



University of California Retirement System

# UCRAYS - Upload Documentation



UCRAYS – Customer Care  
Operational Guide

v.1.1 December 12, 2019

	UNIVERSITY OF CALIFORNIA	
	Retirement at Your Service (UCRAYS)	
	UPLOAD DOCUMENTATION	

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## Upload Documentation

### 1 Overview

The scope of this document is the Upload Documentation process.

- **Goal:** Review the steps to upload documentation in UCRAYS for UC members.
- **Objectives:** To upload documentation in UCRAYS.

#### 1.1 Roles

These roles and definitions are not comprehensive descriptions of responsibilities, but rather define the internal UC roles and job duties directly related to this business process.

Role Names(s)	Definition
Customer Service Representative	The point of contact for member questions and concerns.
Redwood Processor	The processor and evaluator of a specified Redwood queue.



### 2 Business Process Flows

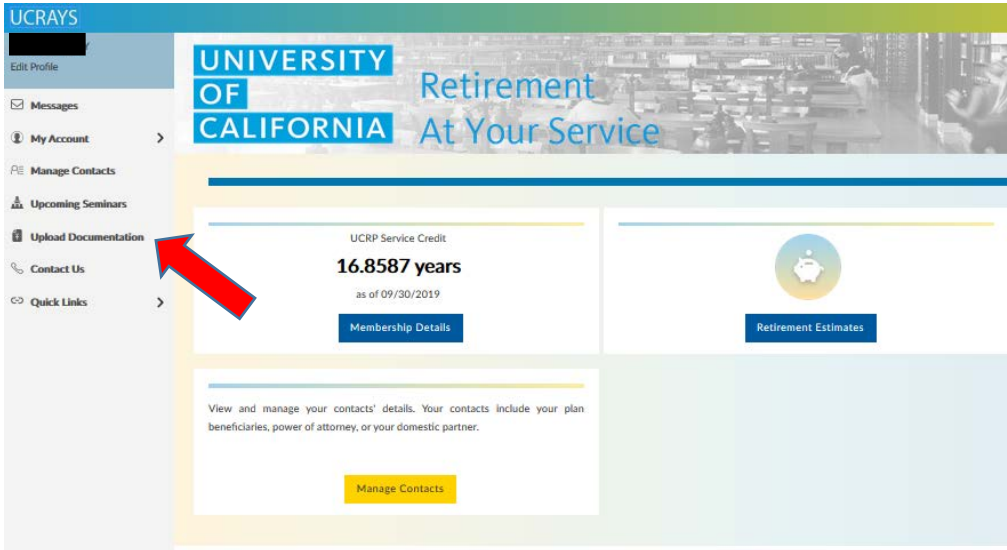
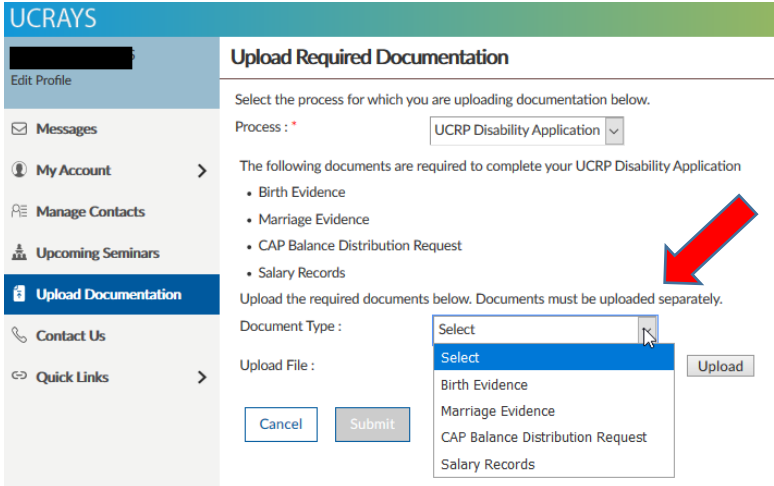
#### 2.1 Upload Documentation

**Important Note:** This functionality is only available when the UCRAYS account owner needs to upload documentation based on an In-Progress BPM for one of the following tasks:

- **UCRP Retirement Election** - If the Service Retirement BPM is in-progress and waiting for supporting documents. This must include both Generate election letter wait & Supporting document wait.
- **UCRP Disability Application** - If the Disability BPM is in-progress and waiting for supporting documents
- **UCRP Service Credit Purchase** - If the Service Credit Purchase BPM is in-progress and the system is waiting for supporting documents.

Updates made in UCRAYS are displayed instantaneously in both UCRAYS and Redwood, unless another party's approval is required.

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Step	Action
1	<p>On the UCRAYS Home Screen, click “Upload Documentation” on the left-side panel.</p> 
2	<p>UCRAYS displays the Upload Required Documentation screen.</p> <p>Click the “Process” dropdown and choose the process for which the documentation is required.</p> <p><b>Note:</b> Only applicable BPMs will display. It is unlikely that a member will have more than one process requesting documentation.</p> <p><b>Result:</b> Depending on the Process selected, UCRAYS displays the required document checklist on the Upload Required Documentation screen.</p>  <p><b>Note:</b> Upload documentation functionality is tied to the following processes:</p> <ul style="list-style-type: none"> <li>• UCRP Retirement Election</li> </ul>

