



NEWS TO USE

A newsletter for PERSI employers

March 2010

- New PERSI Trainer
- Employer Visits
- Transmittal Issues
- Online Forms

PERSI GETTING A NEW TRAINER...BUT THE FACE WILL BE FAMILIAR

It's always a little sad when a well-respected employee leaves PERSI to pursue other opportunities; but it's also exciting to welcome someone new. There will soon be a fresh, but familiar, face at the Retirement Workshops. PERSI is filling a vacancy in the training department from a pool of existing employees. Regardless of who fills the opening left when Graydon Wood moved on, one thing is certain...they will have loads of PERSI experience. The interview process is underway.

Despite the change in personnel, don't expect the retirement workshops to undergo much change. The new trainer will work with seasoned trainer Mike Mitchell to put a unique stamp on the program. They will merge their knowledge, skills, and abilities into the existing program and add enhancements as needed.

PERSI urges employers to encourage their employees to attend a retirement workshop well in advance of applying for their PERSI benefits. Besides the day-long retirement workshop, the education program includes two 1½-hour workshops held at employer locations. These onsite workshops are geared to younger members and those who want to supplement their PERSI retirement by making voluntary contributions to the Choice 401 (k) Plan.

Your employees can register for a retirement workshop from the PERSI Web site at www.persi.idaho.gov. As an employer, if you would like to offer your employees an opportunity to better understand their PERSI benefits and help them plan for their future, call Mike Mitchell at 208.287.9291 to arrange an onsite workshop.

PERSI EXPANDS ONSITE EMPLOYER VISITS

PERSI has begun visiting employers in the southwest part of the state. This effort supplements visits the Coeur d'Alene and Pocatello Retirement Specialists have been doing in north and southeast Idaho. The southwest region is now being targeted to ensure all employers receive the benefit of an onsite visit.

During the visit, PERSI is reviewing procedures, explaining new processes, reviewing payroll records to ensure reporting accuracy (eligible employees should be making contributions to PERSI and ineligible employees should not), and discussing any areas of interest to the employer. Many employers say they do not understand the Choice 401 (k) Plan, so another part of the visit is

dedicated to educating employers about the features and benefits of supplemental retirement savings.

These onsite visits provide quality time with employers. Because of the format, employers can ask questions and receive more detailed explanations than what they might get in an open meeting with a lot of people, a set agenda, and time restrictions. Although the Employer Service Center is always available to answer questions from employers, it is nice to sit down and go over areas of concern mano-a-mano because it strengthens the PERSI-employer relationship. It is a more personal experience, and employers are saying they find it rewarding and well worth their time.

TRANSMITTALS: USING OUTSIDE OR IN-HOUSE RESOURCES

Employers are being asked to let PERSI know if they use an outside IT vendor to handle transmittal issues (and who it is), or if an in-house IT department is used. This information relates to preliminary changes to PERSI's membership database system. (More details in upcoming newsletters.) Please email your response to the Employer Service Center at ESC-employerservicecenter@persi.idaho.gov or call ESC toll-free at 1-866-887-9525 or 287-9525 from the Boise area.

PERSI FORMS AVAILABLE ONLINE

Employers are urged not to keep large quantities of printed forms on hand; instead print forms as needed to avoid using outdated or invalid ones. Few things are as frustrating as completing a form only to redo it because a current version was not used.

PERSI tries to make it easy to get forms; most are available online at www.persi.idaho.gov. Some of the forms can be completed and submitted online; other forms can be opened in PDF format, printed out for completion, then submitted to PERSI by mail or fax. For forms not online, contact the Employer Service Center toll-free at 1-866-887-9525 or 287-9525 in the Treasure Valley area.

Where to Find Forms

The forms are available in various sections of the PERSI Web site. Here is the forms list as of 1/14/10 for quick reference. Doing an online search using the RS number may be the easiest way to locate the form you want:

- **RS102** Membership Application
- **RS108** Account Withdrawal
- **RS109** Notice of Change in Employment Status
- **RS110** Member Address Change
- **RS111** Member Name Change
- **RS113** Durable Limited Power of Attorney
- **RS115** Beneficiary Designation
- **RS116** Separation Benefit Repayment Agreement
- **RS116B** Additional Payment Agreement
- **RS118** Certification of Police Officer Status
- **RS118A** Certification of PERSI Firefighter Status
- **RS121** Retirement Application
- **RS121DS** Retirement Application for Member Changing from Disability Retirement
- **RS121R** Application for Reinstatement of Retirement
- **RS130** Certification of 8-month Seasonal Status
- **RS132** Certification of Employment of a Retired Member
- **RS132A** Certification of Employment of a Retired School Teacher or Administrator
- **RS160** Sick Leave Deduction Authorization
- **RS162** Public Safety Officer Authorization for Insurance Premium Deduction
- **RS322** Federal & State Tax Withholding from PERSI Benefit
- **RS415** Request for Premium Payments through ORP Sick Leave Entitlement
- **RS430** Retired Public Safety Officers Insurance Carrier Agreement
- **RS432C** Insurance Carrier Certification of Group Insurance Policy
- **RS432R** Employer Certification of Group Insurance Policy
- **RS448** Direct Deposit Authorization
- **RS451** Release of Information
- **RS451A** Request for Account Information by Spouse/Former Spouse
- **RS621F** FRF Firefighter Retirement Application
- **RS633F** Request for Payment of Firefighter's Surviving Spouse and Children Allowance
- **RS801** Choice 401(k) Plan Deferral Election
- **RS802** Choice 401(k) Plan Fund Transfer Worksheet
- **RS803** Request to Contribute Rollover Funds to the Choice 401(k) Plan
- **RS804A** Choice 401(k) Plan Request for Distribution to purchase Base Plan service
- **RS807** Choice 401(k) Plan Request for Death Benefit Payment
- **RS813** Choice 401(k) Plan Request for Installment Payments
- **RS1000** Retirement Application Package
- **Notice 402f** Special Tax Notice Regarding Plan Payments
- **AltDOBinfo** Alternate Evidence for Date of Birth
- **AltSSNinfo** Alternate Evidence for Social Security Card

Forms change periodically. To ensure you are using the most current version, please use the forms posted online...it could save you and your employees a lot of time and frustration.