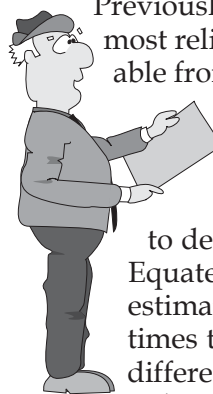# Equated retirement plans see changes

In order to improve the accuracy of Equated Plan pension estimates, as of January 1, 1999, all Public School employees and State employees applying for an Equated Plan option at retirement or an Equated Plan pension estimate prior to retirement are required to submit a Social Security Administration (SSA) estimate of earnings and benefits.

This SSA estimate of what the retiree will receive in Social Security benefits is used to determine the retiree's Equated pension amount. *Only those considering the Equated Option need to supply the SSA estimate.*

Previously ORS used the most reliable data available from the employee's ORS employment records and the actuary to determine the Equated pension estimate. However, at times this estimate differed from the individual's final Social Security payment resulting in a reduction greater than the Social Security amount received by the retiree. Now, by going to the source (Social Security) for the data, Equated pension estimates can be calculated more precisely.

Pending retirees can get a SSA estimate from their local SSA office or they can contact Social Security toll-free at 800-772-1213 or at their Web site: http://www.ssa.gov/. *Please remind pending State retirees they need to specifically request an age-65 estimate or they may not get it for age 65.*

Another change agent success story

Verification of service credit billings was the focus of one of the Claims Processors' Change Agent recommendations. The retirement statute states that wages used to compute a service credit billing for Public School employees cannot exceed the member's Final Average Compensation (FAC). Up until 1989, school employee billings were based on an estimate of the current year's earnings, which might change when the Reporting Unit's quarterly reports were filed.

In 1989, Act 194 was passed requiring the highest previous year's wages to be used to compute the service credit billing. Act 194 eliminates the need for billing review outside of the FAC period for all billings since 1989. However, staff has been reviewing the paid billings for every retiring public school employee who purchased service credit to verify their charge was based on appropriate wages, even though the number of pre-Act 194 billings is rapidly declining.

The Claims Processors' Change Agent team recommended reviewing only those billings paid within the FAC period or in the member's final year of employment. This would eliminate researching old school records and facilitate automation of the retirement processing. Following the new recommended procedure, staff would be able to use the on-line Member Sums transaction records to determine if any of the billings require a review and possible recalculation. It would also

Thought for the Day

Shoot for the moon – if you fail, you land in the stars. That is not bad company. Most people shoot for the barn door, and if they fail – it is not a rose-colored landing.

– Annonymous

Maintaining a healthy PC

With the start of a New Year you may have set New Year's resolutions to eat healthier or get into an exercise routine. You should also consider how you can keep your office PC operating at peak efficiency and avoid a call to the Help Desk.

Each of our PCs is connected to a network of other computers called servers which allow us to access member and retiree data bases through various computer programs. We can also store our files on these servers (most of us refer to them as our e:/ drive or f:/ drive).

However, the programs used to keep our computer system operational don't like "intruders" from outside – like programs brought in from home, or downloaded from the Internet. These "intruders" are not programs supported by ASD (Automated Services Division) and can cause your PC to do strange things, resulting in a call to the Help Desk for technical assistance.

Bringing in computer programs from home or loading a program from the Internet can create other risks as well. Most software programs are licensed for only a single user, on a single PC. If you bring in your software from home

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Only ASD staff are authorized to load programs on your computer.

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and try to put it on your PC at work, you violate federal copyright laws covered by that licensing agreement and may be subject to fines and prosecution. Unauthorized duplication or distribution of software is illegal and penalties may reach $100,000 per

infringement. Violating a licensing agreement is serious business! To track down violators, our PCs are monitored regularly to determine if a state authorized license exists for each piece of software on our PC.

