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Fall 2007 All-Staff Meeting

Watch for survey results and answers to staff questions in the next issue of the *LookOut*

Laurie Hill kicked off the meeting with assurance that the All-Staff planning team listened to surveys and considered busy work activities - The Fall 2007 All-Staff Meeting focused on ORS business issues. But on this 2007 Boss's Day, the tables turned and bosses sang praises of ORS staff.

Phil Stoddard told DMB guests **Director Lisa Webb Sharpe** and **Deputy Director Rose Wilson** how he feels about ORS staff. "I want you to know that I work with a great bunch of people who work very hard and consistently accomplish great things," he said. "We enjoy very high satisfaction from the customers we serve. Our retiree satisfaction is over 90%. Our active satisfaction is in the mid-80s, and our employee satisfaction is strong."



DMB Director Lisa Webb Sharpe speaks to ORS staff at the October 16, 2007 All-Staff Meeting.

"You guys seem to have a great cohesive team," Lisa said. "You understand where you're going, you understand what your daily work is, and it's always a joy to come out and get a chance to talk and interact with you."

Calendar

December

Silent Auction & Basket Sale	14
State Employees Board Meeting	14
WDRA Holiday Party	19
Christmas Holiday	23-26
New Years Holiday	30

January

Forms, Letters, and Barcodes update

Quality, consistency and efficiency rang out as the goals for the Forms, Letters, and Barcodes project. **Laurie Mitchell** gave a presentation showing staff how this will make daily work easier. Filtering documents by system; automatic save to image; barcoding for simpler indexing; and minimizing document review are just a few examples of what's ahead. With the first set of forms available in late January, training plans are in development.

Strategic Planning update

"We are creating a Strategic Planning process that is inclusive," Phil said. "We need to capitalize on all the creativity of this team and invite them to share their talents."

John Donovan and **Brian McLane** took us on an ORS Strategic Planning tour of where we've been, where we are currently, and where we are going. The highlights included a collection of seven goals developed by ORS staff in the winter of 2006. Those goals are:

New Years Day	1
Public School Employees Board Meeting	11
Martin Luther King Day	15
State Police Board Meeting	18
State Employees Board Meeting	25

1. Best-in-Class Business Practices
2. Innovate and Improve Customer Service
3. Continuously Renewed Business-Driven Technology
4. Build Business Capacity Through Education and Development
5. Instill Confidence in Staff Through Quality Communication
6. Proactive Policy Development and Legislative Strategy
7. Engage Top Talent to Realize Potential

On the Horizon

- Deadline for WDRA Excellence Awards Nominations March 1, 2007
- Spring 2007 All Staff April 17, 2007

Two teams made up of ORS staff tackled two of these goals – Best-in-Class Business Practices and Innovate and Improve Customer Service – and developed 11 objectives. These objectives will be reviewed and prioritized, eventually landing on process business plans.

Where are we going? To align with DMB Strategic Planning, we will recraft the WDRA Mission and Vision to create an ORS Purpose Statement.

Finally, returning to the word “inclusive,” the 2008 fiscal year is set to offer more ORS staff the opportunity to bring creativity to the table to define additional goals.

Quick Links

- ORS Member Website
- ORS Employer Website
- Policies and Procedures

Web Self Service

Laurie Mitchell excited us with a demonstration of Web Self Service. For the first time we saw what Web Self Service looks like, what it will do for the customers, and how it will help us.

The account home pages for retirees include secure message boards where they can comfortably discuss confidential information. This message board will eventually phase out the ORSCustomerService email address. Applause rang out as Laurie demonstrated the ease of duplicating a 1099R and changing EFT information. The great news is that the customer can easily make these changes themselves!

Commonly Used Acronyms

AST	Application Support Team
BLA	Business Leadership Assembly (EPC, BPOs, and BPLs)
BPD	Benefit Plan Design
BPL	Business Process Leader
BPO	Business Process Owner
CE	Customer Education
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 (Phil, Laurie, Tim, Anthony, and Kathy)

Active members will also enjoy personal homepages where they can produce their own estimates, determine costs of purchasing service credit, and determine breakeven points of those purchases.

Best of all, active members can apply for their retirement using Web Self Service.

Features for ORS staff include:

- All transactions performed in Web Self Service will be recorded in the Clarety contact log with the Web_User user-id.
- Staff can navigate through an account simultaneously with the customer while on the phone.

