



January 11, 2002

Volume 6, Issue 1

**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

### January

State Police Board  
Meeting ----- 17th  
Martin Luther King  
Holiday ----- 21st  
Public School Employees  
Board Meeting ----- 24th  
Pension Paydate ----- 25th  
State Employees' Board  
Meeting ----- 31st

### February

Valentines Day ----- 14th  
President's Day ----- 18th  
Pension Paydate ----- 25th

## EGTRRA brings changes with the new year

In the past few weeks, several forms of communication have gone out to members, employers, and staff about how the Economic Growth and Tax Relief Reconciliation Act of 2001 (EGTRRA) affects service credit purchases.

Under the new law, effective January 1, 2002, members of the Public School Employees Retirement System and Defined

Benefit Plan members of the State Employees' Retirement System can roll over qualified plan funds from 401(k), 401(a), 403(b), and 457 accounts to purchase service credit. In very limited circumstances, members with an existing TDP agreement who find that they must leave state or school employment earlier than anticipated may be able to use rollover funds to satisfy

See EGTRRA on page 2

## Reporting Instruction Manual updated

Updates to the *Reporting Instruction Manual* (used by public school business, human resource, and personnel offices) were mailed to Reporting Units in late December. In addition to some minor clarifications, revisions include the following:

- Table of Contents - The Chapter Revision Dates page, formerly located in the Introduction section, has been moved to the first page in the Table of Contents chapter. This way, users will be more inclined to make certain that their version is current.

- Chapters 1 and 2 - Post-retirement earnings limitation sections have been updated to reflect statutory amendments.
- Chapter 3 - Perfect attendance pay has been added to the nonreportable compensation list.
- Chapter 8 and Appendix A - The form used by universities to remit monthly health payments and nonmember/non-ORP wages has been revised (R411C).

In addition to the Table of Contents and Index, the following chapters

See RIM on page 4

# MS Office and Windows 2000 training is available

Retirement Services is taking another step closer toward implementing Microsoft Office and Windows 2000 software. To help us prepare for this new software, training videos and CD-ROMs have been obtained. Both provide an overview and opportunities to perform hands-on exercises in each of the Office 2000 applications (Access, Excel, PowerPoint, and Word) and Windows 2000.

A training station has been set up inside a cubicle near pillar F1.13, third floor B-Wing, for your use while reviewing the CD-ROM software.

Instructions on how to operate the software are located on the tabletop near the computer. The training videos may be viewed here at ORS or at home.

To reserve the training videos or CD-ROMs contact **David**

**Travis**. The CD-ROMs can be signed out by staff members and returned during the same business day. Up to two video cassettes can be signed out at a time for two days.

If you have any questions, comments or concerns about the upcoming Office and Windows 2000 software transition, please contact David Travis or **Terry Hayes**.

## EGTRRA

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the balance of their TDP (a TDP rollover).

Some of the communications include:

- Most state employees received notices in their January 3, 2002 pay warrants. Schools received text, posters, inserts, etc. that they can use to communicate with their employees.

- A new Qualified Rollover Certification form (R158X) replaces the four other versions previously used for each system, so please destroy old versions. This form, available on the ORS website, includes instructions on requesting a rollover.

- Another new form for TDP rollovers (R506M) has been created, but all such cases should be referred to Active Accounts for case-by-case

handling. (This form is not available on the website.)

- The old TDP Frequently Asked Questions, found on the web and mailed with every billing statement requested, is also obsolete. We now have FAQs called Service Credit Purchases for state and public school employees. These documents talk about purchasing in general, TDP, and rollovers. Both are available on the web site.

- The website for both state employees and public school employees has been modified to incorporate all of the changes. New information can be found in What's New, Publications and Forms, sidebars (now refer to Purchasing Service Credit, instead of Tax-Deferred Payments), FAQs, and separate pages for rollovers and TDP.

- Procedures for handling the rollovers were developed and shared with relevant staff.

Take a look at the new documents and the web site, both for your own information and for the sake of providing the best possible service to our customers.



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## *CBT performance review cycle ends in six months*

Our Competency Based Training (CBT) program has started its third quarter. June 30 marks the end of the annual CBT performance review cycle. This means a non-probationary employee with an individual development plan (IDP) must have an assessment completed within 28 days of June 30. A probationary employee must follow the review cycle established at the start of the probationary period and continue the cycle until the probationary period has ended. A copy of the DMB Integrated Performance Management System (IPMS) Summary Information is inserted in the newsletter for your review. It contains information on processing an IDP for non-probationary and probationary employees. Supervisors, managers, and employees should regularly record comments that summarize the employee's competencies in terms of behavior exhibited and work performed. These comments will be helpful when completing the performance assessment at the end of the review cycle.

