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Email the LookOut Staff

LookOut Archives

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Calendar

April

EMPAC garage sale	11
Tax Day	15
State employees board meeting	18
Spring All-Staff	23
State police board meeting	25

On the Horizon

- Public school employees board meeting - May 9
- Mother's Day - May 12

ORS continues innovative technology approach with user experience team

Last year, ORS began working with the State of Michigan User Experience (UX) team, a part of DTMB Shared Services, to analyze the effectiveness of our online tools. Their work continues this year, and for the past week the team has been in the walk-in area talking with our customers about using our website and miAccount.



Based on the data the UX team has gathered, here are the changes that we've implemented so far:

- Users wanted information on what happens after they apply for retirement, so we created a What Happens Next in the Retirement Confirmation/Checklist packet in miAccount.
- Users wanted to be kept informed the progress of their retirement application after submitting it. We're working on adding a checklist to the miAccount summary page so that members will see where ORS is in the retirement application process.
- The most common calls in the call center were for user name/password resets. The miAccount login page now has a link that would tell the member if they're registered.

The usability team has also prepared miAccount prototypes for the processes that caused our customers the most confusion during user experience testing, such as applying for retirement, adding/updating beneficiaries, and adding/changing health insurance. The prototypes are easier to read and more user friendly. AST, PS, and CE will be working with eMichigan to make aspects of those prototypes a reality.

Big thanks to Glen Calewarts, Jesse Woodruff, and Yvonne Morrison from the UX team, and **Meg Leonard, Deb Grescowle, Marla Milton, Ben Southwell, Jenniffer Smith, Danielle Fowler, Ian Broughton, Allison Wardlaw, Anitha Japa, Nate Parrish, and Mike Bilek** from the ORS team for their efforts.

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Public school working after retirement training conducted

- Memorial Day
- May 27

Quick Links

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

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
CS	Customer Service
DB	Defined Benefit
DC	Defined Contribution
DTMB	Department of Technology, Management and Budget
EPC	Executive Process Council (Phil, Laurie H, Laurie M, Kerrie, and Anthony)
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
UAT	User Acceptance Testing

The week of March 25, Customer Service staff were trained on answering customer questions about returning to work after retirement for public school employees. The law that outlines the new rules, PA 464 of 2012, adds new provisions and reinstates an old provision that expired in July 2011.



Every process has played an important role in implementing the changes created by PA 464. The CS training will be followed by website and publication updates along with Clarity system changes later this year.

Elaine Scott conducted the training by using a slightly modified PowerPoint created in Customer Education. **Amy Wheeler**, with help from CS staff, created and posted a [Frequently Asked Questions](#) document which is currently available in SharePoint.

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business briefs

DC statements, newsletters mailing this month

State employees participating in the State of Michigan 401(k) & 457 plans will receive a statement and newsletter from ING this month – the newsletter will be posted on ING's website and the mailing will go out by April 12. The *State of Michigan 401(k) & 457 plans Newsletter* gives information about naming beneficiaries, new guidelines for investing in target date funds, using the Michigan Education Savings Program (MESP) to save for education expenses, and tips for monitoring your accounts.

Spring All-Staff on April 23

The next ORS All-Staff Meeting will be held on the morning of April 23 in Conference Room A. You'll receive a meeting for your Outlook calendar soon!

Retiree survey results available in KL

The January 2013 retiree satisfaction survey results [are now available in the KL](#). Navigate to the CE page, then the Surveys tab.

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ORS students take advantage of spring break

Though the weather was still frosty, ORS students got a break from school this spring. So what did they do with all that extra time?



Camie Wieber spent her time in Panama City with 13 friends on the beach soaking up the sun.

ORS Strategic Goals

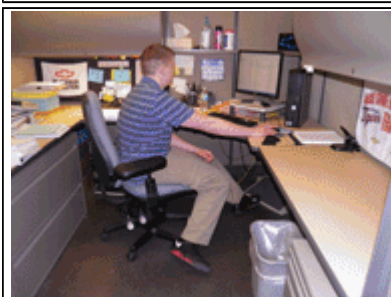


- Innovate and Improve Customer Service
- Best In Class Business Practices
- Instill Confidence in Staff Through Quality Communication
- Engage Top Talent to Realize Potential
- Continuously Renewed Business-Driven Technology
- Build Business Capacity Through Education and Development
- Proactive Policy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

Katie Little visited the UP for the very first time. She stayed in a cabin on the coast of Lake Huron and saw Tahquamenon Falls for the first time!



