



July 26, 2013

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Email the LookOut Staff



LookOut Archives

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Public School Employees Reform Take Two

Employees have until 5:00 p.m. EDT July 26, 2013 to make their elections for their retirement plans. While the window isn't closed until the end of the day, as of Wednesday afternoon, 35.6 percent of 1844 have signed in to miAccount and made their elections.

What does this mean for ORS?

Employer Reporting and school payroll offices will make adjustments to contributions that were reported for health care and pension on members that selected a different option other than the default options. Positive or negative adjustments are necessary for the records back to the original transition date in February 2013 to reflect their new reform options.



During this additional window period, each process contributed to meet the needs of the members affected. Some of the many tasks included updating reform communications, re-creating election screens in miAccount, data scrubbing, and producing metric reports. Temporary resources also returned to assist with the workload. Because of this group effort, we continue to work together to make this reform a success.

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On the Horizon

- Labor Day - September 2
- Public School

ORS Prepares to Launch Facebook Page

Since Facebook launched in 2004, its use has spread from American college students to over one billion people all over the planet. More recently, Facebook has become an additional communication channel between many businesses and their customers.



Earlier this year, ORS worked with Accenture to conduct a social media capability assessment that included researching other large state pension systems. Of the 27 systems selected for the research, about 40% of them already had a Facebook page. In addition, the growth may just be getting started.

CalPERS (California Public Employees Retirement System), had the longest running Facebook page. As of the study, the page had been up for 3.5 years and had

employees board meeting
- September 5

- Central Perk cleaning
- September 10
- First day of autumn
- September 22
- State employees board meeting
- September 26

Quick Links

- [ORS Member Website](#)
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Commonly Used Acronyms

AST	Application Support Team
BLA	Business Leadership Assembly (<i>EPC, BPOs, and BPLs</i>)
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 (<i>Phil, Laurie H, Anthony, Laurie M, and Kerrie</i>)
EPO	Executive Process Owner
ER	Employer Reporting
ORS	Office of Retirement Services
PRIM	Preretirement Information Meeting (<i>public school employees</i>)
PRO	Preretirement Orientation (<i>state employees</i>)
PS	Process Support

around 4,200 likes (people who follow the page). In the six months since the research study, that number has more than doubled to 8,500 likes!

ORS plans to post new content once per day that is designed to educate members and retirees, support existing ORS initiatives, and increase traffic to the ORS website and miAccount. **Amy Price**, CE's social media lead, had this to say, "It's our hope that we can use Facebook to converse with our customers in an engaging and informative way, perhaps even reaching a group that has been missed by our other efforts so far."

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The Walk-In Office Gets A Spruce Up

The walk-in office recently got a makeover. There were extra items needed during the reform that left the area crowded.

CS needed to bring the walk-in office back to normal after the reform. A third station was added that could be used by ING or when the walk-in area becomes busy. There is also a new coat closet for our customers and staff. In the future, if there is a need the closet can be pulled quickly and another kiosk station put in. Stop by and take a look, the area looks cleaner and more professional.



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Service Awards

Congratulations to **Lyndsay Aldrich** for 5 years of service, **Ian Broughton** for 10 years of service, **Candace Clay** for 5 years of service and **Lois Musbach** for 25 years of service.



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business briefs

Changes to your State of Michigan Plan Fund Lineup

The SSgA Short Term Investment Fund within ING accounts is closing on August 23, 2013. All balances as of 4:00 pm on August 23, 2013 and all future allocations will be automatically moved to the SSgA Cash Series Treasury Fund – Class G. If you do not want your balance transferred or future contributions directed to the SSgA Cash Series Treasury Fund, you will need to change your allocations prior to August 23, 2013 at 4:00 pm. Call ING at 1-800-748-6128 or access your account online at stateofmi.ingplans.com do and select Manage Investments.

ORS Picnic on August 7

SME	Subject Matter Expert
UAT	User Acceptance Testing

Don't forget to pack your sunscreen, card games, and Frisbees! The Annual ORS Picnic is August 7, 2013. If you'll be participating in the Relay Race, and haven't submitted your complete 5-person team (with team name), email ORS-EMPAC@michigan.gov.

