



LookOut

January 10, 2003

Volume 7, Issue 1

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.

ORS Calendar

New Year's Holiday	1st
State Employees Board Meeting	9th
Blood Drive	15th
State Police Board Meeting	16th
Martin Luther King, Jr. Holiday	20th
Public School Employees Board Meeting	23rd

February

Ground Hog's Day	2nd
Valentine's Day	14th
President's Day Holiday	18th

Legislative Early Out passed

The State Legislature must have been pretty impressed with what we at ORS accomplished during the Early Out that was passed last spring. Just as we finalized placing the last of the 8,000 or so state Early Out retirees on the November payroll, the House introduced a bill providing for another Early Out.

This one, for legislative, judiciary, and executive staff with 75 years of age and service or 20 years of services for a total of 65, was smaller in scale with a potential impact of several hundred people, and a deadline to apply by December 31.

ORS immediately swung into high gear and a plan was in place: potential retirees were identified; required

system changes to CPPUP were determined; seminars were scheduled; forms were revised and printed; and application packets were stuffed. Trying to stay a step ahead as the deadline to apply neared, we mapped out our steps to meet customer needs depending on the date of passage.

Late in the afternoon on December 30, **Governor Engler** phoned ORS Director **Chris DeRose** to advise him that the bill would be signed. Within the hour ...

- Web information was deployed along with an abbreviated retirement application that could be completed and mailed or faxed to meet the next-day deadline. *See Early Out on page 4*

Online pay period reporting coming

Imagine accessing your personal, up-to-date retirement information any time of the day or night, purchasing retirement credit, or applying for retirement on the Internet, or automatically receiving information at milestones throughout your career that will help you make the right retirement planning decisions at the right times. This is becoming a reality for ORS's customers.

Before a member can access their personal retirement account, ORS needs to begin collecting data on a

more frequent basis. The first step toward offering retirement system members these services is working with the schools to make changes to the employer reporting process. The current quarterly reporting (submitted on diskette and tapes) will need to transition to pay period reporting securely transmitted over the Internet.

In March 2002 ORS asked 17 school administrators from around the state to assist with this transition by

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We have a procedure for that!

Over the past few years you have witnessed the transformation of policies and procedures, from a complex paper format stored in large binders that required weekly updating, to an online process that was still cumbersome but current, to our existing index that allows you to search. Though the current process is user-friendly, we continue to strive to improve the process and welcome input from the policy/procedure users.

As we move closer to the implementation of Vision ORS, many procedures will need to be revised, made obsolete, or rewritten. Here is a look at what you can expect our policies and procedures to look like within the next year:

- An effective date will be published at the end of each policy/procedure to inform

users of the latest revision or effective date.

- The directory and index will be broken down by process for ease in finding a procedure rather than searching by a key word.
- The numbering system will also change to reflect processes. Currently, our numbering system is formatted as division-number. New procedures will be titled with division-process-number (example: CS-PS1 is Customer Service-Process Support). This also serves to help categorize searches.
- Generic terms/titles will be used to eliminate the need for frequent updating.
- The documents in G:\pol_proc\adobe documents will be named with both the number and a short description. Example: ORS102 is found under the Process

Support\phones directory and the file (not the document) is named ORS102 headsets.

- Eventually, all of the documents will be categorized in an appropriate process directory rather than intermixed together.

As policies and procedures evolve, we encourage you to familiarize yourself with them. Process Support documents are currently being reformatted, you can take a peek by going into G:\pol_proc\adobe documents for viewing. There is a Process Support directory with several directories (phones, procedures, DCDS, etc.). All of the phone procedures are interactive documents for your convenience. In the meantime, if you have any ideas on how to make these documents more appealing, contact Lisa Schmidt at 2-6117.

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serving on a Vision Project Advisory Committee (VPAC). VPAC continues to offer valuable insight regarding the potential impact of these pending changes and how best to communicate with those impacted.

Since beginning the employer reporting part of the Vision ORS project back in April 2002, ORS has continued to work with the liaisons, VPAC, school software providers, and others to ensure that all involved understand the changes and are ready to transi-

tion to the web based reporting beginning April 15. All schools will complete the transition by November 15.

Currently an implementation schedule is being developed based on the responses received from the reporting units. Staff are working on updating the employer web site for public schools to include upcoming web reporting changes, FAQs, and a new Web Reporting Instruction Manual. Watch for more updates.



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You can make a difference

Many of us pledge New Years resolutions only to drop them within a week or so. Well, if one of your resolutions this year was to help others, do more volunteer work, become more socially conscience or something along those lines, you are in luck!

You can donate blood and help save the lives of those in your own community.

The State of Michigan is sponsoring an American Red Cross Blood Drive on Wednesday, January 15, 2003 from 9:00 a.m. to 2:45 p.m. at the GOB in Conference Room A.

