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### Calendar

#### June

Father's day	16
Judges board meeting	20
EMPAC book sale	20
State employees board meeting	27

## New in Clarity: retirement checklist

To help members and processors with the retirement application process, a new tool was added to Clarity. For all retirement systems, processors will now see a checklist of supporting documentation, or proofs, that are required to complete an application.

The checklist will populate based on the type of application, and will list one of five statuses: Needed, Received, Accepted, Not Accepted, or Not Required. As we receive documentation from the member, the processor can update the status of each document in Clarity.

Beginning this month, members will see a version of this checklist in miAccount. Once members have applied for retirement, they'll see a link at the top of their member statement to check the status of their application. On the application status screen, they can review the Retirement Checklist which displays the required documents and their statuses. It will also display the last date the checklist was updated.

This change will be a great tool to help members track their application and submit all proofs on

time.

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## New law amends EDRO act

House Bill 4054 (HB 4054), which amends the Eligible Domestic Relations Order Act, was signed into law by Governor Snyder on May 14, 2013 and became Public Act 32 of 2013. The new law provides a 60-day window when a domestic relations order (DRO) that did not qualify as an eligible domestic relations order (EDRO) can be corrected.

The window begins on the date ORS notifies all parties that the DRO does not qualify as an EDRO and during this time, the member and alternate payee may submit an amended domestic relations order. If either the member or the alternate payee doesn't submit a domestic relations order that qualifies as an EDRO before the expiration of the window, any domestic relations won't be accepted.



**On the Horizon**

- Independence Day  
- July 4
- Central Perk cleaning  
- July 10
- Public school employees board meeting  
- July 11
- State Police board meeting  
- July 18

**Quick Links**

- [ORS Member Website](#)
- [ORS Employer Website](#)

**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
CE	Customer Education
CS	Customer Service
DB	Defined Benefit
DC	Defined Contribution
DTMB	Department of Technology, Management and Budget
EPC	Executive Process Council ( <i>Phil, Laurie H, Anthony, Laurie M, Kerrie</i> )
EPO	Executive Process Owner
ER	Employer Reporting
ORS	Office of Retirement Services
PRIM	Preretirement Information Meeting ( <i>public school employees</i> )
PRO	Preretirement Orientation ( <i>state</i> )

ORS already offers members and alternate payees clear guidelines on how to file an acceptable EDRO. PA 32 creates a deadline for all parties to correct any errors.

Click here for more information on [PA 32 of 2013](#).

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Click here for more pictures from the [game](#).

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## ORS Social Media Launch: Get Ready to “Like” Us!

**Nat Sheppard** from Accenture will soon be returning to ORS to provide assistance to CE staff during the start-up phase of our new social media strategy. During this time, Nat will work with CE staff to create procedures and policy for social media posting. Once the documentation is complete, ORS will begin the operations phase by launching a Facebook page in August. The goals include:

- Improving pre-and post-retirement member knowledge.
- Increasing online self-service.
- Reducing volume of our existing processes.

Staff will soon be creating content, posting, and measuring the impact of our social media activity. Keep an eye out for more social media updates in future issues of the *LookOut!*



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## Picture Your Future: Advancing on Your Road to Retirement Readiness - CE debuts new workshop

On June 4, Customer Education presented the Picture Your Future workshop at the Oakland ISD. The workshop is designed for those 6 to 10 years from retirement with the goal to educate members about the importance of retirement planning using

	employees)
PS	Process Support
SME	Subject Matter Expert
UAT	User Acceptance Testing

miAccount as part of their planning tool.

Using personas to solve case studies, CE introduced a new format where they introduced concepts such as the value of money, retirement readiness, understanding Social Security, and preparing for issues that retirees face.

"We were really excited to present Picture Your Future and receive feedback from our customers," stated **Joy Bartell** and **Carolyn Parkinson**. The next workshop, scheduled for June 18, will be presented to Wayne RESA.

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### ORS Strategic Goals



- Innovate and Improve Customer Service
- Best In Class Business Practices
- Instill Confidence in Staff Through Quality Communication
- Engage Top Talent to Realize Potential
- Continuously Renewed Business-Driven Technology
- Build Business Capacity Through Education and Development
- Proactive Policy Development and Legislative Strategy

## Webinars for Working After Retirement

Employer Reporting is conducting webinars clarifying the changes of working after retirement. The webinars are directed to the K-12 reporting units, universities, community colleges, as well as inactive charter schools. The goal of these webinars is to review the rules and requirements for reporting retirees who return to work. "The webinars will allow us to reinforce the recent working after retirement changes with the reporting units, in order to ensure accurate reporting of retirees who have returned to work." stated Andy Kolp

We are anticipating high attendance, the first one held on Monday, June 10 filled up quickly.

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### ORS staff attend PRISM conference

From May 12 to May 15, **Mike Bilek** and **Meg Leonard** attended the annual Public Retirement Information Systems Management (PRISM) conference. PRISM is an organization for the IT managers of public pension funds, designed to help provide state-of-the-art technology support. The conference gives the attendees a chance to share information, experience, and best practices in their field.



