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On The Horizon

AP communication strategy reduces business

As mentioned in the May 30 *LookOut*, CS and CE collaborated on a new communication approach to keep MPSERS June, July, and August applicants informed during the application process. The goal of the project was to *instill customer confidence* in our process so applicants don't feel they need to call to check on their application. First, GovDelivery emails were sent to set expectations and provide information on the process. Then, additional email messages are being sent to members throughout the month of their retirement effective date to let them know how things are proceeding and whether they need to do anything.



Staff feedback and data has shown that we get a lot of avoidable work resulting from calls as customers' retirement dates approach. When customers retire effective July 1 but see a status of Pending in miAccount, they can get concerned. We are now proactively telling them "it's okay, we have you" because we can process them throughout the month and still get them on payroll on time.

The results show our communication is working. From April through June, we deflected 2,400 calls specific to the Applicant/Retiring category. While we did increase message board contacts for Retirement Application by 840, we intended for this to rise. The overall impact is that we've been able to spend 300 hours doing regular work rather than answering the "where's my stuff" calls for retiring customers.

If you are interested to see how CS is progressing through the July retirement processing, check out the top of the News tab on the CS page in the [Knowledge Library](#).

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School staff attends webinar on reconciling

On Wednesday, July 2, payroll staff from seven hand-selected MPSERS schools attended a new webinar for employers titled Reconciling MPSERS Employer Statements. It was designed by Employer Reporting and Financial Services staff specifically to assist schools who



- ORS Annual Picnic - August 6
- ORS Golf Outing - August 14

-  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, Anthony, and Kerrie)
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

are or have recently been in shortfall—behind in their payments to ORS by more than \$100 in a given month.

“We’re offering this webinar in an effort to be more proactive in assisting payroll staff that may be struggling to understand how or why they have fallen behind in their payments,” explained **Angie Schrauben**. “A busy payroll office may not be prioritizing this task, and small mistakes can then snowball, like any minor problem that is ignored or put off too long.”

Randy Bitner designed and presented the webinar, with **Jeff Soergel** on hand to answer questions. After reviewing information regarding the basic process and the types of fees that can inadvertently lead to underpayment, Randy reminded participants of the resources ORS provides to keep reporting units on track and aware of their status.



“Much of this information is not necessarily new to these schools,” said Randy. “But with high turnover in the payroll staff at the schools, some people may not have seen or read this information. And even longtime staff may just not recognize the importance of checking the Data Exchange Gateway weekly for invoices or notices, for example.”

The heart of the webinar was a walkthrough of the reconciliation process, using a spreadsheet designed by ER to assist reporting units. Using a sample reconciliation spreadsheet, Randy demonstrated how a school might go from a slight overpayment one month to a shortfall (underpayment) of more than \$300 just six months later, due primarily to avoidable errors and oversights, and then overlooking fees and interest that compound over months. At the end, Randy and Jeff fielded questions on this process and other issues of concern to participants. Kim Rabideau, a participant from Waterford School District, stated, “Thank you for holding this webinar. It was helpful.”

This webinar will be offered by invitation twice a month for the next several months. Others can register for the webinar as well, but this is a targeted communication especially for schools that are making mistakes that are avoidable and costly. The goal is to have all schools who consistently receive shortfall notices attend the webinar within the next several months. When schools are reporting and paying timely, it ensures member accounts are current.

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ORS Strategic Intents



- **Forge Operational Excellence**
- **Instill Customer Confidence**
- **Engage Hearts and Minds**

Using personal devices at work

DTMB offers several applications and websites to access work email and instant messages from your personal devices, such as Smartphones, tablets and laptops. Before using these tools on your personal device, you should be aware of a few things:



- You are responsible for adhering to all state of Michigan policies when conducting ORS or state related activity, regardless of the device you are using.
- You should review and understand the following policies and standards, before conducting business on your device:

[POLICY 1305 Enterprise Information Technology \(IT\) Policy](#)

[POLICY 1335 Information Technology Access Control](#)

[POLICY 1340 Information Technology Information Security](#)

[1340.00.06 Storage of Sensitive Info on Mobile Devices](#)

[1340.00.12 Use of Privately-Owned Portable Devices](#)

- Do not download, edit or store restricted data on your personal device. If you need to work on restricted data, then you must use a state of Michigan device.
- The information stored on your personal device could be subject to FOIA requests or other state of Michigan security investigations, which could result in the confiscation of your device and/or the erasure of data on your device.
- Your ORS related activity should always be done using your state of Michigan accounts. Do not use personal accounts.

