



# Illinois Municipal Retirement Fund

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Service Representatives 1-800-ASK-IMRF

www.imrf.org

## GENERAL MEMORANDUM

**Number:** 524

**Date:** August 12, 2004

**To:** All Authorized Agents

**Subject:** IMRF's e-Service Vision

By statute, IMRF's mission is to efficiently and prudently administer the IMRF program. Within that framework, it is our vision to be the best provider of retirement services for public employees in the State of Illinois. Through the efforts of both IMRF staff and you—the IMRF employer—we are turning that vision into a reality.

However, to maintain that reality in the future, IMRF is expanding its e-Service capabilities. Existing Web transactions are being revised to move current paper-based transactions to the Web. An e-Service Vision (attached) was created and provides a road map for these e-Service initiatives.

The newly engineered Web transactions will result in more accurate data. Current Web transactions are being improved to catch errors when they are made, before the data reaches IMRF. For example, instead of simply transmitting a wage detail file over the Web as you may do now, the new Web transaction will check the data for missing members, new members, or incorrect amounts. You will be able to fix the data before it is transmitted to IMRF.

In the future, you will be able to “pull down” your employer reports and documents from the Web. The time between when a report is created and when you receive it will be greatly reduced. Today, when you need an IMRF form, you can print that form from our website. You no longer need to maintain a supply of forms that go out-of-date and become spoilage. By printing a form when you need one, you can be assured that you are using the most recent version of that form.

### **Why are we moving toward e-Service?**

At one time there was no choice but to design business processes around paper-based transactions. Current computerized benefit and accounting systems were designed in the early 1990's—before the Web became a part of everyday life. But today, in 2004, we all need to respond to changing business conditions. The Web has increased expectations. You and your employees may expect information to be available when you want it, not when the post office can deliver it.

Moreover, IMRF realizes that you and your employees expect us to provide the highest service at the lowest reasonable cost. Moving paper-based transactions to the Web will allow us to not only provide existing service at a lower cost but to improve the service we provide. In all cases of Web-based transactions, IMRF will decrease handling, postage, and printing costs. In addition, time for all parties will be saved.

Also, by moving existing paper-based transactions to the Web, those transactions can be viewed with a "fresh eye" and changes can be identified that will increase the accuracy of your member and employer records.

As was the case with past changes, these e-Service initiatives will present challenges and opportunities. These changes will not occur overnight nor all at one time. Current Web projects include:

- Redesigning the look and feel of the secure Employer Access area
- Creating a self-service sign up process for employers to request an Employer Access account
- Improving the current Web wage reporting and adjustment process
- Improving the current Web member termination process
- Creating a Document Archive where employers can view and print documents  
(For example, you will be able to view and print your employer's Rate Notices and Retirement Reserve Statements.)

These projects should be completed by the second quarter of 2005. In addition, we will be investigating allowing you to directly update your members' IMRF records and giving you and your employees the ability to view and print documents currently available to IMRF staff only. These changes are likely to occur in late 2005 and beyond.

As you can see, these changes will enable you to share information with IMRF not only more quickly and efficiently, but more economically as well.

### **Employer Access accounts**

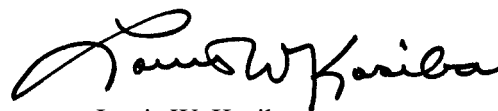
To take advantage of our Web-based transactions, you need an Employer Access account. Currently 1,752 employers have an active Employer Access account with IMRF. We ask that all employers apply for an Employer Access account by January 1, 2005.

- If you **never applied** for an Employer Access account, please submit IMRF Form 2.80, "Employer Access User ID." You can print a blank Form 2.80 from the IMRF website, [www.imrf.org](http://www.imrf.org).
- If you **previously applied** but never used your account, forgot your password, or your account is inactive, please call an IMRF Member Service Representative at 1-800-ASK-IMRF (1-800-275-4673).
- If you are **not sure** if you applied for an account, please call an IMRF Member Service Representative at 1-800-ASK-IMRF (1-800-275-4673).

