



MBTA
RETIREMENT
FUND

Retirement Fund's Response to the COVID-19 Crisis

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Response to COVID-19

MBTARF Response to COVID-19. Since its founding, the Retirement Fund has remained committed to serving its members, retirees, beneficiaries and employees through good times and bad. Although the COVID-19 pandemic presents unprecedented challenges, the Retirement Fund's commitment to service and safety has not wavered. In response to the pandemic and the Governor's various Executive Orders, the Retirement Fund has either implemented, or is in the process of implementing, the following procedures and supportive technology (described in more detail in the following slides) to ensure the personal safety of staff while maintaining quality service:

- Limiting office hours;
- Practicing social distancing;
- Launching (Beta) of PTG Member Self-Service Portal
- Exploring remote online notarizations; and
- Conducting disability exams via telemedicine.

Details on COVID-19 Response

- » **Limiting Office Hours.** The Retirement Fund has temporarily suspended walk-in consultations while continuing to service members through e-mail and telephone to limit in-person consultations. Members, retirees, and beneficiaries that require in-person services are encouraged to call the Retirement Fund office at (617) 316-3800 to schedule an appointment.
- » **Remote Work.** Since Governor Baker's Executive Order to cease in person operations for non-essential businesses, Retirement Fund staff has continued to work productively, but remotely, only travelling to the office as needed for essential business purposes to service Retirement Fund membership. Exceptions in the Governor's Order exist for financial service employees and employees who administer to payroll.
- » **Social Distancing.** Members, retirees, and beneficiaries who require in-person services (e.g., to complete a retirement application) are able to schedule an in-person consultation with Retirement Fund staff. The Retirement Fund is practicing social distancing measures to conduct in-office consultations in separate, "safe" rooms with Retirement Fund staff via a Zoom video meeting.

Details on COVID-19 Response (Cont.)

- » **Remote Online Notarizations.** The Retirement Fund is in the process of engaging Notarize, a remote online notarization provider, to enable members to obtain remotely notarizations for retirement benefit applications. The Notarize platform will allow the Retirement Fund to both upload retirement applications securely and provide the member with a single platform to e-sign and notarize the application.
 - Members will be able to utilize the newly launched beta version of PTG Member Self-Service Portal that interfaces with the Fund's current website to: (i) review pension data, contact information, beneficiary information, and messages; (ii) calculate pension estimates and obtain related information; and (iii) update certain account information by downloading fillable forms to provide to the Retirement Fund.
 - Retirement Fund staff will be available to assist members via telephone if they have questions. The PTG Member Self-Service Portal allows Retirement Fund staff to view simultaneously screens that a member is accessing in order to provide enhanced customer service.
- » **Disability Exams via Telemedicine.** The Retirement Fund, in conjunction with its independent medical evaluation provider, has secured access to telemedicine technology for members in need of a physician's examination in order to apply for disability retirement benefits. Telemedicine allows doctors to examine patients remotely using HIPAA compliant video-conferencing tools.