

# IN PERSON & VIRTUAL BOARD MEETING

\*The Committee meeting will be held following the Board of Retirement meeting scheduled prior.



TO VIEW VIA WEB



TO PROVIDE PUBLIC COMMENT

Members of the public may address the Committee orally and in writing. To provide Public Comment, you should visit the above link and complete the request form by selecting whether you will provide oral or written comment from the options located under Options next to the Committee meeting.

**Attention:** If you have any questions, you may email [PublicComment@lacera.com](mailto:PublicComment@lacera.com). If you would like to make a public comment during the committee meeting, review the [Public Comment instructions](#).

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION  
300 N. LAKE AVENUE, SUITE 650, PASADENA, CA

## AGENDA

### A REGULAR MEETING OF THE OPERATIONS OVERSIGHT COMMITTEE AND BOARD OF RETIREMENT\*

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA 91101

9:00 A.M., WEDNESDAY, FEBRUARY 7, 2024\*\*

*This meeting will be conducted by the Operations Oversight Committee and Board of Retirement both in person and by teleconference under California Government Code Sections 54953(b), (f).*

*Any person may view the meeting in person at LACERA's offices or online at <https://LACERA.com/leadership/board-meetings>.*

*The Committee may take action on any item on the agenda, and agenda items may be taken out of order.*

*Teleconference Location for Trustees and the Public under California Government Code Section 54953(b)*

*Palms Casino Resort, 4321 W. Flamingo Road, Las Vegas, NV 89103*

#### COMMITTEE TRUSTEES:

JP Harris, Chair  
Antonio Sanchez, Vice Chair  
Keith Knox, Trustee  
Wayne Moore, Trustee  
Jason Green, Alternate Trustee

- I. CALL TO ORDER
- II. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER AB 2449, California Government Code Section 54953(f)
  - A. Just Cause
  - B. Action on Emergency Circumstance Requests
  - C. Statement of Persons Present at AB 2449 Teleconference Locations

III. APPROVAL OF MINUTES

A. Approval of the Minutes of the Regular Meeting of December 6, 2023

B. Approval of the Minutes of the Regular Meeting of January 3, 2024

IV. PUBLIC COMMENT

(Members of the public may address the Committee orally and in writing. To provide Public Comment, you should visit <https://LACERA.com/leadership/board-meetings> and complete the request form by selecting whether you will provide oral or written comment from the options located under Options next to the Committee meeting.

If you select oral comment, we will contact you via email with information and instruction as to how to access the meeting as a speaker. You will have up to 3 minutes to address the Committee. Oral comment request will be accepted up to the close of the Public Comment item on the agenda.

If you select written comment, please input your written public comment or documentation on the above link as soon as possible and up to the close of the meeting. Written comment will be made part of the official record of the meeting. If you would like to remain anonymous at the meeting without stating your name, please leave the name field blank in the request form. If you have any questions, you may email [PublicComment@lacera.com](mailto:PublicComment@lacera.com).)

V. REPORTS

A. **LACERA Operations Briefing**

Luis A. Lugo, Deputy Chief Executive Officer  
JJ Popowich, Assistant Executive Officer  
Laura Guglielmo, Assistant Executive Officer  
(For Information Only)

B. **Standardized Retirement Counseling**

JJ Popowich, Assistant Executive Officer  
Tatiana Bayer, Division Manager, Member Services  
Jonathan Tran and Maritza Perez, Presenters  
(Presentation) (Memo dated January 12, 2024)

V. REPORTS (Continued)

C. **Updates to My LACERA**

W. Louis Gittens, Division Manager, Benefits

Kathy Delino, Chief, Information Technology

Alex Ochoa and Kevin Hunter, Presenters

(Presentation) (Memo dated January 25, 2024)

VI. ITEMS FOR STAFF REVIEW

(This item summarizes requests and suggestions by individual trustees during the meeting for consideration by staff. These requests and suggestions do not constitute approval or formal action by the Board, which can only be made separately by motion on an agenda item at a future meeting.)

VII. ITEMS FOR FUTURE AGENDAS

(This item provides an opportunity for trustees to identify items to be included on a future agenda as permitted under the Board's Regulations.)

VIII. GOOD OF THE ORDER

(For Information Purposes Only)

IX. ADJOURNMENT



**\*The Board of Retirement has adopted a policy permitting any member of the Board to attend a standing committee meeting open to the public. In the event five or more members of the Board of Retirement (including members appointed to the Committee) are in attendance, the meeting shall constitute a joint meeting of the Committee and the Board of Retirement. Members of the Board of Retirement who are not members of the Committee may attend and participate in a meeting of a Board Committee but may not vote on any matter discussed at the meeting. The only action the Committee may take at the meeting is approval of a recommendation to take further action at a subsequent meeting of the Board.**

**\*\*Although the meeting is scheduled for 9:00 a.m., it can start anytime thereafter, depending on the length of the Board of Retirement meeting preceding it. Please be on call.**

**Any documents subject to public disclosure that relate to an agenda item for an open session of the Committee, that are distributed to members of the Committee less than 72 hours prior to the meeting, will be available for public inspection at the time they are distributed to a majority of the Committee, at LACERA's offices at 300 North Lake Avenue, Suite 820, Pasadena, California during normal business hours from 9:00 a.m. to 5:00 p.m. Monday through Friday *and will also be posted on [lacera.com](http://lacera.com) at the same time, [Board Meetings | LACERA](#).***

***Requests for reasonable modification or accommodation of the telephone public access and Public Comments procedures stated in this agenda from individuals with disabilities, consistent with the Americans with Disabilities Act of 1990, may call the Board Offices at (626) 564-6000, Ext. 4401/4402 from 8:30 a.m. to 5:00 p.m. Monday through Friday or email [PublicComment@lacera.com](mailto:PublicComment@lacera.com), but no later than 48 hours prior to the time the meeting is to commence.***

MINUTES OF THE REGULAR MEETING OF THE OPERATIONS OVERSIGHT  
COMMITTEE AND BOARD OF RETIREMENT\*

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA 91101

3:10 P.M. – 3:18 P.M., WEDNESDAY, DECEMBER 6, 2023

This meeting was conducted by the Operations Oversight  
Committee both in person and by teleconference under California  
Government Code Section 54953(f)

COMMITTEE TRUSTEES

PRESENT: Herman B. Santos, Vice Chair (In-Person)

Keith Knox, Trustee (In-Person)

Antonio Sanchez, Trustee (In-Person)

ABSENT: Alan Bernstein, Chair

Jason E. Green, Alternate Trustee

OTHER BOARD OF RETIREMENT TRUSTEES

Vivian H. Gray, Trustee (In-Person)

JP Harris, Trustee  
(Teleconference due to Just Cause under Section 54953(f))

STAFF, ADVISORS AND PARTICIPANTS

Santos H. Kreimann, Chief Executive Officer

Luis Lugo, Deputy Chief Executive Officer

JJ Popowich, Assistant Executive Officer

Laura Guglielmo, Assistant Executive Officer

Steven P. Rice, Chief Counsel

Allison E. Barrett, Senior Staff Counsel

Michael D. Herrera, Senior Staff Counsel

Ted Granger, Interim Chief Financial Officer

Chaitanya Errande, Information Security Officer

Kathy Delino, Chief, Information Technology

Louis Gittens, Benefits Division Manager

Rebecca Walker, Kaplan & Walker LLP

I. CALL TO ORDER

This meeting was called to order by Vice Chair Santos at 3:10 p.m.

II. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER AB 2449, California Government Code Section 54953(f)

- A. Just Cause
- B. Action on Emergency Circumstance Requests
- C. Statement of Persons Present at AB 2449 Teleconference Locations

A physical quorum was present at the noticed meeting location. There was one request received from Trustee Harris related to Just Cause (A) due to contagious disease. Trustee Harris confirmed there were no individuals 18 years or older present at the teleconference location. No requests were received for Emergency Circumstances (B).

III. APPROVAL OF MINUTES

A. Approval of the Minutes of the Regular Meeting of November 1, 2023

Trustee Sanchez made a motion, Trustee Knox seconded, to approve the minutes of the regular meeting of November 1, 2023. The motion passed by the following roll call vote:

Yes: Knox, Sanchez, Santos

No: None

Absent: Green, Bernstein

IV. PUBLIC COMMENT

There were no requests from the public to speak.

V. NON-CONSENT ITEMS

A. **Ethics and Compliance Program Charter**

Recommendation as submitted by Steven P. Rice, Chief Counsel, and Allison E. Barrett, Senior Staff Counsel: That the Committee (1) provide input on the proposed Ethics and Compliance Program Charter, which is a goal of the Board of Retirement's approved Strategic Plan; and (2) recommend that the Board forward the Charter to the Joint Organizational Governance Committee for further consideration and recommendation. (Presentation) (Memo dated November 28, 2023)

Trustee Knox made a motion, Trustee Sanchez seconded, to approve staff recommendation. The motion passed by the following roll call vote:

Yes: Knox, Sanchez, Santos

No: None

Absent: Green, Bernstein

V. NON-CONSENT ITEMS (Continued)

B. **Proposed Changes to Board of Retirement Policy for Recovery Of Member Overpayments and Underpayments**

Recommendation as submitted by JJ Popowich, Assistant Executive Officer and Michael D. Herrera, Senior Staff Counsel: That the Committee recommend the Board of Retirement approve and adopt the changes to its Policy for Recovery of Member Overpayments and Underpayments as discussed in the memo and set forth in Exhibit B. (Memo dated November 22, 2023)

Trustee Sanchez made a motion, Trustee Knox seconded, to approve staff recommendation. The motion passed by the following roll call vote:

Yes: Knox, Sanchez, Santos

No: None

Absent: Green, Bernstein

VI. REPORTS

A. **LACERA Operations Briefing**

Luis A. Lugo, Deputy Chief Executive Officer  
JJ Popowich, Assistant Executive Officer  
Laura Guglielmo, Assistant Executive Officer  
(For Information Only)

The Executive team presented the monthly briefing and was available to answer questions from the Committee. This item was received and filed.

B. **FY2022-23 Annual Financial Statement Review**

Ted Granger, Interim Chief Financial Officer  
(For Information Only) (Memo dated November 27, 2023)

Mr. Granger was available to answer questions from the Committee. This item was received and filed.

VII. ITEMS FOR STAFF REVIEW

(This item summarizes requests and suggestions by individual trustees during the meeting for consideration by staff. These requests and suggestions do not constitute approval or formal action by the Board, which can only be made separately by motion on an agenda item at a future meeting.)

There was nothing to report.

VIII. ITEMS FOR FUTURE AGENDAS

(This item provides an opportunity for trustees to identify items to be included on a future agenda as permitted under the Board's Regulations.)

There was nothing to report.

IX. GOOD OF THE ORDER

(For Information Purposes Only)

There was nothing to report.

X. EXECUTIVE SESSION

A. **Potential Threats to Public Services or Facilities**

(Pursuant to Subdivision (a) of California Government Code Section 54957)

Consultation with: LACERA Chief Executive Officer Santos H. Kreimann, Deputy Chief Executive Officer Luis Lugo, Assistant Executive Officers JJ Popowich and Laura Guglielmo, Chief, Information Technology Kathy Delino, Information Security Officer Chaitanya Errande, Benefits Division Manager, Louis Gittens, and Other LACERA Staff.

There was nothing to report.

XI. ADJOURNMENT

There being no further business to come before the Committee, the meeting was adjourned at 3:18 p.m.



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MINUTES OF THE REGULAR MEETING OF THE OPERATIONS OVERSIGHT  
COMMITTEE AND BOARD OF RETIREMENT\*

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA 91101

1:30 P.M. – 2:15 P.M., WEDNESDAY, JANUARY 3, 2024

This meeting was conducted by the Operations Oversight  
Committee both in person and by teleconference under California  
Government Code Section 54953(f)

COMMITTEE TRUSTEES

PRESENT: Keith Knox, Trustee (In-Person)

ABSENT: Antonio Sanchez, Trustee

Jason E. Green, Alternate Trustee

Two Vacant Seats

OTHER BOARD OF RETIREMENT TRUSTEES

Nancy Durazo, Trustee (In-Person)

Vivian H. Gray, Trustee (In-Person)

JP Harris, Trustee (In-Person)

Wayne Moore, Trustee (In-Person)

Les Robbins

(Teleconference due to Just Cause under Section 54953(f))

STAFF, ADVISORS AND PARTICIPANTS

Santos H. Kreimann, Chief Executive Officer

Luis Lugo, Deputy Chief Executive Officer

JJ Popowich, Assistant Executive Officer

Laura Guglielmo, Assistant Executive Officer

Steven P. Rice, Chief Counsel

Chaitanya Errande, Information Security Officer

Kathy Delino, Chief, Information Technology

Celso Templo, Jr., Information Technology Manager II  
Project Management Office, Systems Division

Hernan Barrientos, Specialist Supervisor  
Disability Retirement Services

Kerri Wilson, Specialist Supervisor  
Disability Retirement Services

Eugenia Der, Senior Staff Counsel, Disability Litigation Office

Diana Luong, Senior Legal Secretary, Disability Litigation Office

Iveta Brecko, Project Manager  
Project Management Office, Systems Division

I. CALL TO ORDER

This meeting was called to order by Acting Chair Knox at 1:30 p.m.

II. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER AB 2449, California Government Code Section 54953(f)

- A. Just Cause
- B. Action on Emergency Circumstance Requests
- C. Statement of Persons Present at AB 2449 Teleconference Locations

A physical quorum of the Committee was not present at the noticed meeting location; however, a physical quorum of the Board of Retirement was present. There was one request received from Trustee Robbins, as a member of the Board of Retirement only, related to Just Cause (A) due to contagious disease. Trustee Robbins confirmed there were no individuals 18 years or older present at the teleconference location. No requests were received for Emergency Circumstances (B).

III. APPROVAL OF MINUTES

- A. Approval of the Minutes of the Regular Meeting of December 6, 2023

As there was not a quorum of the Committee present, no action was taken on this item, and it will be moved to the February Operations Oversight Committee. The non-action agenda items were discussed in open or closed session as agendized and as permitted by the Brown Act.

IV. PUBLIC COMMENT

There were no requests from the public to speak.

V. REPORTS

- A. **LACERA Operations Briefing**  
Luis A. Lugo, Deputy Chief Executive Officer  
JJ Popowich, Assistant Executive Officer  
Laura Guglielmo, Assistant Executive Officer  
(For Information Only)

The Executive team presented the monthly briefing and was available to answer questions from the Committee. This item was received and filed.

V. REPORTS (Continued)

B. **Case Management Solution Implementation Progress**

Celso Templo, Jr., Information Technology Manager II  
Project Management Office, Systems Division  
(Presentation) (Memo dated December 24, 2023)

Mr. Templo and other staff gave a brief presentation and were available to answer questions from the Committee. This item was received and filed.

VI. ITEMS FOR STAFF REVIEW

(This item summarizes requests and suggestions by individual trustees during the meeting for consideration by staff. These requests and suggestions do not constitute approval or formal action by the Board, which can only be made separately by motion on an agenda item at a future meeting.)

There was nothing to report.

VII. ITEMS FOR FUTURE AGENDAS

(This item provides an opportunity for trustees to identify items to be included on a future agenda as permitted under the Board's Regulations.)

Trustee Knox requested an item be placed on the next OOC meeting agenda regarding meeting frequency, start times, and duration for OOC meetings.

VIII. GOOD OF THE ORDER

(For Information Purposes Only)

There was nothing to report.

IX. EXECUTIVE SESSION

A. **Potential Threats to Public Services or Facilities**  
(Pursuant to Subdivision (a) of California Government Code Section 54957)

Consultation with: LACERA Chief Executive Officer Santos H. Kreimann, Deputy Chief Executive Officer Luis Lugo, Assistant Executive Officers JJ Popowich and Laura Guglielmo, Chief, Information Technology Kathy Delino, Information Security Officer Chaitanya Errande, and Other LACERA Staff.

There was nothing to report.

X. ADJOURNMENT

There being no further business to come before the Committee, the meeting was adjourned at 2:15 p.m.

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FOR INFORMATION ONLY



## Operations Briefing Report



February 7, 2024



The Operations Briefing Report is divided into four distinct sections, beginning with a general highlight section where we share narratives of projects or operational issues that we feel need highlighted attention. For example, over the last few months we have provided updates on our annual “March Madness” season.

The remaining sections are designed to provide an “at-a-glance” update on projects and initiatives the organization is working on. Each section is divided into the categories listed below to make it easier for you to quickly see what has changed, what has not, and what is completed. We have assigned a color scheme to each section so that as you scroll through the report you will be able to easily identify which of the sections listed below you are in. We have alphabetized each section by project title to make it easier for Trustees to home in on a specific project of interest:

- **New and Updated Information**
- **Existing Projects/Initiatives: No New Updates**
- **Completed Projects/Initiatives**

Each “at-a-glance” section provides a summary of information so Trustees can quickly understand the project and its status. This includes the following fields:

Project/Issue Title – Brief Description:

- **Type:** Each project has been assigned a type (Strategic Plan, CEO (for CEO’s 100 Day Report), MOG (Member Operations Group projects), and BSG (for Business Services Group projects).
- **Start and Target Date:** When the project started and its expected target date for completion.
- **Project Lead(s):** We have added a new information point to describe the project lead for that specific project.
- **Color coded status section** to indicate quickly where we are on the project.
- **A brief annotated notes section** to provide more detail on the status of the project.