Web Self Service will roll out for retirees in early January, and our active customers will begin using the new technology in late March.

A video tape of the All-Staff Meeting is in the Resource Library for those who couldn't attend the meeting.

Legislative changes to retirement laws

In early October, the legislature made changes to retirement laws affecting both public school and state employee retirement systems as a part of the budget deal.

Michigan Public School Employees Retirement System changes:

- To qualify for a full subsidy, public school employees hired on or after July 1,

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

2008, must *earn* at least 25 years of service. If the employee *earns* less than 25 years, a graded insurance premium subsidy applies.

- Beginning July 1, 2008 - If a member purchases service credit that results in the member qualifying for a pension earlier than they could have without the purchase of service credit, the premium subsidy *does not* begin until they would have been eligible for retirement without the purchase of the service credit. The premium subsidy begins when either the length of time equal to their purchased time needed to qualify has passed, or until they reach age 60 - whichever comes first. Service credit purchased *on or before June 30, 2008*, will not affect the date the insurance subsidy begins.
- Effective October 1, 2007, to reestablish membership after a period of deferment, a public school employee must earn at least one-tenth (0.10) of a year of service in each of the five previous years immediately preceding his or her retirement effective date, or must earn one-half (0.50) a year of service in the two fiscal years immediately preceding his or her retirement effective date.
- Employees hired after July 1, 2008 will contribute 6.4 percent of their wages that exceed \$15,000. Employees hired before July 1, 2008 will continue to contribute 4.3 percent.

State Employees’ Retirement System changes:

Public Act 95 of 2007 requires retirees of the State Employees Retirement System who return to work with the state on or after October 1, 2007, to forfeit their pensions for the duration of their reemployment. If a retiree does return to state employment, although their pension will be suspended, they remain eligible for the state retirement insurance with the full state subsidy. They will receive a nominal \$1.00 pension check and will need to pay their premium to the retirement system. The accumulated \$1.00 pension payments will be recouped from their first pension check after they terminate the State employment and reinstate their pension.

CE is working with BPD and SMEs to prepare content that will soon be posted on the website and added to the Life Stages publications. The changes are already being communicated through PRIMs. ORS will also communicate these changes to associations, unions, human resources and payroll offices and other groups that work either directly or indirectly with ORS customers.

Check the [What’s New section of the website](#) for more information.

Values in action

The next time you see CSC staff members **Tim Droste** and **Darla Brzezinski**, give them an “atta boy/girl” for demonstrating our values of excellence and teamwork during a recent state police banked leave time (BLT) adjustment project.

Legislation passed earlier this year requiring ORS to recalculate pensions and give credit to state police retirees who accrued BLT from 1957 through 1963. This also increased cost of living adjustments (COLA) for retirees who had not hit the COLA cap (3% or \$25.00). Because the system is set up to copy the same COLA amount as the previous year, a subsequent project involved manually calculating the new amount and putting it into the system before the regular COLA increase program ran in October.

Tim and Darla had only a small window of time to get all of the adjustments done.

“They knocked out this project in three days, manually calculating, adjusting and auditing approximately 600 COLAs on state police accounts,” **Cindy Mooney** praised.

ER and MI HR celebrate teamwork

Since the 2004 inception of the MI HR Service Center, ER staff has joined forces with them to clean up nearly 30,000 TDP errors. The TDP process, previously managed by individual HR offices with little or no TDP training, is now centralized under one office, one procedure, and a strong sense of teamwork between ORS and MI HR staff.

“We developed an awesome partnership with them and are able to eliminate a lot of issues for our members,” said **Michelle Thompson**.

Michelle was accompanied by **Ann Schneider** and **Pam Garver**, to meet, thank, and answer questions for the entire MI HR Service Center staff.

“Thank you so much for your visit to the Service Center today; it was so nice to meet face-to-face,” said Holly Hibbard, MI HR Service Center supervisor. “Staff appreciated the opportunity to hear about ORS and ask questions. The TDP process and communication we have has never been better.”



Michelle Thompson from ORS, Holly Hibbard from MI HR, and Becky Guyski from MI HR take time to pose for a photo during their recent meeting.

New York seeks ORS guidance

New York State and Local Retirement System (NYSLRS) representatives visited ORS on October 17 to review our best-in-class systems with **John Donovan**, **Anthony Estell**, **Jon Seeger**, and **Kathy Tober**, site visit coordinator.

