Retirement Times
Employer Newsletter

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Tips, Tricks, and News for Our Public School Employers

In This Issue...

- System changes advance records and reports
- How to report arbitration awards, court orders, grievance, or payoff settlements
- Final salary affidavits on their way
- 2005-06 payroll calendars
- New brochure for departing employees coming soon
- Kudos for filing timely reports
- Handling TDP agreements for substitute, part-time, intermittent, or temporary school employees
- New features for web administrators
- More screen design changes

System changes advance records and reports

Since the launch of the online reporting system, some reporting units have had difficulty closing out reports and getting certain types of records to post. ORS has met with payroll officers across the state to collect information about the various payroll systems and identify ways we could streamline the delivery of wage and service information. This past weekend (May 21-22), ORS delivered some of the software changes that have advanced the posting of both records and reports. Payroll officers were notified of these changes last Thursday by email.

This week, some payroll officers will look at their ORS Work On Reports web page and find that the percent posted for some reports has increased, and some reports have even advanced to 100 percent. These changes do not affect all reporting units, but they do affect many and more changes are coming.

During the next few weeks, ORS will gradually increase the posting of records and reports, especially those where all the records are labeled as In Queue. The next set of changes focuses on records that do not show up in your Reject/Edit report, but that are not posted. These records will gradually shift from unposted wages to posted wages.

These program changes have been long in development and have been analyzed critically and thoroughly, taking into account the valuable insights of payroll officers,

Print this newsletter

Quicklinks

- Employer Website
- Production Reporting Website
- Member Website

Highlights From the Last Quarter

- The new publication *Leaving Public School Employment?* was published to the website. Printed copies are being delivered directly to all reporting units.
- We published a list of the most common edit messages in the retirement reporting system. From the Employer Website, click Tools under Employer Reporting on the left navigation bar to view the list, or just click here.
- ORS delivered an email message to payroll officers about managing TDP agreements when employees receive their summer pay in a lump sum at the end of the school year. You can find details in the What's New section on the employer website.
- ORS delivered screen design changes that make it easier for you to find the things you can resolve. Click here to see a description of the changes.

Retirement Times Survey

Please take some time to let us know your

administrators, and technical support staff. ORS is committed to staying flexible while maintaining the quality of the data we collect. We hope you will share with us any comments about your experiences with the changes, as this is an ongoing process.

Top

How to report arbitration awards, court orders, grievance, or payoff settlements

We have had some reporting units attempt to add large arbitration awards to a regular report. These large-sum records are appropriately returned with an edit message that basically says it's too much money. When an employee is granted an arbitration award, a court order, grievance settlement, or payoff settlement, submit a copy of all applicable documents to ORS. We will then determine if any or all of it is reportable for retirement purposes. (Note: This does not apply to a contract settlement for an entire classification of employees.)

If ORS determines that the settlement is reportable, you will receive verification. You will also be instructed to report the back pay and hours on your pay cycle report using the regular adjustment process for the appropriate pay periods within the affected school fiscal year.

This policy is defined fully in the *Reporting Instruction Manual, Chapter 3 Section IV R – Arbitration Awards, Tenure-Commission Ruling, Court Orders.*

Top

Final salary affidavits on their way

By now you have probably received *Final Salary Affidavits* (FSAs) for your employees who have requested a July 1, 2005 retirement effective date.

We want to get your retirees on the retirement payroll as soon as possible, and the FSA is usually the final document needed to do so. You can help by completing the FSAs for contractual employees with wages projected through their final pay period. These are the employees who typically receive the same pay every pay period. Please fax these to ORS at (517) 322-6988 before the Memorial Day holiday, if possible.

For those employees whose pay varies from payroll to payroll, please wait until all wages are determined before completing the FSA. With your help, we'll be in good shape to process the more than 5,000 applications we expect during this "summer rush" season.

You may be hearing from our staff as we verify the information on the FSAs. Your ability to return our calls

comments about the new *Leaving Public School Employment?* brochure.

Submit

Hints and Tips

When a TDP agreement is paid in full

Some of you have asked how to confirm that a TDP agreement has been paid off. After an agreement has been paid in full, submit one more Detail 3 record, but use the 06 reason code and a zero deduction. This record will suspend with one of two messages. Either it will confirm that the TDP agreement has been paid in full or it will inform you that a balance still remains. If the message confirms that the TDP agreement has been paid in full, please delete the record from your report. If the message confirms that a balance still remains, please call the Employer Reporting Call Center at (517) 636-0166.

Common questions about loading and accepting reports

- *Can I can load multiple reports in a day?* YES
- *Do I have to accept my previous reports before loading another one?* NO
- *Do I have to resolve all my edits on a report before I can accept it?* NO, but you do need to check your totals first.

and provide the information requested means that your employee's retirement payments can begin as soon as possible. Thank you for your help and your patience.