Status Indicator Note		
Color coded statuses for a quick at-a-glance indicator to tell you how the project is proceeding.		
On Schedule	Delayed	Pushed Back
(The project is on schedule and the team intends to meet the stated target date)	(The project is slightly delayed. The team does expect a one to two month slip in meeting the target date. Management is more actively watching the progress of these projects)	(The project has been impacted by a significant obstacle or has been suspended due to emergent priorities. Management is actively discussing remedial steps or has a plan waiting to be implemented)

• New and Updated Information

This portion of the Operations Briefing details projects and initiatives that are new or have updated statuses.

Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
		BSG	Financial & Accounting Services Division	August 2023
<b>Project Lead(s): Ted Granger</b>				
<b>On-Schedule</b>				
<b>Actuarial Valuation Reports: Retiree Healthcare (RHC) or Other Post-employment Benefits (OPEB) Program</b> The Retiree Healthcare (RHC) Program administered by LACERA on behalf of Los Angeles County includes retiree healthcare benefits such as medical and dental/vision insurance plans and death benefits. GASB	<b>2023 OPEB – Triennial Investigation of Experience Study</b> OPEB Program actuarial projects for the 2023 reporting cycle are in progress and will include both a triennial experience study and annual valuation report.  Milliman conducted an “educational session” for the Board of Retirement at their January 2024 meeting. The information presented included a high-level discussion of actuarial concepts, methods, and assumptions so Trustees are better informed for the 2023 experience study process.			



refers to these benefits as Other Post-Employment Benefits (OPEB) for financial reporting. GASB Statement Numbers 74 & 75 prescribes financial statement reporting standards for OPEB programs. Actuarial valuations are prepared annually, and experience and assumption studies are prepared triennially for Los Angeles County and LACERA’s Board of Retirement to make funding decisions and to provide the information for the GASB 75 report which is used for employer financial statement disclosure reporting.

The Retiree Healthcare (RHC) Division is working with Segal, LACERA’s retiree healthcare consultant, and the medical plan providers, on the annual process of updating the retiree medical insurance premiums. Milliman uses the latest premium information to develop the medical cost trends and projections. RHC will prepare a Board memo and request approval at the March 2024 BOR meeting.

For fiscal year ending July 1, 2023, Milliman will complete an investigation of experience, which is required by the Board’s Policy to be conducted every three years to review the OPEB Program economic and demographic assumptions and recommend changes. Changes in the assumptions will impact the actuarial valuation results and actuarial funding metrics including the Program’s funded status and actuarially determined contributions. In addition, the valuation report provides information used to prepare the financial statement disclosure reports for Los Angeles County.

Milliman will complete a draft experience study report for the Board of Retirement meeting in April 2024. Milliman will discuss the economic and demographic assumptions and related actuarial methods and staff will request Board approval. The annual valuation report will follow and is expected to be completed in August 2024.

Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	MOG	Benefits	08/01/2020	TBD
	Project Lead(s): Shonita Peterson			
	On Schedule			
<b>Alameda Decision Implementation:</b> In 2020, the California Supreme Court issued its decision in the Alameda County Deputy Sheriff’s Association v. Alameda County Employees	Since the project started, staff have updated the salaries for 4,176 members to exclude Standby Pay and computed the contributions on earnings that occurred on or after January 1, 2013. Of those, 3,013 were actively employed, but only 2,284 had overpaid contributions. Since Active members cannot receive a refund while in service, LACERA suspended future contributions beginning with the			



Retirement Association (“Alameda”), challenging the constitutionality of changes passed in 2013 Assembly Bill 197, which amended the definition of compensation earnable, specifically, excluding pay items previously included such as unused vacation, termination pay, in-kind payments, and payments for services rendered outside of normal working hours. The Court upheld the constitutionality of the Legislature’s actions. In 2021, the Legal Office notified the Board of Retirement that it had completed an initial review of LACERA legacy pay codes and determined that Standby Pay did not meet the expanded understanding of compensation earnable because of the Alameda Case.

March 30, 2022, salary (paid on April 15, 2022) through the point each member’s balance had been depleted. Staff mailed 1,000 letters to the active members on February 11, 2022, and the remaining 1,084 letters on February 25, 2022. A split mailing was used to prevent overwhelming the Member Services Call Center.

Subsequently, staff identified 149 deferred and inactive members, most of whom were entitled to a refund. Staff issued 132 checks to those members entitled to a refund. The balance of seventeen were not owed a refund.

The Systems Division developed programming to remove the Standby Pay code earnings for all retirees who retired on or after January 1, 2013, and recalculated their FAC earnings once the pay codes were removed. Per the BOR approval, these members were subject to having their benefits adjusted prospectively from August 30, 2020, following the court’s decision.

Beginning May 24, 2022, LACERA notified 710 members via email that their monthly benefit allowance will be reduced effective July 31, 2022. Of these, 405 members were notified that due to the retroactive deduction of benefits to the August 2020 monthly allowance, they have been overpaid and will be required to repay the overpaid benefits. Members will be given the option to repay by lump sum, or via deductions from their benefits over a period of time (including financing interest). The remaining 305 retirees were mailed a refund check for the overpaid retirement contributions that exceeded the overpaid retirement benefit. An additional fifty-six members with Standby Pay neither have a refund nor a benefit change due to the timing of their standby pay, while a Plan E member, or having a 30-year cancellation.

The team working on this project has identified five groups of members who will be impacted by this project. The chart below reflects the progress of the project. The team is currently working on the Active/Exceptions cases. As with all the manual cases, these cases are categorized by priority based on the complexity of each case and checked for accuracy.



Alameda Project Status	Current Report	
	1/31/2024	
Row Labels (Type, Status, Detail, Outstanding)	Count	%
<b>Pending Notification</b> (Staff Reviewing and Processing)	554	11.47%
<b>Active</b>	0	0.0%
<b>Retired</b>	6	0.1%
<b>Deferred/Inactive</b>	0	0.0%
<b>Retired Deceased</b>	38	0.8%
<b>Active Death</b>	5	0.1%
<b>Other – *Active/Ex-ceptions</b>	505	10.45%
<b>Withdrawn</b>	0	0.0%
<b>Completed</b>	4,278	88.53%
<b>Active</b>	3,059	63.3%
<b>Retired</b>	873	18.1%
<b>Deferred/Inactive</b>	149	3.1%
<b>Deceased</b>	0	0.0%
<b>Other - *Active/Excep-tions</b>	85	1.8%
<b>Withdrawn</b>	56	1.2%
Not affected	56	1.2%
<b>Grand Total</b>	4,832	100%



	<b>*Alameda Project – Active Members:</b> In addition to the Retired / Deceased / Survivor / Legal Split Payee cases, there are a total of 590 Active Exception cases that require manual review and processing by the specialist.
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Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	Strategic	Executive (MOG/BSG)	08/24/2022	06/24/2024
	<b>Project Lead(s): JJ Popowich, Luis A. Lugo, &amp; Iveta Brecko (PM)</b>			
	<b>On Schedule</b>			
<b>Case Management Project (Sol: Phase I)</b> Implement a case management system that will improve efficiency in processing member requests, provide accurate status and data collection for metrics, and improve the member experience.  Processes included in Phase I are: Disability Retirement Services (DRS) Disability Litigation Office (DLO) Benefits – First Payment	<p>In May of 2022, the BOR approved LACERA’s recommended vendor, Eccentex, to partner with LACERA to develop our Case Management System. Eccentex was selected after an extensive review of thirteen vendor proposals received from our RFP.</p> <p>On January 3<sup>rd</sup>, Disability Litigation and Disability Retirement divisions held Case Management functionality presentation to the OOC with the emphasis on the difference between old business processes and business processes performed in Sol, and the efficiencies that the new Case Management solution introduced to the business divisions.</p> <p>The project team continues working on the First Payment functionality. First Payment process heavily relies on member account information. LACERA software developers and analysts are working on application programming interface (API) development that delivers member account data to Sol.</p> <p>First Payment Go-Live date is 06/24/2024. The scope will include first payment certification and processing for regular retirement. Disability and death payments will be addressed in the subsequent phase.</p>			



	We are planning Sol training for LACERA software developers and administrators.
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Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	BSG	Executive (BSG)	10/06/2022	January 31, 2024
	<b>Project Lead(s): Laura Guglielmo and Cookie Jaranilla (PM)</b>			
	<b>On Schedule</b>			
<p><b>Enterprise Budget Application (Questica) Implementation Phase I</b></p> <p>LACERA is implementing its first automated enterprise budget application which will be used for budget development and budget control and will integrate with LACERA’s financial system, Great Plains. This system replaces a manual budget development process that relies on Microsoft Excel and Word. It will also ensure that managers have real-time budget to actual reporting capabilities for data informed decision making.</p>	<p>After an extensive RFP and selection process, the Board of Retirement approved the selection of Questica on October 6, 2022. The contract and statement of work were finalized, and the project kick off meeting was held with the LACERA Budget Team and Questica team on November 17, 2022.</p> <p>The Project team has continued to fine-tune Questica’s Budget Modernization application in the following areas:</p> <ul style="list-style-type: none"> <li>• Required roles for Change Request Permissions</li> <li>• General Ledger (GL) Account Roll-up and Reporting Requirements</li> <li>• Personnel Sync Integration</li> <li>• Amended Budget Export</li> <li>• View Creation</li> </ul> <p>Implementation activities kicked off in December. The Budget Team is now utilizing the Questica application for the development of the FY2024-2025 budget, starting this month. Divisional meetings are scheduled for mid-December.</p> <p>Business Divisions have initiated the entry of their FY 2024-2025 division budgets into Questica. Simultaneously, the Project Team is actively importing and making essential adjustments to the Personnel data in preparation for the Full Launch Date on January 31<sup>st</sup>.</p>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date	
		BSG	Administrative Services	03/01/2022	02/19/2024
		<b>Project Lead(s): Ricki Contreras, Celso Templo &amp; Michael Dozier (PM)</b>			
<p><b>Enterprise Contract Lifecycle Management (ECLM) Solution</b> Pursuant to a recommendation by Administrative Services staff, the Operations Oversight Committee (OOC) on March 2, 2022, authorized a Request for Proposal (RFP) for software and consulting services to procure, configure, customize, and implement an ECLM system, which was published on LACERA.com on March 4, 2022.</p>	<b>Delayed</b>				
	<p>On April 4, 2022, LACERA received proposals from nine vendors. LACERA’s evaluation team reviewed all RFPs and selected five vendors as finalists. These finalists demonstrated their solutions to the team. A final vendor has been identified and a recommendation to the Board of Retirement was scheduled for consideration at the September 2022 Board Meeting. The Board of Retirement approved the recommended vendor, Cobblestone, at the September 2022 Board meeting for the Enterprise Contract Lifecycle Management system.</p>				
	<p>The ECLM Solution’s Iteration 3 has been completed. ECLM is in production and available for use. Systems, Admin Services, Legal, Investment Division, and FASD Subject Matter Experts (SME’s) have completed conducting their User Acceptance Testing (UAT). Functionalities available in production are the following:</p>				
	<ul style="list-style-type: none"> <li>• Contract Repositories</li> <li>• Vendor Portal</li> <li>• Contract Approval Chain</li> <li>• Consolidated Bid Responses and Evaluation – RFP Management</li> <li>• AI Capabilities – Drafting, Reviewing &amp; Executing of Contracts</li> <li>• Reporting - Contract Requests, Solicitations, Contracts, and Vendors</li> <li>• Systems Integration with Great Plains</li> </ul>				
	<p>The ECLM Project Team has successfully concluded Iteration 3 testing, identifying and reporting several issues to the vendor, which they are currently addressing. As testing and workflow validation continue, our goal is to deliver the Cobblestone ECLM Platform by January 31, 2024, integrating User Acceptance Testing and utilizing the Vendor Portal in production. Vendor-led end-user training for all business divisions</p>				



	is scheduled for February 5 to 13, 2024. This training, involving one SME from each division, will be supported by customized training materials for our internal processes, distributed before the sessions commence. The ECLM project is expected to be fully launched February 19, 2024.
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Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	BSG	Executive (BSG)	01/01/2023	06/30/2024
	<b>Project Lead(s): JJ Popowich and Michael Dozier (PM)</b>			
	<b>On Schedule</b>			
<b>LACERA Incident Response Team (LIRT) Management Solution</b> LACERA seeks a solution that automates the tracking and workflow of LACERA incidents.	<p>In December 2022, the Information Technology Coordination Council approved a LIRT incident management solution project to automate the tracking of LACERA incidents. The LIRT project team decided to leverage a product that is already implemented at LACERA: ServiceNow Information Technology Service Management (ITSM). LACERA selected Winward as our business partner to leverage and customize the incident workflow of ServiceNow’s ITSM to support LACERA’s process regarding incident tracking, management, and reporting. Because LACERA owns this product and is only configuring one module to support our specific process, we can absorb the project's cost in the FY 2023-24 budget. We expect this project to be completed in June 2024.</p> <ul style="list-style-type: none"> <li>Contract execution and procurement have been successfully completed. We are currently in collaboration with the Executive Sponsor, Chief Information Technology Officer, and Subject Matter Experts to finalize and solidify requirements by mid-February. InfoSec staff have been introduced to the project as security and architectural consultants while gathering recommendations on current requirements. We have now completed all initial discovery sessions and the team has developed the first draft of the business requirements, technical requirements and user stories.</li> </ul>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	Strategic	Executive (MOG)	01/01/2013	03/31/2024
	Project Lead(s): JJ Popowich & Lynn Francisco			
<b>Delayed</b>				
<p><b>PEPRA Implementation: FAC Issue</b></p> <p>The Final Average Compensation for PEPRA members is exclusive of most pay items except base pay. The County uses pay code 099 as their base pay code. This pay code has embedded pay items within the code that are not pensionable compensation under PEPRA. To accurately calculate a member's benefit, these non-pensionable compensation items need to be filtered out.</p>	<p>As of late April 2023, the LACERA team and Auditor Controller's Office continue to meet regularly and make progress towards the agreed upon deadline of June 30, 2023.</p> <p>In mid-January, the two teams met, along with LACERA CEO Santos Kreimann, and LA County Auditor-Controller Arlene Barrera, to discuss the urgent necessity of completing the project. Based on availability of AC resources, the two teams will begin working on the final stages of this project in February and have committed to working towards a July 2023 completion date. The team has been meeting bi-weekly to ensure we remain focused on completing this project on-time.</p> <p>On March 16, 2023, AC provided a test file on the PEPRA embedded earnings. Systems and QA division collaborated on testing and confirmed the file provided the appropriate data necessary to calculate a more accurate Final Average Compensation. Systems is now working on updating our internal programs to use these files in a production environment.</p> <p>Systems has completed and implemented the program in production. The program was first run to update the September 15, 2023, PEPRA actual earning salaries and are received with each new payroll period files prospectively.</p> <p>Beginning in November the team started ingesting historical files beginning with the last three years first (August 31, 2023, down to September 15, 2020), and working back to 2013. The files are processed on an expedited basis so we can conclude this project as early as possible. The team expects to complete ingesting the most current three years by December 31, 2023.</p>			



The Process Management Group (PMG) is working on updates to the PEPRA FAC Business rules. The team is working with the Legal Office to finalize the business rule. Once the rule has been finalized (expected to be finalized by end of February) the final parameters can be provided to Systems to program the FAC.

Once we have completed programming the business rules, , the team will be discussing scheduling the release of the PEPRA FAC for current active members to see and for staff to use in the calculation of estimates and retirements. As we continue working on ingesting the more historical records, we'll work on scheduling the release of the PEPRA FAC for use by, and for deferred members.

A secondary effort to use Robotic Processing Automation (RPA) to help automate the manual process of accessing member payroll records and entering the required information into the manual Excel sheets used to calculate the FAC is on-going. The AC and LACERA had held several discovery meetings to help AC programmers understand the manual process. The AC and ISD teams working on this application provided a demo to the LACERA team in May.

Given that the RPA will not be completed prior to the AC completing the permanent solution, the team has been evaluating the need to continue development. Ultimately, the team determined that there is value to the RPA process when having to manually research accounts for problems and appeals. The team has provided feedback to the ISD team, and we are continuing to refine the tool. The tool will be used for supplemental research if questions are raised about the PEPRA FAC.



