



**Wespath**

BENEFITS | INVESTMENTS

AUMCPBO—NOVEMBER 2018

# Benefit Administration and Customer Service Update

# Department Managers—Customer Service



**Jean Runnfeldt**

- 20+ years management experience in a call center environment
- 20+ years experience with health and welfare plans
- 13+ years managing clients with health and welfare/defined benefit plans
- 17 years experience administering benefit plans for client accounts



**Lisa Vincenzo**

- 25+ years people management experience
- Experience managing service operations:
  - Healthcare / provider relations
  - Health and welfare, pension administration, retirement and HR outsourcing
  - Medicare and Medicaid administration for members and providers



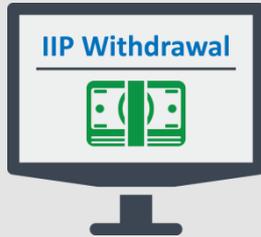
**Amy Cook**

- 20+ years experience with retirement, health and welfare plans
- 12 years experience at Wespath
  - 11 years in Compliance Department conducting assessments, providing training and participating in organizational projects
  - Transitioned to Customer Service in 2018 to implement Quality Team

# Customer Service Update



**No Paper  
Checks**



**IIP  
Withdrawals**



**Moving  
Expenses**



**Phone Call  
Security**



**Payroll  
Process**



**Pin  
Replacement**

# Customer Service Update



## No Paper Checks

- Two phases
- Process
- Concerns



IIP  
Withdrawals



Moving  
Expenses



Phone Call  
Security



Payroll  
Process

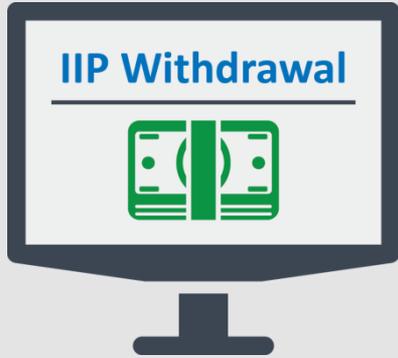


Pin  
Replacement

# Customer Service Update



No Paper Checks



## IIP Withdrawals

- Require online withdrawals
- Fraud prevention
- Functionality/limitations



Moving Expenses



Phone Call Security



Payroll Process



Pin Replacement

# Customer Service Update



No Paper  
Checks



IIP  
Withdrawals



## Moving Expenses

- Implementation
- Ongoing process



Phone Call  
Security



Payroll  
Process



Pin  
Replacement

# Customer Service Update



No Paper  
Checks



IIP  
Withdrawals



Moving  
Expenses



## Phone Call Security

- New process, more personalized
- Escalation process
- Feedback



Payroll  
Process



Pin  
Replacement

# Customer Service Update



No Paper  
Checks



IIP  
Withdrawals



Moving  
Expenses



Phone Call  
Security



**Payroll Process**

- Pilot update
- Process
- Marketing plans



Pin  
Replacement

# Customer Service Update



No Paper  
Checks



IIP  
Withdrawals



Moving  
Expenses



Phone Call  
Security



Payroll  
Process



## Pin Replacement

- Removing paper PIN
- Existing PINs for IVR
- Foreign address limitation



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