Understanding the CBT program continues to be a mystery for some. To begin understanding the CBT program, start with DMB's objective to create a skillful workforce and a learning environment. The CBT program was rolled out after studying the employee survey results and the Strategic Plan Execution Group (SPEG) report. Both indicated the need to build a learning culture that will foster trust, respect, and two-way communication.

The celebration of a new year brings a wish of making it better than the last year. A prosperous year, career advancement, job satisfaction, or personal gratification can be realized through learning and developing competencies. So review your development plan, discuss your development plan progress with your leader, record examples that demonstrate your proficiency for a particular competency, and stay alert for more information about how the CBT program can work and create a learning culture. For questions please contact **Ann Schneider** or **Sam Williams**.

## *Comings and goings in ORS*



Please welcome **Mary Jo Neirink** to ORS. She began working with the Employer Reporting unit on Monday, January 7.

*Mary Jo Neirink*

**Just a reminder:** Please remember to bring in pictures of current or former service personnel to your EMPAC representative to be honored in our picture display. Pictures are needed by Friday, January 18th.

### *Thought for the day*

The phenomenal success of McDonalds is evident throughout the world. How was such a destiny built? Why is Ronald McDonald a household name? The answer rests in the motto adopted by McDonald's executives. It simply reads: "Press On."

As Calvin Coolidge said, "Nothing in the world can take the place of persistence. Talent will not; nothing is more common than unsuccessful people with talent. Genius will not; unrewarded genius is almost a proverb. Education will not; the world is full of educated derelicts. Persistence and determination are supreme."

A solid base for success is perseverance. It separates the winners from the losers. Those who persevere understand that luck is something only failures believe in.

- Taken from "Words for All Occasions" by Glenn Van Ekeren



## *It's fun, it's easy and wow! It's really cool!*

Have you noticed a new look to the Pol\_Proc directory (G:\Pol\_Proc)? **Lisa Schmidt** has been working diligently to convert the policies and procedures into Adobe Acrobat documents complete with hyperlinks for easy navigation.

When you first open the directory you will see two sub-folders, and then two shortcuts — one shortcut to an index of all policies and procedures, and another to

instructions on how to navigate through the policies and procedures (procedure ORS86).

Currently all Customer Service, Director's Office, ITR, and Finance policies and procedures have been formatted with hyperlinks to other documents that are referenced in them. The remaining policies and procedures are available in the Adobe Acrobat sub-

directory, but do not yet have the hyperlinks.

Keep in mind that these newer versions are much more user-friendly. They provide for easy linking to other documents and link to steps within the same document. No more switching from Word to Access and vice versa. Take some time to check it out — you'll be amazed at the results!

### *Michigan.gov email*

Several months ago it was announced that the state would begin using “@michigan.gov” as the principal email address instead of “@state.mi.us” to complement the launch of the Michigan.gov web site.

*So, what does this mean for you?*

Basically, if your previous email address was [JoeSmith@state.mi.us](mailto:JoeSmith@state.mi.us), your new email address is [JoeSmith@michigan.gov](mailto:JoeSmith@michigan.gov). The [JoeSmith@state.mi.us](mailto:JoeSmith@state.mi.us) email will still work for a while longer; however, it has begun to be phased out. Eventually sending an email to [JoeSmith@state.mi.us](mailto:JoeSmith@state.mi.us) will no longer work.

From this point forward you should be using “@michigan.gov” on your email address. Items you may need to update to reflect the new address include:

- Form letters
- Email signatures
- Business cards



### *RIM*

*continued from page 1*

have been revised: Introduction; Chapters 1- 3, 8, and 12; and Appendix A.

Reporting Units have been advised that this will be the last printed update of the *Reporting Instruction Manual*. Future updates will be distributed via the ORS employer website in printable Adobe PDF (Version 5.0) format.

There are many reasons for converting to an electronic *Reporting Instruction Manual*. There is less risk of having outdated versions in use, and the online version can be both searched and bookmarked by users. Most importantly, there will be better control of information. When a change is needed, it can be done in a matter of days (if not hours), as opposed to the many weeks a printed version requires.

Finally, the electronic version will reduce production costs significantly.

If you use the *Reporting Instruction Manual*, please review the updates and replace any obsolete chapters. You can request updated chapters by emailing Charmaine Collings, or you can download them from the web site ([www.state.mi.us/dmb/ors/emp/psru](http://www.state.mi.us/dmb/ors/emp/psru)).