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Best of Health helps retirees prepare for Medicare

The [Summer 2014 Best of Health](#) newsletter was sent to MPERS retirees with Blue Cross Blue Shield of Michigan insurance the week of July 2. *Best of Health* is published quarterly, in print and electronic versions, and is split into Medicare and Non-Medicare editions.



A highlight from the non-Medicare edition is an article on what members need to know and what to expect as they become eligible for Medicare. We know the age-in process can be a pain point for customers based on feedback from staff. The article will help Instill Customer Confidence by making sure customers have what they need to reduce confusion and calls, to both Blue Cross and ORS.

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4th of July fun



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Farmer's Market coming July 31

Thousands of people are expected to check out the home grown wares at the annual Farmers Market at the Capitol. Fruits, vegetables, arts, crafts, vendors, and many food trucks will be on hand. The dates for this year's markets are Thursdays July 31, August 28, and September 25, and the event runs from 10 am to 3 pm, rain or shine. Support Michigan farmers and businesses!



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Slurpees? Slushies? Icees? Oh my

As the hot summer weather continues, many of us may be in the mood for a refreshing iced beverage. We drive to the nearest gas station, and are then overwhelmed by the possibilities. Do I want an ICEE or a slushie? Are they the same thing? And where are the Slurpees? If you have ever found yourself in this situation, read on.

ICEEs are blended ice drinks manufactured by The ICEE Company and are easily recognized by their red, white and blue containers and polar bear mascot. They come in a variety of flavors, the most popular being their Coke and Pepsi flavored products. They are sold at most gas stations and movie theatres across the country, and in fast food chains including McDonald's and Burger King.

So where do Slurpees come in? In 1967, 7-Eleven began a licensing deal with The ICEE Company to sell the beverage in their stores. From then on out, the product known as the Slurpee was only sold at 7-Eleven locations. So when it all comes down to it, ICEEs and Slurpees are the same product, just with different names and slightly different flavor profiles.



However, if you are specifically craving a Slurpee, head to the nearest 7-Eleven store and pick one up (especially today, 7/11, where you will receive a free small Slurpee!) There are four locations still open in the Lansing area.

Lastly are the drinks many would refer to as “slushies.” This drink is made from two distinct parts, the base and the flavoring, which gives it the icier texture, unlike the fine, smooth slush you get with the Slurpee or ICEE. Also, slushies typically only come in fruit flavors, unlike its carbonated counterparts.

So whether you are looking for an icy, fruity slushie; a smooth, refreshing ICEE; or the infamous Slurpee, take a break from the heat and grab some flavored ice.

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On June 19, **Martha Mackie**, **Kris Morris**, and **Jon Slaughter** attended the ARMA International meeting. The topic was Case Study Analysis of Real RIM Issues on June 19. The meeting provided the attendees with the opportunity to fully participate in the analysis of actual records management cases.

On June 27, **Elaine Scott** concluded retiree and insurance training for **Laurie Allen**, **Rachel Beach**, **Feef Dillon**, **Sergio Ray**, **Nick Sekmistrz**, **Antonia Todd**, and **Rick Todd**. With this training completed, these new employees will assist our retired MPSERS, SERS, SPRS and MMRS members.

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business briefs

Interest applied to public school member accounts

On July 1 MIP and Other Employee Contribution (OEC) interest was applied to MPERS Defined Benefit accounts on contributions that have been on account for a year. The OEC interest is a set interest rate of 6% every year. The MIP interest rate that is applied to Basic, MIP and Pension Plus members is determined by the actuary; this year's interest rate is 5.68%.

Reform content has a "new" home

The 2011-2012 reform information for SERS and MPERS has moved from downtown to the suburbs, you might say. All of the URLs and content remains unchanged, but the prime real estate on each home page has been reclaimed for normal business. Now you can access the reform info from a button on the right edge of each home page as seen below. Click to see for yourself!



Emergency contact information

Over the next week or so, supervisors will be asking ORS employees to update their employee contact information. The value of keeping this current becomes obvious when inclement weather, power failures and other incidents occur. It is also maintained securely and accessed only in the event of an emergency. In August, this information will be used in a phone tree drill to test the reliability of our emergency communications process.

