Illinois Municipal Retirement Fund

IMRF uses Adobe® LiveCycle® PDF Generator ES to streamline member and employer access to statements, improving services and accelerating document generation by up to 68%

Illinois Municipal Retirement Fund
www.imrf.org

Industry
Government

Challenges
- Improve benefits and services delivery to members and employers
- Provide members and employers with efficient, secure access to IMRF documents
- Improve the ability for IMRF employees to complete work items in a timely fashion
- Leverage investments in legacy systems while better managing fund correspondence

Solution
- Benefits and services delivery
  IMRF uses Adobe LiveCycle PDF Generator ES to automate the creation and archival of member statements, certificates, and daily correspondence—resulting in improved operational efficiency and customer satisfaction.

Results
- Accelerated the generation of member statements by 68%
- Reduced average file size by 76%, with some files up to 16 times smaller
- Improved benefits and services delivery to employers and members by delivering correspondence online faster and more efficiently, and optimizing internal business processes
- Drove additional value from investments in legacy systems

Setting new standards for customer service

The Illinois Municipal Retirement Fund (IMRF) was founded in 1941 by the Illinois General Assembly to provide employees of local governments and school districts with a sound and efficient system for paying retirement, disability, and death benefits. Over the past 68 years, this pension provider has grown from serving 5 original employers and holding $5,000 in assets to serving more than 2,900 municipal employers and holding approximately $19.2 billion in assets. A leader in pension systems worldwide, IMRF ranked number one in member service both in its U.S. peer group and among all participating pension systems worldwide in the CEM Benchmarking Inc. 2007 Pension Administration Benchmarking Survey.

Because IMRF communicates regularly with more than 180,000 active members, 86,000 retirees, and thousands of municipalities, vast amounts of correspondence—including member and employer statements, certificates of benefits, and more—are generated every day. With the goal of providing members and employers with the latest information regarding their benefits, IMRF set out to provide better access to its correspondence while improving the efficiency of managing its document archives. At the same time, the forward-thinking organization looked to further streamline operations by automating the process of initiating and processing IMRF internal work items related to the delivery of retirement benefits and customer service to stakeholders.

"We wanted to transform how we handle correspondence and member requests to ensure we always provide quality benefits and service delivery," says Curtis Walter, eService systems manager at IMRF.

Traditionally, the majority of IMRF correspondence was generated by a mainframe, and then printed and mailed to employers and members. In an effort to improve customer service by making electronic versions of these files available, IMRF leveraged both in-house and out-sourced conversion of its mainframe data to TIFF files. While the conversion to TIFF files unlocked the information from the confines of the mainframe and enabled IMRF to make electronic copies of correspondence available to employers and members online, the TIFF file format had its drawbacks. Content in TIFF files is not searchable, which made it difficult for employers to locate specific employee information. Additionally, the TIFF files produced from the mainframe data were enormous, with some files as large as 100MBs, which made downloading and storing correspondence prohibitive.

Improving operations, enhancing services

IMRF evaluated document-generation technologies that would enable them to create both paper and electronic versions of documents for distribution and archive; enhance member and employer services by providing secure online access to statements and other correspondence; and integrate with existing imaging and mainframe systems. "We are supported by local units of government, school districts, and ultimately by the taxpayer, so we always strive to operate as efficiently as possible," explains Walter.

To achieve its goal, IMRF adopted Adobe LiveCycle PDF Generator ES. With the Adobe solution, the team can create, distribute, and archive documents in PDF and PDF/A for more than 160 types of member and employer correspondence. "We selected LiveCycle PDF Generator ES because it makes it easy for us to integrate centralized PDF creation, sharing, and storage with our legacy systems," says Walter. "With Adobe LiveCycle ES, we get an automated, high-volume solution to deliver quality correspondence to employers and members and to deliver overall improved operational efficiencies at IMRF."

With LiveCycle PDF Generator ES in place, IMRF focused on enhancing several key processes, including generating annual statements for members and employers; creating a fully searchable, digital document archive; and automating the process of initiating IMRF internal work items.

