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**Ad hoc query tool introduced**

The stage is set for the introduction of the new Clarety ad hoc query functionality to go live July 9, 2007. This new tool gives staff the ability to request and create Clarety queries without the assistance of AST.

Each process that uses Clarety will have report users who will be able to run established query reports. Report creators will have the additional ability to create queries for custom reports. Report creators are available throughout WDRA.

Additionally, the new queries can be run as needed or set on a schedule. Lori Hickman of CSC is looking forward to the gained flexibility and reduced reliance on AST.

AST will continue to provide technical support and assistance in developing more complex queries.

Your ticket to  
**Summer Fun!**

For a list of Michigan Fairs or Festivals, visit:

[www.michiganfairs.org/locator.asp](http://www.michiganfairs.org/locator.asp)  
or  
[www.michigan.org/travel/events/?m=3;1](http://www.michigan.org/travel/events/?m=3;1)

**Calendar**

**July**

State Police Board Meeting	19
Public School Employee Board Meeting	26

**August**

State Employee Board Meeting	9
WDRA Staff Picnic	16
Annual Golf Outing	29

**On the Horizon**

- All Staff Meeting

**Improving CitiStreet loan default process**

Using creative thinking and hard work, **Joe Osentoski** took it upon himself to help simplify the CitiStreet loan default report process employed by ER. The monthly report informs CitiStreet of 401(k) loan participants who are in the process of loan default and are currently on or have been on intervening military leave or payoff. The original loan report from CitiStreet and the master military lists are imported into an Access database created by Joe.



Joe Osentoski

The loan default process used to be very lengthy, taking approximately 24 business hours to reconcile each default loan to verify that the default was appropriate. Each report has between 350 and 550 participants. Joe's new Access system has queries and tables to do all of the comparisons to previous reports and the master military list.

By streamlining the process it is believed that running reports will now only take around eight hours—a savings of 16 hours per month. Thanks to Joe for taking the initiative and to **Andy Oser**

October 16

for his technical assistance on this big project.



Andy Oser

### Balanced Scorecard

[Click here to view the latest Balanced Scorecard.](#)



## New Income Tax Withholding form available

A new version of the [Federal Income Tax Withholding Authorization \(R12X\)](#) is available. The form is being stuffed in application packets that will go into circulation after our existing stock of packets has been exhausted. You may continue to use the existing supply of half-sheet forms.

- It is now a full page rather than a half page.
- It is modeled after the IRS W4-P; the official IRS withholding authorization for pension recipients.
- It includes instructions and worksheets for determining the number of deductions and if they should have additional dollars withheld.

### Quick Links

- [ORS Member Website](#)
- [ORS Employer Website](#)
- [Policies and Procedures](#)

### Commonly Used Acronyms

AST	Application Support Team
BLA	Business Leadership Assembly ( <i>EPC, BPOs, and BPLs</i> )
BPD	Benefit Plan Design
BPL	Business Process Leader
BPO	Business Process Owner
CED	Customer Education and Development
CSC	Customer Service Center
DB	Defined Benefits
DC	Defined Contributions
DIT	Department of Information Technology
DMB	Department of Management and Budget
EPC	Executive Process Council ( <i>Phil,</i>

## business briefs

### DMB communication reaches out

By now you've probably noticed the DMB Table Tents located in our conference and break rooms. This new tool was designed to keep employees informed across the department and is a direct result of employee feedback. The table tents feature business and employee news and will be posted after the first of each month.

### Savings identified

Due to changing business needs, **Pam Ward** reviewed the Call Management System (CSC call monitoring application) invoice to determine if cutbacks could be made. Pam identified five licenses that could be dropped for a cost savings of \$105 a month, or \$6,300 per year! In addition, \$3,369 will be saved by dropping voice mail and recorded lines for a total of \$9,669. Another \$2,000 will be saved by returning unused equipment and lines.



## Expanded access to employer self-service

The employer self service site opened up successfully for extended weekend hours for two weekends in the month of June. Expanding the hours was a recommendation that came from the new Payroll Advisory Team due to requests from employers to have additional access and time to work on their retirement reports. Continued additional weekend access will be scheduled whenever it can be accommodated with other batch programs.