Top

New brochure for departing employees coming soon

By now you've heard that our latest customer education brochure titled *Leaving Public School Employment?* is on our website. You will soon receive a supply of the printed brochures you can distribute to staff who are terminating. Included with the mailing is a notice that introduces a streamlined way to order additional brochures using a web-based order form.

We welcome your feedback on the brochure—click here to let us know how you like it and how we can improve it.

We'd also like your opinion on the new method for ordering. If you like the reorder method, we'll use the same procedure for *Is There a Yacht in Your Future?*, the brochure we introduced last year for your newly hired employees. Watch for a supply of this brochure, along with a matching poster that encourages retirement planning, to arrive by the end of July.

Top

Kudos for filing timely reports

Since the last issue of *Retirement Times* in February, reporting units have really stepped up their efforts to file their reports by the filing deadline. In fact, more than 93 percent of all reporting units are current to within 30 days, and 83 percent of these have been accepted. This means that more and more member accounts have accurate, complete information, and it paves the way for easier processing of summer retirements. Thanks to all the schools who made this happen.

Top

Handling TDP agreements for substitute, part-time, intermittent, or temporary school employees

Do you allow substitute, part-time, and intermittent or temporary employees to participate in the tax-deferred payment plan? If so, here are some guidelines that will help you administer their TDP agreements more smoothly.

Substitute, part-time, intermittent, or temporary employees are employees who fall in one or more of these categories:

- *Can I accept multiple reports the same day, even if I haven't worked on the reports, as long as my totals are good?* YES

Keep submitting and accepting reports.

The more current records are, the easier it is for members to request bills for service credit, apply for retirement, or check on their personal accounts. So it's important that you keep submitting reports even if some records are held up by edits. Remember that when you accept a report, every correct record posts to the members' accounts. Be sure to check all totals (wage, TDP, employee count) on the summary tab before accepting a report. After you've accepted a report, you can still work on suspended records and adjust records that have posted.

Passwords....

... somehow keep getting lost! Please be sure to record and store your password in a safe place where you can find it easily.

- Do not work every pay period.
- Do not work a full year.
- Work intermittently.
- Work part-time for multiple employers.
- Are not on call, but terminate at the end of the day.

What is the employee responsible for?

- Employees may open a TDP agreement with you only on a day they are actively working, not a day that they are on call.
- Employees may have different active agreements with different employers. If the employee begins working more regularly with a particular employer, he or she may choose to transfer the agreement to the other employer using the *TDP Agreement Addendum* form.

What is your role?

Please remind your employees that because they work for multiple employers or work less than full time, they need to manage their own TDP agreements.

As an employer, keep the following in mind.

- If an employee has agreements open with other reporting units, you cannot withhold deductions for those agreements.
- You may make a deduction in any pay cycle in which the employee earns enough wages to cover the deduction amount. In pay cycles where the employee does not earn enough wages to cover the amount, a deduction cannot be taken.
- If the employee transfers the TDP agreement to a new employer, please terminate the agreement by entering an 02 deduction code with no money, and then don't submit a detail 3 record again.
- If an employee is no longer working for your school, or if a temporary employee's job has ended, please terminate the agreement entering an 02 deduction code with no money, then don't submit a detail 3 record again.

Top

New features for web administrators

Watch for some helpful new features in the next few months that will help users and web administrators manage their web reporting accounts.

Individual users will have the ability to create their own web accounts (subject to review and activation by the reporting unit's web administrator) and update their personal profiles.

About the *Retirement Times*

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Thanks for reading!

Web administrators will be able to perform the following functions:

- Maintaining Contact Information - Add contacts; edit existing contacts; delete contacts.
- Managing Web Accounts - Update user profile; activate, update, reset, and unlock user accounts.

The web administrator identified by your reporting unit will receive instructions on the new features, along with a user ID and password if not already issued, in the near future.

Top

More screen design changes

Based on your comments, the screen design changes we deployed earlier this spring have been really helpful to you. More changes coming this summer include:

- Reordering your reports on the Work on Reports page
- Clarifying the status of reports (accepted, suspended, etc.)
- A legend for the new labels (Org Fix, In Queue, On Hold).

We hope you'll find these changes equally useful.

Top

2005-06 payroll calendars

The payroll dates of the records you submit are checked against a list of payroll dates recorded for your reporting unit. These payroll dates need to be updated every year and adjustments made for those end-of-year special situations where the payroll period might be shorter or longer than normal, like at the end of the fiscal year. To make this easier for you, we have reviewed your current schedule and *projected* your payroll calendar for the 2005-06 fiscal year (July 1, 2005, through June 30, 2006). This should arrive in your office in the next few days.

We are asking you to review and affirm the schedule by faxing the calendar back to us. If you need changes, you can note them right on the calendar we've sent you. Even if you have no changes, please be sure to fax the document back to (517) 322-5190. We want to make certain your calendar is correct so we can upload your records quickly and easily.

Top

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