The process takes about an hour from start to finish, only about 10 minutes of that hour are you actually donating blood. The process begins by filling out a questionnaire, then you get your finger poked to make sure you have healthy iron

levels in your blood. If you make it past that point, you move to a recliner, a quick pinch and then you lay back and usually watch a movie while pumping a small red ball to keep things moving. Once that is done, you can enjoy cookies and juice at the cantina.



It's that simple! And, every pint of blood that you donate is made into 4 different products, all of which can help our friends and neighbors who are ill or in an accident. So, your one pint and one hour of time could potentially save 4 lives.

If you are interested in giving blood, posting flyers and distributing information, or helping load or unload supplies the day of the blood drive, please make arrangements with your supervisor and contact Kim LaClear at 2-6133, or kirklandk@michigan.gov.

Seminars available

CitiStreet will conduct free seminars for all plan participants. Basic Investing will be held on January 14, 2003 at 10:00 am and 1:30 pm. Advanced Investing will be held on January 21, 2003 at 10:00 a.m. and 1:30 p.m. Both seminars will be held in Conference Room A.

Information covered in Basic Investing will include basic definitions and terminology, types of risk, balancing risk through diversification, review of funds, and more. It is suggested that the participant have taken the Defined Contribution/Deferred Compensation course as a prerequisite.

Information covered in Advanced Investing will include asset allocation strategies, establishing an investment strategy, incorporating funds into your strategy, and more. It is suggested that the participant have taken the Basic Investing course as a prerequisite.

Both the 10:00 and the 1:30 course will cover the same material and will last 1 - 1/2 hours. If you are interested in attending, please make arrangements with your supervisor. No preregistration is necessary. More seminars to come this spring - stay tuned.

TREATS FOR YOUR THOUGHTS

We need your help! The communications staff is looking at ways to improve the *LookOut*. Enclosed is a short survey for you to complete. This is your chance to let us know your thoughts, what you like and don't like, and how you would like to receive the *LookOut*.



As a token of our appreciation for your time and thoughts, we are providing treats to all those who return their survey to the communications area by **Friday, January 17**. Near pillar **B4** by the printers you will find a basket for completed surveys and another basket with your choice of a treat. We look forward to hearing from you and thank you in advance for your help!

CAFRs published and ready to go

The fiscal year 2001-2002 retirement system Comprehensive Annual Financial Reports (CAFRs) are now available. As many of you may recall the CAFRs are not usually published until March. However this year with much work by DMB-Financial Services, ORS, and many other agencies, the CAFRs for each retirement system are ready for distribution three months early! In September, **Governor Engler** mandated that the CAFR for the state of Michigan be complete by year end, which caused the retirement system CAFRs completion deadlines be moved up since they are a part of the State of Michigan CAFR.

Cindy Moerdyk of DMB Financial Services said, "It is a phenomenal accomplishment to have the retirement system CAFRs done this early, as it requires many agencies to work together and is a team effort. It will now remain our goal to complete the CAFRs every year at this time."

Comings & Goings

Congratulations to **Lila Christiansen** who has recently been temporarily reassigned as a supervisor in Employer Reporting while **Chantele Geisenhaver** is working on the Vision ORS project team.



Jerren

Customer Service welcomed **Jerren Osmar** as a student assistant with Customer Service. Jerren is currently a student at Michigan



Mike

State University. Plan Design and Deployment welcomed **Michael (Mike) Heimburger** as a health care assistant on January 8. Mike will be working on various projects.

ORS said good bye to **Tiffany Jorden** on December 13, **Janelle Campbell** on December 30 and **Jamie Shoen** on December 23.

Welcome back to **Andy Kolp**. Andy joined ORS in December and will be with Process Support until mid January.

In addition to year-end financial data, these reports contain a wealth of interesting statistics, facts, and summaries about each system. CAFRs are currently being shipped. If you are already on the standard distribution list to receive a copy, they are on the way. If you have never received one and would like to, please send requests Cindy by e-mailing her at moerdykc@michigan.gov. Include the requestor's name, address, number of copies, and indicate which system's CAFR they need. The CAFRs will be available on the ORS web site in the near future. Congratulations to all who did such a fine job gathering, compiling, and publishing this report for the benefit of our customers.

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- Outreach staff conducted an informational seminar to 41 customers who showed up after learning of the seminar when it was posted to the web site.
- Human resource offices were informed so they could pass the word to eligible employees.

The next day (December 31), ORS staff manned temporary headquarters at the House Office Building to distribute, assist with, and accept Legislative Early Out retirement applications.

In the end, 236 applications were received. Unsure applicants were encouraged to apply by the deadline, with the assurance that they could rescind their application up until January 15. Seminars are continuing to help customers with their decisions, while estimate letters are being sent out so all applicants have the information they need in time to revoke by the deadline.

Clearly, we're closer to our vision of exceptional customer service. Our quick response can be attributed, in part, to a process-based organization, lessons learned from the previous Early Out, flexible and service-oriented staff, and willing assistance from our partners in Department of Information and Technology, Print and Graphics Services, Mail and Delivery Services, CitiStreet, and Covansys.