

**PENSION SYSTEM RESUMPTION (PSR) PROJECT MATRIX**  
**APRIL STATUS REPORT**  
**May 16, 2012**

**Board Assignment Status**

Assignment Date	Request / Subject	Due Date	Status / Completed Date

**Other Items of Interest**

Item of Interest	Status / Completed Date
PSR/ETM	<p>1 The new Actuarial Option Factor discount rates approved by the Board in March were applied to the retirement benefits factor tables on April 2. Option factors for Service Credit Purchases were applied on April 30.</p> <p>2 Annual Processes were added to the my CalPERS system on April 30; the annual processes include Annual Member Statements for retirement and health benefits, allocation of interest earnings, member annual interest posting, W2 tax statement generation for members who exceed Internal Revenue Code limits for pensions, and Actuarial Valuation System extracts. Production simulation tests will continue to be performed on the annual processes through June as a proactive measure to identify and resolve potential future issues.</p> <p>3 The second phase of usability testing for Member Self-Services began on April 30. Recommendations from the first phase of usability testing in March were incorporated into the screen designs and navigation flow; these changes are being shared with expanded focus groups to obtain feedback for finalization of the user experience. In addition, the Team is working with impacted program areas and IT to develop and execute readiness activities, including training and communication, in preparation for release of Member Self-Service. Member Self-Service Release One is on schedule for implementation in late July.</p> <p>4 The Team reviewed the Post Implementation Assessment (PIA) findings with the program and technology areas in April. Discussions included efficiencies in processes and tools that could be incorporated into daily activities to improve my CalPERS effectiveness.</p>