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New product - active member newsletter

Beginning the week of October 15, public school employees will receive their very first issue of [PROactive](#) (a newsletter for active members) inserted with their 2007 *Member Statements*. The purpose of *PROactive* is to offer ideas and retirement updates to help active members plan for a successful financial future.



As you know, it is our job to keep track of member wages, service credit, and personal contributions and report these figures in the annual *Member Statements*. In addition to these figures, we felt it was necessary to create *PROactive* so that we can provide specific information about their retirement plan and how our office can assist.

A team of ORS staff (**Christina Bishai, Maureen Carden, Elaine Lewter, Kate Lum, Connie Morse, and Erica Waltmire**) gathered to discuss content needs. The team developed a long list of customer "must-have" information that was used to develop content for this year's issues, and will be used each year as we continue producing this publication.

System specific issues of *PROactive* will be delivered annually via the *Member Statement* mailing and online posting. Stay tuned to the *LookOut* for updates on *PROactive* for state employee, state police, and judges.

Statements get a new "do"

The [2007 Member Statements](#), which begin their staggered mailing process the week of October 15, feature a new user-friendly format and a "skinnied" version of text.

Because the *Member Statements* are now mailed with a customer friendly newsletter we are able to remove detailed plan information and focus on the account specific details that you'd expect in a statement.

The new layout utilizes a cover-letter style for the first page, complete with contact information, retirement plan and qualification details, and a message about beneficiaries. The second page is where the customer will find service credit and contribution totals, TDP information, and employer and wage data.

Calendar

October	
All Staff Meeting	16
State Police Board Meeting	18

Public School Employees Board Meeting	25
EMPAC Halloween Party	31
November	
State Employees Board Meeting	1
Veterans' Day	12
Thanksgiving Holiday	22-23
Public School Employees Board Meeting	29

We're also delivering nearly 300,000 statements two months earlier than normal thanks to a new and faster employer pay-cycle reporting functionality!

Member Statements for state employees and state police are scheduled to be mailed during the last week of October and early November. The judges mailing is slated for January 2008.

Statement reprints for 2006 are no longer available; we are only capable of printing current year (2007) statements.

October 2007 *Connections* is published

The Fall issue of [Connections](#) (a newsletter for retirees) will be distributed with the October warrant and EFT mailing. This semiannual newsletter includes news and information that is of interest to our retired members.

Articles in this issue include:

- Protecting personal information
- Tax tips
- A message from the director
- Tracking assets

If you have any comments or suggestions for future issues please send an email to: ORS-CustomerEducation@michigan.gov.

Quick Links
• ORS Member Website
• ORS Employer Website
• Policies and Procedures

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
CSC	Customer Service Center
DB	Defined Benefits
DC	Defined Contributions
DIT	Department of Information Technology
DMB	Department of Management and Budget
EPC	Executive Process Council (Phil, Laurie, Tim, Anthony, and Kathy)
EPO	Executive Process Owner



Legislative update

New Legislative provisions were signed into law last week that affect the public school and state employee retirement plans (Public Acts 95, 110 and 111 of 2007). BPD is working on formal policy statements that will be completed soon. Check the next issue of the *LookOut* for updates.

CED drops the "D"

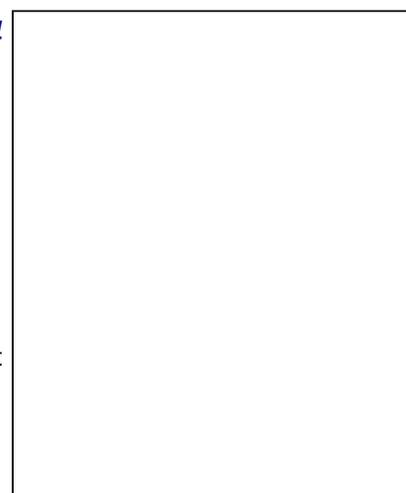
When the Development team moved to Organization Development in the DMB Director's office, the Customer Education and Development (CED) process name returned to Customer Education (CE) effective October 8.