The NYSLRS team, who are still in the “as is” and “to be” phases of replacing their legacy technology systems, were here to learn more about our experience with replacing old technology and our journey with Vision ORS.



“It was a good reminder of our own journey and it’s nice to look back and see just how far we have come,” Kathy said. “Before we started the Vision ORS project, we visited other retirement administrators and found it very helpful. We hope those visiting us now can take away the same great benefits.”

After returning to New York, Peter Cole, a consultant for NYSLRS, emailed our office to say: “As you can imagine, I’ve visited a number of your peer agencies over the years. I have never seen a more organized, enthusiastic, responsive, and open presentation of the good and bad aspects of a project—you have now set the bar for comparison on other peer visits. The universal reaction among the NYSLRS team was how great the visit was, how much they learned, and how much they enjoyed their time at ORS.”

According to Kathy, the NYSLRS visit was the seventh state to visit in the last 18 months. Next up – we have a visit from Massachusetts scheduled for November 6.

All powerfile member files are uploaded to Clarety

All member files that were in our powerfiles are now imaged and uploaded as member files in Clarety. Thanks to the Document Management team - **Christina Bishai, Jessica Cain, Jennifer Carter, Pam Cook, Jasmine Dawson, Chance Harrington, Caitlin Hitchcock, June Holbrook, Zena Johnson, Diane Monroe, Jamie Montague, Kathleen O'Connell, Sonia Rosales, Joan Schneider, Clarissa Sheler, and Aaron Usher** - a total of 63,643 member files including 551,808 paper images and 254,630 related images from microfiche have been uploaded. Most were for active public school employees.

"To get file information for over 63,000 customers uploaded into Clarety is an astounding feat," **Tim McCormick** said.

Additionally, if the member had account information from another system, those images were also uploaded. So some members may have more than one file if they belonged to more than one retirement system.

Other accomplishments:

- All judges member files have been imaged. Each imaged file or microfiche will have a file in images.
- Payroll files from all systems with retirement effective dates back to October 2002 are imaged to member accounts.
- Several thousand public school retired member files and payroll files are imaged, regardless of retirement effective dates. Check Clarety images before requesting a file or fiche. You may find what you're looking for right at your fingertips.
- A total of 39,000 non-workflow documents (completed work, outgoing correspondence, etc.) were imaged from May through September, bringing them current as of September 30.

Coming soon:

- An effort to image over 400,000 historical ORS administrative documents (Board minutes, social security 218 documents, surveys, etc.), and a plan to regularly image these documents. Testing began the week of October 15, and implementation will occur the first week of November.
- A plan to image approximately 35,000 state employees' non-central agency documents and 19,500 judges probate and non-probate documents. These are historical documents containing wage, service, and contribution information.
- We are researching the possibility of imaging select ORS reels and microfiche into an intranet website, such as refund reels and idle account microfiche. This will allow easy access for staff needing to review information and forms housed on the historical media.



ORS offers new webinars to school employers

Beginning in November, two new webinars will be available to school employers -

TDP Agreements and Addendums and Supplemental TDP Agreements. **Kay Johnston** and **Mary Picken** of ER will lend their expertise to answer questions when needed. Eight sessions of each webinar will begin November 1.

New ORS home page makes its debut

Take a peek at the new ORS home page released Wednesday – www.michigan.gov/ors. It features a “who’s who” in ORS, helpful links, a message from director **Phil Stoddard**, and images of the dedicated staff who serve ORS customers.



Since this is the first page many of our customers see when they visit our website, it’s important it makes a positive first impression. Thanks to everyone who helped give our new site a friendly face.

AST staff to temporarily move

The following AST staff will be temporarily moving to wing A near pillars A2 and A3. Their new phone numbers are listed below.

Staff	New Telephone #
Madhavan Chandrasekaran	322-6005
Rose Dudash	322-5205
Tim Lott	322-5407
Hollie McCafferty	322-6639
Thasin Sardar	322-6603

Comings & Goings

Today CE staff welcomed **Fred Doll** to their process. Fred, formerly worked in BPD.

Be sure to wish your best to **Lori Hickman**, CSC BPL, before her last day, October 30. Lori is leaving ORS and returning her expertise to FedEx Express where she has accepted a Project Engineering Specialist position. She worked for FedEx for 11 years prior to her time at ORS, and even though she will miss everyone here, she looks forward to returning to her first professional job.

