



April 14, 2006

Volume 10, Issue 7

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**Welcome to our Training staff**

As you know, the DMB reorganization has paired Retirement Services with parts of Organizational Services and we proudly became the Workforce Development and Retirement Administration. This change created a new process—Training.

Two members of our Training process, EPO **Tim McCormick** and BPL **Ann Schneider**, await the arrival of the rest of their gang. **Bernie Lucas** as BPO, along with **Sandy Ball**, **Lori Edwards**, **Carol Keyes**, and **Michael Zingsheim**, will move to their new digs next week. They will be located in aisle P, near the resource library.



Welcome **Lori Edwards**, **Sandy Ball**, **Michael Zingsheim**, **Bernie Lucas**, and **Carol Keyes**.

Sandy brings with her 35 years of state experience. She began her career with the Department of Human Services.

She has held a number of different positions with the state. Sandy started with the Office of Retirement Services in 1991 and helped implement the state employees and judges defined contribution retirement plans. She started her current position as a training consultant in 2001.

Lori has 27 years of state service, all with DMB. She started with the Office of Purchasing, and served as one of three original members of DMB's Automation Services that became Information and Technology Services Division (ITSD). ITSD is now known as AST with DIT; Lori remained with DMB in Organizational Services conducting software training.

Carol began her state employment in 1966 in the Department of State, Driver Improvement Division. She moved from there to the Campaign Finance Reporting Division and then on to the Department of Community Health. She joined Retirement Administration (then Michigan Public School Employees Retirement System) in 1985 and spent 17 years in various positions. She moved into the training arena in 2001.

Bernie has been with the state for 18 years and worked at the Department of State as a training officer and at the Bureau of Driver Improvement and Bureau of Automotive Regulation. Bernie came to DMB as part of Safety, Health and Employee Development, which evolved into Organizational Development in 2001.

Michael has been with the state for seven years. His first position was here at ORS with the Information and Technology Reengineering group, which coordinated information technology projects. Michael started with Organizational Development

**Calendar**

**April**

|                                       |    |
|---------------------------------------|----|
| Easter                                | 16 |
| Tax Day!                              | 17 |
| State Police Board Meeting            | 20 |
| Earth Day                             | 22 |
| Administrative Professional's Day     | 26 |
| Public School Employees Board Meeting | 27 |
| Bring Your Child to Work Day          | 27 |

**May**

|                                |    |
|--------------------------------|----|
| All-Staff Meeting              | 2  |
| Cinco de Mayo                  | 5  |
| Judges Board Meeting           | 11 |
| Mother's Day                   | 14 |
| State Employees' Board Meeting | 18 |
| Memorial Day                   | 29 |

when the group was created in 2001. Before working for the state Michael spent 11 years working as a District Manager for Bay Petroleum Corporation.

When asked what they liked most about their current positions, their replies were "coworkers," "training people," and "interaction with people."

Our new coworkers collectively bring with them 119 years of state service! The group administers training along with many other projects like the DMB survey, the MI 360 project, and the vision and values initiative. Be sure to stop by and welcome them!

| Quick Links |   |
|-------------|---|
| •           | <a href="#">Email the LookOut staff</a> |
| •           | <a href="#">LookOut Archives</a>        |
| •           | <a href="#">ORS Member Website</a>      |
| •           | <a href="#">ORS Employer Website</a>    |
| •           | <a href="#">Policies and Procedures</a> |
| •           | <a href="#">DMB Intranet</a>            |

## Service Credit joins Employer Reporting

In February when the new process model was introduced, tasks within each process were also assessed to ensure they are appropriately aligned. One area identified to be realigned was service credit, which is currently housed in the CSC. Beginning April 24, some service credit tasks will transition from CSC to ER.

"By aligning member account information with ER, it should make it easier to ensure that the member data is accurate," **Jon Seeger** commented. "Previously, the service credit functions were split across processes, which made it difficult to determine who owned a particular issue. TDP and workers' compensation are prime examples of this."

| Commonly Used Acronyms |   |
|------------------------|---|
| AST                    | Application Support Team  |
| BLA                    | Business Leadership Assembly ( <i>Consists of the 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   |
| DIT                    | Department of Information Technology  |
| DMB                    | Department of Management and Budget   |
| EPC                    | Executive Process Council ( <i>Chris, Laurie, Phil, and Tim</i> )           |
| EPO                    | Executive Process Owner   |
| ER                     | Employer Reporting  |
| ORS                    | Office of Retirement Services   |
| PS                     | Process Support   |

The tasks that ER will be handling are: (1) transfers, repay of refund, MIP window, and workers' compensation billings; (2) cash processing; and (3) service credit breakdowns/evaluations. CSC will continue to manage other billings such as UBI, maternity/paternity, military, etc.

