

BENEFIT SERVICES

2024 ACCOMPLISHMENTS



MEMBER SERVICES

EXCEEDED SERVICE LEVEL
(goal: 80%)
with an **AVERAGE SPEED OF ANSWER** under 30 seconds

94.6%



Received **703,257** calls
Answered **695,754** calls
(Answered 99% of calls received, compared to 97% for FY 2023)

CONTACT CENTER



INCREASED STAFFING to improve service level.

- Onboarded **53 CONTACT CENTER** counselors.
- Achieved an **83% RETENTION RATE** for newly hired contact center counselors.



Implemented new **AFTER-CALL SURVEY** system with streamlined questions.

Responded to **46,435** secure messages.



20 Contact center counselors assisted in **CLEARING THE "RETURNED MAIL" QUEUE**, working over 8,000 documents.



MEMBER EDUCATION AND COUNSELING

13,442 OFFICE VISIT APPOINTMENTS
1,489 WALK-INS
73 PRESENTATIONS



22,758 EXCEEDED OFFICE VISIT AVAILABILITY
(goal: 20,000)



Created a **GENERAL BENEFITS PRESENTATION** and collaborated with ERS to deliver the presentation.



Collaborated with Communications to record and upload the **INTRODUCTION TO TRS** presentation to the website.



Increased the availability of **VIRTUAL VISITS**.



Developed and delivered a **MID-CAREER PRESENTATION**.



Designed a **ONE-PAGE MEMBER RESOURCE** document with QR codes to be used at presentations.



EL PASO REGIONAL OFFICE

Developed and implemented an **ENGAGEMENT PLAN** for the Educational Service Center (ESC) Region 19.

Successfully trained three counselors and the Director on the **"READY TO RETIRE" PRESENTATION** to support statewide travel initiatives.

Created a dedicated **VIRTUAL RESOURCE** that enabled the Regional Office to **MANAGE the NUMBER and TYPES OF APPOINTMENTS** more efficiently.

Successfully facilitated **3,218** OFFICE VISITS
2,636 WALK-INS
23 PRESENTATIONS

More than **5,851** APPOINTMENTS AVAILABLE (exceeding previous FY by 2,075 appointments)



BENEFIT OPERATION SUPPORT

Workforce Management created **DASHBOARDS** to track data for Benefit Accounting and Benefit Processing.



13 Employees responsible for providing OJT received **COACHES TRAINING**.



92 EMPLOYEES SUCCESSFULLY TRAINED virtually.



10 eLEARNING RESOURCE TRAINING COURSES were created for Benefit Services.



78 SUPPLEMENTAL MATERIALS were created for Benefit Services including job aids, resource materials, and cue cards.



370 articles updated in the **KNOWLEDGE BASE** system



11,169 QUALITY ASSURANCE evaluations performed for Benefit Counseling

Implemented **OFFICE VISIT** evaluations for Member Education and Counseling



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BENEFIT PROCESSING

REFUNDS PROCESSED	63,696
ESTIMATES PROCESSED	89,474
RETIREMENTS PROCESSED	26,489
CLAIM PAYMENTS ISSUED	20,417
PROCESSING TRANSACTIONS	870,000+

Improved **SERVICE LEVELS** from FY23 to FY24:

FY23 FY24

ESTIMATES	100%	100%
RETIREMENTS	88%	90%
CLAIMS NOTIFICATIONS	99%	99%
CLAIMS PAYMENTS	96%	99%
REFUNDS	94%	100%

Collaborated with Project Management Office (PMO) and Information Technology (IT) to **AUTOMATE** printing and mailing of **DEATH CLAIM FORMS**, reducing manual workload.

Onboarded

7 NEW PROCESSORS.

Collaborated with PMO and IT to fix defects and **ENHANCE RAP/DTH FUNCTIONALITY** in TRUST.

- Closed **320** tickets related to RAP and **285** tickets related to DTH.
- Implemented enhancements to the RAP process to increase efficiencies:
 - Updated the **FINAL LETTER** to print after the calculation is validated.
 - Added **RETIREMENT CERTIFICATION** subtask to 'Work with Benefit Calculations' screen.
 - Created a **NEW VERSION** of the **TRS32** combining the TRS32 and Final Letter.
 - Data change to update the **RETIREMENT CERTIFICATIONS STATUS** to 'Canceled' if the associated application is 'Canceled'.
 - Created an **ERROR MESSAGE** when entering a calculation and the termination date is later than the retirement date.

