The RASC leverages continuous improvement, enhanced technology and self service to increase our members’ ability to understand, plan for and access retirement plan and retiree health benefits.

Annually, the RASC supports…

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>67,000</td>
<td>Retirees, dependents and surviving family members</td>
</tr>
<tr>
<td>34,000</td>
<td>Former employees</td>
</tr>
<tr>
<td>$2.8 billion</td>
<td>Annual benefit payments</td>
</tr>
<tr>
<td>110,000</td>
<td>Telephone calls answered</td>
</tr>
<tr>
<td>20,000</td>
<td>Pieces of written correspondence answered</td>
</tr>
<tr>
<td>5,000</td>
<td>Annual retirement elections processed</td>
</tr>
<tr>
<td>90,000</td>
<td>Documents scanned and indexed per year</td>
</tr>
</tbody>
</table>
Retirement Season Snapshot

Personal Retirement Profiles (PRPs): April 1 – July 31

- 2016: 1,200 Actives
- 200 Inactives
- 1,400 Total

Retirement Elections Processed

- July 2016: 2,100
- July 2015: 2,200
- FY 2015-16: 5,067
- FY 2014-15: 5,344

70% of July active retirements were supported by the RASC for retirement counseling and document preparation services

or

1,200 of 1,800 July 2016 active retirements
2016 Retirement Choice Program Readiness

- Developed RASC-specific overview training
- Presented weekly RASC-specific training
- Leveraged OptionFinder polling tool quizzes that provide instant feedback on learning
- Attended all-day systemwide training (all RASC staff)
- Delivered UCRP basics training to Fidelity
- Reviewed Retirement Benefits Decision Guide, Fact Sheet and other publications with staff
- Updated retirement estimator and modeling tools
- Documented operating instructions in Customer Relationship Management (CRM) tool
Preparing for Retirement
RASC Presentations

On-site, in-person – since mid 2015

- Delivered 18 presentations reaching 1,400 employees
- On average, 96% of respondents were either Very Satisfied or Satisfied with the presentation (20% response rate)

Webinar (hosted)

- Offered on second and fourth Tuesdays of every month from 10:00 a.m. to 12:30 p.m. Pacific

On-demand web

- Available on UCnet (Compensation & Benefits, Preparing for Retirement)
Customer satisfaction is trending up

% Satisfied or Better - Q3

- Q3 2015: 84%
- Q3 2016: 88%

47% of responses are from current faculty or staff
18% survey response rate
1,470 responses received
8,095 invitations sent
Open Enrollment Update

• Hired six TOPS staff

• Completing onboarding and training
Questions?
Thank you

Photo of UC Santa Cruz
(UC identity archive)
CUCRA/CUCEA
Fall Meeting

Kris Lange, Director
Benefit Programs Vendor Management
October 26, 2016
Medical Plan
Satisfaction Surveys
Overall Satisfaction by Health Plan

Overall Satisfaction – Non-Medicare HMOs

- Health Net Blue & Gold: 84.4%
- Kaiser Permanente: 93.6%
- WHA: 92.5%
- National Average for HMOs: 86.6%

Overall Satisfaction – Non-Medicare PPOs

- Health Savings Plan: 73.4%
- UC Care: 77.6%
- National Average for PPOs: 83.3%
Survey of Medicare Plan Members

1st time Medicare Members have been surveyed by UC

Plans surveyed:
- Health Net Seniority Plus
- Kaiser Senior Advantage
- Blue Shield Medicare PPO & High Option

Launch Date: March 10, 2016
End Date: June 5, 2016
First mail: March 10, 2016
Second Mail: April 4, 2016
Phone interviews non-responders: April 21, 2016

CUCRA/CUCEA request

UNIVERSITY OF CALIFORNIA

OPEN ENROLLMENT Oct. 27–Nov. 22, 2016
Enrollment and Survey Highlights

Responders closely reflect enrollments

**Total Medicare Enrollment**
- Kaiser Senior Advantage: 10,067
- Health Net Seniority Plan: 8,742
- Medicare PPO/High Option: 8,541

**Numbers of Survey Responders**
- Kaiser Senior Advantage: 397
- Health Net Seniority Plan: 474
- Medicare PPO/High Option: 453

OPEN ENROLLMENT Oct. 27–Nov. 22, 2016
Overall Satisfaction by Health Plan

Overall Satisfaction - Medicare Plans

- Medicare PPO & High Option Plans: 90.6%
- Health Net Seniority Plus: 91.3%
- Kaiser Senior Advantage: 95.3%
- National Average (CMS): 88.40%

All UC Medicare plans are above the National Average
Overall Satisfaction with Health Care

All our members are satisfied with their Health Care

Overall Satisfaction with Health Care

- Kaiser Senior Advantage: 94.2%
- Health Net Seniority: 90.9%
- Medicare PPO & High Option: 94.4%
- National Average (CMS): 88.5%
Specialist Experience