Anytime you bring in a floppy disk from home or load an executable program from the Internet there is always a risk of bringing along a virus. Even though we have anti-virus software loaded on our systems it may not catch everything. And with our individual PCs all interconnected through the network servers, an undetected virus could cause major damage to your PC and possibly to the entire network.

Because of potential problems like these that could paralyze the whole system, **ORS employees are not permitted to load any programs on their office PC**. Only ASD staff are authorized to load programs on your PC.

This ORS policy is detailed on page 28 in the ORS Employee Orientation Booklet:

> "All software loaded on any PC (including laptops) within ORS must be accomplished by ASD Support personnel."

On the same lines, ORS staff are not authorized to try to repair or move a PC without ASD staff direction. In some instances, the ASD Help Desk may be able to

walk you through steps over the phone which could save sending out a technician. But before trying to fix things yourself, you should call the Help Desk at 5-1800 or send an e-mail to ASDSupport when you run into a problem with your PC, printer or any network programs.

The ASD Support staff is ready to fix our computers when we run into problems – legitimate problems. However, when YOU cause the problem because you violated ORS policy and loaded something you shouldn't have, not only are you and your PC not functional for however long it takes to get it fixed, but you are also tying up ASD staff and resources inappropriately.

Reminder: Those with Internet access are to use the Internet ONLY for business-related purposes. You agreed to these restrictions before you were given access to the Internet.

Member statement mailing met December goals!

This past December, 311,559 statements of account were mailed to active Public School employees. **Joanne Busley**, who worked with **Don Dimitroff**, **Carla Price**, and **Alice Semevolos** on the Member Statement Team, reported, "This is the first time in a number of years that statements have been mailed before the end of the calendar year."

"Compared to 1997, we had a 3% increase in the number of statements we printed," she said. "Members who worked more than 300 hours during the year were sent 78% of the statements, with 22% going to those working less than 300 hours during the year.

"This year 301,893 statements,

about 97%, were mailed directly to members' homes at the address we had on file. Of those mailed to home addresses, just over 2% were returned to ORS as undeliverable due to bad addresses. Of these, close to half had forwarding addresses which were entered into the system as new addresses, and the statements were remailed."

Those statements where there was not a home address on file with ORS – 3% or 9,666 of them – were sent to the member's primary reporting unit for distribution. Each of these 9,666 statements

had an address form attached for the member to complete and return in order to receive future mailings at a home address.

Just before the statements were to be sent to the reporting units an unexpected sorting issue arose. The statements had been printed in eight different "runs" and those going to reporting units ended up out of order. The statements were quickly sorted and we met the December mailing goal thanks to the efforts of **Joanne Busley**, **Rachel Campbell**, **Charla Clifford**, **Carli Hagedon**, **Lisa Naccarato**, **Jackie Schraft**, **Phyllis Winston**, and **Felicia Wood**. This was a real accomplishment!

Change agent success

Continued from Page 1

improve staff efficiency, especially during the rush periods, and reduce confusion and "surprise" billings for customers. **Phil Stoddard,** Director of Operations, approved the recommendation and the policy and procedures needed to implement this change are being finalized.

In addition to this recommendation, another part of the FAC calculation process has also been standardized. In the past, "carry-over pay" was treated differently for "260-day" public school employees. Effective with February 1, 1999 retirements, all pensions will be calculated with carry-over pay, regardless of the number of days the employee works per year. This change will assure consistent treatment of all retirement accounts when the FAC calculation is done, and new employees will need to learn just one method of calculation. In the long run, this should

also help with future automation of the calculation process. Thanks go to Change Agent Trainer **Teresa Pilar** and the following Claims Processors for their recommendation: **Phyllis Bradley**, **Darla Brzezinski**, **Brita Bucklin**, **Lydia Cecil**, **Janet Darling**, **Ray Fleming**, **Carli Hagedon**, **Kathy Hankins**, **Ed Helzerman**, **Pam Kibby**, **Anita Lane**, **Marcia Mahoney**, **Cartis Mandua**, **Kristine Morris**, **Cindy Nevins**, **Brenda Prast**, **Nancy Quick**, **Pat VerPlanck**, and **Mary Weaver**.