Enhancements to Enhancing

The state employees September 2007 [Enhancing Your Pension \(R612G\)](#) book is now available. Some of the changes made affect the Parental Leave, Military Leave (USSERA), and the pay-off process information. Check out these changes and more by pulling your own copy off the website or requesting a printed version from the supply room.

Transition of Freedom of Information Act (FOIA) requests

While **Leza Rebera** works with the T3 for the next six months **Peggy Shinn** will serve as the FOIA coordinator for our office. Effective immediately, all FOIA requests should be forwarded to Peggy (6-0168).



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
STG	Systems Technology Group (<i>Web self-service contract vendor</i>)
T3	Tools and Technology Team

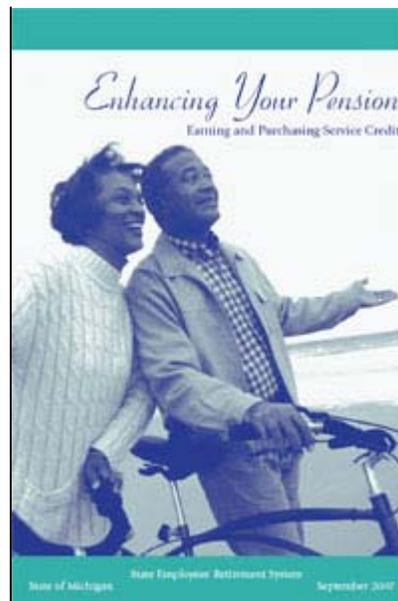
Application webinar up and running

The public school employees webinar, Completing Retirement Application Forms, has been updated and is once again posted online. The webinar was taken offline for a brief time so that updates could be made regarding the *Federal Income Tax Withholding Authorization (R12X)* form.

Reduced spending Executive Directives continue

The 2007 executive directives that placed restrictions on spending are still in effect until further notice (see Executive Directive 2007-21). The directives impacted are:

- *2004-4 Efficient Use of State Motor Vehicles*
- *2007-7 Restrictions on Memberships in Associations & Organizations*
- *2007-10 Special Monitor for State Purchasing*
- *2007-12 Moratorium on Training Expenditures*
- *2007-13 Moratorium on Hiring*
- *2007-14 Moratorium on Performance Pay Awards*
- *2007-16 Reduction of Expenditures for Periodicals & Subscriptions*
- *2007-17 Restrictions on Purchase of Non-Essential Supplies, Equip., etc.*
- *2007-18 Moratorium on Service Contracts, Use of Temporary Employee*
- *2007-19 Travel Moratorium*



ORS ranks tops in innovation

On Friday, August 28, **Brian McLane** presented our Medicare Advantage program to the Council of State Governments (CSG), Midwestern Legislative Conference. His presentation came on the heels of ORS placing in the finals for CSG's 2007 Innovations Award Program, and he explained how the Medicare Advantage program allows us to provide high quality health care that is affordable to members and schools.

Highlights in his presentation provided details on streamlined plan administration, greater access to health care providers, cost sharing, and projected 2007 Medicare Advantage savings of \$40 million.

While ORS did not win CSG's 2007 Innovations Award, it is important to keep in mind that our organization participated in the largest overhaul of Medicare in its 38-year history. We paved the way for other government groups, leading by example.

Congratulations to staff who worked on the implementation and continue to support our members through this transition.

Save the date - October 31

EMPAC's annual Halloween party returns Wednesday, October 31. Start planning now for how you will impress your colleagues with your frightful, comical, or cuddly sweet attire. More details will be coming soon by email, so keep your eyes peeled.

Proclamations from Governor Granholm

Help the energy fight - change a light

Governor Jennifer M. Granholm has proclaimed October 1 as ENERGY STAR Change a Light Day to persuade people to change at least one incandescent light bulb to an energy-efficient bulb.