**Lisa Barrone, Cindee Clouse, Cathleen Curran, Mary McGlashen, Beth Nurenberg, and Suzanne Wright** will join the ER team on April 24. Also, as part of the process changes, **Cindy Adams** will be taking her supervisor skills and knowledge to ER, while CSC will welcome back **Nancy Ott** and her experience in benefit processing as a supervisor.

## Check out the Intranet!

ORS is now on the DMB Intranet. Any state employee surfing the Intranet can now find information about ORS and our services for state employees. To access the ORS page, visit <http://connect.michigan.gov/dmb>, and navigate to Business Services on the top navigation bar. There you will find Retirement Services.

The page provides links to both the state employees and state police member websites and CitiStreet. This provides just one more avenue for our customers to access information on their retirement plan. When you access the Intranet, be sure to log in so that you will also have access to the latest happenings in DMB!

Many thanks to Kathy Hacker of the DMB Director's Office for assisting CED in creating the Intranet page!

### Login instructions:

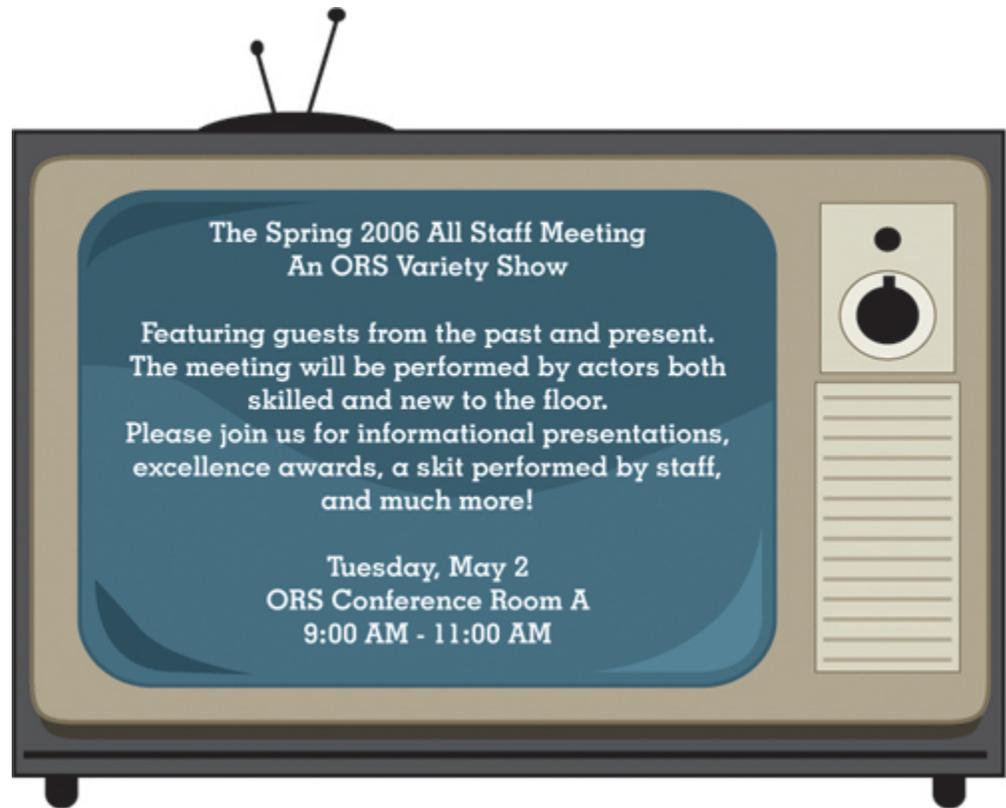
- Visit the Intranet at: <http://connect.michigan.gov/dmb>.
- Click on the word "Login" to reach the login screen.
- Enter your Username. (Your GroupWise user ID without the characters @michigan.gov.)
- Enter your Password.
- Check the box to "Automatically log me in"
- Select the "Log In" button.

To obtain a password, contact Kathy Hacker at 373-3451 or [HackerK@michigan.gov](mailto:HackerK@michigan.gov).

T&T Tools and  
Technology

### Reminder

April 26th is  
Administrative  
Professional's day.  
Make sure you thank  
those who help make  
your job easier!



### on Jennifer Dunavant

*"In every community there is work to be done. In every nation there are wounds to heal. In every heart there is the power to do it."*

*-Marianne Williamson, internationally acclaimed author and lecturer.*

These words can be used to describe ORS's own **Jennifer Dunavant**. Jennifer, along with being a full-time working mom, is a volunteer. She donates her time to help raise money for the Eaton Community Hospice in Charlotte and has done so for about eight years.

Jennifer's mom and grandma were her inspiration; they have both been volunteering for years. "My grandma volunteers for just about everything in Charlotte!" Jennifer said.

Their big project right now is organizing a pizza breakfast to raise funds for hospice. Jennifer said that Eaton Community Hospice is run completely on charitable contributions.

