

YEAR-LONG TRAINING PLAN

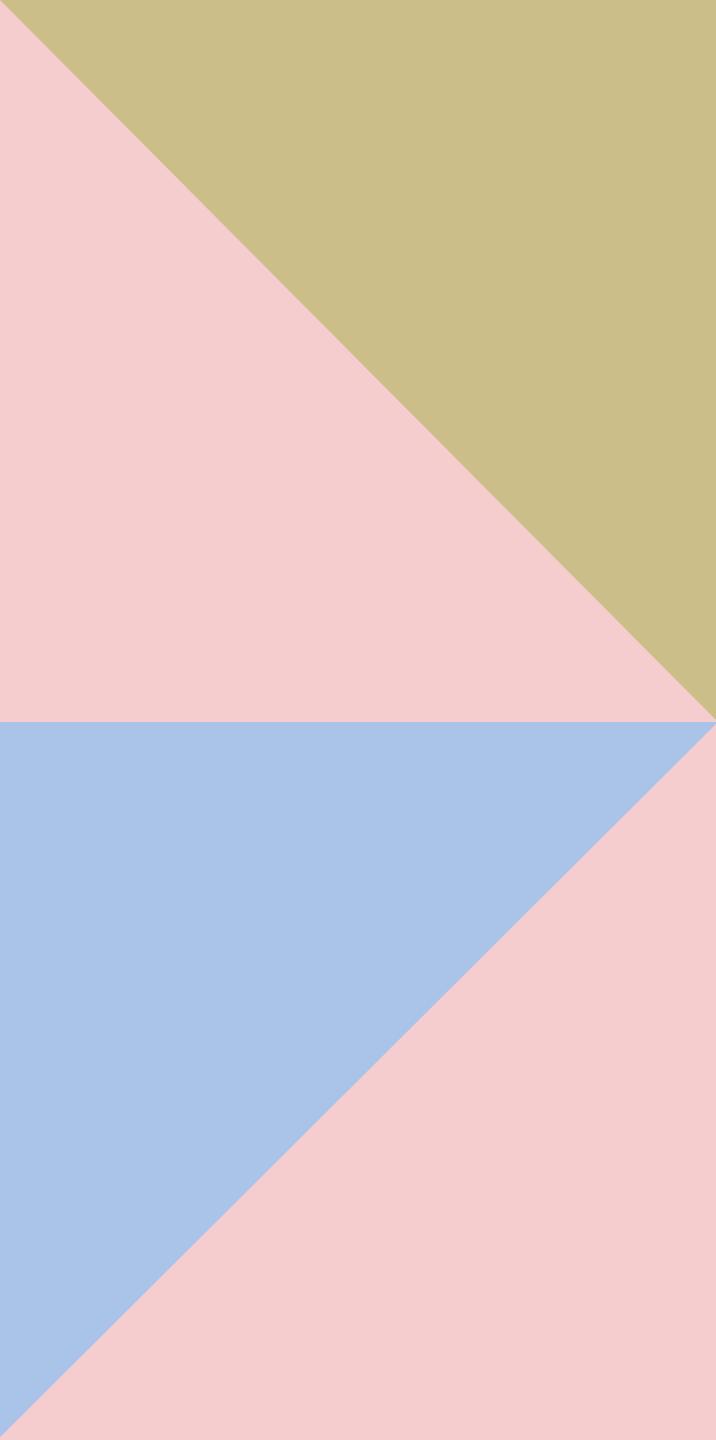
AGENDA

Purpose

Monthly Trends

Proposed Plan

Additional Thoughts



PURPOSE

We'd like to propose a year-long training initiative for Benefit Counseling based on the prominent call dispositions per month. In addition, we'd like to plan for quarterly refreshers for Benefit Processing and Accounting.

MONTHLY TRENDS

Fiscal Year	2023	▼													
Sum of Count	Column Labels ▼														
Row Labels	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total		
Retirement	11346	10187	11836	10209	12166	12533	14444	16469	12284	10294	8831	7367	137966		
Refund	12418	8958	9606	8070	10341	10951	10079	11903	12031	12022	16591	13654	136624		
Directions / Instructions	5351	4672	5816	5304	5521	5201	7660	6708	3437	3433	3870	3810	60783		
Annuity Payroll	5081	4869	4993	3568	3684	3868	9228	9197	4312	4288	3200	3173	59461		
Death Claim	4945	4202	4703	3770	4699	4787	4380	4499	3813	3738	3962	3695	51193		
WSS (Web Self Service)	5066	3445	4314	4309	3937	3680	3868	4359	2934	2782	2419	2544	43657		
Account Changes	4163	3568	3892	3714	3385	3330	3801	4494	3429	3249	3335	3146	43506		
WSS - Resolved	3838	2736	2779	2250	1835	2195	2207	2040	2680	2670	2439	2198	29867		
Health and Insurance Benefits	2533	2130	2083	1679	1916	1995	1926	2677	2216	2162	2589	2742	26648		
Member Statement	1993	1394	1551	1400	1611	1354	1529	1766	1791	2048	1933	1550	19920		
EAR	1367	1169	1296	1000	1081	1107	1410	2172	1595	2010	1342	911	16460		
1099R	3418	3992	3624	2616	399	251	199	233	350	459	115	148	15804		
Call Disconnected	1415	1304	1297	1003	929	943	1122	1288	1045	1163	1138	997	13644		
Service Credit Purchase	1053	899	1147	1073	1109	1269	1287	1759	1175	974	1002	756	13503		
WSS - Not WSS Related	923	858	968	883	867	838	1216	1076	620	692	789	652	10382		
WSS - Not Resolved	1245	772	796	754	666	653	712	791	902	944	903	793	9931		
Appointment	812	666	934	648	823	711	549	579	534	410	503	519	7688		
Callback - No Contact	388	355	296	205	153	142	172	182	673	546	355	314	3781		
My TRS	65	35	38	31	30	48	56	45	48	43	50	50	539		
Benefit Presentation	29	20	24	14	17	14	20	29	43	17	24	28	279		
Grand Total	67449	56231	61993	52500	55169	55870	65865	72266	55912	53944	55390	49047	701636		

