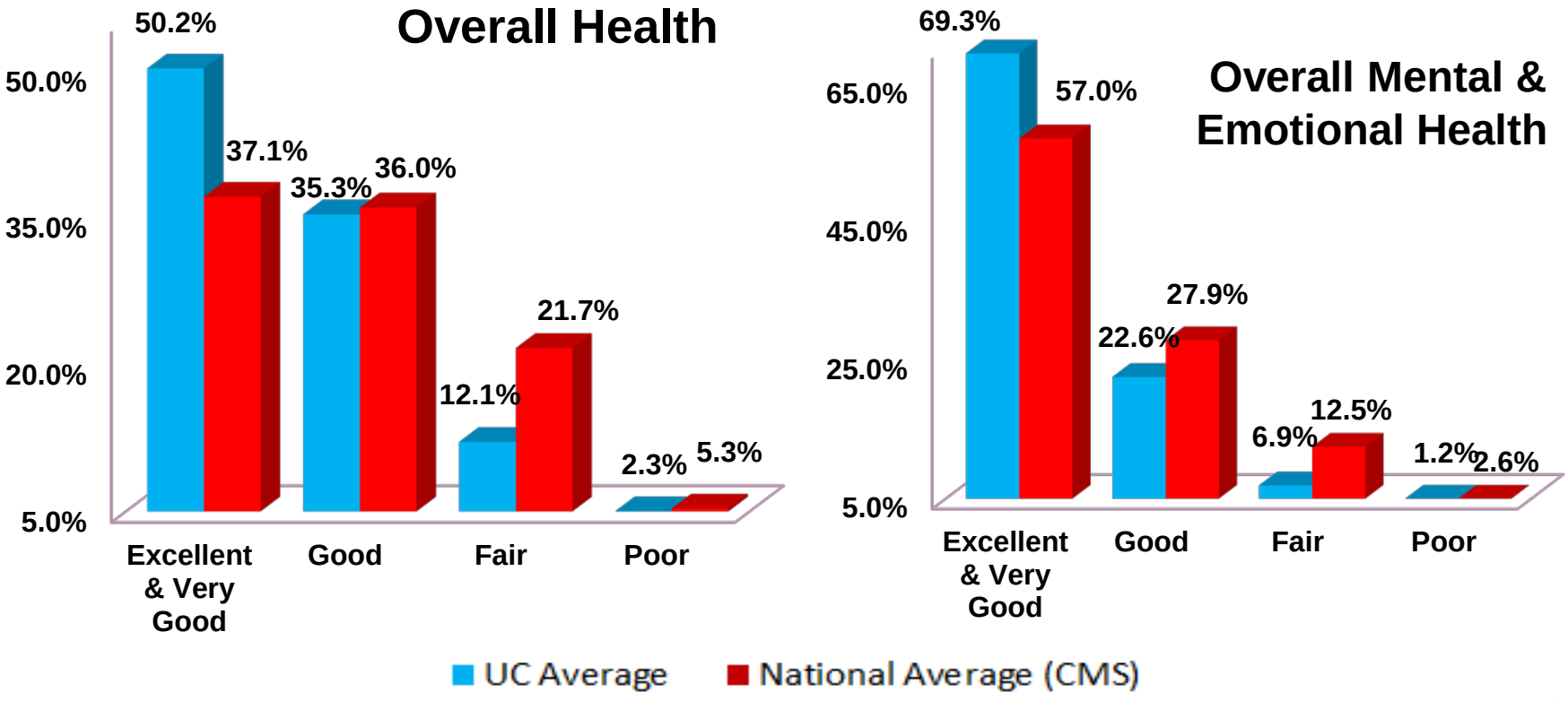
of UC Medicare members used the mail order service

60.3% of Kaiser responders have used mail order – the highest % across all UC Medicare plans.

