



November 17, 2000

Volume 4, Issue 9

### 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

### November

Pension Paydate ----- 22nd  
Thanksgiving Holiday  
----- 23rd & 24th

### December

Public School Employees  
Board Meeting ----- 7th  
State Employees Board  
Meeting ----- 14th  
Pension Paydate ----- 18th  
ORS Holiday Party --- 19th  
Christmas Holidays  
----- 22nd & 25th  
New Year's Holidays -----  
----- 29th & January 1st

## Judge's DC Transfer is Complete!

From June 1, 2000, through July 31, 2000, 170 members of the Judge's Retirement System (JRS) elected to transfer from the Defined Benefit (DB) plan to the new Defined Contribution (DC) plan. About 77 million dollars in retirement funds were transferred to CitiStreet Investment Management Group at the end of October.

The DC plan election was administered in accordance with the amended Judges Retirement Act and the settlement agreement reached last May in the lawsuit *Michigan Judges Association et al. v Roberts et al.* Transfer elections were initially suspended in 1998

*See Judge's DC Transfer on page 2*

## DC/DC Transition Update

All Business Processes have now received their new assignments regarding the Deferred Compensation and Defined Contribution Plans. The CIC will direct participant calls to CitiStreet, if appropriate, or to ORS staff. The following is a list of DC/DC subjects that should be handled by ORS and the Business Process that is responsible for handling calls on each topic.

Topic	Process Accountable
Active Employees Change of Address	Human Resource Offices
Pre-July 1997 W-2 or 1099R	Pension and Insurance Management, John Donovan
Pre-1997 Annuities	Pension Adjustment and Death Processing, Anthony Estell
Service Credit/Hours/Vesting	Active Accounts, Grace Bonofiglio
Conversion from DB to DC	Claims Processing, Nancy Quick
Disability Retirement	Claims Processing, Pam Kibby
Insurance Continuation	DC/DC Plan Administrator, Elaine Lewter
Bankruptcy	DC/DC Plan Administration, John Davidson
Hardship - Appeals Only	Carol Keyes Baubie
Document Management	

## Judge's DC Transfer

*Continued from Page 1*

by court order, following initiation of legal action. The settlement allowed trial judges active in the DB plan as of March 30, 1997, to elect to transfer. As with State employees, the new plan is mandatory for judges starting employment after March 30, 1997.

All of the transfers took place well before the December 31, 2000, deadline. While the number of applications received fell short of the 250 anticipated, ORS Operations and Finance staff calculated transfer amounts, updated service credit records for all eligible JRS members, audited files, and effected wire trans-

fer of funds. Ongoing processing includes DC elections submitted by newly appointed judges, probate judge contributions, deferrals made under PPRISM/HRMN, refunds, and customer service.

Plans are now underway to administer other settlement issues in 2001, including a new 401(h) health investment plan and a buy-in election for members remaining in the DB plan. The buy-in will allow most district, circuit, and probate judges remaining in the DB plan to purchase any portion of their local salary not previously attributed to JRS for pension computation. Some aspects of the buy-in are pending IRS approval.

ORS staff involved in the DC plan election include **Sandy Ball, Van Becker, Janet Darling, John Davidson,**

**Deb Lawrence, Elaine Lewter, Dan Norberg, Denise Omo, Phil Stoddard, Carol Wheaton, and Darlene Workman.** Special thanks to Customer Information Center staff for fielding phone calls regarding the transfer. Support staff from MAIN continue to make critical programming changes to PPRISM and HRMN. Thanks are also extended to the Attorney General's office, CitiStreet, the Finance Department of the Supreme Court, and the State Court Administrative Office for their assistance.



## DC/DC New Employees Booklet

When the State of Michigan hires a new employee, CitiStreet automatically sends them a New Employee Booklet with information about all three of the Deferred Compensation/Defined Contribution Plans. This information has recently been updated to reflect the three new investment options added in October of this year, and clarify plan provisions. Also, more educational information

about the advantages of participating in deferred compensation plans and general investment selection guidelines is included. All copies of the old booklet should be recycled. Participants can call CitiStreet at 800-748-6128 to request a copy of this updated version of the New Employee Booklet. Additionally, two copies of the booklet are located in the resource library.