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	Strategic	Executive (MOG/BSG)	06/15/2022	03/31/2024
	<b>Project Lead(s): JJ Popowich &amp; Shonita Peterson (PM)</b>			
<b>Delayed</b>				
<p><b>Prepaid Bank Card Project</b> Introduction of a prepaid bank card option for monthly benefit payments.</p>	<p>In June 2022, the OOC approved the release of a Request for Proposal (RFP) for a Prepaid Debit Card Service. LACERA seeks an easily accessible alternative to paper checks for monthly participant retirement and survivor benefit payments. The goals are three-fold: to provide a lower cost alternative to issuing checks for those participants without a banking relationship who are likely to pay fees to access their benefit payment, to reduce the number of monthly benefit payment checks issued by LACERA, and to create a more reliable payment process in the event of a disaster that impacts the ability to mail monthly paper checks. A secondary goal is to reduce or eliminate paper checks that are mailed to one-time payees by offering prepaid bank cards and direct deposit for death benefits and withdrawals.</p> <p>On September 30, 2022, LACERA received two proposals for Prepaid Debit Card Services. A cross functional evaluation team reviewed the proposals, and the vendors presented their services to the team. The selection team identified Conduent as the vendor of choice and the recommendation was approved by the Board of Retirement at the April 2023 board meeting.</p> <p>LACERA met with Conduent at our first kick-off meeting also known as the Joint Configuration Session on Tuesday November 14, 2023. Weekly “check in meetings” have been scheduled.</p> <p>We have decided to place the prepaid debit card project on hold due to concerns regarding data security. We have expressed our concerns to the vendor and are currently waiting for their response with a resolution to the matter.</p>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	RHC	Exec	March 2021	2024
	Project Lead(s): Santos H. Kreimann & Luis A. Lugo			
	On Schedule			
<b>Retiree Healthcare Administration: Lifetime Maximum Benefit Project</b>	<p>LACERA and the County CEO’s office are still in active communication in addressing the Lifetime Maximum Benefit issue. LACERA provided the Board of Retirement (BOR) with a formal report and update on our progress during the August 2, 2023, meeting via closed session.</p> <p>LACERA and the County continue to meet bi-weekly to ensure elimination of the Lifetime Maximum Benefit is the point of focus. The County is in the midst of engaging and negotiating with organized labor groups to discuss potential future retiree health benefit program changes. In November, LACERA received an information request from the County and provided the requested information to the County. The County requested additional RHC program related information from LACERA in December and January, to which LACERA responded accordingly.</p> <p>LACERA staff and LACERA’s actuary continue to consult with the County’s staff and actuary. These conversations and the County’s negotiation process have resulted in additional actuarial-related information requests from the County. LACERA is working with Milliman and the County’s actuary to complete these items:</p> <ol style="list-style-type: none"> <li>1) Retiree Healthcare benefits analysis and modeling to project future healthcare cost changes due to hypothetical benefit changes.</li> <li>2) GASB 75 report projections to analyze the impact of future healthcare cost changes.</li> <li>3) Retiree Healthcare benefit analysis of Tier 3 cost savings.</li> </ol> <p>As of January 29, 2024, The County of Los Angeles and Coalition of County Unions (CCU) continue to work through negotiations. LACERA continues to engage the County and Union representatives to provide any relevant information as they progress through their negotiations.</p>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	MS	Executive Office		01/31/2024
	Project Lead(s): Jonathan Tran and Maritza Perez			
	On Schedule			
<p><b>Retirement Counseling Redesign Project</b></p> <p>The basic retirement counseling process for members considering retirement has not changed in many years. While checklists used to counsel members have been updated over time, a top to bottom review of the process has not occurred in some time.</p> <p>The Member Services team has undertaken a project to modernize the counseling process to incorporate a true omnichannel approach by integrating the Retirement Planning section on LACERA.com and the My LACERA portal into the counseling process. Integrating these resources into the retirement counseling process will allow members to connect with LACERA in more ways than ever and help pave the way for future innovations and streamlined services.</p>	<p>A team of Member Services subject matter experts under the direction of the project leads have been meeting and developing a new retirement counseling model.</p> <p>The team has reviewed all data points and information shared with members during counseling sessions ranging from a few minutes to the more in-depth counseling sessions lasting an hour or more. The review is intended to ensure we are covering all of the vital information needed during our counseling sessions. The results of this review have led to updates to checklists, collateral material provided to members, and seeks to integrate the new Retirement Planning section on LACERA.com and My LACERA portal into counseling.</p> <p>Over the last few months, the team has been beta testing this new counseling model during actual member counseling sessions. This beta testing process has allowed the team to collect vital member and staff feedback on the new model.</p> <p>The team is now in the final stages of this project. They are working with the Communications team to update the Retirement Planning section on LACERA.com with additional information that will support key discussion points and feed into new communication collateral. Additionally, the team has launched the first phase of this project with a revamped PEPRA Final Average Compensation training module for all Member Services staff, in collaboration with Quality Assurance, Benefits, and PMG. Member Services staff have received an in-depth overview of the new Business Rules applicable to calculating a PEPRA member's FAC and how this affects other processes.</p> <p>Due to new enhancements to My LACERA that were released into beta in January, the team revised their counseling plans to incorporate the new functionality.</p>			



	Training on the new counseling standards was completed January 11 <sup>th</sup> , 2024. The Team will present an overview to the OOC on February 7, 2024, prior to full implementation expected later in February 2024.
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Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	Strategic	Exec (MOG)	07/01/2022	TBD
	<b>Project Lead(s): Kevin Hawkins</b>			
	<b>Delayed</b>			
<p><b>Tax Table Changes for 2022: Phase II: Online Tax Calculator &amp; ADR Re-design</b></p> <p>The IRS published updated tax tables for 2022 which became effective January 1, 2022. The IRS finalized a revised Federal Withholding Certificate for Pension &amp; Annuity Recipients (commonly referred to as a W-4P tax withholding form). These follow up projects are designed to improve the overall Member Experience.</p>	<p>Earlier this year, the Project Management Group worked with tax counsel to understand the intricacies of the changes to the W-4P tax withholding form for 2022.</p> <p>The team completed the rollout of the new Federal Withholding Certificate for Pension &amp; Annuity Recipients (commonly referred to as a W-4P withholding form) on time. This included updating Workspace so staff can enter member tax elections in compliance with the new form design, as well as My LACERA so members can complete tax election changes themselves.</p> <p>The team also identified additional tasks that need to be completed in Phase II of the rollout. These tasks include:</p> <ul style="list-style-type: none"> <li>Developing and releasing a tax calculator on the Member Portal. This tax calculator is a planning tool separate from the election function that was previously released. The tax calculator is also scheduled to be integrated into the retirement estimate process so members can see what their net pay would be after taxes. Specifications for the initial version have been finalized, and programming is underway. Systems provided a demonstration to stakeholders in May 2023. Systems added an initial version of the calculator to Workspace in July 2023 for select staff to test and provide feedback. User feedback was collected, and all Member Services staff now have access to use it. The Member Portal tax calculator is still under</li> </ul>			



	<p>development. Due to other management priorities, Systems is not currently working on the Portal calculator.</p> <ul style="list-style-type: none"> <li>An Automatic Deposit Receipt ADR redesign. Staff worked to develop a re-designed ADR with new fields that support the new tax withholding rules. After working with our check printing vendor to validate the new format would fit in the allotted space for the existing ADR, a business rule with an embedded copy of the proposed layout was distributed to stakeholders for approval. The redesign was approved by stakeholders in August and the team provided an informational memo to the Operations Oversight Committee in November. In November, we began notifying retired members through inserts in their November checks and various publications. Another notification was provided with the December checks. A new section has also been added to LACERA.com to provide members with detailed explanations on how to read their ADR/check stub. Members should receive the new ADR for the first time with their January 2024 checks or automatic deposits, which will complete this part of the project.</li> </ul>
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Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	BSG	Exec (BSG)	October 2021	01/30/2024
	<b>Project Lead(s): Laura Guglielmo, Ted Granger &amp; Cookie Jaranilla</b>			
	<b>On Schedule</b>			
<b>Travel/Expense/P2P Software</b> LACERA has procured “Certify” software created by Emburse, an accounts payable automation and expense management provider.	<u>Accounts Payable (AP) Module</u>  The AP Certify Project Team’s User Acceptance Testing has been completed, and Live Training has started with the business divisions targeted for the Soft-Launch. These Business Solutions Group of divisions is comprised of the following:			



- Admin Services Procurement
- Disability Retirement Services (DRS)
- Financial and Accounting Services Division (FASD)
- Legal Office
- Systems

In collaboration with Emburse's Implementation Team, the Project Team has aligned check payment processing with the requirements set by State Street Bank, LACERA's partner for clearing and funding checks. Simultaneously, the Project Team is actively integrating AP Certify with Great Plains (GP) Invoice payment data, finalizing critical components for data integration.

The AP Certify Project Team has conducted several End-User Trainings for various business divisions, commencing on January 9 and concluding on January 24. In preparation for the scheduled full launch on January 30, selected business divisions have actively started processing their invoices and requisition requests.



Existing Projects/Initiatives: No New Updates

This portion of the Operations Briefing will detail on-going projects that have no current changes in status.

Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	BSG	Executive (BSG)	12/01/2023	TBD
	Project Lead(s): Laura Guglielmo and Cookie Jaranilla (PM)			
	Delayed			
<b>Enterprise Budget Application (Questica) Implementation Phase II: Budget Book</b> LACERA nearly finished implementing its first automated enterprise budget application which will be used for budget development and budget control and will integrate with LACERA's financial system, Great Plains. This phase of the project will address the Budget Book that is submitted to the Boards during the approval process.	<p>The implementation of the Questica budgeting solution has been divided into two phases. Phase I concerns the implementation of the budgeting application itself. Phase II consists of the review and implementation of the Budget Book function to assist with assembling the budget book that is submitted for approval to the Boards.</p> <p>Development of the budget book is a unique and detailed process that requires significant focus to migrate to a new platform. The native budget book application provided by Questica will be evaluated by the team after we have completed implementation of the budget application. The team plans to produce the FY 25 Budget Book outside of this application while this is under review. Once we have completed the role out of the Questica application we will assign a target date for completion of this phase. The Project Team has been actively collaborating with Questica's Implementation Team to discuss project planning and schedule a kick-off for this initiative.</p>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
		MOG	Benefits	04/01/2021
<b>Project Lead(s): Louis Gittens</b>				
<b>Delayed</b>				
<p><b>COLA Bank Retroactive Changes</b> In April of 2021, the Board of Retirement approved corrections to the COLA Accumulation Bank, which involved making retroactive corrections, recalculating benefit allowance amounts, and paying members retroactive benefits due to a discrepancy discovered in the COLA Accumulation.</p>	<p>The project was broken down into five phases based on the complexity of the calculations needed to pay retroactive benefits to members. We will resume working on this project in January 2024.</p> <p>Phase I-IV: As of the date of this report, LACERA has paid out just over \$3.8 million in retroactive COLA earnings. Of the 9,672 members and survivors impacted, 8,511 accounts have been systematically resolved, which represents all members and survivors currently in a payment status.</p> <p>The fourth phase of the project, which requires manually calculating the retroactive benefits, includes 1,494 cases in a payment status. The manual phase of the project began in December 2021. Staff have manually calculated COLAs for 455 members and payments were issued earlier this year.</p> <p>Phase V: The final phase involves deceased members with no survivors currently receiving benefits. This phase requires research to identify the appropriate beneficiary(ies) or estates to pay the retroactive benefits that were due to the deceased member. This phase is currently delayed due to staffing limitations and the focus on the Alameda Decision Implementation.</p> <p>Systems and Benefits have been reviewing the root cause for the manual processing and developing plans for redesigning some portions of our pension administration system to help alleviate the need for processing for future projects.</p>			



	<b>COLA Bank: Retroactive Payment Project</b>		
	Status (As of 3/31/23)	Number	Percentage
	Completed	8,511	88%
	In-Process	1,161	12%
	<b>Grand Total</b>	<b>9,672</b>	<b>100%</b>

Although previously delayed, Benefits is in the process of training new staff on this project to perform manual processing.

Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date	
		Strategic	Exec (MOG)	02/28/2022	06/30/2024
		<b>Project Lead(s): JJ Popowich &amp; Cynthia Martinez</b>			
	<b>Pushed Back</b>				
<p><b>Communications Plan</b> The development of a strategic Communications Plan providing an overview of the guiding principles used to communicate with LACERA’s various stakeholder groups. The plan will also provide an overview of the channels, resources, methods, planned campaigns, and current commitments of the Communications team. The plan will outline how our communications Division has been designed to be flexible and responsive to our needs as we fulfill our communication goals.</p>	<p>The LACERA executive team met on August 30, 2022, to review and discuss the Communication Plan(s) drafted by both EKA (the Board of Retirement’s public relations consultant) and the LACERA Communications division. Both plans outlined a more tactical approach to engaging our members and various stakeholders, as opposed to a strategic roadmap. The team discussed opportunities and ideas for improving the Communication plan document. We are going to coordinate these efforts with our Strategic Planning process, since the work overlaps with our current Strategic Planning efforts.</p> <p>The Communications team is beginning the process of updating the draft Communications Plan to incorporate the Strategic Plan priorities and other feedback provided by the Executive Team.</p>				



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	Strategic	Exec (MOG)	01/01/2013	03/30/2024
	<b>Project Lead(s): Cynthia Martinez</b>			
<b>Pushed Back</b>				
<p><b>PEPRA Implementation: Annual Benefit Statement</b> LACERA does not currently offer an Annual Benefit Statement (ABS) for PEPRA members.</p>	<p>LACERA was unable to generate a PEPRA member ABS until we could accurately, automatically, calculate a member's FAC. This project is moving forward now that the FAC issue is nearly resolved.</p> <p>Progress continues on the <b>PEPRA Implementation: FAC Issue</b> project and that project's target date has been updated to October 30, 2023, to allow time to import historical files necessary to calculate a member's benefit estimates.</p> <p>A kickoff meeting was held on August 22, 2023, to discuss project expectations, review the Project Charter, confirm the ABS Team participants, briefly review the Active redesigned comp, and discuss next steps. It was confirmed the team will meet weekly to begin the review process of the Active redesigned comp.</p> <p>The team has decided to pursue a change in how we generate the ABS. To provide us with more flexibility in distribution of the new ABS, we'll be looking at generating a digital version which will decouple LACERA's reliance on specialized programming with our print vendors. This should also shorten the time to complete and publish a new ABS. The team is currently reviewing, editing, and formatting the new ABS. Once this is completed, the team is working on defining a target date. The original target date of November 30, 2023, has been pushed back due to delays in importing the PEPRA FAC data and staffing shortages in Communications.</p>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
		Strategic	Executive (MOG)	July 1, 2022
<b>Project Lead(s): Louis Gittens</b>				
<b>On Schedule</b>				
<p><b>Pre-2003 Pension Reserve Clean-up</b></p> <p>Prior to January 1, 2003, non-vested contributory individuals were required to withdraw their contributions upon termination as they were not entitled to future benefits. The law was changed as of that date and non-vested members are now permitted to leave funds on deposit and later retire. LACERA has attempted to contact the non-vested individuals who terminated prior to 2003 and still have funds on deposit so they can withdraw their funds.</p> <p>The purpose of this project is to ensure that LACERA sends written notice through Certified mail to the most valid address we can find. Individuals in this group who still have funds on deposit after this initiative will have their funds placed into the Pension Reserve.</p>	<p>LACERA previously sent notification to the remaining 673 affected individuals. We determined which letters were returned to LACERA and sent notifications to secondary addresses through Certified mail. In November, we began sending letters to next of kin for deceased members.</p> <p>At this point, notification has been sent to all affected individuals. The Process Management Group in Benefits is working with FASD and Systems to have funds placed in the Pension Reserve, the final stage of this project.</p>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
		Strategic	Exec (MOG)	2019
<b>Project Lead(s): Vanessa Gonzalez</b>				
<b>Pushed Back</b>				
<p><b>Retirement Estimate Redesign</b> A legacy strategic plan goal to redesign the retirement estimate and election form as a retirement prospectus to provide members with all the information they need to make an informed decision about their retirement.</p>	<p>The initial redesign work was completed in 2019 and a beta test with members at the Member Service Center (MSC) was scheduled for after the 2019 March Madness. However, the COVID-19 Pandemic placed this project on hold.</p> <p>The team re-evaluated the redesigned estimate, taking into account staff and member feedback gathered over the last few months. The first re-design turned out to be more complicated than would be useful.</p> <p>In late 2022, LACERA updated the Retirement Planning section on LACERA.com and released a new Retirement Election form. The team will be using this election form and the feedback gathered, to create a new retirement estimate. This coincides with a larger Member Experience effort to standardize and streamline retirement counseling across all available channels and incorporating LACERA.com in the counseling process.</p> <p>The team also recognized the previous work on this project may be useful in creating the online retirement application.</p>			

Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
		Operations	Exec (MOG)	June 2021
<b>Project Lead(s): JJ Popowich</b>				
<b>Pushed Back</b>				
<p><b>Retroactive Payroll Adjustments: Prospective Correction</b> The Auditor-Controller is responsible for collecting contributions on all</p>	<p>Following the AC's programming change, LACERA implemented a testing regimen to ensure that the contributions were being deducted as expected.</p>			



compensation earnable and pensionable earnings compensation at the time of payment. For many years, the AC has not been collecting contributions on retroactive payroll adjustments. In 2021, the AC made changes to their programming to take deductions at the time of payment. However, there are still some situations where these contributions are not being collected.

In August, the AC notified LACERA that they were adjusting the time frame that they would be withholding contributions for retroactive adjustments to 60 months (from the current 99 months). All retroactive earnings paid for pay periods more than 60 months in arrears would no longer have contributions deducted from them. This change was made by the County due to excessive degradation in their payroll system's performance.

In 2022, LACERA met with the AC's team to discuss collection of contributions for adjustments more than 60-months old. A few ideas were generated from the meeting, and we will continue to work with them to develop a procedure that both the County and LACERA can support.

No change has occurred on this issue.



• Completed Projects/Initiatives

This portion of the Operations Briefing will detail projects and initiatives that have been completed during the Fiscal Year 2023 - 2024.

Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
		BSG	Financial & Accounting Services Division	August 2022
	<b>Project Lead(s): Ted Granger</b>			
	<b>Completed</b>			
<p><b>Actuarial Valuation Reports: 2022 Actuarial Valuation of Retirement Benefits</b></p> <p>The Government Code requires that valuations of the Retirement Fund (Pension Plan) be performed at least once every three years. The Board of Investments' 2013 Retirement Benefit Funding Policy requires valuations be completed annually. These reports are prepared to determine employer and employee contribution rates and to measure the funded status of the Pension Plan. In addition, the valuation report provides information used to prepare the Governmental Accounting Standards Board (GASB) Statement Number 68, financial statement reports. Plan Sponsors use the GASB reports to obtain information</p>	<p><b>2023 Retirement Benefits – Actuarial Risk Assessment</b></p> <p>LACERA staff and Milliman presented the 2023 Annual Actuarial Risk Assessment report based upon the most recently completed Valuation report, to the Board of Investments (BOI) at their June 2023 meeting. There were some follow-up questions from Trustees regarding the impact PEPPRA may have on setting actuarial assumptions. Staff expects Milliman to present some additional information at a future BOI meeting.</p>			



required for their financial statement disclosures.

Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
		BSG	Financial & Accounting Services Division	July 2022
<b>Project Lead(s): Ted Granger</b>				
<b>Completed</b>				
<p><b>Actuarial Valuation Reports: 2022 Other Post-employment Benefits (OPEB) Actuarial Valuation</b></p> <p>The retiree healthcare (RHC) program administered by LACERA on behalf of Los Angeles County includes retiree healthcare benefits such as medical and dental insurance plans and death benefits. GASB refers to these benefits as Other Post-Employment Benefits (OPEB) for financial reporting. GASB Statement Number 75 prescribes financial statement reporting standards for OPEB programs. Actuarial valuations are prepared annually for Los Angeles County and LACERA's Board of Retirement to make funding decisions and to provide the information for the GASB 75 report which is used for employer financial statement reporting.</p>	<p><b>2022 OPEB – Annual Actuarial Valuation Report</b></p> <p>Milliman completed the July 1, 2022, OPEB Valuation Report and presented the results to the Board of Retirement on August 2, 2023.</p> <p>The upcoming 2023 OPEB actuarial reporting cycle will include both a triennial experience study and annual valuation report.</p>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
		BSG	Financial & Accounting Services Division	August 2023
<b>Project Lead(s): Ted Granger</b>				
<b>Completed</b>				
<p><b>Actuarial Valuation Reports: Retirement Benefits</b></p> <p>The Government Code requires that valuations of the Retirement Benefits Fund (Pension Plan) be performed at least once every three years. The Board of Investments' 2013 Retirement Benefit Funding Policy requires valuations be completed annually. These reports are prepared to determine employer and employee contribution rates and to measure the funded status of the Pension Plan. In addition, the valuation report provides information used to prepare the Governmental Accounting Standards Board (GASB) Statement Numbers 67 &amp; 68 reports. Plans (LACERA) and Plan Sponsors (County) use the GASB reports to obtain information required for their financial statement disclosures.</p>	<p><b>2023 Retirement Benefits – Annual Valuation</b></p> <p>The June 30, 2023, Retirement Benefits Valuation Report has been completed. Milliman and staff presented the final report to the Board of Investments (BOI) at their December 2023 meeting.</p> <p>There are two additional reports that will be prepared based upon the results of the 2023 Retirement Benefits Valuation Report:</p> <ol style="list-style-type: none"> <li>1) Staff will work with Milliman to prepare the upcoming GASB 68 report for Los Angeles County's June 30, 2024, annual financial statements.</li> <li>2) Staff will work with Milliman to prepare the upcoming 2024 Risk Assessment Report, tentatively scheduled to be presented at the June 2024 Board of Investments meeting.</li> </ol>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
		BSG	Financial & Accounting Services Division	May 2023
	<b>Project Lead(s): Ted Granger</b>			
	<b>Completed</b>			
<p><b>Annual Financial Statement Preparation and Audit:</b> Government code sections require that LACERA prepare annual financial statements including footnotes and disclosures, obtain an external audit opinion of those statements, and transmit the reports to the Los Angeles County Board of Supervisors within six-months following the fiscal year-end.</p>	<p style="text-align: center;"><b>2023 – ACFR and PAFR</b></p> <p>LACERA completed it's 2023 annual financial statements project having reached the following milestones:</p> <ul style="list-style-type: none"> <li>• LACERA distributed the Annual Financial Statements (AFS) to the LACERA Boards and Los Angeles County in early November.</li> <li>• Plante Moran presented the audit reports and AFS to the Audit Committee at their December meeting.</li> <li>• Communications completed and mailed the Popular Annual Financial Report (PAFR) to all members in December.</li> <li>• Communications finalized the Annual Comprehensive Financial Report (ACFR) and post it to LACERA's website by the end of December.</li> <li>• FASD submitted LACERA's ACFR and PAFR to the Government Finance Officers Association (GFOA) for their award programs by the end of December.</li> </ul>			



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	BSG/MOG	Communications/Systems	December 2022	September 2023
	Project Lead(s): Selassie Burke, Erika Heru/Ian Duggan			
	Completed			
<p><b>KBase Migration to SharePoint</b>                      KBase is an older knowledge base product that staff use on a daily basis for historical information, explanations of CERL and other information. The KBase data infrastructure needed to be updated to ensure its continued viability and improve access.</p>	<p>As part of the continuous commitment to improve our digital infrastructure and enhance user experience, our current Knowledge Base (KBase) has transitioned to a newer and more advanced platform on SharePoint.</p> <p>The move to SharePoint isn't just about a new look—it's also about functionality, security, and efficiency. SharePoint offers a robust platform, with numerous advantages such as improved security, enhanced collaboration features, and scalability to meet our future needs.</p> <p>KBase remains easily accessible within LACERA Connect. KBase now has a built-in search feature on SharePoint, locating the information needed is faster and more intuitive.</p> <p>Systems, in particular, Selassie Burke, managed the migration ensuring it was a seamless transition of a total of 1,314 related Wiki web pages that are now fully indexed and searchable.</p>			

Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	BSG	Executive (BSG)	01/01/2023	09/30/2023
	Project Lead(s): Carly Ntoya and Michael Dozier (PM)			
	Completed			
<p><b>Human Resources (HR) Case Management</b>                      LACERA seeks a case management solution that supports Human Resources workflow with automatic</p>	<p>In December 2022, the Information Technology Coordination Council approved a case management project for Human Resources. Funding for the project was approved during the FY 2022-23 midyear budget adjustments. The HR project team selected ServiceNow's Human Resources module for their case management solution.</p>			



<p>notifications, document management, and version control as well as the ability to view HR workloads on an interactive dashboard.</p>	<p>Since August, the Winward Implementation team has been testing the HR Case Management Module. We are pleased to report Phase 1 testing has been completed. In addition, the Phase 2 Discovery Session consisting of Knowledge Management and New Hire workflows have been accomplished, and several demonstrations of the completed workflows have been provided, recorded, and saved for training purposes and stakeholders' consumption. Live User Acceptance Testing (UAT) of Phase II was completed in early October. This finalizes the Implementation activities, and the HR Case Management application was released to production on October 3<sup>rd</sup>. The Executive Management Presentation of the HR Case Management took place on October 5<sup>th</sup>. Post implementation plans are to use feedback gathered during the UAT for future enhancements.</p>
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<b>Project / Issue Title Brief Description</b>	Type	Project Sponsor	Start Date	Target Date	
		BSG	Executive (BSG)	10/01/2022	12/30/2023
		<b>Project Lead(s): Carly Ntoya and Don Song (PM)</b>			
		<b>Completed</b>			
<p><b>Human Resources (HR) Digitization</b> LACERA is currently converting 350,000+ paper Human Resources' personnel, payroll, medical, and classification files to electronic files to allow quick retrieval of documents by a hybrid workforce, shared access to information, full text search capabilities, and an audit trail of document access.</p>	<p>In March 2022, the Information Technology Coordination Council approved the Human Resources Digitization Project. Funding for the project was approved as part of the FY 2022-23 budget.</p> <p>The scanning of the 350,000 HR Historical files has been successfully accomplished. As the project concludes, the plan is to transition the management and support of HR Digitization to Systems Infrastructure for ongoing operations.</p>				



Project / Issue Title Brief Description	Type	Project Sponsor	Start Date	Target Date
	BSG	Executive (BSG)	09/21/2023	Q2 2024
	Project Lead(s): Luis Lugo and Gnan Arige (PM)			
	Completed			
<b>Policy Management Solution</b> LACERA seeks an automated solution to support LACERA Policy Management Process.	<p>In September 2022, the Information Technology Coordination Council approved a policy management project to automate the creation, review, approval, and maintenance of LACERA policies as well as track the versions and acknowledgement of policies. Funding for this project was included in the FY 2022-23 budget. The policy management project team issued a Request for Quote (RFQ) and reviewed quotes submitted by interested vendors and consultants.</p> <p>The Executive Sponsor and Project team have decided to conclude this project and integrate its objectives and requirements into a new initiative. The upcoming initiative, tentatively named the “Organizational Governance Initiative,” will encompass additional modules, including Compliance GRC, Internal Audit, and Enterprise Risk Management. This strategic move aims to streamline and align various governance aspects under a cohesive framework for more effective management and oversight.</p>			

DATE RECEIVED	REQUESTER	DOCS REQUESTED
12-19-23	M. Konradt, Princeton	<p>Requester: Detailed (security-level) holdings at year-end for period 2000-2022.</p> <p><b>Legal, on December 27, 2023, via email, informed Requester that LACERA expects to send responsive information by January 12, 2024.</b></p> <p><b>Transmitted 2 documents.</b></p> <p><b>Legal, on January 5, 2024, via email, transmitted the 2 responsive documents shown below.</b></p> <p><b>FOIA Request – Princeton University Max Konradt – Illiquid Holdings 2013-2022.xlsx and FOIA Request – Princeton University Max Konradt – Liquid Holdings 2013-2022.xlsx.</b></p>
01-05-24	H. Ahaiwe, HR, LA County and 1 other Recipient	<p>Per monthly request:</p> <p><b>Transmitted 1 document.</b></p> <p><b>Executive Office, on January 5, 2024, via email, transmitted the responsive document shown below.</b></p> <p><b>MonthlyAgenda.csv for January 1, 2024.</b></p>
01-05-24	LA County Sheriffs Dept and 4 other Recipients	<p>Per monthly request:</p> <p><b>Transmitted 2 documents.</b></p> <p><b>Executive Office, on January 5, 2024, via email, transmitted the responsive documents shown below.</b></p> <p><b>Monthly Agenda Reports for Sheriff Department Listing and Fire Department listing, each dated January 3, 2024.</b></p>
01-05-24	C. Siverson, Fire, LA County, and 5 other Recipients	<p>Per monthly request:</p> <p><b>Transmitted 1 document.</b></p> <p><b>Executive Office, on January 5, 2024, via email, transmitted the responsive document shown below.</b></p> <p><b>Board of Retirement Meeting on January 3, 2024, Benefit Approval List.pdf.</b></p>
01-09-24	J. Kittleworth, Individual	<p>Request: Per agenda item X(C) “Total Fund Investment Cost Report – fiscal Year 2023” presented at BOI meeting on December 13, 2023, requested copy of communication (s) sent out on LACERA’s behalf soliciting disclosure of “Portfolio Company Expenses” for the following funds shown below.</p> <p>Blackstone Real Estate Partners X, L.P.;</p>

DATE RECEIVED	REQUESTER	DOCS REQUESTED
		<p>Carlyle Europe Real Estate Partners III, L.P.; Bain Capital Real Estate Fund I-A, L.P., and TPG Real Estate Partners III, L.P.</p> <p><i>Legal, on January 10, 2024, via email, sent to Investments the request for responsive information.</i></p> <p><i>Transmitted 5 documents.</i></p> <p><i>Legal, on January 18, 2024, via email, sent 5 responsive documents to requester.</i></p>
01-11-24	L. J. Klein, Individual	<p>Request: Public Records for work-related claims for Lonnie Franklin Jr. beginning in January 1983 to 1985 wherein 3 Injured on Duty claims were filed including disability retirement application on November 5, 1991.</p> <p><i>Legal, on January 17, 2024, via email informed Requester that after conducting a thorough review LACERA does not have responsive records for Lonnie Franklin Jr.</i></p> <p><i>Also informed Requester that LACERA manages benefits for LA County employees, not LA City employes. Suggested LA City Employees Retirement System for requested records.</i></p>
01-13-24	J. Dunn, Individual	<p>Request: Public Records related to LACERA's relationship with MHA Consulting for Business Continuity Services.</p> <p><i>Transmitted 15 documents.</i></p> <p><i>Legal, on January 17, 2024, via email, transmitted to Requester 15 responsive documents.</i></p>

## REPORT OF FELONY FORFEITURE CASES

January 26, 2024

#	MEMBER'S LAST NAME	MEMBER'S FIRST NAME	DEPT.	CONVICTION DATE	LACERA NOTIFIED	INITIAL IMPACT NOTICE SENT	FINAL IMPACT NOTICE SENT	STATUS*	DISABILITY STATUS	SERV. LEVEL
66	VEGA	MIGUEL	SHERIFF	9/5/2023	10/27/2023			PEND		
65	HERNANDEZ	CHRISTOPHER	SHERIFF	7/24/2023	10/11/2023			PEND		
64	RIDLEY-THOMAS	MARK	BOS	3/31/2023	3/31/2023	10/23/2023		APPEAL		
61	SHEPOS	THOMAS	CEO	1/23/2023	2/14/2023			PEND		

**STATUS LEGEND:**

- **APPEAL:** Pending an appeal filed with LACERA
- **GLOSED: RET:** Retired member, case is complete
- **GLOSED: DEF:** Deferred member, case complete.
- **GLOSED: INA:** Inactive member – not eligible until age 70, case closed
- **DELAY-MI:** Member input needed (i.e. pending a legal split decision)
- **DELAY-CD:** Pending a court decision (reduction in charges pending conditions being met)
- **PEND:** Case is currently in evaluation and notification stages
- **WITHDRAWN:** Member withdrew prior to conviction – no impact.



January 12, 2024

TO: Operations Oversight Committee  
JP Harris, Chair  
Antonio Sanchez, Vice Chair  
Wayne Moore  
Keith Knox  
Jason Green, Alternate

FROM: JJ Popowich   
Assistant Executive Officer

Tatiana Bayer   
Division Manager, Member Services Division

FOR: Operations Oversight Committee Meeting of February 7, 2024

SUBJECT: Standardized Retirement Counseling

## **EXECUTIVE SUMMARY**

On July 6, 2023, the Board of Retirement unanimously approved the LACERA Board of Retirement's 2023-2028 Strategic Plan. LACERA's Executive and Management team are actively working on the initial priorities, and Member Services Division is leading the Superior Member Experience priority. The initiative is to provide a superior member experience, focused on delivering omnichannel support and everything a member needs during the many journeys throughout the member's lifecycle with LACERA. As a pilot program, our dedicated staff has been collaborating on standardized retirement counseling, simultaneous with the launch of the online retirement application through the Member's portal account (My LACERA.com).

The Omnichannel Retirement Counseling methodology is designed to deliver consistent information from LACERA, through all available channels, such as phone calls, virtual counseling, in person counseling, self-service (My LACERA) and webinars. The retirement election journey is often a complicated journey that involves multiple contacts from members as they make one of the most important decisions of their lives. Creating a standardized and connected process across all channels allows members to choose the way they prefer to communicate with LACERA at different stages of their journey while maintaining a continuity of service and information.

Member Services staff along with Benefits and Systems Divisions collectively completed a comprehensive training, including power point presentations, documentation templates, and new systems updates. Training was provided to all Member Services Division during the week of January 9 through 12, 2024. The training was also recorded, which will allow future hires to be trained or staff to review the presentation at any time. The new standardize retirement counseling and online retirement application will be available to use effective January 16, 2024.

## **WHAT'S NEXT**

We are excited with the high level of information that was shared among staff and the commitment the team showed when they embarked on this process. We are looking forward to continuing to develop and create standardized counseling for the different member journeys they will experience throughout their career and after retirement with LACERA. We will continue to monitor the progress of the Strategic Planning goals and evaluate and analyze member's response to ensure we continue to provide Superior Member Experience.

## **CONCLUSION**

Our staff continues to engage and dedicate time to collaboratively build a strong plan that meets our member's needs through an omnichannel approach. Collaboration with the subject-matter experts in both member-facing and support Divisions is imperative to have a successful superior member experience. We are looking forward to innovative ideas and future collaborations among LACERA Divisions.

CC: Santos H. Kreimann  
Maritza Perez

Luis A. Lugo  
Jonathan Tran

Laura Guglielmo  
Kathy Delino

Louis Gittens

# Member Services: Omnichannel Retirement Counseling

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Jonathan Tran and Maritza Perez



## 01 PURPOSE

The Omnichannel Retirement Counseling model was created with **one goal in mind**: to standardize LACERA's Retirement Counseling Services and ensure that members receive the same information, no matter what communication channel they choose to interact with LACERA. This new approach empowers our members to enjoy a **healthy and secure retirement** by providing new ways to receive counseling, while maintaining our traditional services. Omnichannel respects that **not all members learn or interact with us the same way**, and formed different avenues to meet our members needs and preferences.