### Streamlined handling of member and employer statements

At the beginning of each year, IMRF sends annual statements containing essential pension information to more than 260,000 members and 2,900 municipal employers. Prior to selecting Adobe LiveCycle PDF Generator ES, member statements were produced as TIFF files and posted to a secure website for download by members and employers. Because of the large file size, statement file download times could be long, making the user experience poor. Additionally, because generating TIFF files was time consuming, timely access to statements online was compromised.

By integrating LiveCycle PDF Generator ES with its legacy systems, IMRF now has a seamless process for outputting documents to compact PDF/A files, which are posted to its secure website for download by employers and members. The statements are now fully searchable and adhere to requirements for long-term document archiving.

On average, member statements can be generated up to 68% faster, with the total file size 76% smaller. Some employer statements, which could be up to 100MB in size as a TIFF file, were reduced to just 6MB in PDF/A. "We realized immediate benefits with LiveCycle PDF Generator ES," explains Michael Nesson, senior programmer analyst at IMRF. "For the first time our members and employers gained access to their statements electronically, as much as two weeks before their paper statements would arrive in the mail. Additionally, by making the file size up to 16 times smaller, we've made online access to member and employer statements much more efficient, which results in better service delivery."

Smaller file size also means smaller storage requirements, which allows IMRF to scale the number of archived statements at a lower cost than with the previous solution.

To streamline creation and distribution of annual statements to its members and municipal employers, IMRF selected Adobe LiveCycle PDF Generator ES. The team can create, distribute, and archive documents as fully searchable PDF and PDF/A files for more than 160 types of member and employer correspondence.
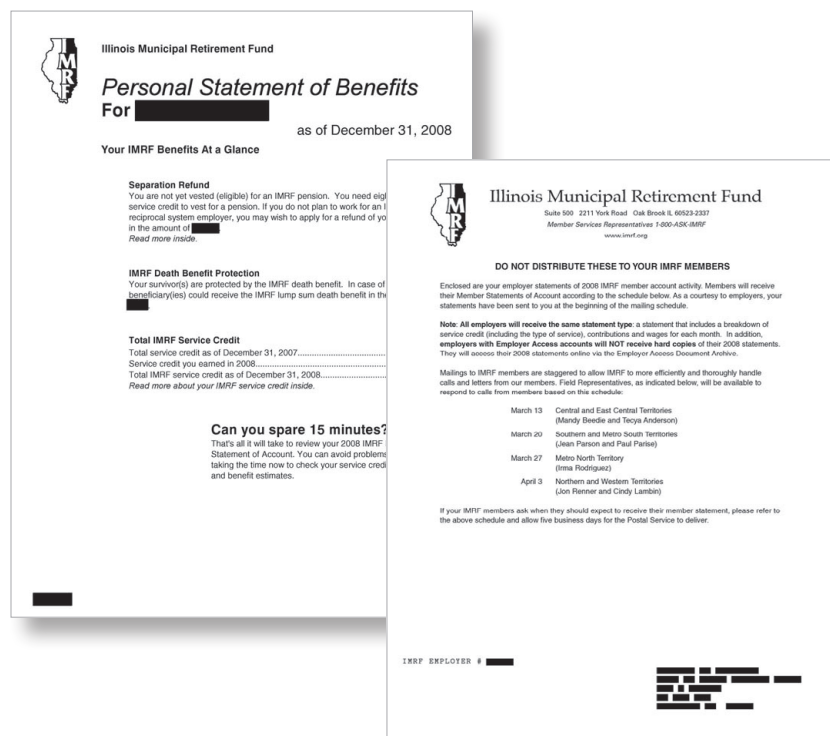
Rapid access to employer correspondence

IMRF generates volumes of employer-specific correspondence every day. To better manage its extensive archive of employer communications, IMRF outsourced the conversion of years of correspondence with each of its more than 3,000 employers to image files. Each resulting file could be hundreds of pages long.