Clarification from 12/18/98 Change Agent article on RPU's recommendation: Information currently stored on the automated Dial-Up system regarding pending retirees may not be updated immediately at retirement, which the proposal would change; however no inaccurate information is provided – the caller is directed to check with an operator (Mary Picken) to verify a retiree's effective date. Informa-

tion on the Dial-Up *is* accurate and provides reporting units with the information they need.

Stan Aves – 1950 - 1999

It is with great sadness that we report the passing of one of our dedicated ORS employees, Stan Aves, on Monday, January 11th after several months of illness.

Stan joined ORS in the fall of 1984, coming from the Liquor Warehouse. Stan held a variety of positions in ORS: calculating service credit for Public School employees; working in Benefits Review; serving as an auditor; and overseeing a number of special projects both before and after joining the Information Technology/ Reengineering Division last year. Stan's sharp mathematical skills and ability to work with detailed program designs made him a valuable resouce for ORS. Stan and his unique sense of humor will be sorely missed.

Comings and goings in ORS!

Susan Jacobs and **Jennifer Robles** joined the Transaction Unit of Operations in mid-November to assist with death process-ing. They are now working on several different tasks.

Susan Jacobs

Before coming to ORS Susan worked for Blue Cross and Blue Shield. Jenni-fer gained a variety of general office and accounting skills while working as a temp for Employment Group. Both Susan and Jennifer are here through Advance Employment.

Jennifer Robles

Don Miller started December 18th to work on special projects within ORS. His first project will be for the Director's office and the Public School Board. Don was previously employed by the City of Kalamazoo Employees Retirement System and is work-ing for ORS through ProTemps.

Don Miller

Janet Graham joined Administra-tion January 4th as an analyst. She will be handling new employee orientation, assist-ing with policies and procedures, and other related employee fuctions in Administration.

Janet Graham

Janet comes to ORS from the Michigan Public Health Institute where she was an executive assistant for the Commission on Genetic Privacy and Progress.

Customer Service welcomes **Samuel Williams** who started January 11th. He will be working on a retirement educa-tion plan for all of our customers. Samuel comes to us from the Lansing District Court where he was a Deputy Clerk.

Samuel Williams

Robin Clough, one of our stu-dent assistants in Operations, left December 18th to begin a new job as a nanny for a family in East Lansing.

Brent Pilarski from the DC team left December 17th for a job in Washington, D.C.

Terry Colby, the last of our "loaned" DC staff, returned to CIS December 19th.

Deb Vincent left the Report Processing Unit on December 24th to take a position in her old office in the Worker's Compen-sation Division of the Depart-ment of Labor.

December 28th, **Deb Strzelec** left for the Department of Natural Resources. She was working in Finance.

Angela Brown left for the Auditor General's office on January 8th. She was working in the Report Processing Unit.

Jackie Schraft, **Rachel Watling** and **Phyllis Winston,** from Grace Bonofiglio's Special Projects group, left January 8th.

Patrick Demitz now is a student assistant in Operations since he's returning to MSU.

Staff Moves Update: **Kathy Parisian** and **Debra MacGregor**, who handle Refunds, moved to the 3rd floor B-Wing in Decem-ber with the Transaction Unit.

Think this Scramble "wood" drive you nuts?

Time to lumber through this issue's scramble, which addresses a knotty problem. You might tie it in with New Year's resolutions. But, of course, first you have to decipher the words and then discuss their meaning with your co-workers. So get cracking!

het restgate
koa swa
cone a tillet
tun"
how delh sit
drugon.

The unscramble posters will be on display next Tuesday (Monday we'll be celebrating the life of Martin Luther King, Jr., remember).

het restgate
koa swa
cone a tillet
"tun"
how delh sit
drugon.