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Email the LookOut Staff



LookOut Archives

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#### Calendar

##### **December**

Christmas Eve	24
Christmas Day	25
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##### **January**

New Year's Day	1
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#### On The Horizon

- MPSERS Board Meeting - January 29
- SPRS Board Meeting - January 29
- Valentine's Day

## ORS rings in the holidays



There was a roaring fire in the virtual fireplace as friends and colleagues gathered to celebrate the holiday season. The tables were adorned with red and white table cloths along with poinsettias center pieces and candy canes to nibble on. Many staff members were dressed in festive sweaters and other holiday gear as Calypso holiday tunes played in the background.

Food was plentiful as volunteers served brunch, including gluten free pancakes grilled by **John Karagoulis**. The celebration would not have been complete without the delicious cookies, fudge, cake, brownies, and an array of other sweets that filled the dessert table.

The gathering continued with friends sharing stories of family holiday plans and traditions, colleagues networking, co-workers playing cards, while others just enjoyed food and music. Eventually everyone's attention was drawn to the front of the room. Excitement was in the air as anticipation mounted for the drawings for the coveted centerpieces. Phil could be seen entertaining the staff as **Sally Jimenez** and **Jamie Guardiola** called out the numbers on the tickets and everyone cheered when a winner was announced. After the last poinsettia was given away, the winner of the grand prize drawing for employees who donated a dessert was revealed. **Dina Dominique** from customer service won a Meijer gift card for her donation of a dump cake.


It was an afternoon filled with merriment as we all ushered in the holiday season together. Thanks to the team for hosting another EPIC event. ORS wishes the entire staff a safe and happy holiday season.

- February 14

- President's Day  
- February 16

 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 ( <i>Phil, Laurie H, Laurie M, Anthony, 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
SME	Subject Matter Expert
UAT	User Acceptance Testing



[Click here for a gallery of holiday party pics.](#)

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## Public school employers receive help with GASB 68 compliance

On November 26, ORS rolled out a comprehensive guide to complying with new regulations from the Governmental Accounting Standards Board (GASB), known as *GASB Statement No. 68*. Although all retirement systems must comply, the rules for cost-sharing multiple-employer systems like the Michigan Public School Retirement System are uniquely challenging and substantial.



Compliance with GASB 68 goes into effect in June 2015. Because the requirements are so substantial, ORS provided the 2013 estimated data and accompanying information early, to allow reporting units time to understand the

requirements and to prepare to implement these changes in their own financial statements in about seven months.

The project was among the largest undertaken in Fiscal Year 2014, both in scope and in time required, with team members from BPD and CE working together to understand the requirements, construct complex spreadsheets, and devise the presentation of this information to the reporting units via the new [GASB 68 section of the PSRU website](#). ER's web reporting team was also briefed on the project, to assist reporting units who call with questions about the website.

BPDs **Steve Crippen** and **Kevin Kubacki** oversaw the project. "The information provided on our GASB 68 web page is the result of work done primarily by two exceptional staff who put forth an extraordinary effort to provide excellent customer service," Crippen said.

"**Amy Buttery** and **Stacey Ferguson-Nelligan** have worked very hard and very smart to complete this task by the date announced at the Michigan School Business



Officials Conference on October 21. They both became experts in GASB 68 reporting, poring over the 268-page *GASB Statement No. 68* document and its 191-page Implementation Guide. They revised draft after draft to make the materials as easy and user-friendly as possible for our reporting unit customers.”

Kevin noted that ORS has received very few calls on the topic after the release. “This is a clear indication that the team anticipated the questions and concerns that reporting units would have and provided a product that addressed those concerns proactively,” he said.

Stacey added that this the largest spreadsheet that she has ever created, with 60 columns and about 750 rows on the summary tab, plus 16 different supporting tabs. “Our team created a supportive environment that encouraged and challenged our calculations and analysis presentation. When the joint talents and skill sets of ORS, from numeric calculations to presentation and communications, are combined we produce a truly amazing product.”

Amy added that the flexibility of her teammates, especially **Ben Southwell** and **Amy Price**, who crafted the website design and helped format tables and other materials, was invaluable.

Outside reviewers were also favorable. Leon Hanks, with Municipal Employees' Retirement System (MERS) said “very nice work and congratulations.” He will be sharing ORS’s material with his CEO and key finance staff working on GASB 68 for MERS participants, so they may comb through the ORS material for presentation tips and aspects of GASB 68 they may have overlooked.

**Laurie Mitchell** and **Kerrie Vanden Bosch** will celebrate the success of this project with a lunch for the “GASB 68 Team” next week.

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## White elephant gift exchanges



**Elaine:** I think this is the same one I gave him. He recycled this gift. He's a regifter!  
**Jerry:** Or maybe he liked your gift so much, he decided to get me the same thing. Perhaps it's an homage.  
**Elaine:** Yeah, perhaps.  
*Seinfeld*  
*The Label Maker, 1995*

Every year, during the holiday season, colleagues and family members may celebrate by participating in a “white elephant gift exchange.”

