

## PERSI WEB SITE IS A USEFUL TOOL

PERSI introduced its newly designed Web site ([www.persi.idaho.gov](http://www.persi.idaho.gov)) last year. Since then, comments about the usefulness of the Web site have been extremely positive. The decision to dedicate time and resources to make improvements was driven by PERSI's commitment to customer service. The goal was to improve navigation, increase the amount of information available, and make it easier for visitors to find what they needed. The site is segmented into employer, member, and retiree pages; there are also brochure, online services, investments, and educational opportunity pages.

### EMPLOYER PAGES

#### ▪ Employer Portal

The most significant employer tool accessible from the PERSI Web site

The Employer Portal is a restricted section of the Employer Information page on the PERSI Web site. It has customized views, features, and security outside the Web site and can only be accessed by employers. The portal was designed to promote communication between Employer Service Center (ESC) staff and employers, and provide additional tools to help employers administer their responsibilities for PERSI. With so many new employers and new payroll and human resource personnel, PERSI feels the usefulness can't be stressed enough.

The Employer Portal is limited to authorized personnel. Only those who have registered on the PERSI Web site **AND** have been designated by their employer as "authorized PERSI contacts" can gain access. Authorized contacts who have already registered on the PERSI Web site to view their personal account information, don't need to register again to use the Employer Portal. They will use their current email address, existing password, and employer ID number to log in to the Employer Portal.

The Employer Portal homepage includes a main menu with links to:

- Employees (as reported to PERSI on the employer's most recent transmittal)
- *News To Use* newsletter
- Employer Training Manual
- Message Board
- PETRA (transmittal reporting application)
- PERSI Home
- Retirement SSN Lookup
- Employer Online Guide (information resource)
- Employer Forms
- Employer Transmittal Reporting Manual
- Changes to Employer Transmittal Reporting
- Log Out

#### ▪ Transmittals

Instructions and tools

#### Reporting:

- 1) The Employer Transmittal Reporting Manual provides a detailed review of transmittal reporting methods, fields, and methods of payment for employers who email their transmittals to PERSI
- 2) Summary of Changes to Employer Transmittal Reporting Manual
- 3) PETRA (A web-based method for transmittal reporting used by smaller employers)
- 4) PERSI Employers' PGP Public Key

#### Payments:

- 1) Easy Pay (PERSI's electronic payment system)
- 2) Introduction to Easy Pay and Sign-Up Form
- 3) Web Based Access – iTelecash and Instructions
- 4) Mellon's iTelecash Web Site:  
<https://www.enternetbank.com/mps>
- 5) Touch Tone Phone Access

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- **Forms**

- Instructions, forms, and required footnote disclosure for auditors

- **Choice 401(k) Plan**

- Plan summary, forms, guidelines and a savings limits calculator

- **Newsletters**

- Current and archived *News To Use* newsletters

Employers who regularly utilize the PERSI Web site report they can locate answers to their questions, or those of their employees, as quickly online as they can by calling PERSI.

The Web site is one of the best sources for the latest materials and most current forms. Announcements are posted on the homepage, making it quick and easy to learn about news and events affecting PERSI employers and their employees.

## MEMBER PAGES

- **Account Information**

- myPERSI* account is a safe, secure, and easy-to-use page where members can view their Base Plan and Choice 401(k) Plan balances\*, use the Account Balances and Projections calculator to estimate their retirement needs, calculate Purchase of Service (POS) costs, or view and print their Annual Statements.

- **Base Plan**

- Overview and FAQ information

- **Choice 401(k) Plan**

- Explanations, forms, and sign on (\*hot link directly to Choice Plan account without a separate sign on)

- **Forms**

- Instructions and forms for active / inactive members

- **Publications**

- The member handbook

- **Newsletters**

- Current and archived *PERSpectives* newsletters

- **What To Do If**

- Questions and answers about life events that could affect members

## RETIREE PAGES

- **Account Information**

- myPERSI* account is a safe, secure, and easy-to-use page where retirees can view their Base Plan and Choice 401(k) Plan\* balances, view their PERSI Benefit Statement, and view and print their 1099 forms .

In addition, this section covers cost of living adjustments (COLA), power of attorney documents, return to employment guidance, Form 1099-R information, and details about the taxability of Base Plan benefits.

- **Choice 401(k) Plan**

- FAQs, forms, and misc. materials

- **Newsletters**

- Current and archived retiree *PERSpectives* newsletters

- **Forms**

- Instructions and forms for retirees

Employers are encouraged to utilize the PERSI Web site to find answers to commonly asked questions, to locate brochures, and to download current forms. It is also easy to refer employees to the site for FAQs, brochures, the board meeting schedule, legislative updates, and retirement workshop dates and registration. The Choice Plan Web tour is one of the newest and most utilized features on the Web site.

To share your comments about the Web site with PERSI, click on the *Contact Us* button at the top of the PERSI Web site homepage; when the page opens, scroll to the *Webmaster* hot link and click. Complete and submit the form. Comments are always welcomed and appreciated.

## Notes

After more than 10 years with PERSI, [Lynne Yowell](#) from the Pocatello office retired last month.

PERSI welcomes [Sherry Slocum](#) and [Brett Harper](#) to the PERSI Answer Center. Sherry comes to PERSI after a year with T-Mobile and Brett spent 4 years in a Direct TV call center. Both have extensive customer service experience.

Project Coordinator [Larry Sweat](#) participated in a CEM workshop focused on pension system benchmarking and performance measures.