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Email the LookOut Staff



LookOut Archives

### In This Issue...

- File clean up will benefit ORS
- New document return policy
- It's the Holiday Season
- Contribution limits for 2010
- Living the value - Excellence
- Contribution limits for 2010
- Member satisfaction with services rises to a new high
- Knowledge Library process pages are live

### business briefs

- Best wishes!

### green scene

## File clean up will benefit ORS

Most staff in ORS use individual and shared network drives to store and share business documents. However, many of these business documents become outdated over time and result in many gigabytes of unnecessary information.

Granted, some documents need to be retained under statutory record-keeping requirements and others may need to be retained for business purposes. However, the value of many of these documents has diminished for ORS and our customers, and should be deleted. The Logical Data Management (LDM) team (**Joanne Brown, Robert Glennon, Kim Marton, and David Travis**) has been working to help make this happen.

The LDM project involves:

1. Identifying retention times for storage of electronic data.
2. Cleaning up the drives that hold data.
3. Implementing a new tool for automatic retention of new files to be saved.

The benefits ORS will see as a result of this effort include:

- Less time spent searching for files.
- Budget savings by not having to pay for as much storage space on the network.
- Assurance that appropriate data is being stored by staff for the appropriate amount of time.
- Increased performance in our computer network and shared drives.

Over the last 3-4 months, the LDM team reviewed the state of Michigan retention and disposal schedules, consulted with staff from each process, and drafted a retention schedule for ORS. Now the project moves into the two-phase clean up process.

In Phase 1, staff should get rid of unnecessary files in their personal staff folders in S:\Common\ORS\ORS Staff and their H drives. This phase runs December 1 - 30. If you do not have any files in your H Drive or personal staff folder you will not have



### Calendar

#### December

MPSERS Board Meeting	10
SERS Board Meeting	17
Space Walk	17
Christmas Holiday	24 - 25
Central Perk Cleaning	30

New Year's Eve	31
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### On the Horizon

- New Year's Day - January 1

### Quick Links

- [ORS Member Website](#)
- [ORS Employer Website](#)
- [Knowledge Library](#)

### Commonly Used Acronyms

AST	Application Support Team
BLA	Business Leadership Assembly ( <i>EPC, BPOs, and BPLs</i> )
BPD	Benefit Plan Design
BPL	Business Process Leader
BPO	Business Process Owner
CE	Customer Education
CSC	Customer Service Center
DB	Defined Benefit
DC	Defined Contribution
DIT	Department of Information Technology
DMB	Department of Management and Budget
EPC	Executive Process Council ( <i>Phil, Laurie, Tim, and Anthony</i> )
EPO	Executive Process Owner
ER	Employer Reporting
FLB	Forms, Letters, and Barcode
ORS	Office of Retirement Services
PRIM	Preretirement Information Meeting ( <i>public school employees</i> )
PRO	Preretirement Orientation ( <i>state employees</i> )

clean up work in this phase.

Phase 2 will focus on cleaning up process folders in the S Drive and is scheduled to begin in January. More information about this will be shared in the next few weeks.

To help staff assist with Phase 1 of the clean up effort the LDM team has created the following two documents:

- [File Clean up Guidelines/Steps](#)
- [Retention Schedule](#)

If you have questions about the clean up process, ask your supervisor.

## New document return policy

A new policy regarding returning original supporting documentation to customers (birth certificates, passports, marriage licenses) went into effect on November 1. The policy is located in the Knowledge Library, article 310173, Policy for Returning Original Customer Documents.

Original documentation will no longer be returned to the sender if the request is made more than 60 days from receipt in the ORS mailroom. CE is working to update language (in websites, forms, publications, PRIMs and PROs) that encourages customers to submit photocopies of all required proofs, with the exception of death certificates.

Please read the entire policy for full instructions, information, and related articles.

The new policy was drafted by **Kris Morris** and **Meg Leonard** with support from the document management team, **Kristina Braxton, Jen Carter, Pam Cook, Drew Gilliland, Loren Greeley, June Holbrook, Chelsea Lancaster, Diane Monroe, Joan Schneider, Clarissa Sheler, and Karen Short.**

## It's the Holiday Season So help make everyone's holiday bright

### Angel Tag Giving Tree

Thanks to all for your generous support of our Angel Tag Giving Tree. There are still tags left on the trees, so join with some friends and pool your resources to grant these last few wishes. Remember to put your unwrapped gift, with the tag attached, under one of the trees by Tuesday, December 15.