Published by: *State of Michigan*  
*Department of Management & Budget*  
*Office of Retirement Services*  
*P.O. Box 30171*  
*Lansing, MI 48909-7671*

Director: *Chris DeRose*  
 Editors: *Rosemary Baker*  
*Matt Beha*  
*Robert Glennon*

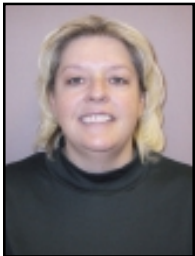
Student Asst.: *Marisa Nedock*

Printed by Authority of 1984 P.A. 431  
 Total number of copies printed: 350  
 Total cost: \$92.18      Cost per copy: \$0.26

## Comings and Goings in ORS

**Tunishia Dankenbring**, from Claims Processing, left ORS on November 9. She accepted a position with the Department of Consumer and Industry Services.

**Julia Thomas**, from Report Processing, also left ORS on November 9. She accepted a position as a case worker with the Family Independence Agency.



Sally Jimenez

Welcome **Sally Jimenez**. Sally began working in the Customer Information Center on November 13. She comes to us from the

Department of Treasury where she worked in the Homestead Division.



Ben Louagie

**Ben Louagie** joined ORS on November 12. Previously Ben worked as an analyst for Jaywood, under contract with Blue

Cross/Blue Shield.

Congratulations to **Maureen Carden** who accepted a position in the Customer Information Center. She began her new job on November 13.

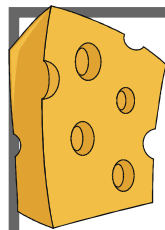
## Communications Advisory Board Adds Members

**Kathy Hankins** (Claims Processing) and **Meg Leonard** (ITR) recently joined the Communication Advisory Board (CAB). The board is comprised of individuals from various areas within

ORS, and strives to promote ORS' commitment to the Vision ORS project by addressing concerns of the ORS organization through clear, concise, communications.

## More on space renovations

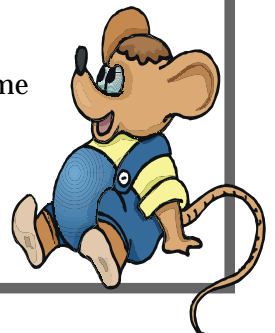
You learned a little more about the ORS space renovations in the All Staff Meeting on Thursday. If you still have questions or concerns please feel to contact one of the Space Renovation Team Members: **Sandy Ball, Deb Gearhart, Terry Jacobson, Mike Katlin, Carol Keyes Baubie**, or **Linda Mahlow**. The team does not have all the answers but can certainly help put to rest some of those "pre-move jitters."

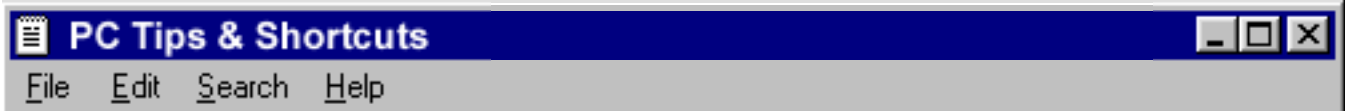


## Cheese Corner Answers

A few of these brainteasers were a little tough, so if you had trouble figuring them out, here are the answers from last issue's *Cheese Corner*.


a home	home	= a home away from home
hea dac he		= splitting headache
dashotrk		= a shot in the dark
polmomice		= mother-in-law





Have you ever finished typing several paragraphs of text in Word 97, only to look up and discover that your screen is covered with squiggly red lines, each one indicating a spelling error? To fix things, you COULD run the spell checker, or you COULD right-click each word, one at a time. However, today we're going to show you a faster method of spell-checking an entire document or only a section of it:

1. To correct the entire document, press Ctrl + Home (to go to the top); to correct only a section of your document, select that section.
2. On the status bar at the bottom of the screen, double-click the Spelling and Gram-

mar Status button (the button with the book on it, at the very bottom of the screen )

Word selects the first misspelled word AND automatically displays the Spelling/Grammar shortcut menu, complete with correction options.

3. Make your correction.
4. Double-click the Spelling and Grammar Status button again. Word takes you to the next misspelled word, which you can correct the same way.
5. Keep clicking and correcting until you've corrected all the misspelled words.

## ***Put on your thinking cap and solve this Sramble!***

Your friendly Scramble editor has been musing about some of his old enterprises again. He once opened a deli that specialized in subs, but it quickly went under. He decided that opening a bakery would really put him in the dough, but that venture fell flat. He tried his hand at a 24-hour breakfast restaurant, but the customers all said, "How waffle."

He finally decided he didn't have the skillet takes to be in the food business. After returning to school, he became a podiatrist. Unfortunately, he opened his clinic next door to another foot doctor and they ended up becoming arch rivals.

Nothing can rival your opportunities for success if you can solve this Scramble and put it to work every day.

The answer will appear in the next issue of the *LookOut*.



**A stovepii krinteh  
slaren ot konkc het t  
fof eht natc**