This year's conference theme was "Creating a Culture of Preparedness," and centered on social media, managing and backing up digital information and data, cloud computing, and more.

The conference included many breakout sessions, a roundtable, and presentations from guest speakers. Lt. General Russel Honore gave a presentation titled "The New Normal: Leadership and Preparedness in the 21st Century" in which he talked about his experience as the commander of the Joint Task Force after Hurricane Katrina. Kirk Langer, the Lincoln, Nebraska Public Schools Director of Technology, spoke to the conference about recovering from a real disaster: his district office being destroyed by an intentionally set fire.

The information Meg and Mike brought back from the PRISM conference will help ORS with its future IT improvements and upgrades.

### ORS staff attend Truven Health Advantage Conference

**Angella Miller** and **Mark Howard** from Benefit Plan Design recently attended the Truven Health Advantage Conference in 2013 in







Scottsdale, Arizona. This four-day conference was organized by Truven Health Analytics, which provides information, analytic tools, benchmarks, and other services to hospitals, government agencies, health plans, and other industries with a stake in health care. Speakers and forums at the conference provided in-depth information and discussion related to current state of the health care field.

Many sessions highlighted the need for health care providers and health plans to bring a focus to prevention and wellness. At the Culture of Health Panel, representatives of Whirlpool, Baylor Health Care, DTE, and Eastman talked about plan features they've implemented to promote wellness. These include financial incentives, healthy cafeteria food choices, and even standing desks. Other speakers mentioned how wellness and prevention can decrease costs by reducing the need for specialists and emergency room visits.

Other topics at the conference included collecting and managing "Big Data," conducting health plan audits, the drivers of health care costs, and a review of health benefits purchasing at the California Public Employee's Retirement System (CalPERS.)

Attendees to the conference learned about a wide range of current and anticipated challenges to health care and plan design, and possible strategies to meet them.

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## business briefs

### Catch-Up mailing goes out to DC participants

Participants in the State of Michigan 401(k) and 457 Plans that are (or will be turning) age 50 or older during this calendar year received a [postcard](#) from ING encouraging them to take advantage of the Age 50+ Catch-Up and the 457 Three-Year Traditional Catch-Up options that are available to them. Catch-up options offer participants who are at least age 50 the opportunity to make up for years they may not have been able to contribute to their 401(k) and 457 plans.

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### Goings:

DO wishes the best to student **Matt McCool**, who accepted a student position with Financial Services. Matt's last day is July 5.

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Sounding Out is a way for ORS staff to share ideas, viewpoints, gripes, praises, and concerns. Email your opinion (300 words or less, if possible) to [ORS-LookOut@michigan.gov](mailto:ORS-LookOut@michigan.gov).

**Bill Motz** reflects on the his 41 years as an employee of the Office of Retirement Services.



It is very hard to put into perspective what has transpired in 40 years, 11 months of service with DMB/DTMB. I can tell you I was one of those “hired off the street” folks, no interview was required, imagine that. Little did they know that I would be a Lifer!

I began working at the Bureau of Retirement the month prior to the birth of my youngest child Steven, who by the way works at at the Department of Purchasing for the past 7 years, oh crap another Bill Motz in the making? I hired in for a job with the Judges’ Retirement System, and have been here for 32 years. It has been a time of changes, typewriters were electric, no non-carbon (NCR) paper at that time, there was green, blue, pink, and goldenrod whiteout...messy, and then we had the monochrome cathode-ray tubes (CRTs) that were tied to the main frame. We had our data center on the first floor, nice and cold down there as was necessary with those boat-sized computers which housed the information for our active and retired members. There was a staff of about 7 – 10 who maintained this albatross.

**ORS Purpose:**  
**We are an innovative retirement organization driven to empower our customers for a successful today and a secure tomorrow.**

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Thanks for reading!!



After 5 years in the Mason Building, we moved out to our current location here at the GOB. We had to move in 3 segments, remember, we had many, many file cabinets, and power files. Paperless wasn’t even a word at that time (1986). Municipal Employees Retirement System, MERS was part of the Bureau of Retirement back then and we all took 1-hour lunches, so office ties were very strong, i.e., played euchre etc., as there was enough time to do so.

I have worked for several directors, all with a totally different approach, and all effective in their own way. I truly wish I could say all that has transpired over the years, but it would take me hours to tell all. I will always be a fixture at the ORS Golf Outing, Baseball Game and of course the ORS Reunion.

Putting things into perspective, I have worked a total of 2,135 Mondays! The next time you think how difficult it is getting up to come to work on a Monday, think about that stat! Life will be different without my ORS friends, but a new chapter in my life nonetheless. I look forward to being on my own agenda and being around my 93- and 92-year-old parents to help them out, and yes they are both doing well. Travel is definitely a part of my wife Pat and my future plans. I would also like to donate some of my time for charity.

Thank you all for being a part of my ORS life, and God bless each and every one of you!  
Sincerely,

Bill

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