As part of Change a Light Day, Governor Granholm encourages State of Michigan employees to take the "change a light" pledge at www.energystar.gov/changealight. Switching to energy-efficient lighting is an easy step we can each take to make a difference in energy resources, our environment, and reducing our own energy bills.

Practice your escape plan

Governor Jennifer M. Granholm issued a proclamation in honor of Fire Prevention Week, October 7-13, 2007, to encourage homeowners to protect themselves and their families by preparing and practicing an escape plan for their home.



The Michigan Bureau of Fire Services joins the National Fire Protection Association (NFPA) and other state and national organizations in recognizing Fire Prevention Week. This year's campaign places extra emphasis on preparing an escape plan for the home and practicing fire safety drills.

- Draw a floor plan of your home and identify at least two ways out of each room, especially bedrooms, and talk about the ways out with each family member;
- If your home has two floors, place escape ladders in or near windows to provide an additional escape route;
- Young children and older citizens may require special assistance to escape and may need someone else's help;
- Identify a meeting place outside the home - once out, NEVER go back inside; and
- Call the fire department from outside the home as soon as possible.

More information about home fire escape plans and all forms of fire prevention are available on the NFPA's official Fire Prevention Week website at www.firepreventionweek.org.

Comings & Goings

CitiStreet welcomed **Eddie Carrington**, Plan Consultant for the eastern portion of Michigan, to the office on Monday, October 1. "Everybody should realize the importance of knowing about their retirement account, and that's where I come in," he commented. Eddie is a graduate of Eastern Michigan University.



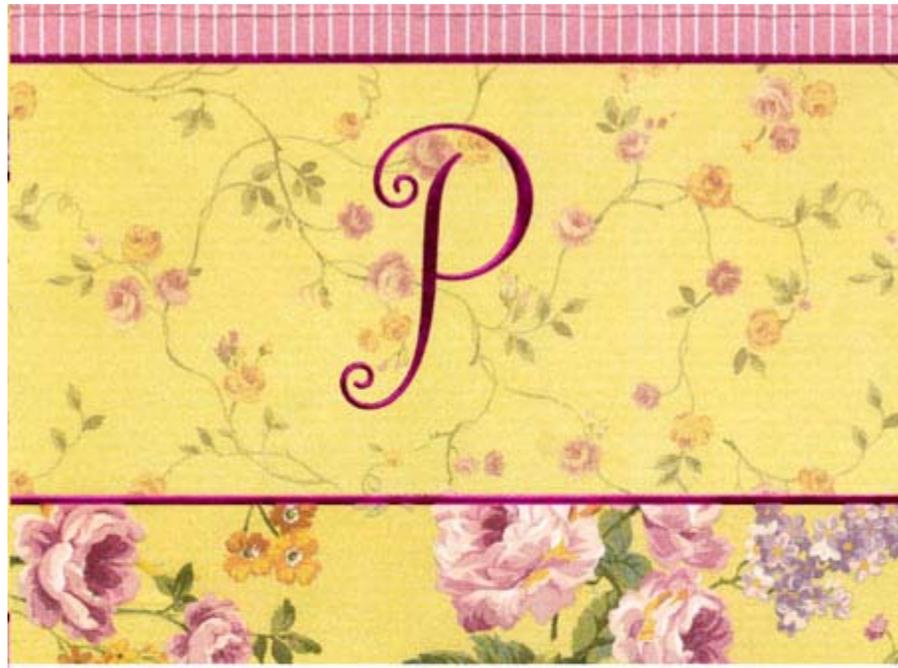
Eddie Carrington

Chuck Simpson of CE has been temporarily assigned to assist T3 with developing test plans until mid-November.

Peggy Shinn and **Andy Kolp**, formerly part of the reengineering team, have transitioned to BPD.

