



Board of Retirement Regular Meeting

Sacramento County Employees' Retirement System

Agenda Item 13

MEETING DATE: May 17, 2023

SUBJECT: Retiree Self-Service Portal

SUBMITTED FOR: Consent **Deliberation and Action** **Receive and File**

RECOMMENDATION

Authorize the Chief Executive Officer to enter into an agreement with the County Department of Technology to develop a retiree self-service portal for approximately \$660,000.

PURPOSE

This item supports the Strategic Management Plan objective to leverage technology and creative solutions to enhance enterprise performance.

DISCUSSION

SCERS has been evaluating options to provide the retired membership with an online portal for self-service activities. SCERS has an opportunity to partner with the County Department of Technology to expand its existing self-service portal available to County employees by providing access to SCERS' retirees.

A retiree self-service portal would enhance member services for retired members by providing access to online/paperless monthly pay statements and annual 1099-R forms. Retirees would also be provided online services to enable them to update personal data such as address and email, bank account, and tax withholding status, activities which are currently unavailable using a secure, online service.

The retiree portal would utilize the County's existing platform with multi-factor authentication that can be easily accessed through the SCERS website. The County's self-service web application has been available since 2005, using proven, industry-leading SAP software, and is a popular, known tool for County employees. Extending access to retirees is expected to be relatively seamless and will provide a familiar experience to SCERS members.

The County's self-service portal pulls data from the County's COMPASS payroll system for employees to access paycheck information. Because SCERS also utilizes the County's COMPASS payroll system to administer monthly pension payments to retirees, the data feed is

already developed and can be easily adapted for a retiree web portal. Full implementation is estimated to take six months, and the portal will be entirely supported by Department of Technology.

The cost is approximately \$660,000 for the initial year, and an annual ongoing cost of approximately \$106,000, subject to inflationary increases. These potential costs have already been included in the 2023-24 SCERS budget.

The table below provides a detailed break out of estimated costs.

One-Time Costs	On-Going	Total Year 1	On-Going
\$460,000 (License) \$200,000 (Consulting)	\$106,000 (License & Maintenance)	\$660,000	\$106,000*

*Subject to a CPI increase.

ATTACHMENTS

- Board Order

Prepared by:

/S/

Margo Allen
Chief Operations Officer

Reviewed by:

/S/

Eric Stern
Chief Executive Officer



Retirement Board Order

Sacramento County Employees' Retirement System

Before the Board of Retirement
May 17, 2023

AGENDA ITEM:

Retiree Self-Service Portal

THE BOARD OF RETIREMENT hereby approves Staff's recommendation to authorize the Chief Executive Officer to enter into an agreement with the County Department of Technology to develop a retiree self-service portal for approximately \$660,000.

I HEREBY CERTIFY that the above order was passed and adopted on May 17, 2023 by the following vote of the Board of Retirement, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

ALTERNATES:
(Present but not voting)

Keith DeVore
Board President

Eric Stern
Chief Executive Officer and
Board Secretary