The Charlotte Pizza Hut sponsors the annual Hospice Pizza Breakfast and donates

50 percent of the proceeds and 100 percent of the tips to Eaton Community Hospice. The hospice volunteers also recruit local “celebrities” to serve the pizza breakfast. Past years have included state representatives, judges, the mayor, and the sheriff. “We like to let the celebrities do most of the serving and waiting tables since most people come to see them,” she said.

Jennifer is also helping with the Relay for Life this year. Where does she find time to do all this volunteer work? “On my early days off of work, I usually get recruited to walk around and get donations. Hopefully one day my kids will learn to get involved too,” she said.

Last year Eaton Community Hospice won the Governor’s Exemplary Community Service Program Award that honors organizations and their volunteers for effectively using volunteers to meet the organization’s mission.

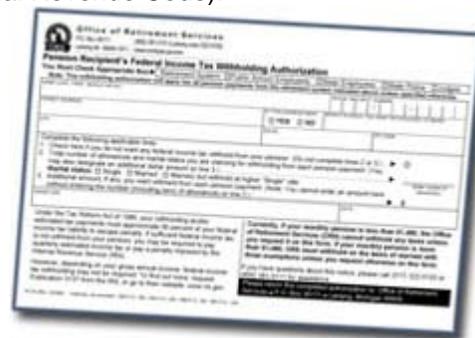
If you would like to support this worthy cause, please join Jennifer on Saturday, April 22, at the Charlotte Pizza Hut from 7 to 11 a.m. Jennifer said that each year the breakfast brings in a few hundred people. She and other volunteers will be there to help out and run things behind the scenes.

Nice job Jennifer!

## New Tax Withholding form—R12X

The [Pension Recipient’s Federal Income Tax Withholding Authorization](#) form (R12X) has recently been revised. The new form looks much more like the IRS form *W-4P*, *Withholding Certificate for Pension or Annuity Payments*. The most significant change is that pension recipients who want a specific dollar amount withheld must first claim a specific number of allowances. They can choose one of the following three options (in accordance with the Internal Revenue Code):

1. Elect to have no federal income tax withheld from their pension.
2. Claim a specific number of allowances.
3. Claim a specific number of allowances AND specify an additional amount to be withheld from each pension payment.



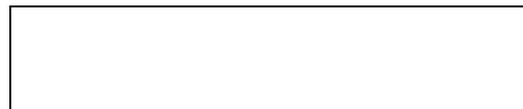
Please begin using the new form immediately. All old versions should be recycled.

## Tax Day—April 17

Federal and state tax returns are due by midnight on Monday, April 17. If you need more time to complete your forms we have good news for you! This year, IRS simplified the process to file for an extension. Go to IRS form 4868, [Application for Automatic Extension of Time to File U.S. Individual Income Tax Return](#), to see how to get an automatic six-month extension. You do not need to sign the extension request or provide an explanation. However, if you owe taxes you’ll still need to pay those before midnight April 17 to avoid possible penalties and interest. Go to the [IRS website](#) for all the specific details.

## Oregon visits

On Thursday, April 13, ORS hosted visitors from the Oregon Public Employees Retirement System. The



Oregon retirement system is a large public service multisystem, similar to ORS. They are current users of the Clarety system and also work with Covansys. Four staff members and a consultant visited ORS to get ideas on where we've been, where we are, and where we're going.

According to David Crosley, Communications Officer, "We are looking for best practices that are used by other retirement systems. We feel that we are where the Michigan system was two to three years ago in a number of areas."



**Kris Morris and Meg Leonard** demonstrate FileNet to our visitors: Wendy Wahl, David Crosley, Greg Williams, Mike McMahon, and Roger Smith.

The meeting focused primarily on the Customer Service Center with particular interest in the integration of Clarety, Siebel, and FileNet as well as our use of the NICE system and lessons learned.

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## Comings and Goings

Process Support welcomed **Pam Ward** from the Director's Office on April 10. Pam's duties will include assisting with system scheduling, DCDS approval, and various document management responsibilities.

ORS will say good-bye to **Veronica Tsai** in CSC on April 21. We wish Veronica well in her new job with DIT!

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## Kudos to ORS

We know we've made great strides since we established our ambitious vision in 1997. Nevertheless, stepping back every so often to see the big picture helps us appreciate how far we've come. It's also fun to look at our work through the eyes of an outsider. For a well-crafted overview of our journey, read "[Retirement Benefits: How One State Agency Became a Process-Focused Organization, with Outstanding Results.](#)" This article was published in the Summer 2005 issue of the Orion Constellation. Orion Development Group provided process management consulting services to ORS.