Please attach your original store receipt (not a gift receipt) to the gift; this allows St. Vincent Catholic Charities to receive matching funds from a federal grant. When you provide the store receipt, it can actually double the value of your gift!

### Winter Basket Auction - Thursday, December 10

The annual Winter Basket Auction is always the place to be! What will your process or process team put up for bid this year? There's no limit to how many baskets each process or team can provide. This year, to make the competition between teams fairer, the process or process team with the highest



PS	Process Support
SME	Subject Matter Expert
T&T	Tools and Technology
UAT	User Acceptance Testing

total sales per person in the group wins an extra casual day. For example, a process or team with 10 people generating basket sales of \$200 would win over one with 20 people with basket sales of \$300. As in years past, the proceeds from the Winter Basket Auction help fund the annual ORS Holiday Party and other fun-at-work events.



### **Bake Sale - Thursday, December 10**

The annual Holiday Bake Sale will be held the same day as the Winter Basket Auction. Bring your yummy treats the morning of the bake sale. Please package your items for individual sale if possible. Not a treat-maker? Then make sure you stop by the bake sale early for the best assortment of individual edibles. Money raised from the bake sale will be used for special activities for our adopted families from St. Vincent's Home for Children—like dinner out, a trip to the movies, or some other fun activity for the kids.

### **Holiday Party - Wednesday, December 16**

You are invited to participate in the Holiday Party on Wednesday, December 16. Details and a link to RSVP online are on their way. If you plan to attend, please RSVP using the link on the invitation. This will ensure enough food will be ordered.

### **Silent Auction – Wednesday, December 16**

Bring in your memorabilia, knick-knacks, craft items, baked goods, or consider auctioning off a service—like 12 months of cookies, a special meal, a homemade dessert, or other scrumptious treat, maybe in a unique container. Then on December 16, check out all the fantastic finds and put in your bids. Money raised from the Silent Auction will also go towards our adopted families. Drop off your Silent Auction donations to your EMPAC representative anytime between now and Tuesday, December 15.

### **Secret Santa**

If you are participating in the Secret Santa event (deadline for signup was December 2), gift giving begins Wednesday, December 9, and runs through Tuesday, December 15. The final big gift and revealing of the Secret Santas will occur at the Holiday Party on Wednesday, December 16.

If you have any questions, please [contact EMPAC](#).

## **Contribution limits for 2010**

The employee contribution limits for the 401(k) and 457 plans for 2010 are \$16,500 for each plan. The 2010 Catch-Up Contribution Limit (for those 50 years or older) is \$5,500 for each 401(k) and 457 totaling of \$22,000 for each plan. For more information, visit ING's website at <http://stateofmi.ingplans.com/>.

### **Social security earnings limits for 2010**

Because there will not be a Social Security COLA in 2010, the Social Security Act prohibits an increase in the retirement earnings test exempt amounts.

- For social security recipients who are working and under the full retirement age (FRA), \$1 in benefits is deducted for each \$2 earned above the annual limit. For 2010, the annual limit is \$14,160 (the same as 2009).
- The limit changes in the year FRA is reached: \$1 in benefits will be deducted for each \$3 earned above \$37,680 (the same as in 2009), but only counting earnings before the month FRA is reached.
- Beginning with the month FRA is reached, there is no earnings limit.

[For more information about social security limits click here.](#)

### IRS limit

Section 401(a)(17) of the IRS code can affect the final average compensation, and therefore the pension payments, of certain highly compensated individuals who were hired after October 1, 1996. The rule places a limit on the maximum compensation allowed for retirement benefit computations. The 2010 limit is \$245,000, the same as 2009.

## Living the value - Excellence

*Excellence is an important part of everything we do here at ORS. Below are just some of the examples of how each process demonstrated Excellence in November.*

### Benefit Plan Design and Director's Office

- Maintain detailed records on changes made to defined contribution accounts. This helps us to understand the history of the changes.
- Completed promulgated rules for judges hearings so that all hearings rules are consistent and the same.
- Report information to the legislature so that they would be able to rely on us when they have data needs.