Implemented sunset legislation related to **INACTIVE ACCOUNTS**.

Mailed **10,679** annual dormant account letters.

Refunded **27,690** inactive accounts totaling **\$70 MILLION**.



Mailed **139,768** certified letters to members with account balances greater than \$200.

Mailed **21,751** certified letters to members with account balances between \$50 and \$199.

Completed FY24 **INTERNAL REFUND AUDIT**

- The 6-month **PENSION REFUND PROCESS** audit included a review of all processes, risks, walk throughs with team members, testing, reporting and providing recommendations for Refunds.
- **MAINTAINED SERVICE LEVELS** throughout the process.
- Received kudos from **INTERNAL AUDIT** for collaboration and pension refund improvements.

BENEFIT ACCOUNTING

Issued **6,002,042 ANNUITY PAYMENTS** totaling **OVER \$12.9B**

Mailed **596,000+** Form 1099-R in January 2024 and **200+** Form 1042-S in March 2024.

February 2024: **500,000+** payments issued through monthly payroll To date: **400,000+** payments impacted by COLA

Implemented **SENATE BILL 10**'s directive to issue **ONE-TIME STIPENDS** and **COLA** to eligible annuitants.

Collaborated across the agency to create **NOTIFICATION LETTERS AND ROLLOVER FORMS**.

Mailed over **285,000 NOTIFICATIONS** by July 10, 2023 informing annuitants of one-time stipend eligibility.

Received and processed over **20,000** rollover forms from July 10, 2023 through Sep. 3, 2023.

Issued over **284,000 PAYMENTS** which amounted to over \$1.5 billion by the end of Sep. 2023.

Mailed over **451,000 NET PAY CHANGE LETTERS** in Jan 2024, which included COLA information for those eligible.

Issued COLA payments in Jan 2024 and over **398,000 ANNUITY PAYMENTS** were impacted by the COLA, which increased payroll by \$30.1 MILLION.

Collaborated with **INTERNAL AUDIT** to identify employers with **HIGH ERROR COUNTS** in order to provide them with targeted training.

Conducted **1:1 TARGETED TRAINING SESSIONS** with **250+** attendees.

of trainings were **IN PERSON, ON-SITE** at employer's location

75%

40 REs

18 HIGHER ED
22 NON-HIGHER ED

Conducted **90 VIRTUAL AND IN-PERSON TRAINING SESSIONS** with **4,772** attendees.

ASSISTED REPORTING EMPLOYERS with completion of **99%** of all Regular Payroll reports in FY24. **100%** of FY24 Regular Payroll reports were complete by year end.

11,711 CALLS

216,766 EMAILS

381 WEB CHATS

Collected over **\$335,000** in **SURCHARGE** from employers through exception reports.

Partnered with Communications to develop new **EMPLOYMENT AFTER RETIREMENT FOR DISABILITY RETIREES TRIFOLD**

Collaborated with Benefit Operations Support to refresh **TRS PAYROLL MANUAL** for reporting employers.

Collaborated with IT to **ENHANCE** the **RE PORTAL** and **FIX DEFECTS**.

- Closed **204 TICKETS** related to the RE reporting (79 defects; 125 enhancements).
- Added **SAVE** and **DOWNLOAD** features in the Retirement Certification screen so REs can save information without certifying and download retirement certifications.
- Provided a **NEW SUMMARY SCREEN** of RE Ledger balances. This allows the REs to identify their ledger information more easily for each fund type.
- Replaced **SURCHARGE EXCEPTION REPORTS** to CRM which allowed EAR to more easily track workflows. Future releases after PBT will include work to move the remaining EAR exceptions reports into CRM.
- Added **InContact SKILL OF HIGHER ED** so calls from a higher education RE can be routed to a Sr. RE Coach.
- Updated **OVER 20 VALIDATIONS** to either resolve defects, remove redundancy, consolidate validations, or fix conditions.