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



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Comings



On July 1, the DO welcomed student **Chelsea Locke** to the team. Chelsea lives down the road in Charlotte and is currently enrolled in the nursing program at LCC. Chelsea comes to ORS after working three years just downstairs with MiOSHA. She has two brothers and a sister, likes snowboarding, soccer, working out, and exploring new places.



Randy Bitner joined the BPD team on July 15 as a business analyst. Originally from Saginaw, Randy lives in Eaton Rapids with his wife and three year old son, with whom he enjoys traveling, camping, and the outdoors in general. Randy graduated from SVSU (BS), Utica College (MBA), earned a graduate certificate from CMU, and recently worked for DCH after 8 ½ years with DTMB in the Retirement Accounting unit.



Going

BPD bid farewell to **Ransom Johnson**. His last day was July 11.

On the Move

PS brought on two analysts on July 21. Congratulations to **Pam Ward** (PS) and **Don Williams** (CS)!

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Kudos

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.



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

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 for **Joy Bartell**. It was a pleasure meeting you yesterday. Great presentation. My department has had wonderful feedback from staff regarding how much they learned from your presentation. They have also shared how much they appreciated the packets of information. Walled Lake School District wants to "Thank You" for coming to our district and sharing your knowledge on pension options, eligibility, and the health benefit; great information. On behalf of Walled Lake school district, I want to express our appreciation for your time and knowledge that you shared with us.

Thanks to **Josey McCloud**. Thank you so much for meeting with our team this week and sharing your wisdom and experience using Visio to create re-engineering maps. The training itself was great, and your facilitation was top notch. We look forward to implementing the tips and hints you provided. It is helpful to have someone who has had experience with similar projects to discuss ways of fine tuning the mapping process. Our cooperative experience is also a great example of two DTMB goals:



- Sharing services across DTMB, and
- Expertise and commitment.

Kudos to **Laura Hall** and **Mike Goodman** for their recent work dealing with customer escalations. Laura and Mike have gone above and beyond to provide reassurance and closure to the situation at hand. Great job, Laura and Mike!



Kudos to **Marla Milton** from the SERS processing team. Her amazing persistence with figuring out the problem and getting the fix in place is helping us maintain high customer service levels and minimizing the number of paper applications that need to be sent out.



Kudos to you, **Dan Norberg**. You were very helpful to me as I prepared for a meeting with another agency. You were able to provide me with great options and offered your assistance with staff training in the future regarding my security question. Thank you very much!

Kudos to **Jeanne Fox** and **Bobby Hoppes** for their prompt review of a PRIM customer's record to confirm her eligibility for an early reduced retirement.



Thank you to **Katie Little**. You're doing a really good job with all the different communications ER has going on! Thanks for all your work!



Kudos to CE. I wanted to thank you again for making CE resources available for our CS skits this past month. The CS “analyst team” worked with **Josey McCloud**, **Dominique Davis**, **Ben Southwell**, and **Danielle Fowler**! These people really invested a lot of time supporting our vision, and offered suggestions that we hadn’t initially considered. They really went above and beyond my expectations.



Great job for **Annette Ruiz** from an employer. I have a great relationship with Annette Ruiz and she has been very patient and helpful to our payroll department in all aspects. She has done an excellent job in helping me to understand and complete my responsibilities in a timely matter. Great Job!!!!

Kudos to the service credit team especially to **Mike Goodman** and **Julie Andretz** for helping a member with her service credit purchase. She just came in to the walk-in office to make her purchase and complete her application. When she found out that the school in Indiana did not sign her form she thought she would not be able to retire this year. She was so happy that the service credit team was able to get everything from the school in less than a week so she could complete her purchase.



Rudy Litterini, thank you for running the walk-in office Monday smoothly. Rudy notified supervisors that additional staff was needed for the amount of members that were waiting in the lobby. Rudy kept us informed on how walk-ins was running and when they were caught up.

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!



Kudos to **David Meiers**. A member wanted to let us know how fantastic, polite, and understanding David is. She has been having trouble applying for retirement in MiAccount and he was able to assist her. Great customer service!