## FOCUS GROUPS

- 9 Member Services Specialists
- Originally only 2 models: Online Guided and Verbal

## BETA TESTING

- Collected members and specialist user feedback on their experience
- Identified need for a new form of counseling: Abridged Counseling

## STANDARDIZING CONTENT

- Counseling Content
- Counseling Checklists
- Retirement Election
- Documentation
- Collaboration across multiple LACERA divisions

## TRAINING AND ROLL OUT

- Trainings concluded in January 2024
- In-House Live Support for Specialists
- Easy access to Operations Instructions and Business Rules Updates
- Fluid Models

# Member Centric Approach



## Prior Retirement Counseling Model

- ❑ Member received counseling and information through different avenues:
  - Phone Counselling through Call Center
  - Virtual Counseling through VMSC
  - In-Person Counseling through MSC
  - General info through [welcome@lacera.com](mailto:welcome@lacera.com)
  - Personalized general info through Secure Message on myLACERA
- ❑ Counseling was individualized but directed from Workspace data and Retirement Checklists – limited access for member.
- ❑ There was no uniform method to provide counseling across all channels of communications.

## Omnichannel Retirement Counseling

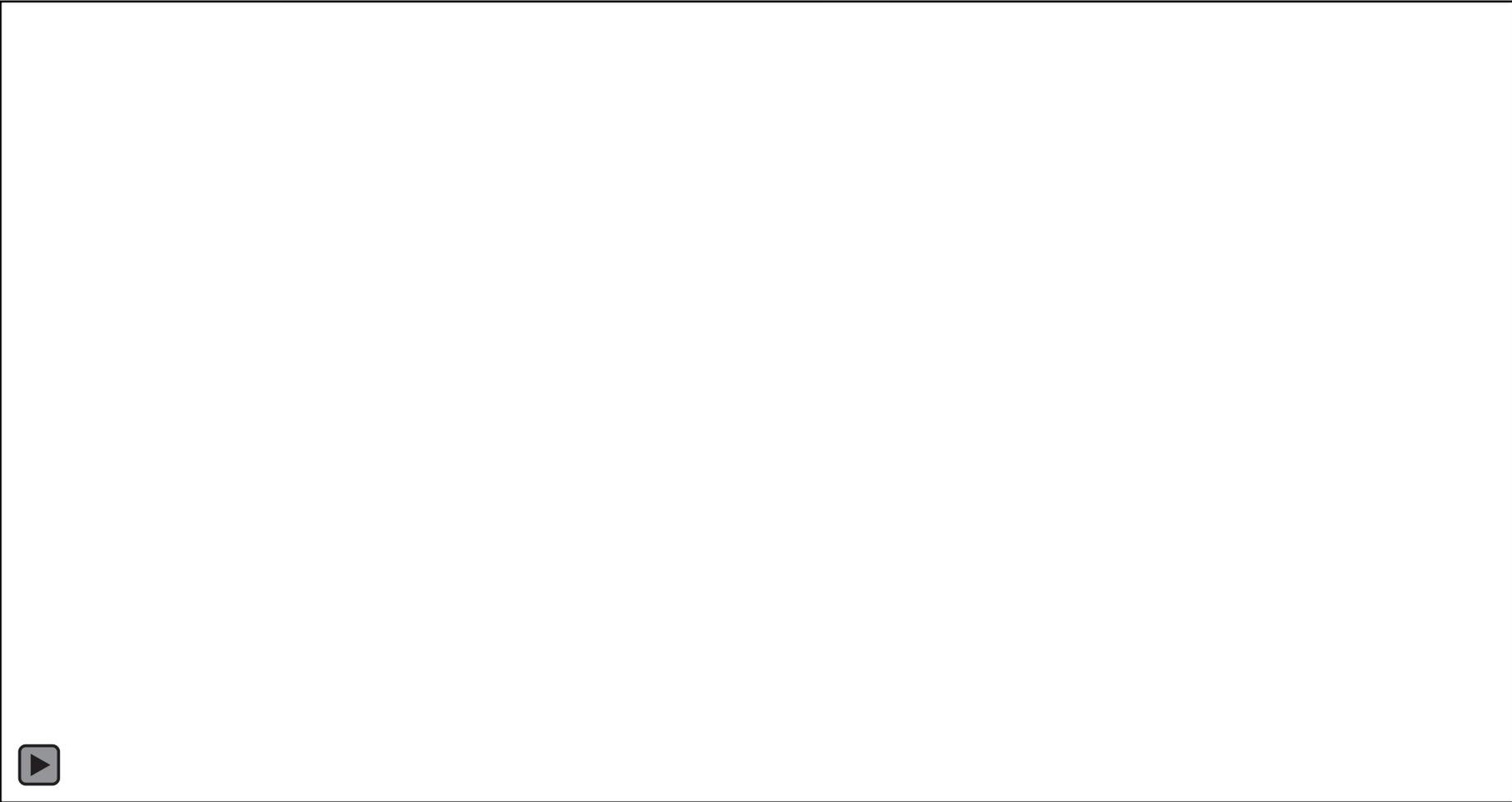
- ❑ Omnichannel approach: providing the same information to members no matter what form of communication they use to contact LACERA.
- ❑ Encourages members to use the new website's **Retirement Planning Hub** as reference tool and resource
  - Centralization of retirement education
  - Online educational and self-service tools
  - Guided online retirement education with a Retirement Specialist
- ❑ Meeting members where they are in real time
  - Continued assistance to members who prefer traditional counseling methods (phone and in person).



## 02 THE RETIREMENT PLANNING HUB

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# Retirement Planning Hub





# 03

## SELF SERVICE TOOLS ON MYLACERA

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# My LACERA Portal Registration



**My LACERA**

Member Sign In

Email Address

Password

[I forgot my password](#)

Sign In

New User? [Register Now](#)

[Assistance with My LACERA](#)



## Multi-Factor Authentication

We are deploying a security feature called Multi-Factor Authentication (MFA) that will protect and ensure the safety of your data. If you reset your password or are using a new device when you log in, you will receive a prompt for MFA to confirm it is you.

# Centralizing Self Service Tools



Where can I find my plan info?

The screenshot shows the My LACERA website interface for a user named Ted Testcase. The page is divided into several sections:

- Retirement Plan G - General:** A table with the following data:

Membership Date	12/31/1969
Termination Date	12/31/1969
Service Credit	15 yrs, 10 15/17 mos
Final Average Compensation	Not available online for PEPPRA members at this time
Latest Contribution Rate	10.69%
Monthly Contribution	\$333.77
Total Contributions and Interest	\$161,303.70
- Eligible for Retirement:** A section stating "Our records indicate that you meet the requirements of eligibility for Retirement Plan D - General." with an "Apply for Retirement" button and a link to "Calculate your benefit estimate".
- Primary Beneficiaries:** A list of beneficiaries:
  - Ann O'Nymous (Spouse)
  - Bunny Fischerie (Daughter)
  - Ben E. Fischerie (Son)
- Manage Your Retirement:** A section with several options:
  - Review Personal Information
  - Purchase Service Credit: "Eligible members can now [apply to purchase service credit](#)."
  - Disability Retirement: "Eligible LA County employees may now [apply for Disability Retirement](#)."
  - Paperless Delivery

How do I apply for retirement?

How do I apply to purchase service credit?

How do I apply for Disability Retirement?

Who are my beneficiaries?

# My LACERA Retirement Estimates



See what your retirement benefit would be for each of the six different Retirement Options

Your Retirement Benefit Estimate (RBE) is a personalized calculation of the benefits you will be entitled to when you retire. It's a valuable tool you can utilize throughout your career as you make decisions that may impact your retirement. Using your personal data currently on file with LACERA, The RBE will show how specific retirement dates and additional service credit—whether earned or purchased—can increase your retirement allowance.

**Please Note**

This non-binding estimate is intended for illustrative purposes only and is subject to final determination of the benefits mandated by the Plan; it cannot be submitted as an application for retirement.

## Quick Calculation

[Calculate](#)

for Fast Results

The quickest route to create your estimate, allowing you to enter an alternative retirement date within six months from today's date.

## Calculation

[Calculate](#)

with Retirement Tips

Takes you step by step through the variables involved in estimating your retirement allowance. Read tips related to that topic along the way.

Los Angeles County Employees Retirement Association

[800-786-6464](#) | [Send Message](#) | [Appointments](#) | [lacera.com](#)



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## 04 STREAMLINING FILING FOR RETIREMENT

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# Two Simple Ways to File For Retirement



## ON PAPER



### SERVICE RETIREMENT APPLICATION

Phone: (800) 786-6464 Fax: (626) 564-6155

Welcome to LACERA's Retirement Application. This document is intended solely for LACERA members electing to apply for service retirement. Contact LACERA for disability retirement or retirement with divorce/dissolution.

Completion of this form requires you to provide necessary personal information and make essential decisions about your retirement. You will need to select a retirement option from six available choices. Each option offers a different balance of benefits for you and your beneficiaries. They are all thoroughly explained in the options section to assist you in making an informed decision.

You will also be required to submit the appropriate documents, depending on your election, along with your form:

- Photocopy of your marriage certificate or California certificate of registered domestic partnership
- Beneficiary birth certificate(s)
- A certificate attestation form with photocopies of your marriage, birth, or domestic partnership certificates, certifying that the copy submitted is a true and correct copy of the certificate and contains no alterations from the original
- Social Security statement showing your benefit amount, if applicable

**Important:** LACERA will accept your signed retirement election and we will honor the date requested; however, LACERA cannot process your application or provide retirement benefits until the required documentation for your option is provided.

**If your account has a legal hold for pending dissolution of marriage or registered domestic partnership, we cannot pay your retirement allowance until we have received the final conformed dissolution documents.**

**Submission notes:** Refer to the instructions at the bottom of Section 5 for details on how to share your application and other required documents with LACERA. When submitting certificates, you will be prompted to complete an attestation form if uploading to [My LACERA](#), or you can download a [certificate attestation form](#) to provide with uploaded, faxed, or hard copies. Your account is subject to review, which may result in a change in retirement benefit. Reciprocity may also affect your benefit.

#### SECTION 1 Enter Your Personal Information

<input type="text"/>	<input type="text"/>	
Name (First Name, Middle Initial, Last Name)	Marital Status*	
<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	
Email	Employee #	Mobile Phone

\*You must be married or registered with the California Secretary of State as domestic partners one year prior to your service retirement for your spouse or partner to be eligible for continuing survivor's benefits.

#### SECTION 2 Confirm Your Beneficiary Designation

Your beneficiary designation directs how your retirement benefits will be distributed, based on your retirement option, when you pass away. Before submitting your retirement election form, check and make any needed updates to your beneficiary designation. You can update your beneficiary(ies) on [My LACERA](#) or submit a new [Beneficiary Designation form](#).

By providing my initials, I confirm that I have reviewed my current beneficiary designation and verified that my beneficiary(ies) and their contact information are up to date and correct.

## ONLINE

**My LACERA**  
Los Angeles County Employees Retirement Association

Welcome, Ted Testcase  
Last Visit: 12/4/2023

Retirement Plan G - General	
Membership Date	12/31/1969
Termination Date	12/31/1969
Service Credit	15 yrs, 10 15/17 mos
Final Average Compensation	Not available online for PEPPA members at this time
Latest Contribution Rate	10.69%
Monthly Contribution	\$333.77
Total Contributions and Interest	\$161,303.70

[Create and print an Amount in Fund letter](#)

Primary Beneficiaries	
Ann O'Nymous	(Spouse)
Bunny Fischerie	(Daughter)
Ben E. Fischerie	(Son)

Is all of your beneficiary information up to date? Access all of your beneficiary records here on My LACERA.  
[Manage your beneficiaries >](#)

**Eligible for Retirement**  
Our records indicate that you meet the requirements of eligibility for **Retirement Plan D - General**.  
[Apply for Retirement](#)  
[Calculate your benefit estimate](#)

**Manage Your Retirement**

- Review Personal Information**  
View and change your [contact information](#) and [beneficiaries](#) on file with LACERA.
- Purchase Service Credit**  
Eligible members can now [apply to purchase service credit](#).
- Disability Retirement**  
Eligible LA County employees may now [apply for Disability Retirement](#).
- Paperless Delivery**  
You can now opt to receive digital copies of your documents through the [Document Delivery Option](#).

Los Angeles County Employees Retirement Association  
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# 05

## OVERVIEW OF RETIREMENT COUNSELING MODELS

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# Retirement Counseling Flow



## Personal Info

- Starts with Basic Validation
- DOB
- Address
- Contact Information

## Comprehensive Screen

- Sworn Statement and Perm Date
- Membership Date
- Current Plan and Plan Transfer Dates
- Contribution Rate and Plan Entry Age
- Service Credit / Reciprocal Service Credit
- Completed Purchases

## Beneficiaries

- Beneficiary Data
- Marriages
- Divorces
- Certificates

## FAC

- Inflations
- Buybacks
- Clean vs Messy PEPRAs Salaries

## Retirement Estimates

- Best Dates to Retire
- Retirement Options and Death Benefits
- Disability Retirement Estimates

## RHC

- Subsidy
- Retirement Healthcare Plans
- Survivor Eligibility

## Retirement Process

- 6 months prior for RBE
- 90 days prior to file written election
- Disability Retirement (online or paper)

## Special Durable POA

- Optional but highly recommended
- Reminders for government-issued ID for AIFs
- Especially important for Active Plan E

## myLACERA

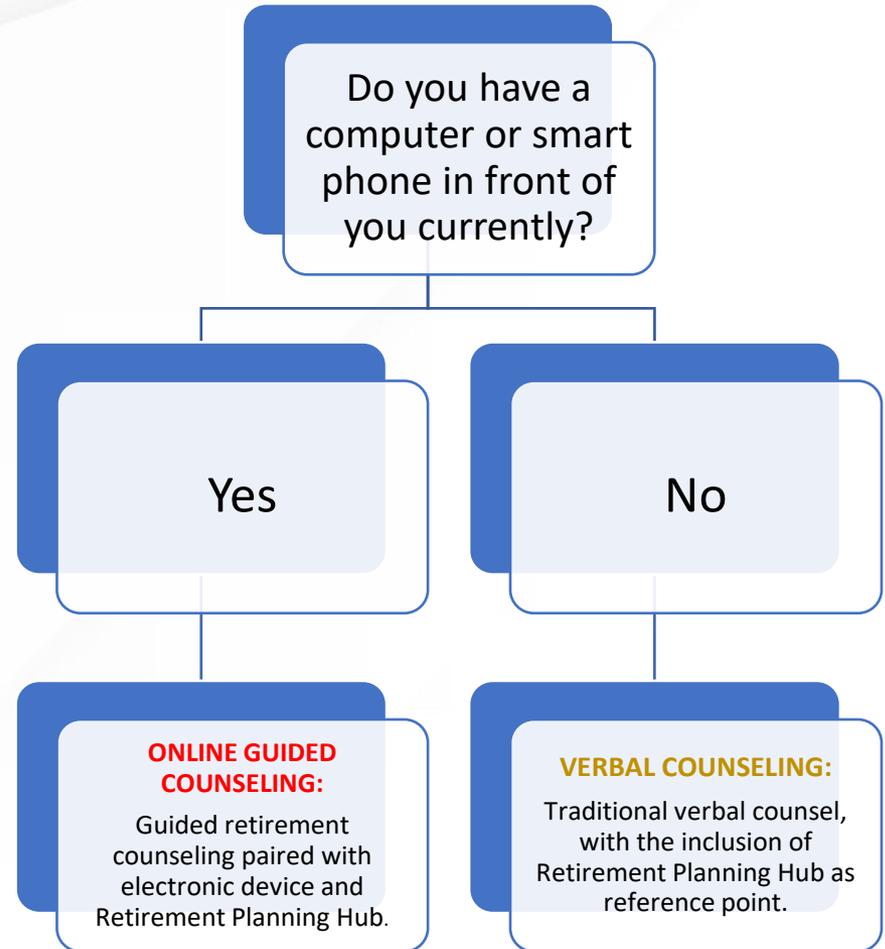
- Optional but highly recommended
- Put Retirement into the hands of retiree
- 24/7 access to retirement information

# Online Guided versus Verbal Counseling



Gauging a member's aversion to technology.

- **For members who have the time for full retirement counseling.**
- **Online Guided Counseling**
  - Specialist will guide member through the Retirement Planning Hub on their electronic device.
  - The Retirement Planning Hub is an additional resource to one-on-one counseling – does not replace counseling with a Specialist.
- **Verbal Counseling**
  - Our current model, with the inclusion of the Retirement Planning Hub as reference point in the conversation.



# Online Guided Counseling



## Service Credit

- Active Service
- Contributions
- Service Credit
- County Categories
- Non-County Categories
- Purchasing Service Credit
- Additional Retirement Credit
- Compensation
- Reciprocity
- Terminating Service
- Felony Forfeiture
- Pre-Retirement Divorce
- Disability Retirement

Service credit is one of the factors used to calculate the allowance you will receive when you retire. The other factors are your retirement plan, age at retirement, and final compensation. There are two types of service credit: earned and purchased.

