



NEWS TO USE

A newsletter for PERSI employers

December 2009

- Org. Changes
- RS102 Form
- Notes

ORGANIZATIONAL CHANGES AT PERSI

Change is a constant reality in today's workplace. Last month PERSI announced changes to the Employer Service Center (ESC). Now PERSI is announcing the next step in our internal reorganization designed to contribute to a quality customer service program. This reorganization will lead a smooth transition to a new pension administration system.

New Database System Catalyst For Change

Over the next several years, PERSI will be replacing its current pension administration system with one better suited to meet growing organizational and member needs. The first step in this multi-year project was the selection of an independent contractor to serve as project manager to define system requirements based on PERSI needs. The vendor (Provaliant) brings expertise in the area of public sector pension benefit administration to the project, and will draw on PERSI staff for direction throughout the life of the project.

In support of this effort and to provide the right guidance, PERSI is creating a project team comprised of a team leader, project coordinator, and subject matter experts from each department. Because of her extensive knowledge of PERSI operations, Judy Aitken has assumed the role of team leader. Judy has served as the PERSI Answer Center (PAC) manager for the past 5 years, and has been with PERSI since 1993. Since the team leader is a full-time job, PERSI reconfigured its structure to remain efficient and ensure continued high-level service to members. Judy will coordinate among the various departments within PERSI to define technical and operational needs, and ensure time lines and goals are met. She will be supported by project coordinator Larry Sweat, who has already played a key role in documenting PERSI processes and procedures.

Creating a New Opportunity

The reorganization included the creation of a new supervisory position. Former retirement specialist Lisa Conn is now supervising the PERSI Processing Center

(PPC) staff. The team consists of insurance specialist Wayne Ellis; technical record specialists Kay Prince, Lenna Strohmeyer, Katt Rouse, and Denice Desilet; and imaging specialist Cathy Andrews. These are the people who process and image incoming/outgoing documents for PERSI.

Former PPC manager Shawnda Kasma is now managing PERSI's Retirement Service Center (RSC). Staff who counsel members on retirement or who process benefit paperwork to support PERSI members comprise the RSC. This new team includes retirement specialists Melody Hodges, Catherine Atchison, Shasta Luper, Lynn Duncan, Susan Strouth, Jennifer Whitley, and administrative assistant Jami Davis in Boise; Kari Caven in Coeur d'Alene; and Lisa Mabe and Frank Dye in Pocatello. She will also supervise field office customer service specialists Kathi Kaufman (CdA) and Linda Parker (Pocatello).

Additional Changes

Retirement specialist Julisa Adams, who performed quality control for PPC, has become a full-time quality assurance specialist. Along with training specialists Mike Mitchell and Graydon Wood, PERSI Answer Center supervisor Kimberlee Hall, and PPC supervisor Lisa Conn, Julisa reports to the Deputy Director Bill Oldham.

Result: Improved Efficiency, Higher Performance

The management changes and realignment of responsibilities will streamline PERSI's daily operations and improve efficiencies in all areas. The competence and expertise of staff throughout the organization can be more easily tapped, resulting in higher overall performance...and that will benefit members and employers. Questions about the changes should be directed to the PERSI Answer Center at 1-800-451-8228 or 334-3365 (Boise area); for ESC questions call 1-866-887-9525 or 287-9525 (Boise area).

FORM RS102 - MEMBERSHIP APPLICATION

- confusion still exists-

There continues to be confusion about using the RS102 form – PERSI's *Application for Membership* form. Employers want to know who completes which section, what documents should accompany the form, and who should use the form. The RS102 form is used to notify PERSI about a new employee or a rehire who might be eligible for PERSI membership, and it requires both the employee and employer to complete certain sections. *Only employers who use paper reporting need to use the form.*

ELECTRONIC REPORTING

It isn't necessary for employers who utilize electronic reporting to use the RS102 form because the required information can be included in a transmittal. Nevertheless, employers who report electronically should advise their employees to send PERSI a *Beneficiary Designation* form (RS115); and if the employee is a retired member, the employer should submit a *Certification of Employment of Retired Member* form (RS132). The employee should complete the appropriate section and sign the form before it is submitted to PERSI.

USING THE PAPER FORM

Employee Information

The personal information section of the RS102 form should be completed by the employee. The employee needs to sign the form to acknowledge the statements on the form are correct and complete to the best of their knowledge.

The employee should provide a copy of their Social Security card to their employer when they turn in the completed RS102 form. A *Beneficiary Designation* form (RS115) should also be completed and returned to the employer for submission.

Employer Certification

The employer will complete the section that certifies

the applicant meets the definition of employee as defined in Idaho Code, and that the information on the form is correct and accurate. If eligibility is from Police/Firefighter certification, the employer also needs to complete an *Employer Certification of Police Officer Status* form (RS118) or *Employer Certification of Firefighter Status* form (RS118A).

Submitting the Form to PERSI

When the employer submits the form to PERSI, a copy of the employee's Social Security card should be included. Follow the instructions for completing the form, which identifies the documents and additional forms that must accompany the RS102 when it is submitted.

Hopefully this article has made the RS102 easier to understand.

CHANGES TO KEY PERSI FORMS

PERSI wants to take this opportunity to make employers aware of recent changes to a few key forms. The two forms most affected are the *Base Plan Withdrawal* form (RS108) – aka *Separation Benefit* form, and the *Application for Retirement* form (RS 121). Forms having to do with the distribution of funds now require notarized signatures before funds will be released. The exception is the *Beneficiary Designation* form (RS115). Because of Idaho's community property laws, the RS115 does not require a spouse's signature since the spouse is automatically entitled to 50 percent of the benefit.

A minor name change was made to the Power of Attorney form, which is now called a *Durable Limited Power of Attorney* form (RS113).

PERSI will try to keep employers up-to-date on any future form changes.

Notes

Choice 401(k) Manager Diane Kaiser and Retirement Specialist Manager Shawnda Kasma attended a one-day conference sponsored by Milliman, PERSI's actuary. Held at the Grove Hotel in Boise, the 38th Annual Client Conference on Employee Benefits focused on healthcare reform, pay and benefits, emerging from the economic crisis, 401(k) programs over the next 25 years, and the presentation of a dependent eligibility audit case study.