In other BPD news, **Kerrie Vanden Bosch** is officially serving as their BPL and **Leza Rebera** will be setting aside her BPD roles to assist the T3 team for the next six months.

Kudos



8-3-07

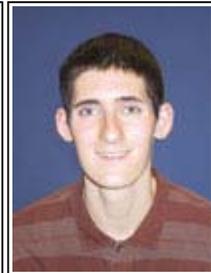
Dear Mrs. Bartell,

Thank for the assistance in finalizing my plans for retirement. I look forward to my new ventures with excitement and expectancy. Continue being pleasant and informative.

The Lord bless you and keep you.
NUMBERS 6:24 NIV



A customer gave **Robin Keene** an "atta-boy". She did an outstanding and super job!



Zach Wight
Zach has done a fine job of keeping us informed of forms in the storeroom.



A customer wants everyone to know that **Tony Contu** gave her excellent information that will be helpful with her retirement. She appreciated Tony's patience and kindness.



Mary McGlashen
A customer thanked Mary for her help with his service history. She went above and beyond their expectations.



Angie Schrauben
Angie is great to work with. She's on the ball, gets me information when she says she will and if she's behind, she provides updates.



Kris Morris Is fabulous. I'm not sure if she knew the ad hoc query tool before she did this query, but she worked Friday until she had it done. My kind of gal...

To whom it may concern:

Attn: Director, Phil Stoddard

I retired from Ann Arbor schools and would like to bring to your attention the fact that Mr. Chuck Simpson helped me with my case and mistake in my file. Mr. Simpson is very kind, helpful and patient.

Thank you so very much for employees like him.

Sincerely,

Peter



Clarissa Sheler

Thank you for all your hard work to get through the backlog!! It makes our job so much easier when we can bring up or letters so timely!



Matt Torok

Having organized such things in the past, I know how much work goes into planning and carrying out the Harvest Gathering activities, let alone finding a way to get people motivated to join in. Thank you Matt for doing such a great job!



Peggy Shinn

I want to express my gratitude to WDRA for loaning me Peggy's services to help with the Budget maps and procedures. We had an enormous task trying to document a year's worth of budget process, but Peggy was up to the challenge. She was professional, conscientious, thorough, thoughtful, and - very importantly- fun to work with. It was a great opportunity for both of us to learn something new.



Andrew Oser

I just wanted to take a moment to let you know how great a job Andy did in building the new Superintendent Access DBase. This tool is absolutely wonderful. In addition to his excellent and extensive business knowledge, he was a pleasure to work with. He was patient, responsive, and demonstrated teamwork at every turn. In summary, hat's off and thanks to Andy, we are fortunate to have him on our team.



Laurie Mitchell

I have to tell you I am so impressed by your leader-of-the-meeting skills. I aspire to do as well. The way you kept everyone on track and discerned what was relevant and what wasn't. I also liked how quickly you thought on your feet and made really good decisions. You have excellent critical thinking skills that helped us be really productive. I think the web self service will be a huge success. Thank you for letting me be a part of it. I truly enjoyed being a "change agent."

Group Kudos

Dear Sir/Madam:

Now that I have received the July and August checks, I want to compliment the staff at the Office of Retirement Services for how well my retirement application went. I was able to complete all the work with the information and forms provided on your web site. The informational meeting last winter was useful and the person I spoke with on the phone was helpful and courteous.

With all the staff and budget cuts you've suffered, you are still providing quality service. I salute all of you for the work you do!

Thank you for your attention to this matter.

Michael

LookOut Staff
 Nice work everybody!

 AWESOME work!!! I completely enjoyed reading every bit of the *LookOut (Outlook)* today. You made our entire section laugh out loud for several minutes. Really good work and I needed the laugh today, so bonus for me. :)

 Great work! We have been reduced to tears over here!

 Hilarious! Thanks so much for supporting the value of fun!