Below is a comment received from an employer in appreciation of the weekend access:

*Thanks to everyone who made it possible for us to work on ORS during the weekend. I really appreciated it the first time and was able*

	Laurie, Tim, Anthony, and Kathy)
EPO	Executive Process Owner
ER	Employer Reporting
ORS	Office of Retirement Services
PRIM	Preretirement Information Meeting (public school employees)
PRO	Preretirement Orientation (state employees)
PS	Process Support
SME	Subject Matter Expert
STG	System's Technology Group (Web self-service contract vendor)
T&T	Tools and Technology
WDRA	Workforce Development and Retirement Administration

to clean up items on my report. Again ... THANKS!!

Thelma  
Ann Arbor Public Schools

The next step for extended service is to open at 6:00 a.m. instead of the normal 7:00 a.m. start time on weekdays starting July 10; this is expected to be a permanent change.

## Day in the life of Jon Seeger

Assisting in the leadership of all things customer service, Jon Seeger is a very busy man, and often gets pulled into meetings, projects, and consultations by people seeking his expertise. Jon said, "Right now what's taking most of my time is assisting with planning for web self-service and reviewing forms for the Forms, Letters, and Barcodes project."



Look at the sample day below for a better understanding of what Jon does:

7:30	Read emails and catch up on issues from the day before. Review issues and hopefully provide solutions for Clarety and Seibel problems.
8:15	Review the AST newsletter that ran the night before so that I am up to speed with all things related to our business.
8:30	Meet with Chantele Geisenhaver to discuss Clarety enhancements.
9:00	Meet with Laurie Mitchell, STG, and other SMEs for the Joint Application Development (JAD) to discuss web self service design, functions, and the overall customer experience.
11:00	BLA Monthly Meeting of all office leadership to ensure each process is apprised of activities and changes within our business.
12:00	Travel to Summit Day Camp to meet my daughter for lunch.
12:30	Planning meeting for server replacement.
1:00	JAD session. 4:00 Meet with Kathy Tober for our weekly CSC status meeting.
5:00	Weekly update meeting with Lori Hickman, Linda Turner, and Tom Zach regarding the new electronic Workforce Management Tool.
5:30	Catch up on all the emails and issues that came up during the day while I was in meetings.

On a rare occasion Jon is actually able to leave at his regular "quitting time" of 6:00. He commented that there is no typical day for him because of the many impromptu meetings that arise causing his schedule to be altered.

## Kudos from the mailbag

Dear Phil.

I just received my copy of "Connections" dealing with the Judges Retirement System. I think it's well done and a great idea.

That led me to try out the web-site which is also well done and easy to use - even for a novice like me.

Congratulations to you and your team there.

Best Wishes,  
I am



**Clarissa Sheler**  
Thank you for the quick work and the good communication to everyone! I appreciate the help.

**Joy Bartell**  
Thank you again for your valuable assistance in resolving this problem.



**Travis Peake**

Thanks for all the support you have provided to Training. Your great attitude and willingness to assist with training setup, booking conference rooms, learning the training registration process, pulling various reports from the training database and the many other items you do for us is appreciated.



Thank you, **Kris (Morris)**, for the explicit responses. Staff will be satisfied knowing this - makes accepting change a little easier with all the blank spots filled in. And they will be so thrilled when the records are at their fingertips and they won't have to use fiche readers, film machines, etc. as I am sure your staff will be, too.

We appreciate your efforts to make our work easier. Please say thanks to your team for us! Again, thank you.

I wanted you to know that I was speaking with someone here who really appreciated the assistance that **Mike Goodman** gave them. They were doing walk-ins and was having trouble understanding the Medicare situation the members they were with were having. (Problems w/having another insurance and



having to cancel one to get MPERS back etc.) They came back to the insurance unit to get assistance and Mike made himself readily available and went over the situation, but the counselor was concerned over correctly relaying all the information back to the walk-in members. Mike went up front and in 5-6 minutes went over the members options with them and it was a done deal. The counselor was so grateful and impressed by Mike's 'Customer Service' not only to the members, but his internal customer service!!!

This is very true for me too, when I think of it, Mike has always been available and doesn't act like it's a bother to him or that it is out of his way to help.

