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2009 Member Statements Mailed

The Office of Retirement Services mailed over 235,000 personalized Member Statements this week. The 2008-2009 Member Statements include reported wages and service credit for the July 1, 2008, to June 30, 2009 school fiscal year.

[Member Statements](#) have a new look and include the fall 2009 issue of [PROactive](#), our active member newsletter.

Employees with incomplete accounts for the 2008-2009 school fiscal year will not receive their statement. Incomplete accounts can be attributed to missing reports or unposted records. ORS will continue to contact those employers to resolve these issues, and will mail the statement as soon as the accounts are complete.

Employees with interest accruing TDP agreements will receive their statement in October.

If your employees have general questions about their statements, please refer them to the miAccount Message Board at www.michigan.gov/orsmiaccount. You may also be able to assist in answering their questions using the View Employee Information link on the retirement reporting site which shows all posted wages, hours, and tax-deferred payment deductions.

 [Print this newsletter](#)

How to Contact ORS

Email:

ORS_Web_Reporting@michigan.gov

Telephone:

Employer Reporting Call Center
(517) 636-0166

Quicklinks

- [How to Contact Us](#)
- [Employer Website](#)
- [Employer Self-Service Website](#)
- [Member Website](#)
- [PROactive Member Newsletter](#)

On June 8, a new link was activated on the employer reporting home page. The *Retirement Applicants* link takes payroll officers to the new *Final Payroll Details* screen which replaces the paper final salary affidavit. The *Final Payroll Details* screen lets payroll officers submit the last bits of information needed to start a pension electronically. Some of the major gains from this substantial system enhancement are:

1. A higher percentage of public school employees received a pension payment in July, which means that fewer experienced a gap in income between their work life and their retired life. Eliminating the gap in income is a high priority for ORS.
2. Payroll officers can see a complete list of everyone in their school district who has applied for retirement and the month in which the applicant will be retiring. Applicant names appear on the day that ORS processes the application!
3. The screen is customized for the applicant – it only requests information specifically needed for this particular applicant.
4. It's **green** technology! This link is updated every time we get a new application and applicants stay on the list until the information is completed. Previously, you received a new affidavit every two weeks for every applicant that wasn't completed yet – many of you commented on the paper stacks in your offices!

And the process will only get better. As you continue to provide accurate pay period reports, less information will be needed at the time of retirement. You will find the amount of information shrinking as time goes on, so you will spend less time completing the screen.

We are listening! Immediately after the new screen was delivered, ORS learned that schools needed a couple of quick changes and we moved quickly to deliver them. One was to add a place to list the payments amounts that exceed the contract amount. The second was to make sure you always had enough payrolls available for summer pay. More enhancements were delivered August 24. They were:

- The ability to enter both the *Last Day Worked* and the *Termination Date* for each member.
- The option of entering the actual days worked in the *Count Days* field, including zero, or going into the *Count Days Calendar* and deselecting the days not worked.

Many payroll offices have made suggestions to enhance the *Final Payroll Details* screen. We are reviewing all of the suggestions we received to see which can be delivered.

How You Can Help

Think ahead to your own retirement! No one likes to wait for that first check, but ORS and you are sticklers for making sure that first check is for the right pension amount. This means that to process these applications on time, receiving your the final payroll information is critical! Here's how you can help.

1. Check your *Retirement Applicants* link every day! This is a real-time system now, so it could change every day.
2. Supply the information as quickly as you have it. For contracted employees who receive the same payroll each week, go ahead and complete the report as soon as you can. It helps us to receive some earlier than others so we can get everyone who has applied processed in the same month.

Thank you for helping us help your employees make a smooth transition into retirement!



Transferring a TDP Agreement

When an employee changes school employers, the TDP agreement may also transfer to the new employer within 90 days of the termination date. Please advise terminating employees of the 90-day window.

Please ask your new employees if they had a TDP agreement with their previous employer. If so, inform them agreements must be transferred from their previous employer to your reporting unit within 90-days of their termination date with the previous employer.

All agreements not transferred within 90 days from the date of termination with the previous reporting unit are closed. There are no exceptions that allow an agreement to be reinstated beyond the 90 day policy.



Annual Superintendent Certification

Superintendent certification forms have been sent to each employer. The annual certification requires each employer's superintendent or equivalent to sign and return the certification form to the Office of Retirement Services. Signing this form certifies that the superintendent is aware of and responsible for reportable wages and hours submitted to the MPERS payroll reporting. Their signature also certifies the accuracy of their web administrator and employer contacts. Updating of escalation contacts is the responsibility of the employer. After review of these contacts, forward updates to your web administrator.

All superintendents are to complete the certification process by signing the form and returning to ORS by September 15, 2009.



Don't Forget! Set the Wage Code Back to 01 for the 2009-2010 School Year

Remember to change the wage code for employees who were receiving summer spread wages with no hours (wage code 08) back to wage code 01 for the first pay period of the new school year. Returning employees must be reported with wage code 01 (regular wages) because you must begin reporting hours attached to the wages.