### Customer Education

- Proactively plan for our customer needs and react quickly to new assignments and projects that affect our customers to ensure information is consistent and current.
- Consistently use our red pens to ensure consistent and quality communication to our customers.
- Seek opportunities to grow individually and as a team through brown bag learning lunches.

### Customer Service Center

- Exhibit teamwork and excellence when pulling together to process retirement applications and at the same time meeting the goals with responses on the phones of 80 to 90 percent.
- Hired six new CSC contact center staff, which resulted in a loss of students in CSC and various processes. Excellence was demonstrated when all processes reprioritized, and cross trained, to cover business needs.
- Trained staff on how to identify fraudulent callers.
- Implemented a process to provide daily communication through the Knowledge Library, which provides quick and easy access to complete, vital, and always changing data needed to serve our customers.
- Answer Message Board requests within 12 hours of receipt.

### Employer Reporting

- Responded to miAccount Message Board inquiries within the designated 12-hour response time 99 percent of the time.
- Increased ER participation in ORS/DMB sponsored charitable events.
- Received positive employer training feedback.
- Cross-training staff has resulted in improved customer service to our members and employers.



## Process Support

- Provide quality assurance through:
- Daily imaging, imaged member files, and our re-indexing ensuring excellence with quality images and workflows.
- Locating and uploading requested files in a timely manner, so that staff have what they need to do their work and therefore provide excellent service to our external customers.
- Meeting our imaging targets consistently, showing pride in our work and our commitment to providing exceptional service.
- When working on projects, identify the impacted parties and ask them what they want/need from the project to complete their tasks. Including the impacted group (or individual(s) representing the group) in the project effort helps to provide a better understanding of the wants/needs (business requirements).
- Through Disaster Recovery planning, specifically pandemic planning of late, developing proactive solutions to problems that may occur.
- Provide data/queries to solve customer problems and provide internal service.

## 2010 retiree insurance updates

The 2010 MPSERS insurance rates will be presented to the Retirement Board for approval on December 10. The updated rates will be available on the public school website shortly thereafter. Retirees will receive the updated rate information in their December pension statements scheduled for mailing on December 18.

Retiree Benefits Bulletins and Summary of Benefits were mailed to state and state police (both DB and DC) Medicare-Eligible retirees enrolled in the State Health Plan PPO approximately two weeks ago. The bulletins explain changes that will take effect January 1 and can be found on the [civil service website](#).

- [SERS Retirees bulletin \(GIS 04-2009R\)](#).
- [SPRS Retirees bulletin \(GIS 02-2009R\)](#).

A similar bulletin and summary sheet will be mailed to retired judges in the DB and DC retirees in the near future.

Also effective January 1, Blue Cross Blue Shield of Michigan (BCBSM) will replace Express Scripts, Inc. (ESI) as the prescription drug provider for the State Health Plan PPO. The Employees Benefits Division will mail bulletins regarding this change to all state (DB and DC), state police, and judges PPO enrolled active employees and retirees beginning next week.

## Member satisfaction with services rises to a new high

At the end of June, ORS surveyed members who contacted our office during the months of March, April, and May of 2009. The results show that 89.2 percent of respondents were satisfied with our service, a new high. The graph below shows a history of satisfaction scores over time.



Survey results also showed 94.6 percent of respondents indicated they received the service they were seeking, compared to 90.7 percent in the previous survey. This is a tribute to the integrity and hard work of ORS staff.

The survey also shows that, although the telephone remains the most common method of contacting ORS, electronic methods are on the rise.

If you have questions regarding how the results of this survey may affect you, speak to your process BPO.

## Knowledge Library process pages are live

In addition to providing quick access to internal information and resources, the [Knowledge Library \(KL\)](#) also has web pages for each process in ORS. As of November 23, all process pages on the KL are live.

Developing the pages was a collaborative effort. Each process determined the layout and content of their process page, and put time, effort, and talent into improving the functionality of the KL.

CE staff members that assisted in the development of these pages were **Annie Earls**, **Danielle Fowler**, and **Josey McCloud**. These pages can be accessed through the menu bar at the top of the KL homepage. Make sure to check the pages regularly for updates!