### Calculating Your Retirement Benefit

Log in to [My LACERA](#) to use the retirement benefit estimate (RBE) calculator. You can input potential retirement dates, service credit amounts, and retirement options to see how it will affect your monthly amount.

### Earned Service Credit

You earn service credit for each payroll period in which you work and a retirement contribution is made. Since years of service credit are one of the factors that determine the monthly allowance you receive when you retire, the more years of service credit you have, the higher your monthly retirement allowance will be.

Service credit also affects the cost of your LACERA-administered retiree healthcare benefits. The County subsidizes retiree medical/dental insurance based on a member's years of service credit; the more service credit you have, the more the County pays toward your premiums (certain exceptions apply).

Plan E members have different requirements for earning service credit than contributory plan members. Consult the [Understanding the Variables > Earning Service Credit](#) section of your plan book for more info.

**Member:** How did I miss service credit?



## LACERA

About LACERA Active Members Retirees and Families Retiree Healthcare

### Purchasable Service Credit

Service credit may be purchased for certain types of County service and non-County government service performed prior to LACERA membership (various eligibility requirements apply).

Plan E members may not purchase County and non-county employment prior to LACERA membership.

**Purchasable County service** may include:

- Temporary County service
- Permanent County time prior to LACERA membership
- Redeposit of withdrawn contributions
- Sick without pay (SWOP)
- Conversion of prior general service to safety service

**Other purchasable government service** may include employment with:

- U.S., state, or other public entities located within the state of California
- Federal government and military service

Purchasing non-County service will increase your total years of service credit, but will not count toward meeting the minimum service credit requirement to retire or to be eligible to apply for a nonservice-connected disability, pre-retirement survivor benefits, or to defer your retirement.

For more information about payment options and contracts, read our [Purchasing Service Credit](#) page.

**Member:** Then what do I do? Does that mean I have to wait longer to retire?

**Member:** I worked for another agency in the past.

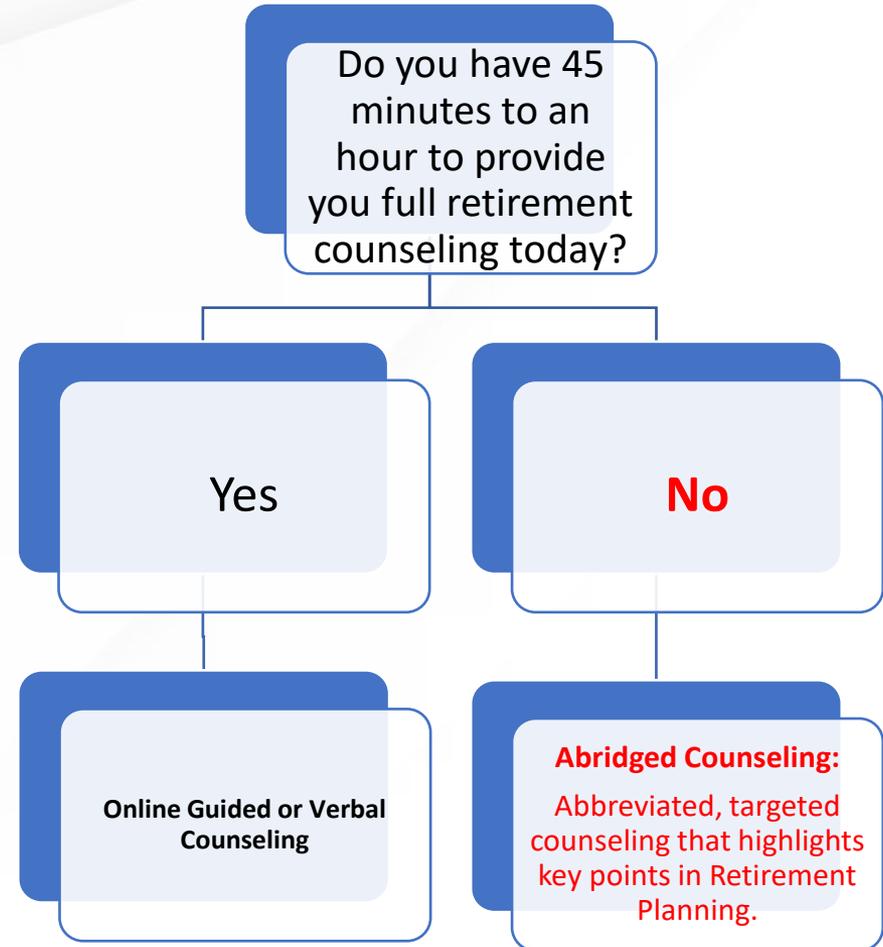


# Abridged Counseling



## Managing member expectations:

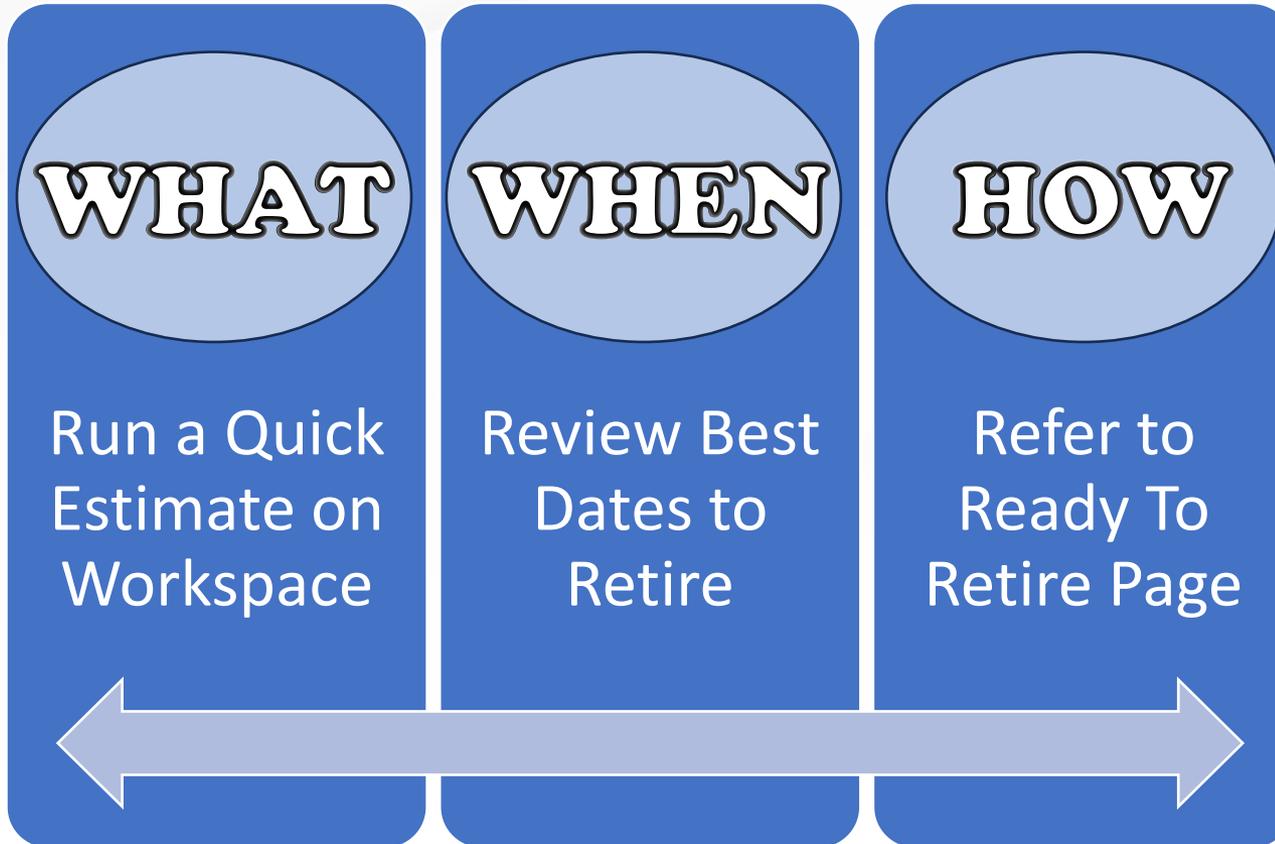
- For members who do not have the time to spend on full counseling.
- **Abbreviated, targeted counseling.**
  - The What, The When, and The How
- **This is NOT to replace full Retirement Counseling**
  - Invitation for future counseling
  - A disclosure is read to member to advise this version of counseling is a quick reference.



# Abridged Counseling



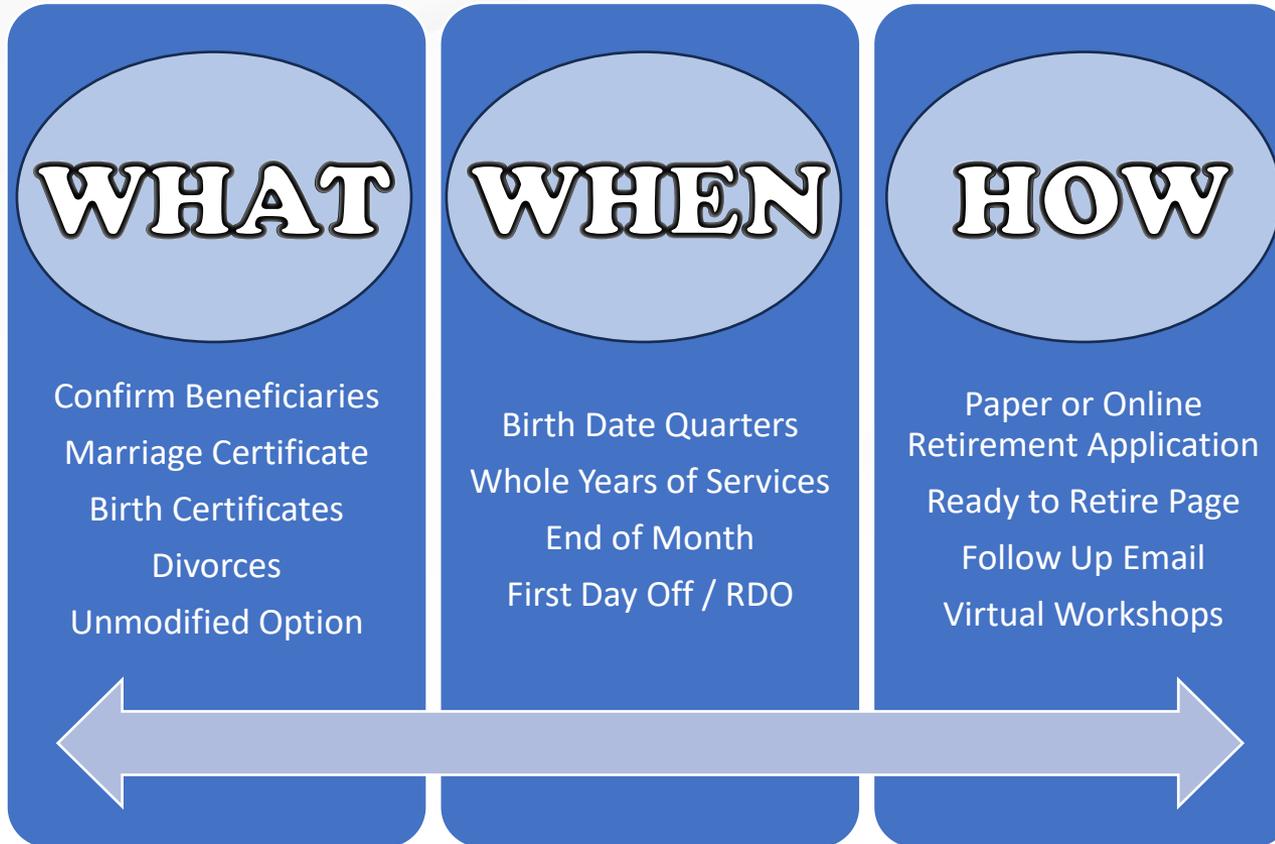
The WHAT, WHEN and HOW of Scenario



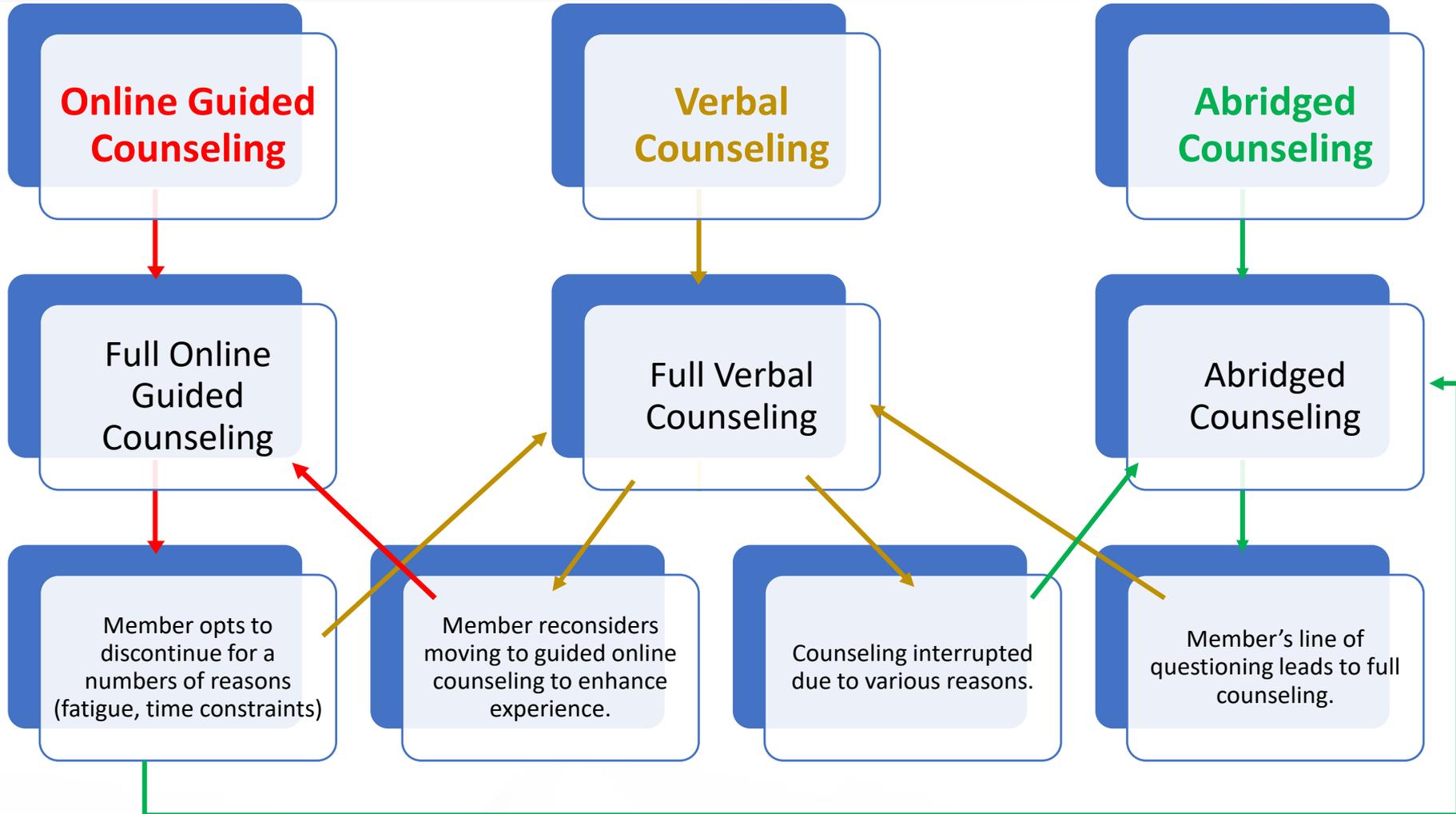
# Abridged Counseling



## The WHAT, WHEN and HOW of Scenario



# Transitioning between Counseling Models



# Follow Up Email



## Frequently Asked Questions

Dear Member,

Thank you for allowing us the opportunity to speak with you today. Congratulations on taking a step forward in preparing for retirement. As you continue your retirement journey, we want to provide you with additional resources to continue your retirement planning education.

Below are quick links to our website regarding the major topics covered in our retirement counseling and our members most asked questions. We hope that it may be a helpful resource for you.

As you read and navigate our website resources, if you have questions or need assistance, we are always here to help. Here's how you can reach us:

- Call us at 800-786-6464 between 7:00 a.m. and 5:30 p.m. (Pacific Time), Monday through Friday, except holidays.
- Schedule an in-person or virtual face-to-face appointment by visiting [lacera.com](https://lacera.com). You can use the "Appointments and Workshop Reservations" link near the bottom of the page.
- Log in to your My LACERA account to send us a secure email.
- Email us at [welcomel@lacera.com](mailto:welcomel@lacera.com) with general questions.