**Pam Kibby**

DEAR MRS. HISKMAN,  
I WISH TO EXPRESS MY GRATITUDE AND APPRECIATION FOR ASSISTANCE PROVIDED ME BY PAM KIBBY, A MEMBER OF YOUR STAFF.  
AFTER 34 YEARS OF PUBLIC SCHOOL EMPLOYMENT AND 13 YEARS OF RETIREMENT, BLUE CROSS HAS CANCELLED MY PRESCRIPTION DRUG COVERAGE AS OF APRIL 1ST. THE MANY BARRIERS AT BLUE CROSS MADE RESOLUTION TO MY INSURANCE PROBLEM BEYOND MY CAPABILITY.  
A PHONE CONVERSATION BY PAM KIBBY YESTERDAY WITH BLUE CROSS RESULTED IN A CHANGE OF ATTITUDE AT BLUE CROSS AND, HOPEFULLY, THE PROMPT REINSTATEMENT OF MY PRESCRIPTION DRUG COVERAGE. PAM KIBBY'S OBVIOUS PEOPLE SKILLS ARE MATCHED ONLY BY HER MOST SINCERE DESIRE TO BE A POSITIVE INFLUENCE IN THE LIVES OF YOUR CLIENTS.  
THE PAST 3 1/2 MONTHS HAVE SHOWN ME HOW FRAGILE AND VULNERABLE WE ARE WHEN THE SYSTEM FAILS TO FUNCTION. I WILL NOT EVER FORGET THE ASSISTANCE PROVIDED ME BY PAM KIBBY. NEVER.



Thanks for being there  
**Michael (Zingsheim)!**

**Angie Schrauben** is about the best employee one could ever hope to have here in our organization. Every interaction I have with her is top notch. She is professional, hard-working, extremely customer service focused and also produces quality work consistently—just wanted to pass that on!



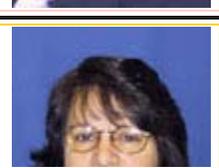
**Mary Lowry**

Here is the copy you asked for. Thanks for all your help. You do a great job & have been very helpful.



A customer said **Shanna (Hoss)** was very smart, accurate, and a

AST team member **Rose Dudash** did an excellent job on these ASAP queries. Thank you so



genius. She said Shanna helped her tremendously.

much. They contain all of the info I requested, and they were correct with the first pass. GREAT JOB!!



A local school employee wanted to mention how great **Deb Lawrence** is. She always is cheerful and helpful and always goes out of her way to help!

**Mary Picken**

Thank you so much for being such a HUGE help to me today on the phone. You have always been very helpful. I believe that I just saved myself hours and hours of work by talking with you.



**Chuck Simpson**

Dear Mr. Covert,

We are compelled to write this letter of commendation to you regarding Mr. Chuck Simpson. My wife Carol is planning her retirement and after attending a pre-retirement information meeting we scheduled a personal phone consultation. Mr. Simpson was our representative during this personal consultation. Mr. Simpson is extremely knowledgeable, caring, understanding, and above all happy and willing to assist us with the retirement process. It was apparent that he was well prepared for our phone consultation as he answered all of our questions. Especially impressive to us is his dedication and willingness to offer his assistance.

We are sure you are well aware and acknowledge Mr. Simpson's services to the ORS. Because of our deep appreciation of him, we would ask that this letter confirm his many virtues. We have taken the time to write to you of our own accord. We believe it is important to acknowledge an employee of such dedication, and this letter should serve as a formal positive acknowledgment of Mr. Simpson. We congratulate you on employing such a caring and knowledgeable employee.

Sincerely,



A member called back for **Elaine Scott** to thank her for helping her earlier on her insurance issue.

She said she deserves a **big** bouquet of flowers!



A customer shared that **Cathleen Curran** is absolutely fantastic and terrific!

I was able to get **Sean Evans** on the phone and he was WONDERFUL! Let me tell you, working with him was a life altering event! I can't express enough how wonderful Sean was and what a great job he did.



A customer wanted to let us

Thanks for



know how great **Angie (DeRose)** is in helping get the job done. She helped him get a COBRA issue straightened quickly and efficiently, and she as helpful to him. Way to go Angie!

staying on top of this **Lori (Edwards)**. I appreciate the extra effort on your part to ensure DMB staff stay informed.



