



## my|CalPERS Milestone

This month marks a significant milestone for the PSR Project – Final System Acceptance of the my|CalPERS system.

Final System Acceptance is a contractual acknowledgement that Accenture has completed their original scope of work and authorized changes. CalPERS will increasingly take responsibility for the system, data, corrections and enhancements. Accenture will take a secondary role and will remain onsite until September 2014 for knowledge transfer and assistance.

Final System Acceptance does not mean the system has reached its full potential or that all needs have been met. We will continue to make changes and enhancements to my|CalPERS that help us to improve the delivery of pension and health care services.

## my|CalPERS Fast Facts

- *Incorporated Pension Reform Changes into the System*
- *Completed One Annual Member Statement Cycle for 1 Million Members*
- *Processed Two Annual Tax Cycles for 650,000 Retirees*
- *Completed One Annual Health Statement Cycle for 460,000 Participants*
- *Implemented One Comprehensive Annual Financial Report Cycle*
- *Conducted Two Open Enrollment Cycles for Participants*
- *Integrated Judges, Legislators & Supplemental Income Plans*
- *Replaced 49 Major Systems and 60 Support Systems*
- *Conducted 18 Monthly Warrant Rolls for more than \$18 Billion*
- *Implemented more than 50 Weekly Warrant Rolls*

### **Member Self-Service Successes**

*In the first seven weeks, more than 650 members applied for retirement online and 1,690 members submitted requests to change their payment options*

## my|CalPERS Strategic Goals

**The following my|CalPERS Strategic Goals are all on track for completion.**

- 1) Provided a system addressing all of the fundamental business requirements of California's public pension system.
- 2) Created a Web self-service environment for members that facilitates "one-stop shopping," including access to and management of current customer account information.
- 3) Eliminating the dependency on paper documents by providing the ability to accept information and process transactions electronically.
- 4) Increased the integrity of pension-related information by reducing multiple data stores and the manual entry of data.
- 5) Reducing the information technology costs related directly to the support of the retirement line of business.
- 6) Reduced the time to implement required pension system changes.
- 7) Reducing the workload devoted to data clean up and reconciliation.
- 8) Applied business rules uniformly across all business components to ensure CalPERS adheres to all mandated laws, regulations, and policies.
- 9) Facilitating the movement to a more analytical work environment by automating more routine tasks.
- 10) Provided consistent presentation of pension related information across all CalPERS business processes.



## my|CalPERS Service Goals

*The following my|CalPERS Service Goals, which support the overall Strategic Goals, have been completed.*

### What Our Members Can Now Do

- Use the my|CalPERS self-service system 24/7
- Generate their benefit estimates
- Apply for retirement
- Enroll in a health plan (retirees)
- Track the status of their requests
- Update their demographic information
- Access their account status in real time
- Take advantage of “one-stop shopping” services
- Continue to utilize customer service by phone
- Benefit from faster processing times and greater information security due to the reduction of the SSN as the unique identifier
- Experience greater data integrity and accuracy in initial benefit payments

### What Our Employers Can Now Do

- Use the my|CalPERS self-service system 24/7
- View their contract information
- Initiate their contract processes
- Resolve their payroll discrepancies
- Make their electronic payments
- Track the status of their requests
- View their employee and retiree health enrollment data and statements
- Make their prior year payroll/contribution adjustments
- View their billing invoices, reporting and contribution histories
- Benefit from faster posting of payroll/contribution information, which is now more readily available for calculating benefits
- Take advantage of immediate notification of payroll errors and automatic notification of changes in their retiree health enrollment
- Benefit from faster processing times
- Reduce their reliance on paper forms

### How We Have Increased Internal Efficiencies

- Provided better financial and data integrity, with the implementation of a single source of financial and pension data
- Integrated a full view of customer data
- Utilized standard programming language
- Corrected payroll errors
- Reconciled data
- Tracked documents
- Responded more promptly to changes in business needs
- Simplified our IT infrastructure