### New miAccount login page

miAccount will soon have a new login page! Ideas collected over the past two years and top rated login pages were studied for the revamp of the page. Some of the larger changes include changing "User ID" to "Username," making the links for forgotten Username and Password more prevalent, and making the Register Now button more prominent on the page. The page is being tested and will be included in the December 23 release.

### It's Prim Season!

The 2009-2010 Preretirement Information Meeting (PRIM) season has



begun. Customer Education is offering online sessions in addition to the traditional in person programs. **Fred Doll** recently facilitated a PRIM in East Lansing for an audience of about 65.

## Best wishes!

### Join us for a reception honoring DMB Director Lisa Webb Sharpe.

- When: Thursday, December 10 from 2:30-3:30 p.m.
- Where: Conference Room A.

Lisa leaves DMB at the end of the year to become Senior Vice President of Finance and Administration at Lansing Community College.



### Join us in celebrating Assistant Attorney General, Larry Brya's retirement.

- When: Tuesday, December 9 from 2:00 - 3:00 p.m.
- Where: ORS Crossroads

Wish him farewell as he enters into the next stage of his life as a retiree!



### 'Tis the season to be green'

Want more ideas? Check out the Holiday Waste Reduction Tips from the Michigan Department of Energy, Labor, and Economic Development.

**DMB Mission:**  
Partners in achieving  
excellence

**ORS Purpose:**  
We are an innovative  
retirement  
organization driven to  
empower our  
customers for a  
successful today and  
a secure tomorrow.

The *LookOut* is  
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Michigan

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Phil Stoddard

### MAKE YOUR OWN WRAPPING PAPER.

Most mass-produced wrapping paper you find in stores is not recyclable and ends up in landfills. Instead, here's a great chance to get creative! Wrap presents with old maps, the comics section of a newspaper, or children's artwork. Or use a scarf, attractive dish towel, bandana, or some other useful cloth item. If every family wrapped just three gifts this way, it would save enough paper to cover 45,000 football fields.

### BUY ENERGY-SAVING "LED" HOLIDAY LIGHTS.

Now you can decorate your house with LED lights that use 90 percent less energy than conventional holiday lights, and can save your family up to \$50 on your energy bills during the holiday season!

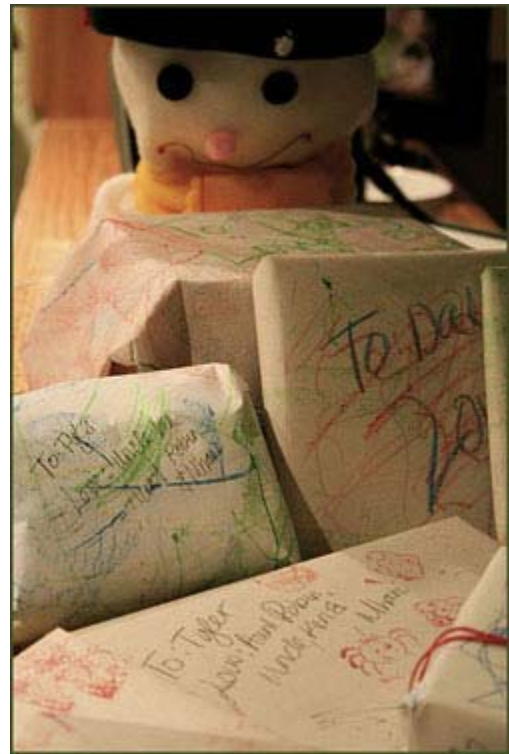
LED lights are available at many major retailers, including Target, Costco, and Ace Hardware.

**ADD ORGANIC & LOCAL FOODS TO YOUR HOLIDAY FEAST.** Support local family farmers who grow sustainable meat and produce. Not only does it taste better, you'll be doing your part for the planet too. Looking for an organic turkey or ham for Christmas dinner? Find out where to get local green products in your neighborhood.

These tips and more can be found [www.sierraclub.org/holidays](http://www.sierraclub.org/holidays).

Edited by Customer  
Education

Thanks for reading!!



Want more ideas? Check out the [Holiday Waste Reduction Tips](#) from the Michigan Department of Energy, Labor, and Economic Development.

**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.