Follow the AP progress

In the *CS Today*, CS is documenting the daily the progress of MPERS July 1 retirement effective date applications. As of July 10, 70% of the 3,268 applications received have been processed. Check daily to see the progress.



As of 07/10/2014

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Comings



Justin Ouendag joined ORS on June 30 as a Student Assistant in Customer Service. He is from Portland, MI and is currently a junior at Michigan State University studying Supply Chain Management. Before working at ORS, Justin worked for the MSU Surplus Store. He enjoys both watching and playing sports, including tennis, golf, basketball and football.



Process Support also welcomed a new Student Assistant, **Sam Perry**, on July 7. Sam is a freshman at Lansing Community College, where he is studying Mechanical Engineering. He is from Chesaning, MI, but will be moving to Owosso soon. When he is not at work, Sam enjoys being outdoors. He spends his time camping, hiking, and working on motorcycles.

Goings

AST wishes the best to **Sagar Bellamkonda**. His last day was June 24.

Angie Parkhurst has accepted a new position in state government. Her last day is July 18.

On the move

Andrew O’Keefe accepted a position as departmental supervisor in CS, effective July 7. Hats off, Andrew!

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Kudos

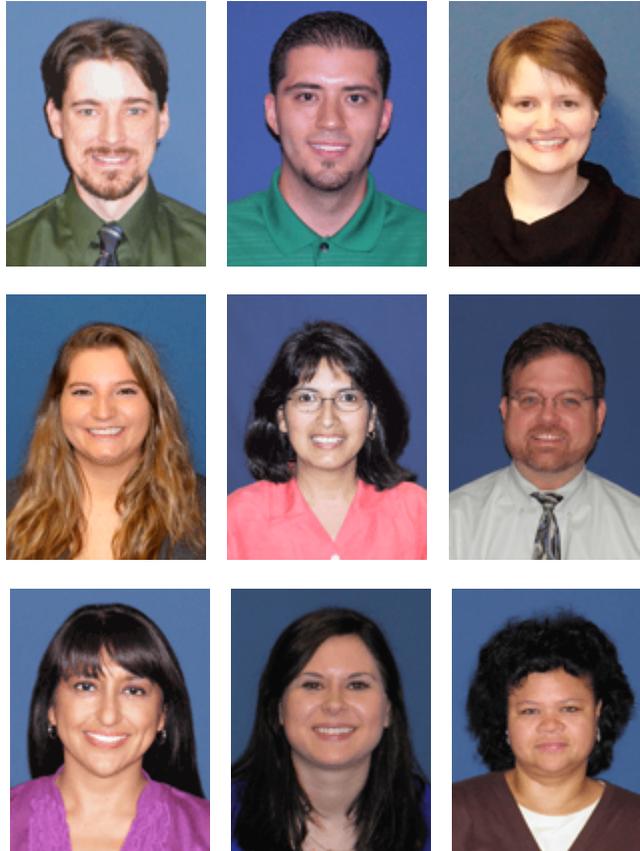


Thank you to **Angie DeRose** for assisting a member in the walk-in area with healthcare concerns. Angie was asked to come to the walk in office. She did without hesitation. She assisted the member, calmed her down and took ownership of her problem. She told the member why it happened, what she was going to do to fix it the problem, when it would be restored and when she would call the member back. The member just want to thank her for her professionalism and knowledge today helping the lady.



A co-worker thanked **Johnny Moore** for his training of the two newest temporary employees on Message Board.

Kudos to **Sean Douglass, Dustin Duprest, Kristin Forester, Erica Higbee, Josey McCloud, Tim McCormick, Christina Sanchez, Olivia Schneider, and Cherie Vaughn.** To each of you, please accept our sincere thanks for one of the most professional, business-like, but still fun All Staff meetings we have conducted. It was clear that the presenters were thoughtful about what would resonate for the attendees – it was also clear that they practiced and were prepared for their presentations. The theme, the food, the band, the decorations and the Grand Marshall Hot Dog were all big hits. Please accept a big pat-on-the-back for creating a new standard for All Staff meetings.
Nice Work!!



Way to go Mike! We received some “constructive” feedback on our retirement process from a customer. There was one shining part of her feedback though, thanks to **Mike Goodman.** So, thank you Mike.