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## Kudos

Below are some of the kudos we've collected from the past quarter. They are expressions of approval, commendations, praises, accolades, or compliments for excellent customer service that we have provided to our external and internal customers. If you have received a kudo, or know of someone who has, please email them to [ORS\\_LookOut@michigan.gov](mailto:ORS_LookOut@michigan.gov), or place the original card or letter in ORS mailbox #174, for possible inclusion. We'll try to include as many as possible, but we might not be able to include all of them.

Elaine Scott received a card from Mr. and Mrs. C. She helped them with insurance questions and forms. They appreciated Elaine's help and patience as they were asking questions concerning their retirement. They want everyone to know that Elaine is the "Office Lady of 2006."

February 22, 2006

Joyce Weber  
 Office of Retirement Services  
 P.O. Box 30171  
 Lansing, MI. 48909

Dear Joyce Weber,

This note is in regards to one of your dynamic employees, Char Drysdale. People always like to be acknowledged when they go above and beyond what is expected of them. I thought I would take this opportunity to tell you that my husband and I think that Char Drysdale is one of those employees.

As we were both waiting to be seen, we noticed that Ms. Drysdale was not only quick and efficient, but knowledgeable and personable as well to everyone that she helped. We were fortunate to have her service us. I'm sure that the other members that you have on staff have comparable skills, but Ms. Drysdale seemed to stand out from the rest.

Ms. Drysdale's enthusiasm for her job and the people she met did not go unnoticed.

Thank you for making our day pleasant even if we had to wait a while.

3-27-06  
 Dear Mr. DeRose,

Just a note to tell you I do not take for granted the fine job you do as director of the system.

I've been a pension recipient for 23 years and have been impressed with the service you and the other "bureaucrats" provided on each and every occasion I have had to request help or information from you.

K.W.

I have had the pleasure on two separate occasions this year, months apart, to have been service by Ms. Joy Bartell. Ms. Bartell has been a joy. She's pleasant, efficient, professional, and personable and one can feel her passion for getting the job completed.

I was inspired by her exceptional skills in working with the public to write this letter of commendation about her. She is truly an asset to your organization.

B.C.

Anne Watros spoke to one of our members by the name of Sharon. Sharon wants everyone to know that Anne was very helpful, courteous, and deserves a pat on the back.

Mr. K. said "ORS is the most professional organization he has ever dealt with, period". He has always received exceptional service every time he has called here, and he thinks Raini is the best!

Forwarded from the ORS\_Web\_Reporting mailbox

>>> "Rood, M" <xxxx@publicschool.org> 3/21/2006 10:50 AM >>>  
 I just wanted to let you know what a great employee you have. Deb Lawrence has helped me get through almost a full year of ORS reports that would not post due to some unusual payments we make in our school district. Her patience in explaining how to work the system is exemplary. I hope that this memo gets to her superiors so that they know how lucky they are to have her as an employee.

M. Rood  
 Public School Payroll Coordinator

The Retirement Readiness booklet is excellent - congratulations to the authors!

A school superintendent wrote  
 "The bottom line is that Mr. Ray

J. Phillips wants me to pass along that even though the wait to talk to us is long right now, we are worth the wait. Thanks for the accurate answers to her questions and our pleasant dispositions.

Fleming represented your organization very well! I am sure that I don't need to tell you that you have a 'keeper' in Mr. Fleming, a true asset to your organization."

I just wanted to tell you that I just spoke to a service representative named Ann (Cook) and I was very impressed by her pleasant demeanor and the competence with which she helped me with my question. It's not often one deals with someone as willing to help as she. I appreciate the excellent service.

The ORS brochures are excellent. It looks like Director, Chris DeRose, and the ORS are a valuable asset to the State of Michigan and are doing an outstanding job.

Dear Jennifer,  
Thank you for the quick response to my request. I really appreciate the FABULOUS Customer Service from ORS. You guys are great! Genie

**ORS Mission:**  
We deliver pensions, related benefits, and services to promote the future financial security of our customers.

**ORS Vision:**  
Fast, easy access to complete and accurate information and exceptional service.

Dear Chris,

I wanted to say thank you for involving Joanne in the issue I raised. She has been extremely helpful in looking at these issues and helping us come up with solutions as well as offering for us to contact her again if the suggested solution doesn't work.

I consider that to be exemplary customer service and we really appreciate it!

S.T.

Business Office Supervisor

Once again- thank you EMPAC for your ongoing contribution to make ORS a better place to work!

Phil Stoddard

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Director: Chris DeRose  
Edited by the Communications Staff, Customer Education

Dear Ms. Johnston,

I hope that you are able to share this email with your supervisor. Ms. Johnston, you have done an outstanding job of sorting out a complicated situation and have responded promptly, clearly, and courteously. The employees of the state of Michigan are fortunate to receive services from your capable hands. Thanks you again for all of your efforts.

Sincerely, LPC

Thanks for reading!!

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**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.