NEWS TO USE

PERSI

A newsletter for PERSI employers

December 2007
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STRENGTHENING OUR EMPLOYER RELATIONSHIPS

...a year-end message from PERSI Executive Director Alan Winkle

Hopefully it hasn't gone unnoticed that PERSI has been working hard to increase its level of customer service in all areas.

■ The PERSI Web site has been updated recently; and in upcoming months, you will see additional changes. Our goal is to make more information available while also making the site easier to navigate and more user friendly.

■ Our member education programs were modified to make the sessions shorter and more pertinent to the needs of our members. These too will continue to undergo change based on member needs. As part of our education program expansion, in November we co-sponsored a program with the Social Security Administration (SSA) and the Senior Health Insurance Benefits Advisors (SHIBA) to educate active, inactive, and retired PERSI members about Social Security, Medicare, and other retirement-related programs. The initial workshop was held in Nampa, but additional workshops are being considered for elsewhere in the state next year.

■ We reorganized how we do business so we would always have dedicated PERSI staff available during business hours to answer member questions and provide information whether it's via telephone, email, one-on-one counseling, group sessions, or formal education workshops. A new phone system was implemented to help us reach our goal of having a live person answer member questions without placing the caller on hold or transferring them around. I'm proud to be able to say we achieved our 90 percent goal this year. Through continued staff training, I expect this percentage to go even higher over time.

So, how do these changes affect the relationship with our employer representatives? Besides making all the above services available to you and to the members with whom you work, other changes have been made specifically for employers.

■ What was once the transmittal processing section is now a full service Employer Service Center (ESC) with six qualified fiscal technicians available to answer questions and provide assistance.

■ The level of education we provide to employers at our annual employer meetings held around the state has been upgraded. This year's meetings included an Employer Certification session where participants were provided hands-on training and a workbook that covered everything from transmittals, eligibility, and unused sick leave to the Choice Plan 401(k) and using the new Employer Online Guide. A certificate of completion was mailed to everyone who attended the training sessions. This certification process will eventually be available on the Web site so our employers can take a refresher course at any time, or new human resource or payroll personnel can use it to learn PERSI "basics."

■ We have continued working on upgrading our electronic transmission of data through file transfer and the PETRA system. This includes building a secure Employer Portal on the Web site dedicated to providing employers with the data and information needed to do their jobs. In response to employer requests, we are also now providing a knowledge-based system (Employer

Online Guide) via the Employer Portal to answer specific questions from employers.

So what's next? Over the years I have come to appreciate that employers are the key to the quality of the service we provide PERSI members. Virtually all data we receive comes from you, and data is the foundation for the accuracy and timeliness of service we give PERSI members. I believe by using a collaborative approach, progress has been made in helping employers easily and quickly provide data to us using electronic transmittals, while also allowing us to edit each payroll period within a few hours and resolve issues together in a short period of time. Two new programs will be instituted in the next year to continue the timeliness and accuracy of data reporting and to help you perform your administrative responsibilities for PERSI. These programs are:

▪ **Employer Self-Review:** This idea was borrowed from the Washington retirement system, which posted their entire "audit" process on the Web site and encouraged employers to go through the same check list used by staff during an actual employer visit. We are finalizing our check list and supporting materials so we can begin to roll out a similar program in the near future. Those of you who attended the employer meetings got a sneak peek at the Self-Review program.

▪ **Automated Data Review...Or We Don't Know What We Don't Know:** Over the years we have worked with employers to edit and review the data we receive to ensure it is consistent and accurate. However, the data not reported to us doesn't go through the same rigorous editing process. We aren't able to work with employers to identify employees who should be in PERSI but who are not reported on a transmittal, nor can we detect PERSI retirees who are employed by a PERSI employer but who are not reported correctly. In other words, we aren't able to help employers with accurate reporting because we "don't know what we don't know."

Sometime after the first of the year, we will begin working with selected employers as prototypes to develop and finalize our Automated Data Review procedures.

After the roll out of these programs, we will begin another program to review all data in each payroll to ensure it is accurate in all respects — for both members on the PERSI report and those who are not on the report. Our goal is to work with every employer to ensure each payroll is accurate as it is processed rather than picking up errors months or even years later. By receiving the non-PERSI payroll data (in generally the same format as PERSI data), we can run edits and analyze the data to ensure the accuracy of the entire payroll to eliminate future problems.

While your reports to PERSI are critical to our mission, I know we are not the only entity you deal with that requires reporting. Working together using education and technology, I believe your job can be made easier by streamlining various processes. I am confident PERSI and our employer units will be even more successful and productive in 2008 than we were during the past year. If you have any questions about or suggestions for ESC, please contact me at alan.winkle@persi.idaho.gov or contact ESC manager Diane Kaiser at diane.kaiser@persi.idaho.gov.

Notes

PERSI Answer Center Supervisor Kim Hall attended the National Pension Education Association (NPEA) conference where the focus was on member education, customer service, new technologies, and the economic outlook for public pension systems.

Choice Plan Manager Diane Kaiser paid a visit to ACS HR Solutions [Choice Plan 401 (k) record keeper] to learn more about new technology enhancements and call center operations.

IT Manager Carol Boylan attended her first board meeting for the Public Retirement Information Systems Management (PRISM) where decisions were made regarding the group's annual conference.