Survey Respondents' Health Status (self-reported)

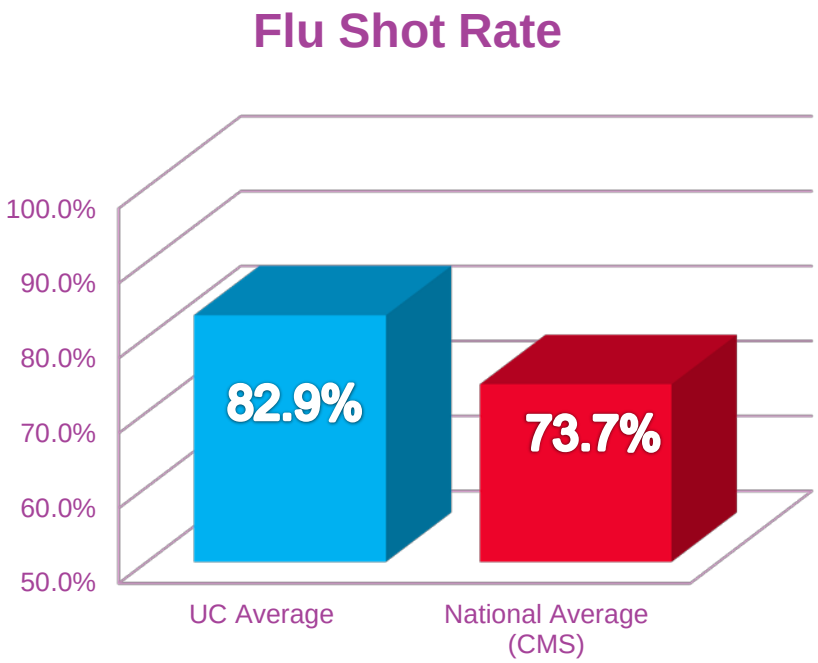
Respondents' Health Profile

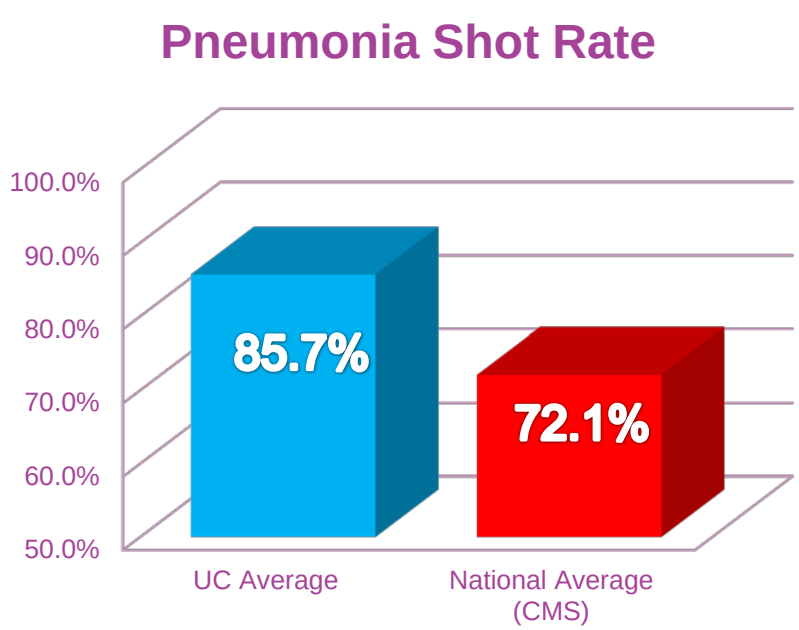
UC Medicare members rate their health better than national average!