How Easy to Get Appointments with Specialists

- Kaiser Senior Advantage: 89.3%
- Health Net Seniority: 86.6%
- Medicare PPO & High Option: 86.3%
- National Average (CMS): 88.6%

A opportunity for improvement
Getting Needed Care

Get Care As Soon As Needed

Health Net is below the national average

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kaiser Senior Advantage</td>
<td>94.3%</td>
</tr>
<tr>
<td>Health Net Seniority</td>
<td>84.7%</td>
</tr>
<tr>
<td>Medicare PPO &amp; High Option</td>
<td>91.8%</td>
</tr>
<tr>
<td>National Average (CMS)</td>
<td>89.9%</td>
</tr>
</tbody>
</table>

UNIVERSITY OF CALIFORNIA

OPEN ENROLLMENT Oct. 27 – Nov. 22, 2016
Customer Service Experience

Plan’s Customer Service Treated You with Courtesy and Respect

- Kaiser Senior Advantage: 95.2%
- Health Net Seniority: 92.4%
- Medicare PPO & High Option: 98.7%
- National Average (CMS): 94.4%

OPEN ENROLLMENT Oct. 27–Nov. 22, 2016
Customer Service Experience

Plan’s Customer Service gave you the info and help you needed

- Kaiser Senior Advantage: 79.3%
- Health Net Seniority: 69.7%
- Medicare PPO & High Option: 76.0%
- National Average (CMS): 80.7%

OPEN ENROLLMENT Oct. 27–Nov. 22, 2016
Prescription Plan

Overall Satisfaction with Drug Plan

- Kaiser Senior Advantage: 94.9%
- Health Net Seniority: 91.7%
- Medicare PPO & High Option: 88.7%
- National Average (CMS): 86.8%

Graph showing the percentage satisfaction for different plans compared to the national average.
Prescription Plan

Your Prescriptions were covered by plan

<table>
<thead>
<tr>
<th>Plan</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Average (CMS)</td>
<td>82.5%</td>
<td>17.5%</td>
</tr>
<tr>
<td>Medicare PPO &amp; High Option</td>
<td>88.6%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Health Net Seniority Plus</td>
<td>87.9%</td>
<td>12.1%</td>
</tr>
<tr>
<td>Kaiser Senior Advantage</td>
<td>98.5%</td>
<td>1.5%</td>
</tr>
</tbody>
</table>
Prescription Plan – Mail Order Usage

37.2% of UC Medicare members used the mail order service

60.3% of Kaiser responders have used mail order – the highest % across all UC Medicare plans.
Survey Respondents’ Health Status (self-reported)
Respondents’ Health Profile

UC Medicare members rate their health better than national average!

Overall Health

- Excellent & Very Good: UC Average: 50.2% (National Average: 37.1%)
- Good: UC Average: 35.3% (National Average: 35.3%)
- Fair: UC Average: 12.1% (National Average: 21.7%)
- Poor: UC Average: 2.3% (National Average: 5.3%)

Overall Mental & Emotional Health

- Excellent & Very Good: UC Average: 69.3% (National Average: 57.0%)
- Good: UC Average: 22.6% (National Average: 27.9%)
- Fair: UC Average: 6.9% (National Average: 12.5%)
- Poor: UC Average: 1.2% (National Average: 2.6%)
Vaccination Rates

UC Medicare members receive vaccinations at rates better than national average!

Flu Shot Rate

- UC Average: 82.9%
- National Average (CMS): 73.7%

Pneumonia Shot Rate

- UC Average: 85.7%
- National Average (CMS): 72.1%
Member’s Health Profile

Only cancer related issues are above the national average

Ever Had Any of These Health Conditions

- A heart attack: 5.8% (UC), 11.1% (National Average)
- Coronary heart disease: 11.8% (UC), 15.8% (National Average)
- Hypertension or high blood pressure: 53.4% (UC), 65.2% (National Average)
- Cancer, other than skin cancer: 18.0% (UC), 14.1% (National Average)
- Asthma or pulmonary disease: 14.9% (UC), 19.3% (National Average)
- Diabetes or high blood sugar: 22.6% (UC), 31.0% (National Average)
Different Rules for H&W vs. UCRP

Work in progress
- Updating and clarifying websites and publications
- Letter to all employees with DPs enrolled in H&W regarding the UCRP requirements

Does NOT impact current retirees
- Retirees are asked for domestic partner information at point of retirement
Different Rules for H&W vs. UCRP

Definition of eligible domestic partner

- **Health & Welfare**
  - Same gender – no age restriction
  - Opposite gender – one partner must be at least age 62 and eligible for social security based on age

- **UCRP**
  - No age restriction for either same or opposite gender
Different Rules for H&W vs. UCRP

Documentation Requirements for non-registered domestic partners

- **Health & Welfare**
  - No affidavit required, but must submit documentation upon request from SECOVA as part of FMEV

- **UCRP**
  - UBEN250 must be filed
  - Documentation must be in place one year before death in order to receive survivor benefits
QUESTIONS?