### **Questions?**

If you have any questions regarding IMRF's e-Service initiatives, please call an IMRF Service Representative at 1-800-ASK-IMRF (1-800-275-4673) Monday through Friday, 7:30 a.m. to 5:30 p.m.

Sincerely,



Louis W. Kosiba  
Executive Director

# IMRF e-Service Vision

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## **IMRF e-Service Vision**

e-Service is the secure, electronic, and interactive expansion of customer service and communication excellence provided by IMRF to employers and members.

e-Service will enhance the IMRF experience for employers and members without detracting or replacing the organizational philosophy of '*high-touch*' customer service and communication excellence.

e-Service will empower employers and members by simplifying and expediting the exchange of information with IMRF via the internet.

e-Service will improve information accuracy and reduce costs by reducing paper-capture and manual-update of information.

e-Service will serve as a catalyst for process re-engineering at IMRF.

## **IMRF e-Service Goals**

The goals of IMRF e-Service are:

- Cost savings for IMRF resulting in cost savings to employers
- Business process automation
- Uncompromised privacy and security of information

# IMRF e-Service Vision

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## **Cost Savings for IMRF**

1. IMRF costs related to paper-based mailings including paper, printing, and postage are reduced through the use of internet website and email technology.
2. IMRF costs related to IMRF staff intervention on behalf of an employer or member and costs related to IMRF staffing are reduced via increased use of automation and end-to-end self-service.
3. IMRF costs related to out-of-date or incorrect information are reduced by the ability of employers and members to interactively self-initiate corrections to information related to their IMRF account.
4. Employers and members are able to directly update information in the IMRF database via the internet without IMRF staff assistance and without delays related to mailing and manual-processing.

## **Business Process Automation**

1. Re-engineer and automate existing processes to take advantage of technology rather than making technology fit existing procedures.
2. Provide an attractive alternative to traditional IMRF procedures.
3. Promote speed and simplicity—a quicker, cleaner, easier way for employers and members to interact with IMRF.
4. Expedite the exchange of information between IMRF and our employers or members.
5. Enhance the perception of IMRF Service to employers and members by reducing effort and costs related to mailing and processing of paper forms.
6. Self-service is flexible and optional, where appropriate, to IMRF employers and members.

# IMRF e-Service Vision

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## Uncompromised Privacy and Security of Information

1. Trusted
  - a. Information exchanged electronically with IMRF via the internet is kept completely confidential and is protected from being intercepted or compromised by nefarious or unintentional means.
  - b. Confidential information exchanged between IMRF and employers or members has an identifiable source, an identifiable destination, and an identifiable, secure channel on which the exchange will occur.
  - c. Information that is not of a confidential nature exchanged between IMRF and employers or members has an identifiable source and an identifiable destination, although these communications will not be transmitted via a secure channel.
  - d. Security is ensured via trusted internet technology like secure sockets layers protocols <SSL> and through the use of trusted and identifiable providers of SSL Certificates like VeriSign.
  - e. Privacy of information is ensured by a comprehensive statement of Privacy and Security that is understood and followed by all IMRF Staff and IMRF Systems. The Privacy Policy conforms to industry standards.
  - f. Electronic communication with employers and members via email or the website is appropriate and handled in a centralized, controlled, and planned fashion. Electronic communication is manageable and non-intrusive to IMRF and employers or members.
  
2. Legal and Compliant
  - a. The IMRF e-Service Strategy is compliant with the Illinois statutes related to Electronic/Digital Signatures.
  - b. IMRF culture and process supports and promotes adherence to all legal requirements and to the IMRF Privacy and Security Policy by all IMRF Staff and IMRF Systems at all times.
  - c. The IMRF e-Service Strategy meets and exceeds employer and member expectations for privacy and security.

# IMRF e-Service Vision

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## 3. Auditable

- a. Able to insure delivery or receipt of information.
- b. Able to confirm viewing of specific documents.
- c. Able to track all communication sent to IMRF employers and members.
- d. Able to control and track External User access to employer and member information.
- e. Able to control and track IMRF Staff access to employer and member information.
- f. Able to report metrics related to service, process, and function.