Vaccination Rates

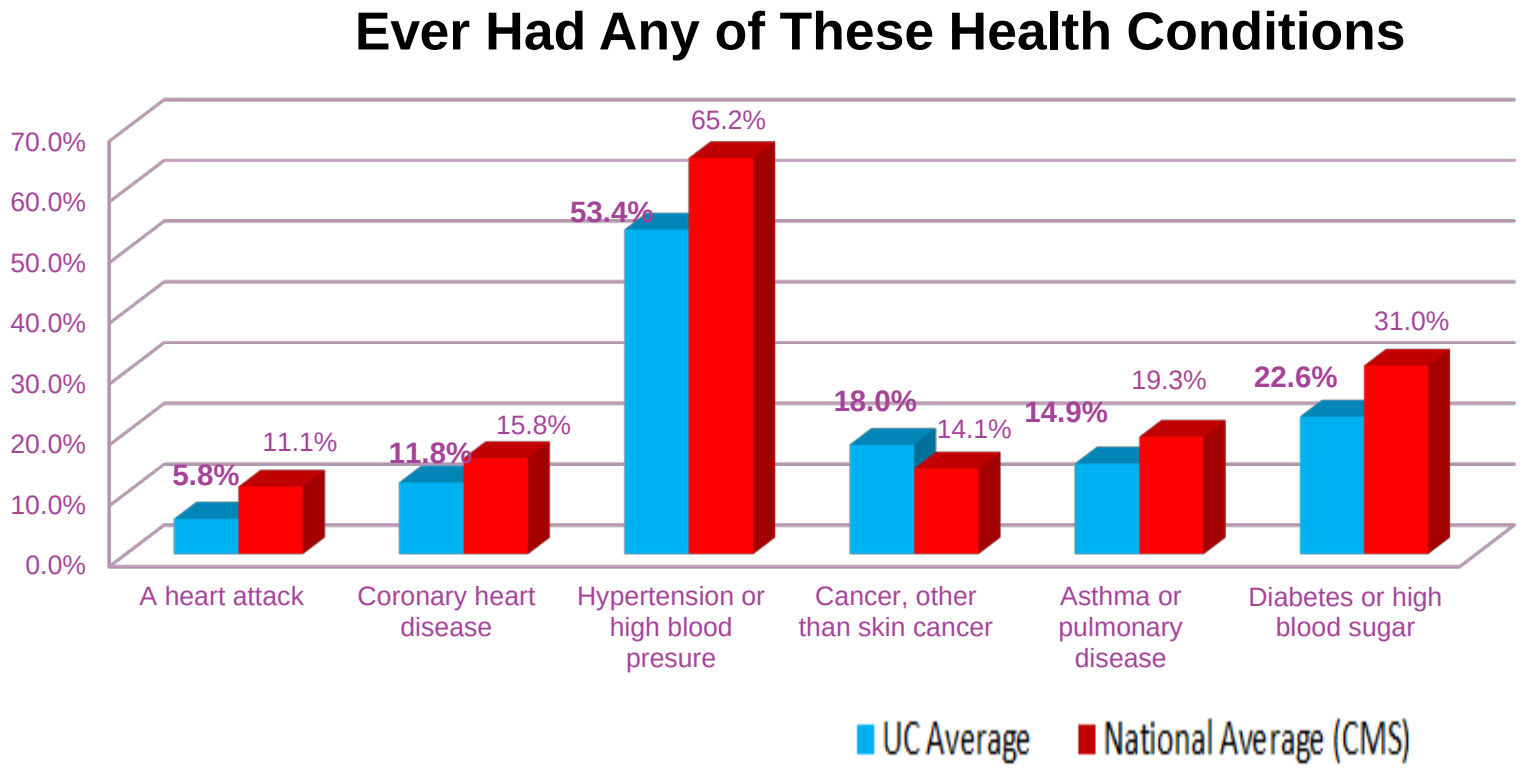
UC Medicare members receive vaccinations at rates better than national average!





Member's Health Profile

Only cancer related issues are above the national average



Domestic Partner Policy Review

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Different Rules for H&W vs. UCRP

Work in progress

- Updating and clarifying websites and publications
- Letter to all *employees with DPs* enrolled in H&W regarding the UCRP requirements

Does *NOT* impact current retirees

- Retirees are asked for domestic partner information at point of retirement

Different Rules for H&W vs. UCRP

Definition of eligible domestic partner

- **Health & Welfare**
  - Same gender – no age restriction
  - Opposite gender – one partner must be at least age 62 and eligible for social security based on age
- **UCRP**
  - No age restriction for either same or opposite gender

Different Rules for H&W vs. UCRP

Documentation Requirements for non-registered domestic partners

- **Health & Welfare**
  - No affidavit required, but must submit documentation upon request from SECOVA as part of FMEV
- **UCRP**
  - UBEN250 must be filed
  - Documentation must be in place one year before death in order to receive survivor benefits

QUESTIONS?

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