The Retirement Systems of Alabama
201 South Union Street, Montgomery, Alabama 36104 · 877.517.0020
STRENGTH. STABILITY. SECURITY.
November 2009

Eight Things to Know about RSA Member Services

RSA Member Services is your source for personalized benefit services through our Contact Center and Counseling Center. You are still communicating with the same RSA employees you have in the past. However, coordinating all benefit needs in one place allows the RSA to better serve you and help make your transition to retirement successful.

Member Services Agents in the ***RSA Contact Center*** receive all incoming calls during business hours to give you the personalized service you deserve. If you need to make an appointment with a counselor in Montgomery, these same Agents will schedule counseling appointments in the ***RSA Counseling Center*** at the RSA Headquarters building in Montgomery. They will help you select the best time for your appointment and ask for information pertaining to your requests.

Contact RSA Member Services

877.517.0020 or 334.517.7000

Note: Members of the ERS who participate in the State Employees' Health Insurance Plan (SEIB) must contact SEIB at 866.836.9737 to schedule an appointment to meet with their counselors. SEIB is also located in the RSA Headquarters building.

Important points to remember when you contact RSA Member Services:

1. **The Member Services Agents answering your calls are trained to answer a majority of your questions.**
   The Member Services Agents are not receptionists expected to only transfer your call. The Agents are being trained to handle the majority of inquiries about the various RSA plans. If necessary, the Agent will transfer you to the first available staff member who is specialized in your area of concern. The Agent will relay your information so that you do not have to re-identify yourself and repeat the request.

2. **Our Agents use an identification process without a Social Security number for your protection.**
   The Member Services Agents will use the information you provide in conjunction with a couple of basic questions to verify the caller's identity without requesting a Social Security number. This ensures that only the member, retiree, or authorized representative can obtain information about accounts. Please note that certain information (account balances, beneficiary designation, etc) cannot be given over the telephone but will be mailed to the address on file.

3. **Knowing your Personal Identification (PID) Number is helpful.**
   Your PID number is the unique personal identification number assigned to each member, retiree, dependent or beneficiary by the RSA. The Member Services Agents can access you account information faster when you provide your PID. In a few months, the RSA will mail each member a letter with their PID number. PEEHIP members have their PID number on their insurance cards as their contract number.

4. **If you are calling on behalf of your employer, please identify yourself by name and title.**
   If you are calling on behalf of a state or local agency, school system, or postsecondary institution in an effort to assist an employee or retiree, please inform the Agent taking your call. The Member Services Agent will send you directly to the appropriate staff for assistance.

5. **Give the Agent the reason for your call up front.**
   If you just need basic information such as the examples listed below, we do not need to confirm your identity. Give the Agent a little information up front about why you are calling and we can get you the information without delay.

Basic inquires might include the following types of information:

- directions to our building
- Web site information and navigation: www.rsa-al.gov
- fax or telephone numbers
- request for forms
- general plan rules or requirements

6. **Please hold as wait time is minimal.**
Generally, a Member Services Agent will answer your call **without any wait at all**. However, there are those rare high volume calling periods when all the Agents are assisting other members. If you are asked to hold, please remain on the line. *Repeated hang-ups only slow our ability to assist callers.* Our hold queue is designed to **hold only three (3) calls**. Our average wait time is **less than 40 seconds**, even during periods of excess call demand.

7. **Making an appointment with a Retirement Counselor will save you time.**
   - We know your time is valuable, so making an appointment saves you from waiting. Walk-ins may have to wait for an opening to meet with a Counselor. This could take time.
   - Meet with a Counselor at the scheduled time.
   - If you need special assistance with handicapped parking and entering the building, please notify us when you make the appointment.
   - You may request a specific Counselor.
   - Counselors will already have your paperwork prepared prior to your arrival.
   - If you need special assistance with handicapped parking and entering the building, please notify us when you make your appointment.

8. **The Member Services Division is growing.**
Member Services is barely a year old and still growing. We appreciate your patience because we are working hard so that the first person you speak to can address your needs effectively and efficiently.

Making decisions about retirement is serious business – especially today. You are making decisions which will impact the rest of your life and in most cases, your beneficiary's life. We know your time is valuable, so we want to make your experience with RSA Member Services helpful and informative.

Prepared by the Communications staff of the Retirement Systems of Alabama. To have your questions answered in "Preparing for Retirement", please address them to **Michael Pegues, Communications, Retirement Systems of Alabama, P.O. Box 302150, Montgomery, Alabama 36130-2150**. Please visit our Web site at **www.rsa-al.gov**.