The rules may vary, but in general, your group gathers to exchange gifts of things no one really wants anymore. Maybe it's a latch-hook rug, or an almost-obscene statue, or gloves made out Hane's white briefs. Maybe it's something that was given by someone you love dearly, but you'll never, ever use, and you can't bring yourself to the point of throwing the gift away.

It's a great tradition! But, why do we call it a “white elephant” gift?

According to Wikipedia—which is always correct—the white elephant is a reference to the sacred animals kept by Southeast Asian monarchs. Keeping a white elephant is certainly an honor, but it's also expensive, very expensive. A monarch might say, “Why don't we honor a neighboring monarch with the supreme gift of our white



elephant?” (We just won’t tell the recipient how much it costs to keep such a prized possession.) And so a tradition is born and crosses cultures.

Maybe this year, you’ll receive a “white elephant.” Don’t feel guilty at all! It’s part of a cross-cultural tradition.

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## Reporting email abuse

*Oh boy! This email says if I respond soon, they’ll wire one million dollars to the bank account of my choice! I’ll be rich!*

There are a lot of phishing scams out there and they seem to be more wide spread around the holidays. Before opening an unusual or suspicious email, before clicking on links or responding with personal information, remember your 2014 Security Mentor training and add in a bit of common sense. If something seems out of place, DTMB has resources available to you.

If you need help quickly, call the State of Michigan Client Service Center at 517-241-9700. If you receive a suspicious email, and you don’t need help, attach that email to a new email and send it to [Abuse@michigan.gov](mailto:Abuse@michigan.gov).

For more information visit the [DTMB SharePoint site](#) that follows to refresh your understanding of “phishing” scams and get an idea of how to recognize malicious messages.

In addition to reporting the suspicious email to [Abuse@michigan.gov](mailto:Abuse@michigan.gov) here are steps to follow:

- Do not click on links embedded in an email from an untrusted source.
- Do not open attachments from an untrusted source.
- If the email seems suspicious, simply delete or report it to the email address below.
- Do not respond to emails asking for personal information.

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## The origin of the Christmas sweater

It’s that time of year again — gatherings with family and friends, caroling, Santa and his elves, gift giving, cookie baking, good will towards all men, and, lest we forget, Christmas sweaters.

Have you ever wondered where the idea of wearing bedazzled snowmen, gingerbread houses, mistletoe, reindeer, wreathes, ornaments, and candy canes on an otherwise



perfectly nice piece of clothing come from? We did too, so off to Google we went. And what did we find about the origin of Christmas sweaters? Well, not much. But what we did find might be upsetting to Christmas sweater fans.

It seems no one wants to take credit for this wearable object of festivity. During our research, not one name surfaced as the inventor or designer of the Christmas sweater. However, if the words Christmas, holiday, or festive were put in front of the word sweater, the word ugly always turned up, and it's thought that our neighbors in Canada may be the originators of the ugly holiday sweater contests and parties that are now so popular.

When it comes to Christmas sweaters, it seems there's no in-between — either you wear or you wouldn't dare be caught in one. Since it's the season, don't despair all you holiday sweater fans. Hold your head up, keep calm, and sparkle on!

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## business briefs

### Life Insurance forms get updated

The R0782GHB Life Insurance Beneficiary Designation form (SERS, SPRS, JRS) for designating primary and secondary life insurance beneficiaries upon retirement was updated to clarify that your estate can be listed as a potential beneficiary. The rules didn't change—the estate has been the default if other eligible beneficiaries weren't listed or living.

### Reducing business for the new year

In an effort to reduce the amount of calls ORS receives in January, a message was sent to retirees giving them the information they need. Here are a few items that were covered:

- 1099-R forms
- Tax rates for 2015
- Pension payment schedule
- Pension statements
- Insurance rates for 2015

The retirees were encouraged to use miAccount to find 1099-R forms and pension statements. They were also directed to the Message Board for any additional questions.

### Business intelligence mentoring initiative

ORS has staff in every process tasked with performing data work. PTD Technology and DTMB classes on things like Access and Excel introduce foundational techniques that are necessary in working with data, but do not lead to mastery of those techniques. The Business Intelligence Mentoring Initiative is designed to allow office data users to practice these techniques at their own pace and on their own timetable to help them do their data work more efficiently, more effectively, and with greater confidence.

The Data Support Team (DST) will prepare a series of modules composed of objective-based exercises in order to reinforce techniques necessary to complete data work. Users of this product will also be provided with reference materials and one-on-one mentoring to better foster expertise. Each module will be designed to represent approximately 2 hours or so of work per week, including a 30 minute face-



to-face meeting with a DST representative to go over the materials.

### **eBook for public school Deferred Compensation Option now available**

*The Plan Information eBook* for the public school Deferred Compensation Option is now available on the [State of Michigan 401\(k\) and 457 Plans website](#). The eBook details how enrollment and contributions work, how to monitor your account, loans, withdrawals, and options when leaving employment.



