



C/O UC Davis Retiree Center  
One Shields Avenue  
Davis, CA 95616

April 25, 2025

President Michael V. Drake  
Office of the President  
University of California  
1111 Franklin ST., 12<sup>th</sup> Floor  
Oakland, CA 94607

Dear President Drake:

We write on behalf of the UC Emeriti/ae Associations to draw your attention to urgent needs in relationship to RASC and the proper and efficient functioning of the work of our Benefits Representatives on each of our campuses. Specifically, we request:

1. Access, for our Benefits Representatives, to the retiree database, Redwood, and the ability to produce documents for clients.
2. Access, for our Benefits Representatives, to the ECM (Enterprise Content Management) Imaging database.
3. Access, for our Benefits Representatives, for viewing complete service credit details.
4. Access, for our Benefits Representatives, to track CCM (Customer Communications Management System) requests.
5. Return of our local retirement counselors to each of our campuses.

UC Emeriti Associations have been watching the changes that have occurred with the UC Retirement Administration Services Center (RASC) over the past several years. While significant changes have been made in reorganizing RASC, hiring and training new staff, long-standing problems remain unresolved. The Council of UC Emeriti Associations (CUCEA), the UCD Retiree Association Director, and representatives from local campus HR staff in their meetings with RASC personnel have made many efforts and are in regular communication. We understand that UC provosts also have communicated about these persistent problems.

CUCEA and campus representatives were assured that campuses were considered partners in assisting with efficient and smooth retirements for Emeriti and end of life issues. These are *all*

areas where campus faculty and staff and retirees turn to their local campus representatives first. Most do not have knowledge of RASC and their centralized role where their retirements, contingent annuitant, and medical separation issues are managed.

### **Access to Redwood Retiree Database**

Appropriate campus staff, i.e. Health Care Facilitators, Benefits Representatives, and other HR personnel were assured that they would be given **access to the Redwood retiree database**. The restoration of this access was assured two years ago, once the migration to this new system was complete. Local campus representatives need a streamlined process and on-demand ability to generate multiple retirement estimates, personal retirement profiles, and election documents. Unnecessary time, effort and stress is placed on members with login and navigating their own UCRAYS accounts before we can begin to counsel on options. The ability to bypass UCRAYS login issues is also crucial for Power-of-Attorney, cognitive decline/end of life situations. It is also important that *Redwood and UCPATH talk to each other*. The systems are currently awkward and incompatible.

Prior to the migration to Redwood, campus personnel were able to provide counseling/guidance to campus faculty, staff and retirees. They had not only visibility, but editing authority. They navigated such situations as:

- Generating retirement estimates and personal retirement profiles
- Election documents for highly sensitive and urgent counseling needs such as
  - End of life elections
  - Counseling on retirement options due to layoffs
  - Long leaves and medical separations
  - UCRP disability income vs Service Retirement
  - Job offer/considering leaving UC employment
  - Technology challenges for those with limited computer literacy
  - English as a second language challenge for those with limited English fluency

### **Access to ECM (Enterprise Content Managing) Imaging Database**

Local campuses representatives need access to the Enterprise Content Management (ECM) imaging system to verify documents, form submissions, or to help explain correspondence sent to or by the RASC. Such visibility allows representatives to help explain correspondence sent by RASC. They have been asking for this access for many years.

### **Access to Service Credit Details**

Prior systems provided access to month-by-month UCRP service credit details enabling local benefits counselors to review and triage Retirement Tier and Service discrepancies. Current access is only by fiscal year. Improved access would reduce unnecessary member submission of service credit verification requests. These requests can take many months to be addressed by RASC, leading to member frustration and unnecessary delays.

### **Access to CCM**

Local campuses have no access to tracking members' cases in the Customer Communications Management System (CCM). Benefits Representative need to be able to have a way to track the progress of their requests.

### **Return Local Campus Retirement Counselors**

It is critical to return local campus Retirement Benefit Counselors. Local campus representatives, with Redwood access, would assist RASC and greatly improve the efficiency of the necessary central processing of all types of members' benefit requests. They facilitate members' understanding of the retirement process. They help them make appropriate retirement decisions that would facilitate RASC in processing requests, especially complex benefits packages. Even though three campuses have retained their local retirement counselors (UCSD, UCLA, UCI), even they do not have access to Redwood.

This would require training of local personnel by RASC staff to utilize the functionality of the Redwood system. Read-Only access and the ability to query Redwood for needed information/reports would not require campus personnel to change any documentation in the system. Having knowledgeable campus personnel work in partnership with RASC staff would make the entire process work more effectively and efficiently for everyone. A more visionary approach is to give local benefits personnel editing authority in Redwood. We must remind our leadership that these diligent officers of our university *did have editing authority prior to Redwood*.

We have waited far too long to get satisfactory resolution to the problems our faculty, staff, emeriti/ae, and retirees continue to experience. Allowing appropriate local campus representatives to have a more active and integrated partnership in meeting our members' needs must be addressed now. Everyone has waited too long. Everyone has listened to too many excuses.

We appreciate your attention in addressing this urgent situation.

Respectfully Submitted,



Suad Joseph, President, UC Davis Emeriti/ae Association



Eli Silver, President, UC Santa Cruz Emeriti Association

A handwritten signature in black ink, reading "Fernando Torres-Gil". The signature is written in a cursive, flowing style with a long horizontal line extending from the beginning.

Fernando Torres-Gil, President, UCLA Emeriti Association