The sincerest of KUDOS deserves to be given to **Sally Jimenez**. Sally just very recently learned the disability process, and the training she received was delivered very quickly due to precedence of other obligations requiring attention. Sally made a HUGE effort at not only working on the disability RED files and eligibility statements but completed them ALL. She worked very hard as she wanted to ensure that they were all taken care of prior to her vacation AND before the heavy June and July MPSERS processing months. Given the number of the red files that were remaining this would be amazing enough to have caught these up but the addition of the fact that Sally was fairly new to this processing speaks to the work ethic and commitment to ORS Sally holds. I thank her VERY much for her efforts and truly appreciate her.







Thank you **Andrew Mkwaila** and **Heather Zaban** for completing the Supervisor Onboarding and adding it to SharePoint.



Kudos to **Patricia Myles**. I called the HUB and Patricia answered. She helped me out with the question I had, looked into the account further and came over to my desk with the new information. Then a few minutes came back and realized I was still on the call and told me to transfer the call to her. I want the supervisor and Patricia to know that I feel she went above and beyond.

A member was very, very happy to have spoken with **Julie**

	<p>Wight today and wants her supervisor and Julie to know, Thank you Julie for taking time with him. He has been upset all week and now is clear and happy to know for sure about his pension check.</p>
	<p>Thank you to Lynn Stowell. The supervisor team would like to thank Lynn for putting together insurance training last minute. We needed more staff trained to help with the phone calls and Lynn did the insurance training in 2 ½ hours. Thank you Lynn!!</p>
	<p>We would like to thank Patrick Turcotte for training several staff members on different workflows that would help the business. This was asked of Patrick to do on Monday and all training was completed by Tuesday. Great job Patrick; thank you!</p>
<p>Kudos for Bobby Hoppes and Dustin Duprest. I just want to pass on how impressed I am with Bobby and Dustin. I have "seen" their work by auditing or doing closeouts that they have initiated however, I never had the opportunity to work directly with them prior to the training opportunity and I am ABSOLUTELY impressed with each of them.</p> <div data-bbox="776 1140 976 1407"></div> <div data-bbox="997 1140 1196 1407"></div>	
	<p>A customer thanks Johnny Moore. I would like to bring your attention to Johnny Moore and his excellent service at the Office of Retirement Services (ORS). Over the past 6 weeks, I have been working with various ORS staff to try to get my mother prescription drug insurance. There were many frustrating experiences and conversations, including promises to return a call to me that never came. My experience with Johnny today was different. When Johnny suggested that he give me a call back, I was skeptical. He said "I am a man of my word" and he is. He not only called me back, he followed up until he received the correct documentation and assures me that my mother's coverage will be backdated to January 1, 2013. Please be sure to recognize Johnny's excellent work ethic by following through for a job well done.</p>
	<p>A member thanks Sandy Blommer. I retired from the Michigan State Police on Thursday 01/31/2013 and would like to thank Sandy Blommer who assisted me on several occasions with</p>

	retirement and DROP-related questions. I spoke with Sandy by telephone on several occasions during the past three months, and she was always courteous and had time to answer my many questions. She made the retirement paperwork process easy to understand.
	Malachi Hooser would like to give recognition to Angie Parkhurst for her great work on recent workflow training. "Angie did great!" He went on to say that she prepared the training with limited time, she created the plan, scheduled the times and facilitated the training.
	Thank you to Pam Ward . CS Supervisors would like to thank Pam Ward for going the extra mile to get the training pod set up for application processing training.
<p>Fred Covert and Danielle Fowler: You guys make publishing the Business Score Card (BSC) so transparent to me. I really appreciate it. This is important information for our organization and the two of you collect and post the information so timely and so easily....at least you make it look easy! Thank you! Laurie Hill</p> <div data-bbox="756 1180 956 1444"></div> <div data-bbox="977 1180 1177 1444"></div>	
	A customer called to say that Jeanne Fox was extremely helpful. There was an error in her pension calculation and Jeanne recognized the error and was able to fix it right away.
	Angie Parkhurst , a big shout out to you for training and staffing the BCBS Discrepancy Report. You rock!!