With the adoption of LiveCycle PDF Generator ES, IMRF could OCR the files to make them searchable and convert them to PDF/A compliant files for long-term, reliable archiving. "Having these documents available as searchable PDF files enables our staff to easily look up any previous communications with employers and more quickly address any questions," says Nesson.

Building a flexible, reliable long-term digital archive

Since 1993, IMRF has created and archived in total more than 1.6 million documents containing member and employer correspondence, including documents such as certificates of benefits.

With Adobe LiveCycle PDF Generator ES, the organization took what was once a vast and difficult-to-manage archive and transformed it into a more flexible, searchable digital archive that is readily accessible via a secure website by members and IMRF employees.

Today, all correspondence generated by IMRF is converted and stored as PDF/A files on a daily basis. "Much to the satisfaction of our members, employers, and staff, finding any document—whether it was created five days ago or five years ago—can now happen in seconds," says Walter.

Bringing new efficiencies to internal processes

Critical to maintaining a high level of service quality for its employers and members is the resolution of specific tasks generated by events that occur in the IMRF mainframe system, which lies at the core of its operations. Tasks can include a request for an audit of specific member information (including a review of a member's wage and service history), reviewing an address correction, or forwarding documentation for legal review.

Previously, work items were assigned for resolution by notifying a user via inconsistent methods such as an e-mail, a pop-up window that a user would need to print, or by manually retrieving the work item from IMRF's mainframe system.

Because the resolution process was manual and paper-based, there was little consistency in how quickly a work item was completed, with no way to enforce deadlines or track the progress of an item as it was resolved. There was also no permanent record that a work item was assigned or of how it was completed.

To improve visibility into, and streamline its process for resolving work items, IMRF relies on LiveCycle PDF Generator ES to create work item instructions using the mainframe to generate PDF documents. Each PDF document contains instructions regarding the work item and what tasks need to be completed in order to reach a resolution.

IMRF INTERNAL WORK ITEM
IMRF FORM WI000001

WORK ITEM SUMMARY

Description: Reciprocal Claim Certification Request

Member SSN: ███████   Member Name: ███████

Employer Number: Employer Name:

Work Item Date: 08/27/2009   Work Item Origin: Reciprocal Access Website

WORK ITEM DETAIL

A Reciprocal Fund Member requires a Claim Certification:

  Member SSN: ███████
  Member Name: ███████

The audit has been requested by:

  Reciprocal Fund Name: State Teachers Retirement System
  Reciprocal Fund ID: ███████
  User Name: ███████
  User ID: ███████

Member information should be audited in Spectrum. Review wage and service history; make corrections as needed, and update the Audit Date on Spectrum MB11 screen.

The Reciprocal Fund is expecting the audit to be completed within 7 days. The Reciprocal Fund does not need to be contacted when the audit of member information has been completed.

To address this issue, IMRF is using LiveCycle PDF Generator ES to create work item instructions using the mainframe to generate PDF documents. The PDF documents are then automatically imported into IMRF's imaging and workflow system, where they can be assigned to a staff member, tracked, and managed to completion. Each PDF document contains clear instructions for an IMRF staff member regarding the work item and what tasks need to be completed in order to reach a resolution.

Using this approach, IMRF can improve visibility into, and enforce, its standard process for resolving work items. Work items are resolved more quickly and with fewer errors; ultimately delivering better service to employers and members and improving staff productivity. "Using LiveCycle Generator ES, we can create a bridge between two incompatible systems to improve the efficiency and speed of a standard operational process," says Nesson, "This enables IMRF to drive additional value out of its current technology investments."

Notable efficiency gains
For IMRF, the advantages of using LiveCycle PDF Generator ES are evident inside and outside the organization. In addition, the resulting PDF/A files are simpler to distribute and store, more easily searchable, and meet ISO standards for long-term, digital archiving.

"Adobe LiveCycle ES enables IMRF to deliver better service to its employers and members by producing and delivering correspondence faster and more efficiently, and by improving operational effectiveness," says Walter.

Systems At A Glance
• Adobe LiveCycle PDF Generator ES

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