A member wrote to Phil Stoddard about **Johnny Moore.** "My wife and I stopped by the ORS Customer Service Center this morning to get some information. I would like to commend Mr. Johnny Moore, who assisted us, for the superb customer service he provided. Mr. Moore's knowledge and willingness to assist us was exceptional."



Kudos to **Jennifer O'Herron**. The emails for Bring Your Child to Work Day have been informative and look very cool. Staff didn't have to ask what the plan is or look through old emails for drop-off/pick-up times. Thank you.

Dominique Davis and **Fred Doll** received a kudos for assisting with a GovDelivery task for the Summer Application Project. Thank you!



Kudos to **Sierra McNamara**. Anytime I need help for myself or my staff she is always willing to assist and has a great attitude about it.



A member left a voicemail indicating she was extremely satisfied with the service **David Meier** had provided. She said, "David restored my faith in government employees." Kudos to David.



I just want you to know that **Julie Wight** deserves a KUDOs for her hard work and dedication taking care of the HUB and helping with miAccount problems. She goes over and above to take good care of member issues and follows up as quickly and accurately as possible. We really appreciate the helping hand.



Kudos to **Jennifer O'Herron**. "I just wanted to share with you how appreciative I am of Jennifer's hard work with helping me get through my appreciation training. Now I know this sounds funny (appreciating someone who helped me get through appreciation training), but Jennifer really went above and beyond the call of duty. I had waited until the 11th hour to complete the training and ran into login issues with the website. Jennifer called the training vendor to resolve the issue. That still didn't

work. She continued on to find a solution for me and eventually I was able to log back into the training session. Jennifer even brought me a loaner laptop in case I had trouble with the website again. I thought this was a very powerful example of someone in Process Support going the extra mile."

Thank you **Andrea McDonnell** and **William Roe** for all that you do! A member stated "I was very fortunate that Will Roe answered my phone call this morning. I was having insurance issues and did not have coverage. Will resolved the issue quickly. I was very lucky to have such a great person attend to what I needed."



Kudos to **Erica Waltz!** A member wrote: "She is W O N D E R F U L! I had a serious issue with Catamaran and Erica tried to contact me this week, but we were on vacation. When I returned home last night, I had both a voice mail message and an email from Erica. There was still an issue with getting my daughter's prescription approved, even though I thought it had been resolved a week ago. I fought with Catamaran for MONTHS last year and have been dealing with the same issue again this year for weeks. It has been a complete nightmare- two years in a row! I am afraid I took some of that frustration out on Ms. Waltz this morning.

"Yet she was soooo nice, kind and helpful! My anger and frustration didn't rattle her at all, thank goodness. She told me it was her top priority to get this problem fixed and she would try her best to do it and get back to me today. Her hard work and diligence paid off and she resolved the matter today for us. As she had promised, she called me back today with the good news. The employees of Catamaran could take many lessons from Ms. Waltz! I only wish I had found her weeks ago. You can be sure I will use her services in the future, if need be.

"Thank you for having such a wonderful employee. Erica and the service she provided was EXCELLENT and I am very grateful!"

Will Roe also received a very nice compliment from



another member stating they had several retirement questions and Will answered all their questions perfectly. He was precise, very pleasant and patient. She stated "You have one heck of a worker!"



Seirra McNamara a co-worker reported that Seirra is an awesome member of the PS team. She has been so very helpful with requests for help and always timely.

Rosemary Baker and **Amy Price** received praise for their quick work in turning around the Military Application and updating the Military website.



A member called to give Kudos to **Will Roe** for helping her with MiAccount issues she was having. Will was very patient, kind, thoughtful and talked her through the whole process. He did an amazing job!! Thank you Will for doing such a great job serving our customers.



Thank you **Tim McCormick**! Tim has been great support in coaching us on the model process.



Kudos to **Stacey Ferguson-Nelligan**! Stacey has paid great attention to our administrative budget reporting. Her hard work is helping produce accurate budget numbers that are user friendly.

Thank you to **Dustin Duprest** and **Ava Smith** in ER for answering

questions about how ER forms should work.



Kudos to **Andrew O'Keefe** for taking the initiative and making sure all staff that needed to know some key information were kept in the loop. Thanks!



Kudos and thank you to **John Schiller**. John has been a great help with organizing BPD's business planning and brings a great level of detail to this role.



A member wanted to praise **Andrea McDonnell**. She wants us to know that for an event that is as life changing as retirement, Andrea was incredibly helpful and understanding, answered her questions, and walked her through the process. Thank you Andrea! You are amazing!!



