

A high-angle, top-down photograph of six diverse business professionals (three men and three women) in a huddle. They are all smiling and looking towards the center, where their hands are stacked on top of each other. They are wearing professional attire in shades of grey, white, and beige. The background is a plain, light-colored floor.

DRS Advisory Committee

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Online Retirement Application

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Project Background



Strategic Goal

- Increase customer self-service options by expanding and simplifying DRS' online systems
 - Offer an online retirement application process by March 2012
- Successfully implemented **March 29, 2012**
 - Provides the ability for customers to complete an online service retirement application



Early Customer Involvement



- Analyzed existing retirement application processes and best practices for online applications
- Developed screen design options
- Worked with focus group participants (internal and external) to select approved design
- Continue to modify application to incorporate customer improvement suggestions



Customer Service Enhancements



- Customers can apply online for a service retirement and independently start the process at their convenience
- Provides retirement education information for the customer's specific system and plan
- Questions within the application are specific to customer's system and plan



Customer Service Enhancements



- Estimated retirement benefit amount is known
- Information will be pre-filled whenever possible
- Customers can update information directly online
- Built-in calculators



Customer Service Enhancements



- Once the application is submitted
 - Ability to print forms with information pre-filled
 - Provides tracking of exactly what additional forms or documentation is needed to retire
 - Ability to cancel and resubmit the application
- Eliminates requirement to file some forms separately



Customer Service Enhancements



- Eliminates approximately 5 manual processes
- Fewer errors as information is pre-filled and legible
- Automatically updates DRS systems
- Provides information to generate optional bills based on customer's request
- Improved application processing time
 - Application view is organized as a DRS team member typically processes retirement information

April 2012 Usage



- 751 total service applications submitted in April 2012
- 81 or 10.8% were submitted through the web

System Plan	Application Received	System Plan	Application Received
PERS 1	10	TRS 1	3
PERS 2	38	TRS 2	3
PERS 3	4	TRS 3	8
LEOFF 1	1	SERS 2	2
LEOFF 2	4	SERS 3	8



Customers Submitting the Application



- Preliminary review shows
 - 63% applications submitted were completed within one hour, averaging 35 minutes to complete
 - The fastest completion was 12 minutes
 - 14 members submitted forms in 10 days or less
 - 7 members took over 10 days to submit required forms

Communicating to Customers



WASHINGTON STATE DEPARTMENT OF RETIREMENT SYSTEMS
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HOME MEMBER

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Your Retirement Account*

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Also Available for Login/Sign up:
[Plan 3](#)

[Deferred Compensation Program](#)

*Formerly Defined Benefit Access

Lifetime Retirement Planning

New Member | Nearing Retirement

What's New

Applying for Retirement is a Click Away [more](#)

April is Financial Literacy Month - let's celebrate! [more](#)

If you're nearing retirement and want to learn more, check out this short video. [more](#)

Update on gain sharing [more](#)

The latest on public pension legislation [more](#)

See more [news](#)

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I want to

- Find out what DRS does
- Get directions to DRS and DCP
- Learn about the Director
- See the latest pension statistics
- See more...

Requesting Public Records
Transforming Washington's Budget
State Investment Board
Office of the State Actuary
Health Care Authority

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Defined Benefit Access

Apply For PERS 2 Retirement

I want to | [Estimates](#) | [Tracking](#) | [Planning](#)

We want to make applying for retirement as easy as possible. Below, are some tools to assist you with planning for retirement.

I want to

- [See what I need before I start](#)
- [Start my retirement application](#)
- [Learn more about my retirement eligibility](#)
- [See what to expect after I submit](#)
- [Learn more about retirement planning](#)

OTHER INFORMATION

[DRS News](#)
[Glossary](#)

MY USER PROFILE

Washington State Department of Retirement Systems



Communicating to Customers



- News and Announcements on DRS Public website
- Expanded stakeholder communications delivered incrementally
 - LEOFF Plan 2 Retirement Board
 - Superintendent of Public Instruction
 - Washington Education Association
 - Governor's Office & Cabinet Members
 - WA Federation of State Employees
 - All state agency Communication Directors



Customer Follow-up



- Contacting customers who have submitted an online application to determine ease of use and recommended enhancements
- General questions about overall experience

What Customers Are Saying



- What they liked:
 - Easy to use and quick to complete
 - Prompts if something is incorrect or missed
 - Helpful publications and information throughout the application
 - Being able to track their application
 - The tax calculator
 - The Purchase Service Credit calculator

What Customers Are Saying



- Recommendations for enhancements:
 - Make the beneficiary section clearer and allow members who designate a survivor to designate contingent beneficiaries
 - Clarify what allowances means in the tax calculator
 - Clarify in the purchase service credit text that you can use Deferred Compensation monies to pay for the service credit
 - Make the requirement to submit a Spousal Consent Form clearer in the application



What's Next?



- Foundation for future online customer service delivery enhancements
- Compile short term and long-term customer service delivery enhancements
- Validate future service delivery enhancements with customer recommendations
- Adapt application as needed and continue to follow-up with customers



Thank you for helping us
develop the online
retirement application!