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Retirement		8%	7%	9%	7%	9%	9%	10%	12%	9%	7%	6%	5%
Refund		9%	7%	7%	6%	8%	8%	7%	9%	9%	9%	12%	10%
Directions / Instructions		9%	8%	10%	9%	9%	9%	13%	11%	6%	6%	6%	6%
Annuity Payroll		9%	8%	8%	6%	6%	7%	16%	15%	7%	7%	5%	5%
Death Claim		10%	8%	9%	7%	9%	9%	9%	9%	7%	7%	8%	7%
WSS (Web Self Service)		12%	8%	10%	10%	9%	8%	9%	10%	7%	6%	6%	6%
Account Changes		10%	8%	9%	9%	8%	8%	9%	10%	8%	7%	8%	7%
WSS - Resolved		13%	9%	9%	8%	6%	7%	7%	7%	9%	9%	8%	7%
Health and Insurance Benefits		10%	8%	8%	6%	7%	7%	7%	10%	8%	8%	10%	10%
Member Statement		10%	7%	8%	7%	8%	7%	8%	9%	9%	10%	10%	8%
EAR		8%	7%	8%	6%	7%	7%	9%	13%	10%	12%	8%	6%
1099R		22%	25%	23%	17%	3%	2%	1%	1%	2%	3%	1%	1%
Call Disconnected		10%	10%	10%	7%	7%	7%	8%	9%	8%	9%	8%	7%
Service Credit Purchase		8%	7%	8%	8%	8%	9%	10%	13%	9%	7%	7%	6%
WSS - Not WSS Related		9%	8%	9%	9%	8%	8%	12%	10%	6%	7%	8%	6%
WSS - Not Resolved		13%	8%	8%	8%	7%	7%	7%	8%	9%	10%	9%	8%
Appointment		11%	9%	12%	8%	11%	9%	7%	8%	7%	5%	7%	7%
Callback - No Contact		10%	9%	8%	5%	4%	4%	5%	5%	18%	14%	9%	8%
My TRS		12%	6%	7%	6%	6%	9%	10%	8%	9%	8%	9%	9%
Benefit Presentation		10%	7%	9%	5%	6%	5%	7%	10%	15%	6%	9%	10%

YEAR-ROUND TRAINING PLAN

MEMBER EDUCATION AND COUNSELING AND THE CONTACT CENTER

Topic	Details	Training Method
QDRO	Explanation and Calculation	eLearning
Accessibility and Confidentiality	ADA, HIPPA, Member Accessibility	eLearning
Death Claims	Process & Statuses	Instructor Led Training
Tax Season	Forms, Letters, Correspondence	eLearning & Job Aid
Tax Season	FAQ	Instructor Led Training
Retirement	Tiers, eligibility, rule of 80/90	Instructor Led Training
Retirement	Paperwork and timelines	eLearning
Health and TRS Care	When to contact Health & enrollment	Micro-eLearns
Service Credit Purchase	Commonly Billed SCP (withdrawn, military, OOS)	Instructor Led Training
Refund	Statuses and Timelines	eLearn
EAR and Reporting Requirements	Exceeding limits, surcharges, reporting	eLearning
Member Statement & WSS & Resources Infographic	MyTRS – expand advantages	Job Aids & Instructor Led Training

YEAR-ROUND TRAINING PLAN

9

BENEFIT ACCOUNTING

Quarter	Topic	Learning Method
Q1	Lifecycle of the TRS 28	eLearning
Q2	Reporting ORP	eLearning
Q3	Trustee-Trustee (TRS to ORP) and Reverse (ORP to TRS)	eLearning
Q4	Soft Skills	ILT – Chris & David

BENEFIT PROCESSING

Quarter	Topic	Learning Method
Q1	File Analysis	ILT - Baytina
Q2	Direct Deposit & Bene Entering	eLearning
Q3	Disbursements, Supplemental Payments, Payroll Process	eLearning
Q4	How to review/confirm PROP and ERS	eLearning