### **Updated Guides to Benefits now available for state DC participants**

New guides explaining retirement benefits for state employees in the Defined Contribution (DC) plan are now available on the [State of Michigan 401\(k\) and 457 Plans website](#). The guides, titled *Your Retirement Benefits: Healthcare, Life Insurance, Disability and Death Benefits*, were developed by the Office of Retirement Services and Voya Financial™.

There are two versions of the guide:

#### Defined Contribution – Subsidized

Retiree Insurance. This version is for state employees in the DC plan who have subsidized retiree insurance, including participants who transferred to the DC plan under PA 487 of 1996.

- Defined Contribution – Personal Healthcare Fund. This version is for state employees in the DC plan who began employment before January 1, 2012, and elected the Personal Healthcare Fund.

As the title states, the guides detail retiree healthcare (including Personal Healthcare Fund), life insurance, disability, and death benefits. Participants will also find information about who to contact regarding various related topics.

To navigate to the books on the website, select State Employees under the Plan Information dropdown, then go to Publications under the Plan Information tab.

### **DC Plan automatic enrollment for judges and legislators begins January 2015**

Starting January 1, 2015, all newly hired judges and legislators will be automatically enrolled in their contributions to the State of Michigan Defined Contribution (DC) Plan. Public Act 242 of 2014, which was signed into law on July 16, 2014, gives public employers the authority to automatically enroll eligible participants.

Automatic enrollment makes getting the full employer match easy. Judges and legislators hired on or after January 1 will automatically begin contributing 3 percent of their gross wages pre-tax to their 401(k) Plan starting their first day on the job. This will earn them the maximum match from their employer, which is a dollar-for-dollar match on the first 3 percent of contributions each pay period.

Participants in all other retirement systems who are eligible for an employer match are already automatically enrolled in the State of Michigan 401(k) and 457 Plans to receive their full employer match.

### **Public school retirees receive insurance rates**

Between December 2 and December 10, rate information was mailed to all public school retirees enrolled in health, dental, or vision insurance. People who retired

before January 1, 2013, received personalized letters with their subsidy and cost calculated, and people who retired after January 1, 2013 received an insurance rate sheet. The [Insurance Options Summary \(R0379C\)](#) was also updated with 2015 plan information on copays, deductibles, and benefits for all health insurance vendors.

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### Managers and supervisors attend DTMB training

All DTMB managers and supervisors attended half day training on December 9 in East Lansing – over 350 people participated across the department. DTMB Director David Behen updated everyone on the strategic plan, town hall meetings and agency action planning. ORS was recognized for our efforts to include all staff in the strategic planning process and pictures of our giant flip charts were featured in a presentation. The keynote speaker at the training was Doug Wiescinski, a management consulting partner from Plante Moran. Doug talked about the employee culture at Plante Moran and how they set a vision for their corporate culture and the steps they take to live it daily. The attendees focused on learning from Doug to help us achieve a culture of excellence and accountability while valuing, engaging and empowering employees. The training was a good reminder that we are all responsible for contributing to the culture of a workplace and encouraged managers and supervisors to think about how they provide leadership, management and coaching to achieve the DTMB vision.

In a special moment at the end of the meeting, Director Behen recognized a single individual from each of the DTMB agencies. Our own **Laurie Hill** received a Symbol of Leadership Director's Coin for her significant impact on ORS over the past 35 years. Laurie was surprised and pleased to receive the recognition.

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**Samuel Perry** and **Stephanie Wolniakowski**

For helping organize the supply room for Process Support. Nice job!





**Kris Morris, Joan Schneider, Loren Greeley, and Kristina Braxton**

The entire document management team has done an outstanding job to meet the Process Support team's metrics. The extra effort, positive approach and innovative approaches helped to significantly reduce negative impact to our customers and meet the needs of our downstream users.

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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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## Comings



**Kelsey Pierce** joined ORS in Process Support on November 23. She is from Grand Ledge, MI and graduated from Michigan State University with a B.S in Kinesiology. Kelsey has a dog name Macy and enjoys coaching gymnastics, snowboarding, and anything outdoors. She would like to visit the Grand Caymans at some point. Welcome to the team Kelsey.



On November 24 ORS welcomed **John Thurber** to AST. John is previously from Greenfield, Indiana. He is happily married and proud of his 3 children and 3 dogs who keep him busy. In his free time John participates in charity motorcycle rides across the country and would like to visit Italy again. John enjoys reading, music, and playing the saxophone. Welcome to the team John.

## Goings

Congratulations to **Julie Wight**, who accepted an analyst position with the Department of State. Her last day was December 4. Customer Service wishes Julie all the best!

AST would like to bid a fond farewell to **Nelson Gibson**. Nelson's last day was December 5. Good luck Nelson!

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Thanks for reading!!



**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.