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CAFRs, finance, and guests (oh my!)

Every year ORS, along with Financial Services, conducts research for its six retirement systems with help from auditors from the Office of the Auditor General. The process starts near the end of the fiscal year, and the results are the Comprehensive Annual Financial Reports (CAFRs) for public school, state employees, state police, and judges, and a Financial Statement each for the two DC plans (401(k) and 457). Through these, we publicly demonstrate our transparency, accountability, and the health of our pension systems.

Why is this important?

Through this process, ORS stays accountable to DTMB, the Governor's Office, and the general public for how well we manage the resources entrusted to us by our retirees. Our goal is to use resources appropriately and this process is how we measure our success and learn what we can improve.

What's the process?

At the end of the fiscal year, financial statements and reconciliations are completed by Financial Services staff. Auditors review these for adherence to accounting standards. They also review ORS's internal controls and financial practices and offer an "opinion letter" reporting how well ORS meets these standards. If there's a gap, ORS and Financial Services respond with a plan of action.

What does it mean to you?

You may see new faces at ORS as the team begins its work in the coming weeks; they'll be working in A-wing behind **Sara Hoppes**. If you're contacted by an auditor with a request, work with **Angella Miller**, the audit liaison, to turn them around as soon as you can.



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On The Horizon

- Central Perk cleaning - November 6
- State employees board meeting - November 7
- Veteran's Day - November 11
- Thanksgiving - November 28

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,

Business, insurance process reengineering in the works for FY 14

ORS is starting to plan for two long-term projects that will improve how we handle our financial and insurance processes.

Business Process Reengineering (BPR) – This project will improve the processes for producing financial statements and the CAFRs, which includes employer payments. This project will:

- Improve the way wages display in Clarety and to reporting units.
- Improve reporting of information needed to produce financial statements and CAFRs.
- Add EAA, Pension Plus and DC functionality in Clarety.



Insurance Process Redesign (IPR) – This project will update ORS's insurance software and processes to allow us to adapt to the demands of a changing insurance market. This project will:

- Manage enrollments on an individual level rather than on a contract-holder level.
- Give insurance enrollees more flexibility in choosing insurance products.
- Adapt to Medicare requirements such as the Late Enrollment Penalty, the Low Income Subsidy and the 21-day notification requirements.
- Create error management and validation techniques that will simplify and speed up processing while reducing errors.
- Improve the insurance module in miAccount.

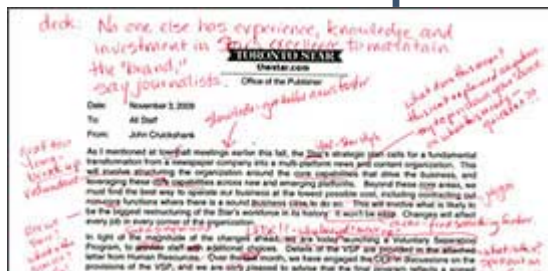
The requirements, which are the "to do" list of changes needed, will be done by the end of September. The target completion date for both projects is the end of FY 2014.

Marcia Sweet is leading the BPR project, and **Chris Trout** is heading up the IPR project. The list of participants for requirements and planning for both these major projects is so long, we can't list it here. Look for more information as the projects get off the ground this fall.

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Public school content sees reform updates

The public schools DB plan website, publications, forms, and seminars are being updated to reflect changes due to the 2012 Retirement Reform. Much of the content is seeing some revisions and additions, but the most substantial changes are in the pension calculation and insurance



	<i>and Anthony)</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
SME	Subject Matter Expert
UAT	User Acceptance Testing



- 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

sections. You'll also find the new benefit structures defined as members will need to know their benefit structures to fully understand their pension benefits.

A revised *Retirement Readiness: A Two-Year Countdown* will be on the website COB Friday, September 20 – you'll be notified when hard copies are available. Other public school publications will be updated and available this fall.

Updates to the public schools DB plan website content will start in the coming weeks, and seminar content is being revised in time for the first Preretirement Information Meeting on October 9.

Public school forms will be updated next. The majority of them will be complete by the end of this calendar year.

In addition to public school DB content, Pension Plus website content for public school members is being updated to include information about the Personal Healthcare Fund and information for new members who first work starting on or after September 4, 2012. These changes should be live by December.

Special thanks to **Lyndsay Aldrich** for spearheading the effort and to **Angie Schrauben, Andy Kolp, Lois Musbach, Kerrie Vanden Bosch, Angela Sanborn,** and the CE team.

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Customer Service and Customer Education unite for joint meeting

On September 18, 2013, CS and CE came together for a division-wide meeting, the second of its kind. A meeting like this is a great opportunity for the processes to interact and support each other on projects and other initiatives, especially at the start of the business plan cycle.

The meeting began with an introduction of new employees, and well-deserved recognition for exceptional performance. **Tim Simpson** discussed scorecard enhancements, **Alvina Manson** previewed new written correspondence QA guidelines, **Carolyn Parkinson** gave an overview of CE's new workshop "Picture Your Future," and **Katrina Kaufman** shared information about the new solution finder tool.

