CalPERS Board Correspondence Handling Process – Option A

Mailroom

Correspondence addressed to Board Member(s) → Security x-ray → Addressed to specific individual(s)? — No → Review correspondence* → What is the stakeholder requesting? — General assistance or submitting forms → Process and route to appropriate program area (1 day)

(Addressed to specific individual(s)? — Yes ↓)
(What is the stakeholder requesting? — Board assistance ↓)

Board Services Unit (BSU)

Marked confidential? — No → Review and log correspondence**

Marked confidential? — Yes ↓

Log correspondence being forwarded to Board Member → Forward unopened correspondence to Board Member (weekly)

Review and log correspondence** → Discuss approach to assist or respond to stakeholder

Send copy of original correspondence with approved approach to appropriate Board Member(s) → Coordinate response with appropriate program area or Board Member(s) → Copy Board Member(s) on final response

CEO

Discuss approach to assist or respond to stakeholder → Approve approach

Board Member

Receive correspondence

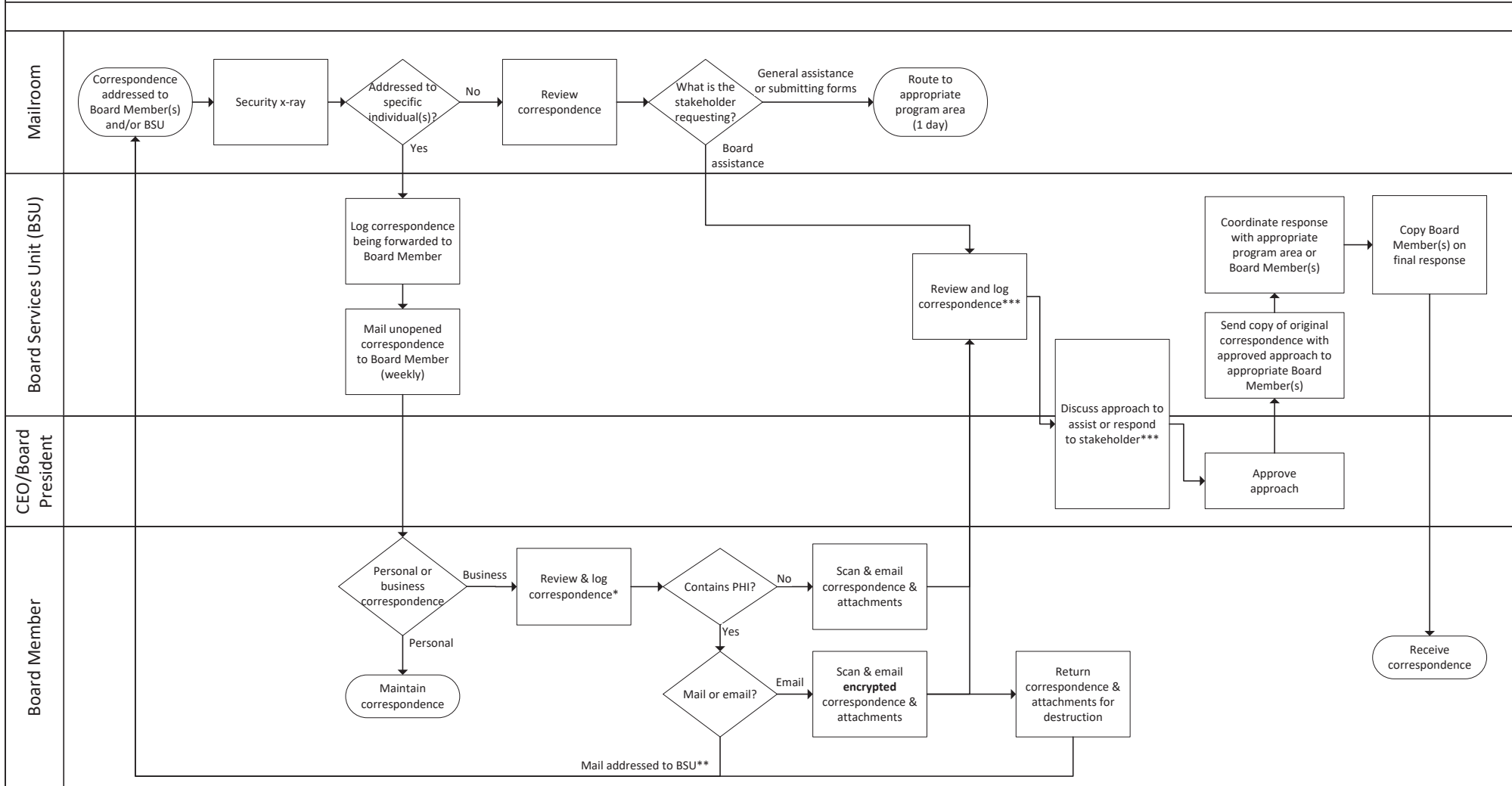Receive correspondence

Comments:
*The Mailroom opens non-confidential correspondence and routes pertinent correspondence (e.g., retirement applications, mcp workflow documents, other benefit forms, etc.) directly to program areas within 1 business day to reduce response time and increase customer service to stakeholders.
**BSU coordination with program areas and Board Members ensures PRA compliance, protects member HIPAA and PII data, prevents duplication of efforts (if multiple letters are sent to different Board members), and ensures stakeholders receive a timely and consistent response from CalPERS.

CalPERS Board Correspondence Handling Process – Option B

Comments:

*For correspondence mailed directly to Board Members, each Board Member is responsible for properly securing members' HIPAA and PII data. Those correspondence are also potentially subject to a California Public Records Act (CPRA) request and Board Members could be required to search their correspondence in order to comply. CalPERS recommends tracking correspondence as a best practice for ensuring PRA compliance.

**If the correspondence contains member benefit forms and PHI, re-routing correspondence back and forth through CalPERS Mailroom could result in longer response times and reduced customer service to members.

***As members may contact multiple Board Members (in separate correspondences), it is essential for Board Members to coordinate with the BSU to prevent duplication of efforts and ensure members do not receive conflicting responses.