Katie Wirth traveled to Fort Lee, Virginia, to visit her fiancé who is training with the Army. She and her family also spent a day in Washington, DC.



Matt McCool, Lucas Cairns, Olivia Schneider, Stormee Gallagher, Carlos Mendoza, Drew Gilliland, and Jennifer Carter spent their time here at ORS!

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Fun facts about taxes

In 1955, April 15 was set as Tax Day to allow the IRS more time to handle the work and to offer taxpayer refunds. Did you know:

- The instructions for the 1040 form are almost 200 pages long.
- The 1040ez has 33 pages of instruction. (Hooray for plain language!)
- The U.S. tax code is almost four million words long.
- Traffic accidents increase significantly on or around April 15th.
- Less than 1 percent of eFiling returns contain errors.
- There are more people working for the Internal Revenue Service than the Central Intelligence Agency and the Federal Bureau of Investigation.
- In 1952, Joseph Nunan, former IRS Commissioner, was convicted of income tax evasion and imprisoned for five years.
- Over 300,000 trees are used annually to create the necessary tax forms.
- The Tax Freedom Day – “the day when the nation as a whole has





earned enough money to pay its total bill for the year" is April 18, 2013 this year.

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Kudos



"Kristina Rae's happily announces our debit card machine is up and running. Special thanks to **Pam Ward** and Fred Brock for their diligence in assisting us!"

Kudos to **Angie Parkhurst** and **Don Williams** for finding a quick fix to a nagging issue that will save processors a ton of time. During a training, Angie shared a way to get rid of a step when editing letters in Clarety. Don helped figure out the exact steps so we could get a how-to and LookOut article together for staff. Good work, Don and Angie!



Thanks to **David Mogle** for putting this data together so quickly. I appreciate your quick response and "dropping" everything. This data will help us paint the picture for Phil nicely tomorrow morning.



"After many phone calls to ORS I was directed to **Chanda Donnan** in the Director's Office. She listened to my dilemma and was very professional, positive, and caring on the phone. Chanda directed me to the correct personnel and the insurance issue was resolved within the next four days. I just wanted you to know that she was instrumental in helping to resolve my insurance issue and I so appreciate the help I received from Chanda!"

Kudos to **Fred Doll** and **Pam Kenney** regarding the ORS Employee Engagement Survey. Fred for his excellent planning and quick response in modifying questions. Pam for quickly responding to the need to deploy the survey using GovDelivery due to an issue with Survey Monkey's emails. Thanks to her efforts, the survey was sent with only a small delay.

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



Thank you to **Marla Milton** for helping Bianca's team set up their team page on the Knowledge Library.



Thanks to **Ted Walker** for assisting with a project in BPD. Ted did a great job with identifying relevant data and developed a consistent system to complete the project in a timely manner. Thanks for the hard work Ted!!



Thanks to **Candace Clay** for identifying a problem with a member's retirement application and contacting the application processing team to get all the information from the member that same day. She passed it on and they were able to get the member completed the same day. Thanks for going the extra mile and making sure all the member's concerns were resolved.

Thanks to **Heather Zaban** and **Patrick Turcotte** for their current and future help with Excess Earnings workflow processing!



Thanks to **Bill Motz** for handling an issue with a judge's retirement processing. Bill received the escalated phone call and answered all the judge's concerns.



The supervisors would like to thank **Amy Wheeler** for taking a member call after 5:30 when the main queue was clearing. Her willingness to help was much appreciated.

The CS supervisor team would also like to thank **Amy Wheeler** and **Elaine Scott** for hustling to prepare, schedule and facilitate the latest round of Working After Retirement training. Thank you for coordinating this so promptly!



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Thanks for reading!!



A customer says of **Rudy Litterini**: "Thank you for your assistance this morning with processing my friend's paperwork. Your courtesy and professionalism was a welcomed surprise and it was greatly appreciated. I think as an agency we fail to acknowledge the impact that it has when people are met by employees with something as simple as a smile and good disposition, so thank you for making a Monday morning a little more bearable."

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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.