	<ul style="list-style-type: none"><li>• UCRP Disability Application</li><li>• UCRP Service Credit Purchase</li></ul>									
3	<p>If the UCRAYS account owner has already uploaded documents for the process selected, they will be listed in a grid.</p> <p>The document(s) cannot be deleted but can be replaced by any updated documentation uploaded at this time.</p> <div><div>Upload Required Documentation</div><div>Select the process for which you are uploading documentation below.</div><div>Process : *<div>UCRP Disability Application</div></div><div>The following documents are required to complete your UCRP Disability Application</div><div><ul style="list-style-type: none"><li>• Birth Evidence</li><li>• Marriage Evidence</li><li>• CAP Balance Distribution Request</li><li>• Salary Records</li></ul></div><div>Upload the required documents below. Documents must be uploaded separately.</div><div>Any documents you have already uploaded as part of this process are listed in the grid below. They may not be deleted, but will be replaced by any updated documentation you upload at this time.</div><div>Document Type :<div>Marriage Evidence</div></div><div>Upload File :<div>Browse...</div> No file selected. <div>Upload</div></div><div><table><thead><tr><th>Document Type</th><th>File Name</th><th>Remove</th></tr></thead><tbody><tr><td>Birth Certificate</td><td><a href="#">Birth Evidence.docx</a></td><td></td></tr><tr><td>Marriage Evidence</td><td><a href="#">Marriage Evidence.docx</a></td><td><a href="#">x</a></td></tr></tbody></table><div><div>Cancel</div><div>Submit</div></div></div></div>	Document Type	File Name	Remove	Birth Certificate	<a href="#">Birth Evidence.docx</a>		Marriage Evidence	<a href="#">Marriage Evidence.docx</a>	<a href="#">x</a>
Document Type	File Name	Remove								
Birth Certificate	<a href="#">Birth Evidence.docx</a>									
Marriage Evidence	<a href="#">Marriage Evidence.docx</a>	<a href="#">x</a>								
4	<p>Click the “Browse” button to select the documentation. The UCRAYS account owner selects the appropriate documentation from their device.</p> <p>Repeat this step as many times as necessary.</p> <p>A document can be removed by clicking the blue “<a href="#">x</a>.”</p> <div><div>Upload Required Documentation</div><div>Select the process for which you are uploading documentation below.</div><div>Process : *<div>UCRP Disability Application</div></div><div>The following documents are required to complete your UCRP Disability Application</div><div><ul style="list-style-type: none"><li>• Birth Evidence</li><li>• Marriage Evidence</li><li>• CAP Balance Distribution Request</li><li>• Salary Records</li></ul></div><div>Upload the required documents below. Documents must be uploaded separately.</div><div>Document Type :<div>Birth Evidence</div></div><div>Upload File :<div>Browse...</div> No file selected. <div>Upload</div></div><div><table><thead><tr><th>Document Type</th><th>File Name</th><th>Remove</th></tr></thead><tbody><tr><td>Birth Certificate</td><td><a href="#">Birth Evidence.docx</a></td><td><a href="#">x</a></td></tr></tbody></table><div><div>Cancel</div><div>Submit</div></div></div></div>	Document Type	File Name	Remove	Birth Certificate	<a href="#">Birth Evidence.docx</a>	<a href="#">x</a>			
Document Type	File Name	Remove								
Birth Certificate	<a href="#">Birth Evidence.docx</a>	<a href="#">x</a>								
	<p><b>Note:</b> The “Submit” button will only display when at least one document is uploaded.</p>									
5	<p>Click the “Submit” button.</p>									

### Upload Required Documentation

Select the process for which you are uploading documentation below.

Process : \* UCRP Disability Application

The following documents are required to complete your UCRP Disability Application

- Birth Evidence
- Marriage Evidence
- CAP Balance Distribution Request
- Salary Records

Upload the required documents below. Documents must be uploaded separately.

Any documents you have already uploaded as part of this process are listed in the grid below.

Document Type : Marriage Evidence

Upload File : Browse... No file selected. Upload

Document Type	File Name	Remove
Birth Certificate	<a href="#">Birth Evidence.docx</a>	
Marriage Evidence	<a href="#">Marriage Evidence.docx</a>	<a href="#">x</a>

Cancel Submit

**Result:** UCRAYS displays a confirmation message stating the documentation has been successfully uploaded.

### Confirmation

The required documents for your UCRP Disability Application have been uploaded and submitted to the Retirement Administration Service Center (RASC) for processing.

**Note:** Once the final document required for a BPM is uploaded, the member will not be able to replace/resubmit a new document for that BPM. If necessary, the member can submit a new document via Secure Messages.

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**Result:** The uploaded documentation will be immediately available in ECM.

**Important Note:** If a member uploads multiple documents (replacing the previously uploaded documents), then the CSR must check ECM Imaging to make sure they have the most updated/correct version because the BPM will only have the original document attached.



ECM Images Lookup

#### Search Criteria

1081815

#### Search Results

Redwood ID	Document Type	Document Description	Reason Code	Document Class	Imaged Date
1081815	<a href="#">ELWK</a>	Election Worksheet		Retirement	12/09/2019
1081815	<a href="#">REST</a>	Generate Retirement Estimate Letter		Retirement	12/05/2019
1081815	<a href="#">REST</a>	Generate Retirement Estimate Letter		Retirement	12/05/2019
1081815	<a href="#">REST</a>	Generate Retirement Estimate Letter		Retirement	11/27/2019
1081815	<a href="#">REST</a>	Generate Retirement Estimate Letter		Retirement	11/21/2019
1081815	<a href="#">REST</a>	Generate Retirement Estimate Letter		Retirement	11/21/2019
1081815	<a href="#">REGA</a>	UCRAYS Registration Acknowledgement		Retirement	09/24/2019
1081815	<a href="#">REGA</a>	UCRAYS Registration Acknowledgement		Retirement	09/17/2019

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### 3 Action Items

The following section of this document contains the outstanding questions, issues, or action items that remain as of the date this document was drafted.

No.	Description	Owner