Sincerely,

LACERA Member Services Division

### Quick Links and Frequently Asked Questions:

- What are the best dates to retire? [Choosing a Retirement Date | LACERA](#)
- What is service credit and how can I purchase more? [Service Credit | LACERA](#)
- What is Reciprocity? [Reciprocity | LACERA](#)
- What agencies does LACERA have reciprocity with? [Reciprocal Systems | LACERA](#)

- What is included in my Final Average Salary with LACERA?  
[Compensation | LACERA](#)  
[Pay Items Included in Legacy Plans | LACERA](#)  
[Pay Items Included in PEPRA Plans | LACERA](#)  
[Cafeteria Allowance | LACERA](#)  
[Compensation and Benefit Limits | LACERA](#)
- What are my different retirement options? [Retirement Options | LACERA](#)
- Does Social Security Benefits affect my LACERA pension or vice versa? [Windfall Elimination Provision](#)
- I am Plan E. How does Social Security Benefits affect my LACERA pension? [Plan E | Social Security and Medicare | LACERA](#)
- What will be the cost of my healthcare coverage? [Paying for Coverage | Retiree Healthcare](#)
- How does divorce affect my pension with LACERA? [Pre-Retirement Divorce \(Dissolution\) | LACERA](#)
- How and when can I let LACERA know I want to retire? [Ready to Retire | LACERA](#)
- I am ill or injured and can no longer continue to work. Do I qualify for Disability Retirement benefits? [Disability Retirement | LACERA](#)
- How can I attend a LACERA Pre-Retirement Workshop? [Workshop Schedule](#)



## 06 RETIREMENT COUNSELING CHECKLISTS

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# Changes to Checklists



## Retirement Checklist and Outreach Checklists

- Reorganized and Updated
- New additions:
  - My LACERA registration
  - Retirement Planning Hub
  - Marriage and Birth certificate requirements
  - Disability Retirement Option Change (change in law effective 1/1/2023)
  - Reciprocal Disability Disclosures
  - Updated disclosure for members retiring within 14 days
  - Follow Up Email: Retirement Counseling Summary
  - Legal Holds
  - Returning to Work After Retirement disclosure

## Reciprocity Checklist

- Reciprocal Disability Disclosures

## 120 Day Return to Work Checklist

- Revamped and updated

## Abridged Counseling Checklist

## PEPRA FAC Checklist



07

**MEMBER EXPERIENCE**

---

# Member Experience



## **Online Guided highly effective at VMSC and MSC**

- Counseling time increased, but also the quality increased
- Members were able to understand concepts using the Retirement Planning Hub as a visual reference whereas they would have not if simply verbally instructed.
- Specialists had several good experiences implementing Online Guided over the phone with younger, technology embracing members.

## **Abridged Counseling highly effective through the Call Center**

- Successful inviting members for future counseling and setting expectations

## **Retirement Counseling Summary Email well received by both members and Specialists.**

- Helps recap the information provided without requiring the member to memorize



January 25, 2024

TO: Operations Oversight Committee  
JP Harris, Chair  
Antonio Sanchez, Vice Chair  
Wayne Moore  
Keith Knox  
Jason Green, Alternate

FROM: W. Louis Gittens *LG*  
Division Manager, Benefits Division  
Kathy Delino *KD*  
Chief, Information Technology

FOR: Operations Oversight Committee Meeting of February 7, 2024

SUBJECT: Updates to My LACERA

## EXECUTIVE SUMMARY

On July 6, 2023, the Board of Retirement approved the LACERA Board of Retirement's 2023-2028 Strategic Plan. LACERA Management is working on the related priorities and the Benefits Division is actively supporting the Member Services Division which is leading the Superior Member Experience priority. The purpose of this priority is to meet or surpass member expectations and to deliver omnichannel support throughout the member's lifecycle. With this in mind, LACERA staff worked together to make on-line retirement elections available on My LACERA (also known as the LACERA portal).

The Process Management Group (PMG) within LACERA's Benefits Division manages major changes within the Member Operations Group. The retirement election journey can become complicated depending on a member's circumstances and it is important for all LACERA staff to receive uniform information regarding this change. Additionally, all staff tools must be updated so staff can provide members with uniform information. As a result, PMG developed comprehensive training procedures and related materials. PMG also collaborated with Systems to make the related updates in our system.

The Business Solutions team within LACERA's Systems Division developed a new self-service retirement election process on MyLACERA. The new process was deployed last Tuesday evening, January 16, 2023. The retirement elections entered on MyLACERA are integrated with LACERA's Pension Administration System, Workspace, as well as the new case management system, Sol. Other improvements deployed in the latest release of MyLACERA include:

- A redesigned and customized home page that displays the most important information and options according to the member or payee's status and recent interactions with LACERA

- Expanded Retiree Healthcare data for LACERA payees that includes detailed plan names, member premiums, and Medicare Part B Reimbursement amounts
- Year-to-date work hours for retirees that return to work for a 120-day temporary assignment to ensure they remain in compliance with the policy that limits their annual work to 120 days (or 960 hours)

PMG provided training to the Member Services Division during the week of January 9 – 12, 2024. The training was also recorded so that staff can review the training whenever the need arises. PMG also partnered with Member Services to develop standardized retirement counseling. The online retirement counseling was made available to members effective January 16, 2024.

## **CONCLUSION**

Systems and PMG will continue to work with partners throughout LACERA to drive the necessary changes to provide a Superior Member Experience for all members throughout their careers.

CC: Santos H. Kreimann      Luis A. Lugo      Laura Guglielmo      JJ Popowich  
Tatiana Bayer      Alejandro Ochoa      Sumil Makadia      Larisa Fradkin  
Sandy Pang      Susana Seeckts      Kevin Hunter      John Gaffney  
Ganesh Gopanapalli

# Redesigned MyLACERA with Online Application



LACERA

Welcome, Tammy Testcase

Last Visit: 12/1/2023

**Allowance**

Service Retirement Benefit	\$14,584.10
----------------------------	-------------

[View payment history](#)

[Pension Verification \(Award Letter\)](#)

**Retiree Healthcare**

Medical and Dental/Vision Insurance
Medical Kaiser (Retiree and Family)
Dental/Vision Cigna Dental HMO/Vision
Medicare Part B
Reimbursement Total <b>\$150.00</b>

Find out more details about your healthcare coverage, including eligible dependents, effective dates, and more.

[View Coverage Details >](#)

**Primary Beneficiaries**

**Ann O'Nymous** (Spouse)

Is all of your beneficiary information up to date? Access all of your beneficiary records here on My LACERA.

[Manage your beneficiaries >](#)

**Manage Your Retirement**

Review Personal Information  
View and change your [contact information](#) and [beneficiaries](#) on file with LACERA.

1099-R Forms  
Your 1099-R forms for last year are now [available here](#).

Direct Deposit  
Have your money [deposited directly](#) into your checking or savings account.

Paperless Delivery  
You can now opt to receive digital copies of your documents through the [Document Delivery Option](#).

# Retired Member

## Allowances Card

Request a Pension Verification letter  
Payment history information including deposit receipts

## Retiree Healthcare cards

Added to provide an overview of their current RHC benefits

## Primary Beneficiaries

Helps maintain the most current information

## Manage Your Retirement Card

1099-R Forms card  
Direct Deposit review



## Medical and Dental/Vision Insurance

### Coverage Details

LACERA Administered Retiree Healthcare Benefits Program

#### Coverage Information

##### Medical

Kaiser Permanente/Kaiser Permanente Senior Advantage for California Residents

One family member is "Senior Advantage"; one is "Basic" over age 65 without Medicare Parts A and B

#### Kaiser Terms

##### Basic

Includes participants who are under age 65.

##### Excess I

For participants who have Medicare Part A only. (Closed to new enrollments)

##### Senior Advantage

Includes participants who are age 65 or older and who have assigned both Medicare Parts A and B to Kaiser Permanente.

##### Excess II

For participants in the Excess Plan who either have Medicare Part B only or are not eligible

Effective Date	2/1/2023
Monthly Premium	\$1,114.20
Member's Portion	\$0.00

##### Dental/Vision

Cigna Dental HMO/Vision

Effective Date	5/1/2015
Monthly Premium	\$95.28
Member's Portion	\$0.00

Medicare Part B Reimbursement **\$329.80**

Total Part B reimbursement for member/survivor, spouse, and/or dependents.

Los Angeles County Employees Retirement Association

800-786-6464 Send Message Appointments lacera.com



# RHC Details

- The View Coverage Details link will bring members to this new page
- Members can find plan names effective dates and premium information.
- Medicare Part B Reimbursement is listed here as well.
- All parties covered under these plans are listed.

My LACERA  
Los Angeles County Employees Retirement Association

Home Profile Messages Uploads Sign Out

Tax / 1099R Beneficiaries Account History

Welcome, Tammy Testcase  
Last Visit: 12/1/2023

**Rehired Retiree: Approaching Limit**  
You are nearing the maximum number of hours (960) you are allowed to work for the year as a rehired retiree.

Allowance	
Service Retirement Benefit	\$14,584.10
<a href="#">View payment history</a>	
<a href="#">Pension Verification (Award Letter)</a>	

Rehired Retiree	
Temporary rehire on the 120-day program	
Hours Worked	
	<b>870.75</b> of 960 allowed hours
Fiscal Year 2023/2024	
Accrual Date	8/31/2023

Retiree Healthcare	
Medical and Dental/Vision Insurance	
Medical	Kaiser (Retiree and Family)
Dental/Vision	Cigna Dental HMO/Vision
Medicare Part B	
Reimbursement Total	<b>\$150.00</b>
Find out more details about your healthcare coverage, including eligible dependents, effective dates, and more.	
<a href="#">View Coverage Details &gt;</a>	

Primary Beneficiaries	
Ann O'Nymous (Spouse)	
Is all of your beneficiary information up to date? Access all of your beneficiary records here on My LACERA.	
<a href="#">Manage your beneficiaries &gt;</a>	

**Manage Your Retirement**

 **Review Personal Information**  
View and change your [contact information](#) and [beneficiaries](#) on file with LACERA.

 **1099-R Forms**  
Your 1099-R forms for last year are now [available here](#).

 **Direct Deposit**  
Have your money [deposited directly](#) into your checking or savings account.

 **Paperless Delivery**  
You can now opt to receive digital copies of your documents through the [Document Delivery Option](#).

Los Angeles County Employees Retirement Association

800-786-6464 [Send Message](#) [Appointments](#) [lacera.com](#)



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# Retired Member on 120-Day Assignment

- Rehired Retirees will display hours worked up to the current accrual period
- As the member gets closer to the 960-hour limit the card turns to **Yellow** and then **Red** as displayed here
- A warning is also placed at the top of the page to remind members that they are reaching the limit

Welcome, Ted Testcase

Last Visit: 12/1/2023

Retirement Plan G - General	
Membership Date	12/31/1969
Termination Date	12/31/1969
Service Credit	15 yrs, 10 15/17 mos
Final Average Compensation	Not available online for PEPRA members at this time
Latest Contribution Rate	10.69%
Monthly Contribution	\$333.77
Total Contributions and Interest	\$161,303.70

[Create and print an Amount in Fund letter](#)

Primary Beneficiaries	
<b>Ann O'Nymous</b> (Spouse)	
<b>Bunny Fischerie</b> (Daughter)	
<b>Ben E. Fischerie</b> (Son)	

Is all of your beneficiary information up to date? Access all of your beneficiary records here on My LACERA.

[Manage your beneficiaries >](#)

**Eligible for Retirement**

Our records indicate that you meet the requirements of eligibility for **Retirement Plan D - General**.

[Apply for Retirement](#)

[Calculate your benefit estimate](#)

**Pending Cases**

Disability Retirement Updated

Case No. DR 2302-00033

Current Status Disability Retirement Evaluation Report

[View Details >](#)

**Manage Your Retirement**

-  Review Personal Information  
View and change your [contact information](#) and [beneficiaries](#) on file with LACERA.
-  Purchase Service Credit  
Eligible members can now [apply to purchase service credit](#).
-  Disability Retirement  
Eligible LA County employees may now [apply for Disability Retirement](#).
-  Paperless Delivery  
You can now opt to receive digital copies of your documents through the [Document Delivery Option](#).

# SOL Case Pending

If a member has a current disability case it will display here

Pending cases involve the new SOL case manager

Future case management will include First Payment

# Home Page

Service Retire directly from portal account

Member must meet retirement eligibility

Link to estimate calculator

**My LACERA**  
Los Angeles County Employees Retirement Association

Home Profile Messages (2) Uploads Sign Out

Beneficiaries Estimate Purchases Documents

## Welcome, Testa Louise Case Six

Last Visit: 01/23/2024

Retirement Plan D - General	
Membership Date	02/01/2012
Service Credit	22 years, 1 months
Final Average Compensation (1-year avg.)	\$2,000.00
Current Contribution Rate	Not Available Online
Latest Contribution	Not Available Online
Total Contributions and Interest	\$0.08

[Create and print an Amount in Fund letter](#)

### Primary Beneficiaries

**Miss Testy McTest** (Spouse)

Is your beneficiary information up to date? Access all of your beneficiary records.

[Manage your beneficiaries >](#)

### Eligible for Retirement

Our records indicate that you meet the requirements of eligibility for **Retirement Plan D - General**.

[Apply for Retirement](#)

[Calculate your benefit estimate](#)

### Manage Your Retirement

 Review Personal Information  
View and change your [contact information](#) and [beneficiaries](#) on file with LACERA.

 Paperless Delivery  
You can now opt to receive digital copies of your documents through the [Document Delivery Option](#).

## Introduction

### Application for Service Retirement

You can now submit your **Service Retirement** election online!

This application is for members choosing one of LACERA's Service Retirement options **only**. For members considering applying for disability, please visit our [Disability Retirement Application](#).

#### Eligibility

You have met the eligibility requirements for **Retirement Plan D - General**

- Age 50 with 5 years of County (or combined County and reciprocal system) service credit, or
- Any age with 30 years of County (or combined County and reciprocal system) service credit, or
- Age 70, regardless of years of service credit

#### Submitting Certificates

Depending on the retirement option you select, you will be required to submit certain beneficiary documentation. You must provide LACERA with a copy of all legal certificates as stated under your selected retirement option after you submit this retirement election. We will accept your application with the retirement date indicated, but we cannot begin processing your payments until after all required legal certificates have been received.

I understand that LACERA recommends members seek retirement counseling and understand the material found in LACERA's [Planning to Retire](#) and [Ready to Retire](#) sections of LACERA.com as well as our [Pre-Retirement guide](#) prior to electing to retire using this online retirement application.

Let's Begin!

#### *Calculate an Estimate*

Before you begin the application for service retirement, [calculate an estimate](#) of what your retirement benefit would be for each of the six different retirement options.

- ❖ Only to be used for Service Retirement
- ❖ Certificate requirement
- ❖ Counseling should be completed prior to filing for retirement
- ❖ Link to Estimate Calculator

## Verify Information

- ❖ Members are asked to verify their information before continuing
- ❖ Link to member Profile is provided to change contact information if needed

### Review Personal Information

If any of the following information is incorrect, contact LACERA at your earliest convenience at **800-786-6464**.

Testa Louise Case Sixn

Birth Date 02/28/1964

Age 59

Retirement Plan D - General

Membership Date 02/01/2012

Service Credit 22 years, 1 months

Verify

Cancel

### Review Contact Information

If any of following is incorrect, update your [My LACERA User Profile](#) information **before continuing** with this application.

#### ⚠ Personal Cellphone and Email Address

You should not use your county-issued cellphone number or email address in your profile, because you will lose access to those contact methods upon your retirement. By providing us your personal phone or email address, we can stay in contact with you.

#### Home Address

300 N LAKE AVE  
PASADENA, CA 91101-4109

#### Mailing Address

1558 N CATALINA AVE  
PASADENA, CA 91104-2406

#### Phone Numbers

Primary: (626) 372-0940  
Home: (555) 555-3334  
Work: 443-337-844-44

#### Email Address

aochoa@lacera.com

Verify

Cancel

## Beneficiary Review

### Review Beneficiaries

If any of the following beneficiary names or birthdates are incorrect, update the information on the [Beneficiary Designation page](#) before continuing with this application.

#### Designated Primary Beneficiaries

Miss Testy McTest (Spouse)	100%
Birth Date	01/01/1980

For your eligible spouse, registered domestic partner, or disabled adult dependent to receive lifetime survivor healthcare benefits, you must name them as beneficiary, and they must be entitled to receive a continuing monthly allowance. [Retiree Healthcare eligibility rules apply.](#)

#### Verify Marital Status Required

Check the box below to confirm that your current spouse on file is correct. If not, update the information on the [Beneficiary Designation page](#) before continuing.

Spouse on file: "MISS TESTY MCTEST"

Verify

Cancel

#### *You Should Know*

All LACERA retirees are entitled to designate any beneficiary (or multiple beneficiaries) to receive a one-time, \$5,000 lump-sum death/burial benefit. This benefit is flexible, and you can change the named beneficiary after retirement.

Secondary beneficiaries are entitled to any eligible remaining benefits if your primary beneficiary(ies) pass away.

- ❖ Retirement Options will be based on beneficiaries on file
- ❖ Link is provided to update beneficiaries
- ❖ If spouse is listed member must verify that spouse is current
- ❖ Member can update beneficiaries then return to complete application

## Choose Retirement Date

This can be the current date or up to 90 days in the future.

- You can rescind this election to retire until 5 p.m. on the business day prior to your submitted retirement date. After that deadline, this election is final and cannot be rescinded or modified.\*
- If you are retiring **today**, you will not be able to rescind this election.

**\*Exceptions:** If you retire under the Unmodified option, you can change to a modified option after your retirement date but prior to your first payment. If you elect and are granted a service retirement and are later granted a disability retirement, you may elect to change your retirement option. This will result in a change to your retirement benefits.

