CalPERS

02/10/2010

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

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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

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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.

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CUSTOMER TOUCH POINT (CTP) REPORT

02/10/2010

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

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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 [redacted]

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

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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/ reciprical system. (8006)

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CUSTOMER TOUCH POINT (CTP) REPORT

NAME: Guido, Fred
ID INFO: 5[redacted]

Category: No Category
CTP Type: Customer Note
Date: 04/07/2009
Division: Customer Service and Education Division
Staff: Streeter, Phyllis
Information: Mbr just turned in his SR application at GRO. He forgot to bring spouse birth cert and to check in Suv Cont sect5 that he has been married at least one year prior to SR. He is mailing in copy of spouses passport and a copy of page from application w/Surv Cont with box checked 'yes'. He will mail by tomorrow 4-8-09.Mailed "Welcome to the World of Retirement" and pub 33. He can be reached at cell 213 819-9596 or home 909 861-9596.

Category: No Category
CTP Type: Customer Note
Date: 04/07/2009
Division: FIELD SERVICES DIVISION
Staff: Fox, Mindy
Information: mbr submitted sr appl RD 6/1/09 reciprocal with lacera, opt 2w naming wife Lucille as life time ben, sigs previously notarized. dir dep submitted.

Category: No Category
CTP Type: Customer Note
Date: 04/02/2009
Division: Customer Service and Education Division
Staff: Singh, Manjit
Information: Member had questions about completing his SR Application. Explained our SR process and time frame.

Category: No Category
CTP Type: Customer Note
Date: 04/02/2009
Division: Customer Service and Education Division
Staff: Doria, Jose G
Information: assisted agent with bene designation forms...

Category: Retirement Estimate
CTP Type: Customer Note
Date: 09/30/2008
Division: MEMBER SERVICES DIVISION
Staff: Estrada, Melissa
Information: Mbr requests reciprocity with LA county 11,838.00 mo

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02/10/2010

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

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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

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Category: Retirement Estimate
CTP Type: Customer Note
Date: 10/06/2003
Division: FIELD SERVICES DIVISION
Staff: Fogal, Deborah
Information: Manually completed estimate and sent mebmer reciprocity template. See prior CTP.

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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.