After that, **Kara Gross** and **Krystal Strachan** shook things up with a group challenge: build the tallest structure possible using playing cards. CS and CE staff collaborated on this monumental task, some groups using found objects (like paper, tape, and the playing card box) while others crowded about their "pure playing card" structures in an attempt to sway the judges.

Because we're on the cusp of a new fiscal year, **Andy Kolp** and **Ian Broughton** spoke to the group about some upcoming business plan items where collaboration is key. **Travis Peake** also gave everyone an outline of the insurance process redesign that begins next fiscal year.

Thanks to the meeting organizers, presenters, and CS student assistants that made this meeting a success!



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DTMB presents security awareness training to GOB

In early September, Jason Nairn from DTMB's Cybersecurity and Infrastructure Protection presented a workshop on security awareness, where he discussed some good behaviors to ensure that visitors and coworkers at the GOB stay safe.

Your workspace

It's the property of DTMB, and you're not the only one who has access to it. So don't leave valuable items in plain sight; lock them up and keep the keys on you.



People are creatures of habit, and scoundrels know this. When securing your valuables, don't pick the first place that comes to mind.

Outside the building

Criminals don't feel bad taking advantage of people's good graces. If someone you don't know has their hands full and asks you to hold a secure door open, make sure they have an ID or point them to the security desk.

When heading to your vehicle, skip the headphones and texting and have your keys in hand. If something doesn't look or feel right, leave and contact security.

Hunters: if you plan to hit the woods after work, don't keep your gun in your car. State policy prohibits guns on state property, even if they're in your trunk.

While traveling

Use crimemapping.com to scope out potential parking areas. This site gathers information law enforcement departments from all over the state.

If you'd like to view Jason's presentation, you can access it on the [DTMB SharePoint site](#).

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STAFF TRAINING

ORS staff sharpen Photoshop skills

CE's publications team, **Lyndsay Aldrich**, **Danielle Fowler**, and **Ben Southwell**, attended Part 1 of Adobe Photoshop training at New Horizons. The team, along with **Marla Milton** from PS, is taking Part 2 the week of September 23. Once they've completed the trainings, they'll have the skills to effectively use Photoshop to adjust and refine photographic images for a variety of media including the ORS website, publications, the *LookOut*, *Connections*, and the ORS staff photoboard.

Get Fit team members attend conference

On September 11, three of the Get Fit Team members - **Candace Clay**, **Jeanne Fox**, and **Sherea Lacy** - attended the 32nd Annual Wellness in the Workplace Conference in Ann Arbor. Attendees came from as far away as China to gather information and network with peers. The team received ideas on how to measure the success of the wellness program and ways to get people involved, as well as resources that could be used in Get Fit.

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Going

AST wishes the best to **Ashok Chilla** and **Giridhar Rayala**. Their last day was August 16.

AST also bid farewell to **Pratima Doddapaneni** on September 4, along with Sathya Ramasubramanian and **Nikki Bacigal** on September 13.

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business briefs

2013-14 insurance rate sheets on web and in Clarety

The new insurance rate sheets for state employee and state police pension recipients are posted on the [Employee Benefits Division website](#), and are also available in Clarety, along with the judges insurance rate sheets. Upcoming Preretirement Orientation meetings will have the new rate sheets in the audience packets.

Get Fit salad bar September 26

Get Fit is sponsoring a salad bar on Thursday, September 26 in Crossroads from 11 a.m to 2 p.m. See **Heather Zaban** in A wing office E10 near pillar D2 to sign up to reserve your plate for the low price of \$5. Keep the ticket you receive to be entered in a drawing to win a prize! Can't sign up today? Don't worry; you can still sign up next week. On September 26, the price goes up to \$6.

Windows 7 update coming in FY 14

The DTMB Customer Services Windows 7 Project Team will be upgrading departments to Windows 7 through March of 2014. Field Services techs will perform the upgrade onsite. Portions of the upgrade may be scheduled for an overnight or weekend upload to minimize down time for ORS staff. Microsoft Product Support for the Windows XP operating system ends in 2014. For more information about the migration and information about Windows 7, check the [Process Support KL page](#) as updates become available.

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The ORS Garden Team will be holding a Harvest Sale on October 1. All proceeds will go to purchasing fall plants and spring bulbs. The team is looking for garden related donations to be included in the sale, items such as plants, bulbs, pumpkins, gourds, fruits, canned goods, craft items, etc. If you would like to contribute, drop off your donations in Cube A-10 (to the right of the Wing A entrance) on September 30. Thanks for your support!

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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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Thanks for reading!!



One time at band camp - we need your awkward photos



Seriously?

Sure, we're all suave and sophisticated ORS staffers now, but it wasn't always that way.

If you're brave enough to share an awkward school photo, send a copy to the *LookOut*, and we'll publish them in our next issue. Let us know what grade you were in when the picture was taken, and anything interesting you remember about the photo shoot or the school year.

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This week's header is Dancing Cloud by Lansing artist Tony Hendrick.

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.