A member called to give kudos to **Erica Higbee**. He was so impressed with her that he called back JUST to say how much he appreciated her! He stated "I am a good judge of character (he also happens to be a retired judge!), and I know character when I hear it!" Thank you Erica!!! We do appreciate you.

A member would like to send a big THANK YOU to all ORS employees who quickly resolved the problem that his wife had with Catamaran. Special thanks to **Jawon Baker** and **Johnny Moore** who were truly professional, and courteous with me on the phone. All of you truly are to be commended for the work you do for us retirees, spouses etc.



Thank you to **Lucas Cairns!**



"Lucas plays the role of my Admin and has done a great job getting me re-aligned with all of my Customer Service meetings. This is not an easy task I know, but he does it with a smile on his face every time and I am grateful!" – Letitia Levi



"I have 0.0 experiences with the world of Twitter and wanted to send Kudos to **Amy Price** for helping me get started. She was so helpful and non-judgmental!" - Letitia Levi



Kudos to **Ethan Hoppes** who quickly turned around a Model Process Assessment tool and helped organize our Hollow-O Project documentation.



Kudos to **Erica Waltz** who has brought great leadership to meetings that addressed MOOP issues with Catamaran.



Members wanted ORS to know how wonderful **Andrea McDonnell** is. A member stated "She helped us with miAccount and took the scared out of computers for us. Please praise her for the amazing job she did!"

Thank you to **Johnny Moore** and **Angie Parkhurst** for all their help with the Message Board common responses.



Kudos to Will Roe!

A member called to let me know what a wonderful job Will did. She stated he was “kind, informative and patient as he took her and her spouse through the Medicare process”.

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Spotlight

David Pastula, who is working on contract in Customer Service this summer, has an unusual pastime: Quidditch. He plays on the Michigan State University “Spartan Spitfires” Quidditch team and also served as the Rankings Coordinator for International Quidditch Association (IQA) World Cup VII, held in Myrtle Beach, South Carolina this past April.

Muggle Quidditch, based on the magical game in the Harry Potter books, does involve brooms and snitches, but it’s also an intense, co-ed contact sport played by over 300 teams worldwide, according to the IQA. Invented by students at Middlebury College in Vermont in 2005, it continues to grow rapidly; some of the best teams now come from the U.S. Southwest.

Picture a combination of rugby, dodgeball, and tag, involving two teams of seven players each, four balls, and the elusive snitch (a tennis ball worn around the waist of a player wearing yellow shorts)—all without padding. Players carry small brooms, adding a unique challenge to both running and handling balls. Sports fans can find more details about game play [here](#).



David began playing Quidditch on MSU’s team as a freshman in 2011. He has played in Midwest regional competitions in Indiana and in World Cups V (New York) and VI (Kissimmee, Florida). For [World Cup VII](#), David served as the rankings coordinator, using spreadsheets to update scores and calculate tiebreakers in the rankings.

ORS Purpose:

The sport is evolving rapidly, with both collegiate and community teams forming all the time. Some schools recognize Quidditch as a club sport, with funding and recognition, while at Michigan State and the University of Michigan it's a student-run organization. Other Michigan schools with teams include Central Michigan University (the highest-ranked Michigan team), Grand Valley State University, Eastern Michigan University, Hope College, and Michigan Technological University. The rivalry between Michigan's two largest universities is as fierce in Quidditch as in other sports—MSU is 25th and U of M is 29th out of 170 U.S. teams. But both schools produce leading Quidditch referees and are at the forefront of rules development.



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

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Community teams typically consist of former college players as well as others who show interest. David described the experience of playing on the Jetpack Ninja Dinosaurs from Space, a community team with members from all over the U.S., as among his best Quidditch experiences. Players met in New York, practiced intensely one day before the match, then played in World Cup VI. "Quidditch has a really tight community," said David, "with very strong friendships forming over a few days."

In its first years, Quidditch was primarily a U.S. phenomenon, but in recent years it has become truly international, with strong teams on most continents. Australia, Africa, South America, Europe, and even Iceland all have competitive teams. As a result, the original IQA is becoming US Quidditch, and a new international organization will form as the IQA to organize and oversee world competitions.

Follow the [Spartan Spitfires](#) or your favorite Quidditch team on Facebook.

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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.