 It has gone above and beyond what I thought it would do when it first started. The best thing is that they keep the news fresh and interesting.

 As usual, AWESOME edition! Hats off to you all.

Andy Kolp and Peggy Shin

Thank you for teaching me how to do the mapping process.

The Director's Office recently asked Design and Construction to provide them with the process of what it takes to produce and approve the weekly Director's Agenda. I met with some key players for one meeting, gathered the steps for the process, came back to my desk and mapped it (took 2 days!). After we tweaked the steps, we presented it to the DMB Director's Office and for the first time in a long time, we didn't have any corrections and ONLY wonderful comments and thank you's!

I think it is the map itself. It's a very good visual for persons who relate to this type of information and it certainly worked this time. So again, thank you for teaching me this tool. I've learned a lot from both of you!

	<p>I would like to commend two of your staff, Jennifer Dunavant and Maureen Carden for going above and beyond. They truly put forth their best effort to assist me in serving a walk-in. I had the widow and daughter of a retired</p>	
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	<p>state trooper who had just passed away. Jen and Maureen were key to providing the best in customer service to them and they did so without hesitation. Thanks so much!</p>	
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	<p>CSC Team. A customer wants to give a special thanks to staff at ORS. We received his Refund application on 8/20/07, processed his Refund as a Hardship and he will be receiving his money around 9/18/07. (He was being evicted from his home this month).</p> <p>He said "I want to say a special thanks to Tony Contu and Marcia Mahoney (no photo available) and those that helped with getting this money to me ... I feel like I just won an Academy Award."</p>
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Rosemary Baker, Connie Morse, Angela Schrauben, and Erica Waltmire
 I just wanted to let you know we are receiving these forms in more frequently. I only have one comment—I LOVE them! Easy to date stamp, easy to identify, easy to scan.

Thank You

Kudos to the ORS team!

A customer wanted to let everyone at ORS know how wonderful and efficient we are at performing our jobs. Her check was received on time and she has not encountered any complications.

CSC team

A newly retired member shared we always do a great job when he calls and he enjoys calling us.

Employer Reporting

Just wanted to write a note of thanks. I work for a school district and 99% of my work is done in the evenings. You need to be thanked for having the report available during the additional hours. It sure makes my job easier.

Pam Kibby and Team

Thank you for going the extra mile for a customer today. CED was scrambling to take care of an overloaded walk-in center, with no staff to spare. A gentleman waiting downstairs did not have a photo ID, but insisted on speaking to someone about Medicare eligibility. Rather than sending the customer home for ID, or asking CED's receptionist to figure something out (and keep on "juggling"), you took the most efficient and customer friendly route—you simply asked one of your staff to go downstairs and assist the customer. CED and ORS customers are lucky to have you and your team.

EMPAC

I would like to acknowledge individually each member of the EMPAC team for a

great picnic and their hard work throughout the year. Many thanks go to: **Angela Bryant, Michelle Childs, Sean Evans, Robert Glennon, Ann Schneider, Alice Semevolos, and Suzanne Wright.**

 Thank you EMPAC for putting together a great picnic! I had a lot of fun, especially with the bike challenge. A little silliness can go a long way. Congratulations on another success!

Run with the Governor

Join Governor Granholm and the first gentleman for the 30th anniversary of the Detroit Free Press / Flagstar Marathon on Sunday, October 21. The course crosses the U.S. and Canadian border twice and has musical entertainment along the way.



Events include:

- Marathon run (26.2 miles)
- Marathon for wheelers and hand cyclists with disabilities (26.2 miles)
- Half-marathon run (13.1 miles)
- Half-marathon competitive and non-competitive walks (13.1 miles)
- Five-person team relays - distances vary from 3 to 7 miles (26.2 miles)
- 5k fun run and fitness walk and kids mini-marathon (3.1 miles)

You can learn more and register online at www.detroitmarathon.com. The Governor's

Council on Physical Fitness encourages Michigan residents to be "one in a Million" by making a commitment to regular physical activity. For more information, visit www.michigan.gov/oneinamillion.

