



CUSTOMER TOUCH POINT (CTP) REPORT

NAME: Guido, Fred

ID INFO: [REDACTED]

Category: Reciprocity

CTP Type: Customer Note

Date: 01/19/2010

Division: FIELD SERVICES DIVISION

Staff: Molloy, Connie S

Information: Note: On 1/17/2010 received phone call from member Fred Guido, regarding his retirement with CalPERS and LACERA. Member states he was not granted reciprocity and now has retained an attorney to appeal CalPERS decision. Mr. Guido asked if I would be called to testify on his case. I stated I do not know, but that I would forward this to the appropriate area to review his questions. After phone call I contacted my Manager, Laura Duran, and advised her of this phone call conversation. Also contacted Liz Burke to advise as appropriate.

Category: No Category

CTP Type: Customer Note

Date: 12/31/2009

Division: LEGAL OFFICE

Staff: Buzynski, Susan

Information: I returned the member's call on 12/30, and this morning he returned my call. He does not want to make a "Public Records Act" request, but rather wants copies of his own member file, CTP notes and copies of any emails between staff regarding his case. He has been sent a Member Record Request form, and will complete and return that with a cover letter listing the additional items he seeks.

Category: No Category

CTP Type: Customer Note

Date: 12/30/2009

Division: Customer Service and Education Division

Staff: Copher, Denise L

Information: Mbr would like a Public Records Act request of all written and electronic correspondence, IE emails and please call mbr for additional information on request, gave mbr number to legal unable to give any additional information

Category: No Category

CTP Type: Customer Note

Date: 12/30/2009

Division: Customer Service and Education Division

Staff: Renteria, Pamela A

Information: agent ok to refer mbr to legal if inq is regarding to appeal per ctp notes 12 22 09



CUSTOMER TOUCH POINT (CTP) REPORT

NAME: Guido, Fred

ID INFO: [REDACTED]

Category: Reciprocity

CTP Type: Customer Note

Date: 12/22/2009

Division: LEGAL OFFICE

Staff: Satow, Sarah E

Information: The reciprocity appeal was received in Legal on 12/17/09 and will be assigned to an attorney. Until an attorney is assigned, please refer appeal inquiries to Legal's main line: 795-3675.

Category: Retirement Estimate

CTP Type: Customer Note

Date: 11/10/2009

Division: MEMBER SERVICES DIVISION

Staff: Unciano, Jindra M

Information: Closed estimate, mbr on roll.

Category: Retirement Estimate

CTP Type: Customer Note

Date: 07/30/2009

Division: MEMBER SERVICES DIVISION

Staff: Reese, Elizabeth

Information: mbr requests fc amnt \$10,000.00 LACERA

Category: No Category

CTP Type: Customer Note

Date: 06/29/2009

Division: MEMBER SERVICES DIVISION

Staff: Griffin, Kerry L

Information: MBSD responding to member in writing.

Category: Reciprocity

CTP Type: Customer Note

Date: 06/01/2009

Division: MEMBER SERVICES DIVISION

Staff: Griffin, Kerry L

Information: Received the reciprocity determination for the incoming period (outgoing for LACERA) they have denied reciprocity due to concurrent service of 2 years 1 month. Outgoing reciprocity is denied due to lapse in service of 14 years 8 months and 11 days. Letter to member denying reciprocity with appeal rights.



CUSTOMER TOUCH POINT (CTP) REPORT

NAME: Guido, Fred

ID INFO: [REDACTED]

Category: Reciprocity

CTP Type: Customer Note

Date: 05/18/2009

Division: MEMBER SERVICES DIVISION

Staff: Griffin, Kerry L

Information: Spoke with LACERA (Clarence Malone) to review the following dates, 4-1-73 thru 11-25-77 and 1-1-1997 to current. Reciprocity will not apply due to concurrent service for incoming and lapse for outgoing. Unfortunately a letter was sent to the member in 2003 from the estimate unit that states reciprocity will apply this letter was sent in error.

Category: No Category

CTP Type: Customer Note

Date: 04/30/2009

Division: FIELD SERVICES DIVISION

Staff: Molloy, Connie S

Information: Spoke with member and updated (corrected) mailing address via comet. Mbr's correct address in 2735 Rocky Trail Road, Diamond Bar, CA 91765.

Category: No Category

CTP Type: Customer Note

Date: 04/30/2009

Division: Customer Service and Education Division

Staff: Horton, Denise

Information: member said that he received a call from us advised since no notes he can expect a call back verified the letter of reciprocity on file

Category: Service Credits

CTP Type: Customer Note

Date: 04/28/2009

Division: MEMBER SERVICES DIVISION

Staff: Griffin, Kerry L

Information: sending 1004 to LACERA.

Category: Service Retirement

CTP Type: Customer Note

Date: 04/24/2009

Division: BENEFIT SERVICES DIVISION

Staff: Mcadams, Shane P

Information: RFA to Unit 841 to establish reciprocity w/ reciprocal system. (8006)



CUSTOMER TOUCH POINT (CTP) REPORT

NAME: Guido, Fred

ID INFO: 5 [REDACTED]

Category: No Category

CTP Type: Customer Note

Date: 11/15/2007

Division: Customer Service and Education Division

Staff: Wigington, Christopher John

Information: Copy of Estimate confirmation letter.
File to DMS.

Category: Retirement Estimate

CTP Type: Customer Note

Date: 09/24/2007

Division: MEMBER SERVICES DIVISION

Staff: Woo, Brittany

Information: requests reciprocity with LACERA for 11775

Category: No Category

CTP Type: Customer Note

Date: 09/04/2007

Division: Customer Service and Education Division

Staff: Horton, Denise

Information: ran estimates but member didnt want empl to know so had to cancel

Category: Retirement Estimate

CTP Type: Customer Note

Date: 10/29/2003

Division: FIELD SERVICES DIVISION

Staff: Chikasawa, Kevin J

Information: cust req: used unverified final comp of \$10,000.00 w/LACERA as given by mbr

Category: Retirement Estimate

CTP Type: Customer Note

Date: 10/06/2003

Division: FIELD SERVICES DIVISION

Staff: Fogal, Deborah

Information: Manually completed estimate and sent member reciprocity template. See prior CTP.



CUSTOMER TOUCH POINT (CTP) REPORT

NAME: Guido, Fred

ID INFO: [REDACTED]

Category: No Category

CTP Type: Customer Note

Date: 10/02/2003

Division: FIELD SERVICES DIVISION

Staff: Molloy, Connie S

Information: Mbr had questions on reciprocity; currently with LACERA and may return to a CalPERS agency. Sent member booklet and pub for reciprocity.