Retirement Date

03/30/2024

[« Back](#)

[Continue »](#)

### *The Best Date for You*

There are numerous factors to consider when determining the best date to retire, based on your age, years of service, and personal circumstances. We've provided general guidance on [Choosing a Date to Retire](#) that may help your decision.

## Retirement Date

- ❖ Date entered must be within 90 days
- ❖ Link to Choosing a Date to Retire for member review
- ❖ Same day retirement must be submitted by 5pm PST
- ❖ Member cannot choose a date in the past

# Choosing Retirement Option

Only options available are based on beneficiary information

Member can view the different option videos to review the retirement options

For options that cannot be chosen a reason is provided

## Select Retirement Option

Select a retirement option from the list below.

Retirement Options	
Unmodified Option	>
Unmodified+Plus Option	>
Option 1	>
Option 2	>
Option 3	>
Option 4	>

### Unmodified Option

Select Option

Provides you with the highest monthly retirement allowance you can receive, based on your age at retirement, amount of service credit, and final average compensation.

#### Eligible Beneficiaries

Eligible spouse or California state-registered domestic partner; if none, unmarried, minor child (eligibility may be extended through age 21 if child remains unmarried and is a full-time student in an accredited educational institution).

#### Provide Certificate

Once your retirement application has been submitted, you will be required to provide a copy of your marriage certificate or declaration of domestic partnership.

#### Survivor Benefit

65% of member's allowance (55% if Plan E)

#### Change Beneficiary After Retirement

None to the survivor allowance. If the eligible beneficiary dies before the member, the member can name a new beneficiary to receive any remaining accumulated contributions.



# Retirement Election Confirmation

## Review and Sign

**You're Almost Done**  
The information you entered won't be submitted until you've reviewed and signed.

### Unmodified Option

Retirement Date: 03/30/2024

Pension Advance Option **Declined**

Survivor Benefit (if eligible)  
65% of member's allowance (55% if Plan E)

### Primary Beneficiary

Miss Testy McTest (Spouse)

Birth Date 01/01/1980

Marriage Date On File 11/30/2000

## Sign and Submit

By signing this election form, I understand I am electing to retire on the date and under the retirement option listed above, and that I have verified my beneficiary information. I understand that I have until 5 p.m. on the business day prior to my listed retirement date to rescind this election, and that after that date, this election is final and cannot be rescinded or modified.

### Your Signature

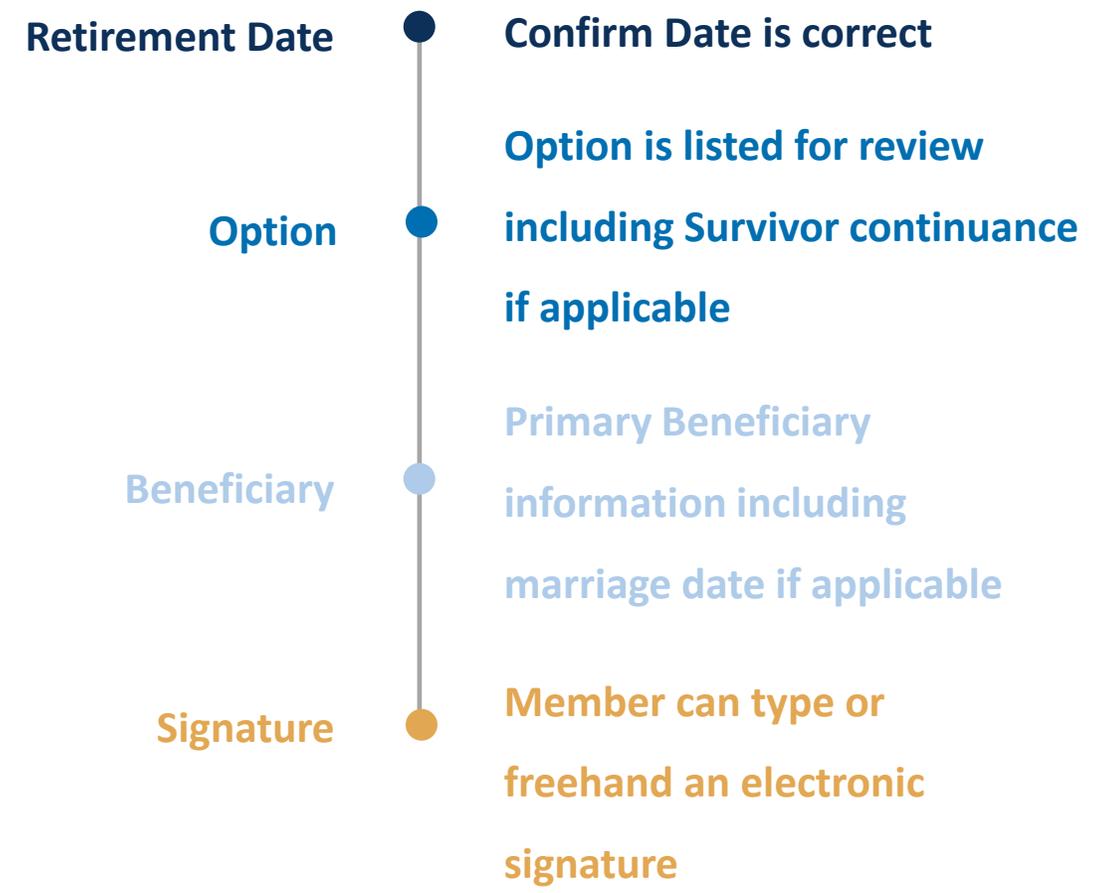
Type Draw Clear

*Test Member*

Type your name  
Test Member

Maximum length: 25 characters

# Review and Sign



# Submitted Application

Member may print for their records

Based on chosen option Required Certificates are listed

Next steps provides member the documents that will be required

✔ Application Submitted  
Application for Service Retirement for Testa Louise Case Sixn has been successfully submitted.

Transaction Summary Print

Transaction Date 01/24/2024 Transaction ID AAAAAKKP\_00025926

<b>Unmodified Option</b>	
Retirement Date:	03/30/2024
Pension Advance Option	Declined
Survivor Benefit(if eligible)	65% of member's allowance
<b>Primary Beneficiary</b>	
Miss Testy McTest (Spouse)	
Birth Date	01/01/1980
Marriage Date On File	11/30/2000

**Your Signature**

*Test Member*

**Required Certificates (if applicable)**

Now that your application for service retirement has been submitted, you will need to provide LACERA with the following documents before we can begin processing your payment.

- Marriage Certificate
- Beneficiary's Birth Certificate

**Social Security Statement**

If you are a member who was previously covered by Social Security while working for the County or another employer, you will need to provide your latest Social Security statement, which shows your yearly earnings and projected Social Security benefits amount.

---

*Next Steps*

To further prepare for your retirement, download and complete the following forms. For the fastest processing time, submit them via the [Upload File](#) page. You can also submit them to LACERA in person, by fax, or by mail.

<b>Direct Deposit</b> Have your monthly allowance deposited directly into your checking or savings account. <a href="#">Set Up Direct Deposit</a>	<b>Healthcare Enrollment</b> Enroll in a LACERA-administered health plan within 60 days of your retirement, or you will be subject to late enrollment rules. <a href="#">Healthcare Enrollment Form</a>	<b>Tax Withholding</b> Download and complete the federal W-4P and (if applicable) California DE 4P tax withholding forms. <a href="#">W-4P/DE 4P Form</a>
---------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------

# Confirmation of Retirement Election



LACERA has received your retirement application. Congratulations on your pending retirement and thank you for your public service!

We will now review your application and account to verify eligibility and confirm that all the necessary documents have been submitted.

**If your eligibility is verified and your application is complete**, LACERA will include your application on the next Board of Retirement meeting agenda for ratification. Once you have been added to the meeting agenda, we will mail you a retirement confirmation letter and send an electronic notification letter to your personnel department to indicate that you have elected to retire with the date of your retirement.

**If there are any issues with your application**, LACERA will contact you for further information.

**If your application is missing required documents**, LACERA will notify you. We will accept your signed retirement election and honor the date requested; however, we will not be able to process your application or provide retirement benefits until the required documentation for your option is provided.

**If you change your mind**, you can rescind your election to retire or change your retirement date by submitting a [Request to Rescind or Change Retirement Date form](#). Your rescind/change request form must be received at LACERA by 5 p.m. on the business day prior to the elected retirement date on your application.

**If you want to change your retirement option selection**, your request must be submitted in writing with your signature. A request to change your retirement option selection must be received at LACERA by 5 p.m. on the business day prior to the elected retirement date on your application. If you want to change from the Unmodified retirement option to a different retirement option, the request must be received by LACERA prior to the payment of your first retirement benefit.

If you have questions about this information or need any other assistance, we are always here to help. Here's how you can reach us:

Welcome, Testa Louise Case Sixn

Last Visit: 01/24/2024

## Retirement Plan D - General

Membership Date	02/01/2012
Service Credit	22 years, 1 months
Final Average Compensation (1-year avg.)	\$2,000.00
Current Contribution Rate	Not Available Online
Latest Contribution	Not Available Online
Total Contributions and Interest	\$0.08

[Create and print an Amount in Fund letter](#)

## Primary Beneficiaries

Miss Testy McTest (Spouse)

Is your beneficiary information up to date? Access all of your beneficiary records.

[Manage your beneficiaries >](#)

## Application Received

Your application for **Service Retirement** has been received. We'll let you know details as they become available.

## Manage Your Retirement



### Review Personal Information

View and change your [contact information](#) and [beneficiaries](#) on file with LACERA.



### Paperless Delivery

You can now opt to receive digital copies of your documents through the [Document Delivery Option](#).

## Service Retirement Application

Transaction ID: AAAAAKP\_0002928  
Transaction Date: 01/24/2024

### Section 1 - Personal Information

Name: TESTA LOUISE CASE SIXN  
Employee #: 666666 Marital Status: Married  
Email Address: ACHOA@LACERA.COM Mobile Phone: 6263720040

\*You must be married or registered with the California Secretary of State as domestic partners one year prior to your service retirement for your spouse or partner to be eligible for continuing survivor's benefits.

### Section 2 - Beneficiary Information

Name	Relationship	Birth Date	Beneficiary %
Miss Testy McTest	SPOUSE	01/01/1980	100%

I confirm that I have reviewed my current beneficiary designation and verified that my beneficiary(ies) and their contact information are up to date and correct.

For your eligible spouse, registered domestic partner, or disabled adult dependent to receive lifetime survivor healthcare benefits, you must name them as beneficiary and they must be entitled to receive a continuing monthly allowance. [Retiree Healthcare eligibility rules apply.](#)

### Section 3 - Retirement Date

Retirement Date: 03/30/2024

### Section 4 - Retirement Option

#### Unmodified Option

Allows you to receive the maximum allowance. The survivor's benefit for this option applies to your primary beneficiary (your eligible spouse or California state-registered domestic partner, or if none, any eligible minor children; for your spouse or partner to be eligible, you must be married or registered at least one year prior to retirement.) They will receive a survivor's continuance of 50% for Plan E or 60% for all other plans. If you do not have an eligible spouse, domestic partner, or minor child, you may name any person as your beneficiary; however, they will only receive your remaining member contributions and interest and will not be eligible for a continuing benefit.

#### Required Documents

#### Marriage Certificate or Declaration of Domestic Partnership

Marriage Date on File: 11/30/2000

Important: LACERA will accept your signed retirement election and we will honor the date requested; however, LACERA cannot process your application or provide retirement benefits until the required documentation for your option is provided.

For more information on submitting your documents, see [How to Submit Required Supporting Documents and Certificates](#) on the following page.

### Section 5 - Signature

By signing this election form, I understand I am electing to retire on the date listed in Section 3 and under the retirement option selected in Section 4. I understand that I cannot rescind this election to retire after 5 p.m. on the business day prior to the retirement date listed in Section 3, and that after that date, this election is final and cannot be rescinded or modified.

I certify I have reviewed all the available retirement options, and understand that depending on the option selected, I may not be able to change my beneficiary after retirement. I also understand that an account review will be conducted to determine final retirement benefits. Estimated amounts will only be finalized after account review is completed and all salaries have been posted.

*Testa Louise Case Sixn*

01/24/2024

**Important:** If you submit your signed election form but pass away prior to your retirement date, your survivors will only be eligible for active death benefits (eligibility rules apply). Plan E members: There are no pre-retirement death benefits under your plan, which is important to consider when selecting your retirement date.

**Exceptions:** If you retire under the **Unmodified** option, you can change to a modified option after your retirement date but prior to your first payment. If you elect and are granted a service retirement and are later granted a disability retirement, you may elect to change your retirement option. This will result in a change to your retirement benefits.

If your account has a legal hold for pending dissolution of marriage or registered domestic partnership, we cannot pay your retirement allowance until we have received the final confirmed dissolution documents.

This retirement election was electronically submitted through the LACERA Member Portal on 01/24/2024 at 9:52.

#### How to Submit Required Supporting Documents and Certificates

#### Attestation Forms

An additional [attestation form](#) will be required for any certificates provided by mail, fax, or delivered in person. An online attestation form is included in the process of uploading a certificate when you use the Uploads page on My LACERA.

#### Upload

Scan or take a cellphone photo of your documents and log in to submit via My LACERA (recommended as the fastest and easiest method). PDF, JPG, and PNG formats accepted. Be sure the images are entirely legible before sending to avoid a delay.

Mail to LACERA P.O. Box 7060 Pasadena, CA 91109-7060

Fax: 626-564-6155

#### Drop Off

Our secure on-site mailbox is located to the right of the main lobby entry doors at 300 N. Lake in Pasadena. We mark a document as "received" if it is dropped off before 4 p.m. during the week. (Any document placed in the mailbox after 4 p.m. is picked up the next business day.)

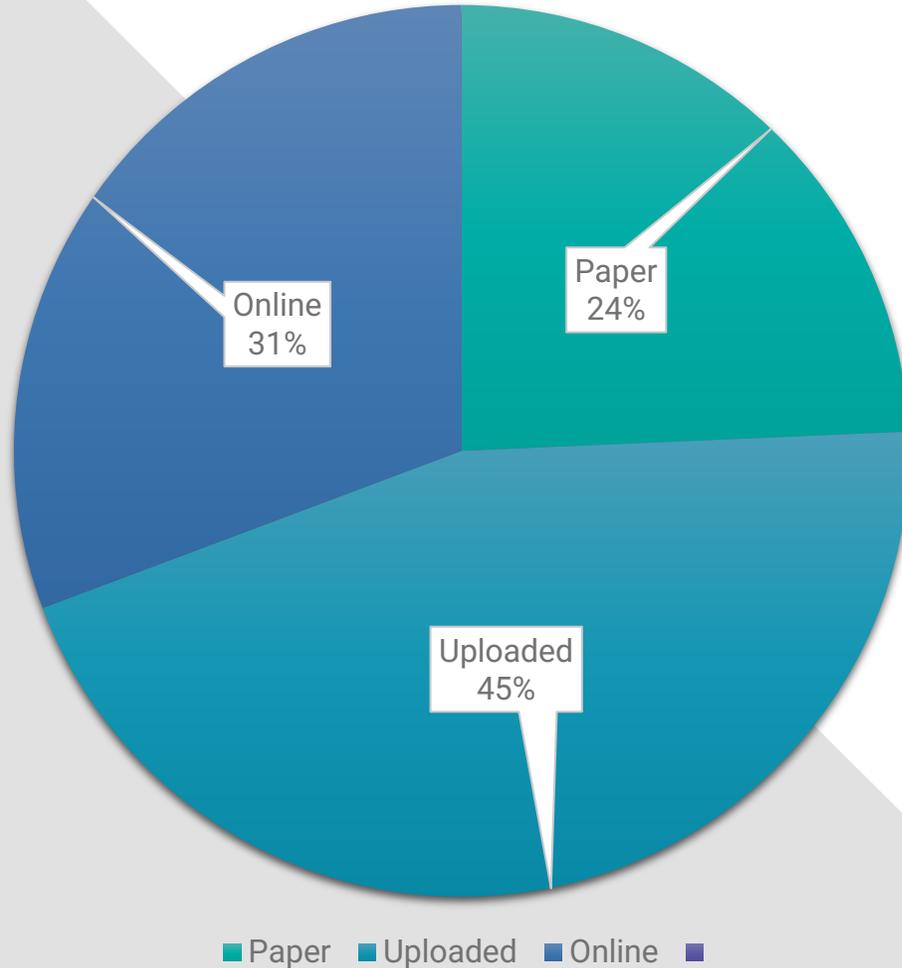
Retirement Election | Page 2

01 Email to member

02 Home page Confirmation

03 Viewable Retirement Application

## Service Retirement Applications since launch



# How are members retiring?

**45%** Uploaded Service Retirement Application via portal account

**31%** **NEW** Completion of Online Service Retirement Application

**24%** Submitted via mail, fax, or in office drop off

# Member Experience

What are members saying about the new online application?

Members that submitted a completed Online Service Retirement Application during the first week were called and asked about their experience:

“Easy to use”

“So convenient”

“Glad to see one less form to fill!”

“Surprised to see how easy it is to retire”

# THANK YOU

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Data System Analyst

Alex Ochoa [aochoa@lacera.com](mailto:aochoa@lacera.com)

Process Management Group

