

## 2018 KP RETIREMENT PROCESS SURVEY

Based on issues raised by KaPeRs members, the Board of Directors decided to field a retirement process survey in the Fall of 2018 in order to gather information about the retirement process to share with senior Regional leaders. 390 KaPeRs members responded! Thank you!

### Survey questions

**What year did you retire?**

**Please rate your experience with the KP retirement process:**

Great    Very good    OK    Problematic    Bad

**For which KP entity did you work?**

KPNW Health Plan                      KPNW Hospitals  
Northwest Permanente                  Program Office  
Another KP Region

**In what capacity did you work?**

Union                      Non-Union                  Management

Here's what we learned:

- Dissatisfaction with the retirement process has increased since 2012, and for the past two years almost half of retirees reported the process was "problematic" or "bad".
- Working for multiple entities (health plan, med group, hospitals, program office) doesn't seem to cause more issues.
- Although union retirees reported slightly more dissatisfaction, it wasn't significantly higher.

Here are issues you identified via text comments:

- Mercer/Retirement center are difficult to deal with; different person every time; different information from every person.
- Communication between Retirement Center/Human Resources and other entities is inconsistent, regarding both initial and ongoing benefits.
- Billing systems do not communicate with RC and HR (Connexis, Wage Works, KP claims processes, HRA/HSA)
- Medicare Part B reimbursement process is unwieldy and untimely
- There are issues converting from retiree insurance programs to Medicare
- Dental coverage is still an issue for some retirees.

What have we done with the information:

Sue Hennessy, Jan Loewen and Vern Uecker met with Regional President Ruth Brinkley; Vice President of HR, Frank Hurtarte; and Vice President of Marketing, Sales and Business Development, Keith Forrester on April 3 to discuss our findings.

We identified several areas for follow up, including

- improving communication processes between KPNW HR and the retirement center,
- inviting the KP program office liaison with Mercer to meet with the KaPeRs board to clarify expectations and escalation processes,
- investigating whether billing/payment processes currently available to commercial groups could also be available to retirees, and
- investigating whether the existing dental rider could be made available for purchase.

Frank Hurtarte will serve as the KaPeRs Board partner to advocate for these improvements. The Retirement Center is now a shared service across the Program and Frank also volunteered to be our regional link to the leadership of the service center as we proceed.

We are cautiously optimistic about possible improvements and will continue to keep you updated on work in this area. As you know, we have no ability to make the changes but we are committed to advocate for our retirees.

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Judy Shafer Collinworth will be available at the end of the General Meeting to hear concerns members have about interacting with the KP Retirement Center and to offer pointers on getting assistance from the retirement center.