Thank you for **Rosemary Baker**. Can we get something to Rosemary Baker's manager THANKING her profusely for her efforts? When I brought this up in March she immediately started asking questions and working on this in order to assist us in processing. It could NOT have come at a better time. As we embark on our biggest processing month, having this form available is going to HUGELY save our processors precious time while allowing us to produce MORE in less time. She deserves a HUGE thank you as this was not an easy task and she seems to have captured all of our needs in making this request a Clarety reality! This is a VERY exciting development indeed!

Thank you to **Jawone Baker, Sandra Croom, Lisa Schmidt, Johnny Moore, and Patricia Myles** for the participation in the After Call Survey focus group. Their feedback was awesome and ideas were greatly appreciated.



Thanks to **Rudy Litterini** from a customer. Just wanted to take a second and thank you for your assistance this morning with processing my friend's paperwork. Your courtesy and professionalism was a welcome 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.

The niece of a deceased member called in today and wanted to give accolades to **Danielle Goodale** for helping her. She wanted to express her appreciation for Danielle taking the time to research and for being a good employee because it is already hard enough when a family is going through a traumatic time with a death. She wants Danielle to receive the accolades she

	deserves for taking the time to help and being such a good employee.
	A member left a wonderful message about Darren Williams . She called and was very confused with filling out the Income Tax Withholding Authorization form. She said Darren was very gracious and patient with her. He explained how to fill out the form and she wanted me to know how much she appreciated his kindness and understanding. She stated, "Help like that is very hard to find now a days." Thank you Darren, we appreciate what you do!
	Team Lacy would like to thank Angie DeRose for the fast and efficient responses she has done this week on insurance escalations while Lynn has been out. We appreciate her expertise.
	A member would like to thank David Meiers for being so helpful and understanding. He listened to all our questions and did a great job of being very detailed in all of his answers. Thank you for the great customer service.
A member gave a wonderful compliment to Aubree Dowsett today. "Aubree Dowsett helped me today and I cannot tell you the fantastic customer service she provided me. She went above and beyond the call of duty. I cannot tell you what that means to someone who is retired and disabled. She needs to be commended! She was professional, but professional with a heart, which is very hard to find!" Thank you Aubree!	
Kudos to Deb Lawrence . I always hope that I get Deb Lawrence when I call for some help because no matter how stupid my question is or no matter how big or small my problem is she always helps me and treats me with respect.	
A MPSERS member called and wanted to let our office know what a great job Amanda Coulter is doing. He was having problems applying for his retirement and Amanda was patient and very helpful with getting his password reset, as well as getting him started with his online application. He was very grateful for all the hard work and time Amanda put in for him. Great Job Amanda!!	
Kudos for William Roe from a customer. I just wanted to let you know that a member said that you were a pleasure to speak with. He said he was dreading calling ORS, but was pleasantly surprised at how polite and helpful you were.	
Thank you to Andrea McDonnell . I would like to thank Andrea for the great customer service she gave me. She was very patient, and helpful. She answered	

all my retirement questions and helped get onto miAccount so I could apply for retirement. Thank you again for your great customer service. Great job Andrea.

A member called wanting to thank **Joe Grinston** for being so helpful and patient. Joe answered all my questions and was very nice and courteous. Joe took extra time to make sure that I understood all the information he was giving me. Thank you Joe!!

February 6, 2013

Mr. Phil Stoddard
Office of Retirement Services
7150 Harris Drive
Dimondale, MI 48821

Life is a gift.

ORS

FEB 12 2013

Dear Mr. Stoddard:

My name is Laurie Krum and I am a retired teacher from Three Rivers Public Schools. I received a letter on January 17th stating my son Blake Krum had been dropped from all insurances due to ineligibility.

After many phone calls to ORS I was directed to Chanda Donnan in the Directors 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!

Handwritten signature: Phil Stoddard

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

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Director:
Phil Stoddard
Edited by Customer Education

Thanks for reading!!



Kudos to Pam Ward

IT'S ALL ABOUT YOU...AND IT'S ABOUT TIME!!!

KRISTINA RAE'S IS HAPPILY ANNOUNCES OUR DEBIT CARD MACHINE IS UP & RUNNING!!

SPECIAL THANKS TO PAM WARD & FRED BROCK FOR THEIR DILIGENCE IN ASSISTING US!!



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.