Flexible Spending Accounts

Open enrollment for Flexible Spending Accounts (FSA) will begins next week and will be announced by the Michigan Civil Service Commission (MCSC).

FSAs are convenient, easy to use, and offer significant tax savings while paying for a wide array of out-of-pocket health care and dependent care expenses. Consider how a FSA may help you by reviewing the [materials provided by MCSC](#).

Important dates from the MCSC website:

- Oct. 19, 2007 Notice of open enrollment sent to employees.
- Nov. 1, 2007 Flexible Spending Open Enrollment begins.
- Nov. 29, 2007 Flexible Spending Open Enrollment ends.
- Jan. 10, 2008 First payroll deduction for 2008 Plan Year.
- Mar. 15, 2008 Last day to incur charges for 2007 FSA.
- Apr. 15, 2008 Last day to submit reimbursement request for 2007 FSA.
- Mar. 15, 2009 Last day to incur charges for 2008 FSA.
- Apr. 15, 2009 Last day to submit reimbursement request for 2008 FSA.

DMB Mission:
Partners in achieving excellence

ORS Mission:
We are a customer-focused organization that serves members and employees today and prepares them for tomorrow.

ORS Vision:
Empowering people for a successful today and a secure tomorrow.

The LookOut is

Sneak peek of active member self service

Laurie Mitchell gave a demonstration of the active member self service tool during a recent Payroll Advisory Team (PAT) meeting. The demonstration illustrated how the site works and what type of information and transactions will be available to active members once the tool is rolled out.

"The demonstration was very cool and I've already had four schools contact me to volunteer their time testing the new tool," said **Pam Garver**, PAT member.

The PAT brainstormed best practices for educating employers and discussed plans to roll out a pilot program.

Who is PAT?

PAT meets on a quarterly basis to look at the retirement reporting process and is comprised of reporting unit payroll officers, payroll software vendors, a Michigan School Business Official, and ORS representatives.

Thanking our charitable coordinators

The success of the Harvest Gathering and the State Employees Combined Campaign (SECC) are in large part due to the efforts of ORS volunteers **Christina Bishai**, **Josey McCloud**, and **Matt Torok**. For these three individuals and others who help coordinate charitable events for our office, we thank you for your diligence and dedication.



Matt, Christina, and Josey all had previous experiences with charitable fundraising. "I've previously worked with charitable events," Matt stated. "When the opportunity to volunteer for the Harvest Gathering arrived I felt compelled to volunteer."

"I volunteered because I've always enjoyed fundraising for charity and thought it would be fun," said Christina.

"When I looked at the list of SECC organizations, I realized how many have directly or indirectly affected my family," Josey said. "I like having the opportunity to specify where my donation goes and give back to my community."

The 2007 Harvest Gathering campaign has ended, however, the SECC will continue through October 19.

Fall behind with Daylight Savings Time

Daylight Savings Time (DST) ends on Sunday, November 4. DIT has already worked to adjust your computer's date and time for this change. Meetings or appointments scheduled prior to March 5, 2007, have the potential for being off by one hour, and only meetings or appointments between October 28 and November 4 are impacted.

Should you have any questions about DST or the impact on computers, please contact the DIT Client Service Center at 517-241-9700 or 1-800-968-2644.

published by
Office of Retirement
Services, Department of
Management and Budget,
State of Michigan

Director:
Phil Stoddard
Edited by Customer
Education

Thanks for reading!!

Correction

The Fall Survey article that ran in the September 28 issue of the *LookOut* incorrectly listed **Fred Doll** as PS staff. Fred is an employee within BPD. We apologize for any confusion this may have caused.

Note: Because some of the links in this newsletter point to resources within ORS, some of the links may not work if you are outside of ORS.