

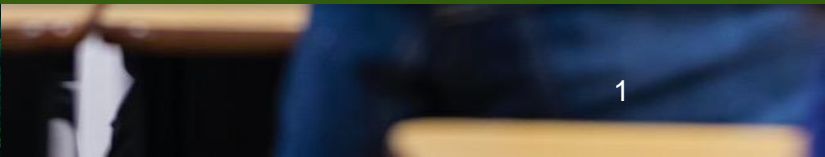


CALSTRS



Quality Management and Account Review Approaches

May 2024 Benefits and Services Committee
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Employer Services mission and themes

We build relationships with employers and business partners by providing **service** and **education** that lead to **accurate** contribution reporting and member benefits.

Service | Education | Accuracy

Quality focus: FY23-24

- Evolution of quality approaches
- Employer Reporting to Final Benefit legacy
- Initiative 2C1- Accuracy of member data
- Formalized and expanded teams
 - Quality and Risk Management
 - Compensation Review Unit



Quality and risk management vision

- Collaboratively develop quality assurance measures to foster consistent understanding and application of division standards
- Review workloads for compliance with division service standards, applicable laws and guidelines to identify trends and recommend opportunities for improvement
- Identify areas of risk and develop internal control strategies in collaboration with division leadership



Employer assistance work volume

- From June 1, 2023 through March 1, 2024
 - 1,526 phone calls
 - 762 Secure Employer Website messages
 - 3,107 initial emails (primary QC target)

Quality control successes



Fiscal year-to-date Division QC Score: **91%** (472 inquiries sampled)



Accuracy

Fiscal year-to-date: 93%



Service

Fiscal year-to-date: 96%



Education

Fiscal year-to-date: 88%



Tone

Fiscal year-to-date: 89%

Benchmark: 85%



Quality control challenges



Style

Fiscal year-to-date: 73%



Reworked style criteria –

- Reduced from seven criteria to two criteria
- Published Employer Communications Standards job aid with Training and Development to simplify



Early benefits

- Quality score feedback shared with teams and used for coaching
- Increased interventions to ensure the dissemination of accurate information
- Standardized written employer communications to provide consistent customer service
- Identifies potential gaps in or opportunities for internal training materials and fosters collaboration with training to develop quality assurance documentation to further education



Compensation Review Unit

- Team has historically reviewed benefits against risk thresholds *after* retirement
- Added manager and four analysts to existing team
- Brand-new effort and methodology for identifying member accounts to review prior to retirement
- Focusing on reasonable population size and certainty of upcoming retirement



Compensation Review Unit

- Primary goal: test approaches and develop methodology
- Both teams began pre-benefit account reviews as of January 2024
- Reviewed 68 accounts of members set to retire
- Requested verification from employers for three pay rates and two special compensation amounts
- Sample had broad final compensation years



What's next

- Updating quality scoring criteria
- Exploring new workloads and functions to QC
- Refining and learning from initial pre-benefit account review methodology
- Listen to teams and find ways to continue our evolution