Leaving School Employment and Not Retiring

It's important that your employees know how termination effects their retirement when they leave for reasons other than retiring. We strongly encourage you to provide them with the [Leaving Public School Employment?](#) brochure while they're still considered a member of the retirement system. This publication will provide them with important information about their status in the retirement system. [Order some now.](#)



Share Retirement Planning Tips With Your Employees

Rev up your retirement planning by understanding how much money you'll have in retirement.

**Average monthly pension for a public school retiree
= \$1,603.75**

That's about \$19,245 per year. Will it be enough to cover your living expenses, travel, and leisure plans during retirement years?

It's important to remember that your pension should not be your only – or even your primary – source of income in retirement. A secure retirement depends on a balance of personal savings and social security benefits, in addition to your pension.

We encourage you to use the Pension Estimate functionality in miAccount to get an idea of how much money you'll receive in retirement. You may also consider working with a financial planner.



ORS Employer Reporting Staff Pilot Employer Training

On Thursday, July 16, 2009, ORS employer reporting staff presented payroll reporting instructions to payroll personnel in person, and associated faces with many names and voices from payroll offices across the Lower Peninsula!

On behalf of employer reporting staff, **Ann Schneider** and **Cindy Adams** welcomed 19 payroll personnel

attending the report processing training session held at ORS Lansing office. Fifteen different employers were represented throughout Michigan from Troy to Muskegon to Bay City. They were invited to participate in a pilot training session developed and presented by the employer reporting staff that was a premier of the plans to provide ongoing trainings to customers and employers, in alignment with the ORS purpose to empower our customers for a successful today and secure tomorrow.

Employer reporting staff identified the most significant and universal reporting issues additionally they covered wage and service adjustments, reporting retro wages, web reporting online tools that can make their jobs easier, error download detail reports, TDP download detail reports, and view totals download detail reports. PowerPoint presentations of these topics were presented by employer reporting staff **Kay Johnston, Deb Lawrence, Mary Picken, and Mary Weaver**, with technical support provided by **Richard Miles** and **Annette Ruiz**.

Employer reporting staff received lots of positive, useful feedback, and participants appear excited about the idea of ongoing trainings. Their comments included: Thought the training was great! ... Thank you for providing this training ... Overall very helpful.

Employer reporting also received useful recommendations for future topics and formats. Online tutorials and webinars and hands-on sessions, are being considered as potential training options. All-in-all it was a mutually rewarding experience.



Fast, Easy Access to Retirement Information

Did you know that members can complete most of their business transactions with ORS from the comfort of their homes? miAccount, our secure online site, provides customer service without the phone call or the drive!

ORS customers have an arsenal of tools—publications, websites, miAccount, secure message board, exceptional services provided by our call center—that empower them to successfully manage their retirement.

Please encourage your employees to use [miAccount](#), our [website](#), and [publications](#).



Reporting Instruction Manual Updates

The online Reporting Instruction Manual has been updated. Go to the RIM Changes page at www.michigan.gov/psru for a listing of all RIM changes since the last newsletter in May 2009. Changes were made to the following sections:

➤ 5.1 - Compensation

Clarifies that the Act, the RIM, and ORS are the only sources for determining if compensation is consistent with the retirement statute and eligible to be included in a member's final average compensation.

- **5.2.4 - Other Wages - Multiple Wage Codes**
Explanation of new option to report 3rd party workers' compensation that allows the DTL2 record to spread the hours and wages over multiple pay periods within the same fiscal year.
- **7.6 - Using the Download TDP Detail Link**
Updated screenshot in Figure 7-9.
- **7.7 - TDP Annual Interest**
Updated language describing the contents of the TDP Agreement Details spreadsheet.
- **Chapter 8 - Final Payroll Details**
A complete revision of Chapter 8. ORS has discontinued using the paper final salary affidavit. The chapter provides information and step-by-step directions on using the new online Retirement Applicants link and Final Payroll Details screen.
- **8.2 - Instructions for Entering and Submitting Final Payroll Details**
Step 8 of this section was revised. Changes to a payroll calendar date may not appear on the Pending Wages section of the Final Payroll Details screen.
- **8.3 - Frequently Asked Questions**
This is a new section containing frequently asked questions and answers regarding the new final payroll details report screen.
- **E.2.5 - Validations Run for DTL2 Records**
Rules 60 and 62 have been changed and a new rule, 63, has been added. Allows DTL2 records reporting 3rd party paid workers' compensation to spread over multiple pay periods with the same fiscal year.

The online Reporting Instruction Manual (RIM) is your resource for detailed information about retirement reporting. You may also contact the Employer Reporting Call Center at (517) 636-0166 or ORS_Web_Reporting@michigan.gov with any questions.



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Thanks for reading!