2007 NAGDCA Annual Conference

CitiStreet sent **Elaine Lewter** to represent the State of Michigan 401(k) and 457 plans at this year’s National Association of Government Defined Contribution Administrators conference. NAGDCA is a voluntary organization of state and local governments who sponsor 401(k), 403(b), and 457 plans for their employees.

The annual conference features seminars and discussions on all aspects of these government plans. Some examples are automatic enrollment, fiduciary responsibility, target date asset allocation funds, and hardship withdrawal procedures. Representatives from the Department of Labor and the Internal Revenue Service were there to explain new laws such as the Pension Protection Act

of 2006.

"This is a great opportunity to ask questions of these experts and find out how other plan sponsors are dealing with the new laws," Elaine said.



The conference is also great for networking with other plan sponsors. A special meeting of representatives from Michigan, Florida, Ohio, Oregon and Hawaii discussed CitiStreet issues. Break-out sessions let participants learn from others responsible for similar sized plans and discuss common problems.

"I get ideas for how to improve our services and things to watch out for when implementing a new provision," she added.

To learn more about NAGDCA, its website has a wealth of information on various topics - visit www.nagdca.org.

Tuition assistance for those in need

Beginning August 1, 2007, the No Worker Left Behind (NWLB) program offers eligible individuals a three-year window to receive a maximum two years worth of free tuition at any community college, university, or other approved training provider to gain the skills and credentials for new careers in high-demand occupations, emerging industries, or to start a business. The program will expand on job training and education services currently available to job seekers through Michigan Works! Service Centers.

To qualify for NWLB you must be:

- Currently unemployed, or
- Received a notice of termination or layoff from employment, or
- Have a family income of \$40,000 or less per year.



Tuition assistance is capped at \$5,000 per year for two years, for a total of \$10,000 per person. It covers tuition or instructional costs, books, materials, fees (such as application costs, registration, and laboratory fees), and academic supportive services (counseling and career advising).

If you or someone you know meets these requirements and would like to find out more about eligibility and participation in NWLB, go to www.michigan.gov/nwlb or call (800) 285-WORK.

Spooky times in Mid-Michigan

Halloween - the only day you can dress up like a pirate or ghouel without anyone lifting an eyebrow. It is also a time for local thrill seekers to track down the next big scare. Here are a few Michigan attractions to satisfy your fear-fueled adrenaline rushes.

Thrills for grown-ups

The Homer Mill

A unique restaurant/bar/haunted house hybrid attraction located in Homer. Explore three stories of an old haunted mill with authentic Hollywood-style special effects. It

is the only haunted attraction that rocker Alice Cooper visits!

Phantasmagoria

A local terror house located at FunTyme in Okemos. There are four unique attractions to choose from, ranging from a flashlight-led haunted labyrinth to a kid-friendly chain maze.

Erebus

A haunted monstrosity recognized as the largest walk-through haunted house by Guinness Book of World Records. The attraction sprawls through a four-story abandoned building in downtown Pontiac.

Family Fun

The Great Zoo Boo

A family favorite is the Great Zoo Boo at Battle Creek's Binder Park Zoo. It's a "merry-not-scary" event for kids of all ages. Tons of jack-o-lanterns, hundreds of scarecrows, and dozens of displays line the Trick-or-Treat Trail, along with snow leopards, red pandas, Mexican wolves, and more. Besides trick-or-treating, there are hayrides, train rides, the Conservation Adventure Station. The BooVille Carnival has carnival displays, photo opps, and carnival games with fun prizes. The zoo itself is all about conservation and education, and is a wonderful place to visit during the regular season. If you haven't been there, get there!

Haunted Cider Mill

Potterville's own Country Mill goes spooky in October. There are many eerie attractions to choose from. Older thrill seekers can enjoy the Haunted Cider Mill, while younger thrill seekers can enter the Haunted House for kids. There is also a family-friendly corn maze and haunted hayride.

Uncle John's Cider Mill

Enjoy the best of October without the frights at St. John's Uncle John's Cider Mill. Corn and straw bale mazes, a pumpkin patch, and wagon rides are just a sample of activities. There is a special Halloween Costume Contest and Pumpkin Patch Scavenger Hunt for kids 12 and under Sunday, October 28.

These are just a small sample of Michigan's haunted attractions. Many more can be found using FearFinder.com.

**DMB Mission:
Partners in achieving
excellence**

**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.**

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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.