**Fred Doll** received his Project Management Novice certification through Project Management Methodology Express.



**Team Kudos**

For **Jennifer Dunavant, Shannon Meyer and Marsha Moore**: Thank you for providing exceptional customer service. You had a customer's retirement process go smoothly. The customer said you were all helpful, confident, reassuring and knowledgeable.



Thank you, **Angie (Bryan)** and **Katie (Lum)** for helping a customer with her insurance related issues. She was pleased with the service provided. Way to Go!



For **Andy Kolp, Peggy Shin, and Kerrie Vanden Bosch**: Well thank you! I said to George Hakim (our deputy director) yesterday that you guys are a remarkable team and it's hard for me to see myself in your role!!! he said he recently attended the parking reengineering validation (I think) session and was also impressed on how well you guys come into an area knowing nothing about it and are able to pick up on the process very easily! I said I agreed!!





For **David Travis** and **Pam Ward**:

It sounds like this (CED) move went smoothly! I appreciate all the help and effort that went into it!! Thank you both.



For **Penny Winston, Catherine Jones, Katie Lum, Trish Smith, and Mike Sysak**:

A customer wants to say Thank You to the ORS employees that helped her get through her retirement process. She said every time she called or sent an email, the responses were informative. The ORS employees were kind, thoughtful, and patient. They all deserve a pat on the back. It has been an awesome experience.

**Tamil Chinnachamy, Jimmy Issac, Tim Lott, Jiang Luo and Satyana Sainkineni**:

These AST staff members worked diligently to identify a resolution of an indexing error. Thank you very much for your hard work.

**Clarissa and the Document Management Team**

Thanks so much for your quick response. You Rock!

**Kris Morris and the Document Management Team**

I just had the opportunity to work with the new File/Fiche Request process and it is sooo slick! Thanks so much for this useful tool! And for being so quick in completing! It gave me exactly what I needed! Hats off to you and your team!

## WDRA employees earn Starburst award

**Michael Zingsheim**, with assistance from **Ann Schneider**,



recently partnered with DMB communication staff to help address the department's communication needs. It was decided that a communications survey (conducted in May 2007) and focus group sessions (to be held in the fall of 2007) would be conducted. Michael helped to design and create the survey. Additionally, Michael coached the communications staff on how to analyze the survey results.

In thanks for their efforts, DMB Director of Communication **Edward Woods III** presented WDRA with the Starburst award. "**Michael Zingsheim and Ann Schneider** were lauded for their expertise, teamwork, and professionalism," said Woods. The Starburst Award is presented monthly at the Senior Management Team meeting by DMB Communications to highlight, appreciate, and recognize communication assistance from DMB personnel.

**ORS Mission:**  
We are a customer-focused organization that serves members and employees today and prepares them for tomorrow.

**ORS Vision:**  
Empowering people for a successful today and a secure tomorrow.

The *LookOut* is published by Workforce Development and Retirement Administration, Department

## Comings & Goings

**Marsha Moore** has resigned; her last day with our office was June 26. Staff wish her all the best in future endeavors.

Please join us in wishing the best to **Patrick Witherspoon** who will leave our office on July 20 to attend San Diego State University's MBA program. Patrick started working here in June of 2004, and was hired back as a student in March 2005 after returning from a study abroad program in Australia. He graduated from Michigan State University with a bachelor's degree in Political Science in May of 2006, and then took accounting courses at LCC last year.

## Blast from the past

The following article appeared in the August 28, 1998 issue of the *LookOut*.

### Steering Committee members perform their Auction service

Remember when the members of the Steering Committee were auctioned off for the picnic fund? Each performed their two hours of service. Here's photo proof!



*Chris DeRose, above, copies information from a record. Above right: Cindee Clouse, right, gives instructions to Laurie Hill. Center right: Ginger Bomar, left, assists Tony Contu in fielding phone calls. Below right: Deb Gearhart searches for a file. Far right: Amy Dickinson, standing, shows Phil Stoddard how to copy records onto microfiche.*





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Thanks for reading!!

**Note:** Because some of the links in this newsletter point to resources within ORS, some of the links may not work if you are outside of ORS.