



# NEWS TO USE

*A newsletter for PERSI employers*

August 2010

- Printed Newsletter
- Class II Members
- Focus on Employer Education

## SAYING GOOD-BYE TO THE PRINTED NEWSLETTER

This is the last month the newsletter will be mailed to employers. After this issue, the *News To Use* will only be mailed to employers without email access.

PERSI recently contacted the employers in our database who didn't show an email address. We found nearly all employers actually had Internet access and email, we just didn't have the information.

Sending a link to employers when the newsletter is posted to the PERSI Web site has been a long-standing practice. Receiving one less piece of mail each month will be the only change for most employers. The newsletter can be printed from the PERSI Web site at [www.persi.idaho.gov](http://www.persi.idaho.gov) by anyone wanting to keep a hard copy.

The trend is toward online services – and for good reason. Online resources can streamline operations and save time and money. PERSI offers many online tools and documents for employers (e.g., employer portal, online transmittal capability, and forms); and employees can easily get current information (e.g., brochures, handbook, account information, and forms) at any time. The PERSI Web site is under constant evaluation, and upgrades are continually made to enhance the user experience.

Please let PERSI know if your email address changes so you will continue to receive the link to the monthly newsletter. If you miss the email, remember the *News To Use* newsletter is posted to the PERSI Web site at the beginning of each month.

## CLASS II CERTIFICATION REQUIRED

A programming change will soon require PERSI employers to submit an RS118 certification form for new Class II public safety officers and an RS118A form for new Class II and Class D firefighters.

The first time a new Class II or Class D member is added to a transmittal file, the system will accept the file without requiring an approved RS118 form. If PERSI has not received and approved an RS118 form by the time the next payroll file is received, the file will be rejected with an error message regarding the missing or incomplete form. The Employer Service Center (ESC) will work with employers to resolve the issue so files can be successfully imported.

For those new to PERSI reporting, the RS118 forms certify a member's eligibility for public safety officer or firefighter classification, which affects contributions and benefits. This is a way to prove a member meets the eligibility requirements and receives the entitlements associated with being a Class II member. The RS118 forms go into detail about who qualifies

for this status. Be sure to read them carefully before completing the entire form. The subsection of the Idaho Code used to certify public safety officer eligibility must be cited in the member information section of the RS118 form.

PERSI is asking that new employees be certified to ensure the quality of our data and to make certain members are paying the right contributions, are eligible for the death and disability benefits of a Class II member, and ultimately that the correct retirement benefit is paid.

The RS118 forms can be found on the PERSI Web site under the "Forms" link in the **Employer Section** of the Home page. The forms can be completed and submitted online or downloaded and mailed to PERSI.

Contact ESC toll-free at 1-866-887-9525 or 287-9525 from the Boise area if you have questions about reporting or completing one of the RS118 forms.

# FOCUSING ON EMPLOYER EDUCATION

PERSI spends much of its time educating members about their retirement benefits...and that will continue. Now, there is also a focus on helping employers better understand the features and benefits of both the Base Plan and the Choice 401(k) Plan. By educating employers, more (and accurate) information is expected to get to employees.

## New Materials

The employer education campaign informally kicked off with the development of new Choice Plan materials last year. The new materials are easy to understand. They provide detailed information about saving for retirement and explain the choices available to PERSI members. The materials make it easier for employers to respond to employee questions.

## A New Trainer

The employer education effort is supported by ACS HR Solutions (ACS), the Choice Plan record keeper. Wayne Ellis was hired as a trainer/educator by ACS to help with the new program and emphasize Choice Plan benefits.



Wayne Ellis

Wayne has been in the financial services industry for 9 years. While finishing his Bachelor's degree in Finance from Idaho State University, Wayne worked for Waddell & Reed as a financial advisor. After graduating from Idaho State University, Washington Mutual Bank asked him to pilot an investment program in Idaho where investment representatives worked as bankers and licensed advisors. Wayne spent the next 6 years with Washington Mutual Bank as a branch manager, financial consultant, and leadership development coordinator. While with Washington Mutual he obtained a Master's degree in Business Administration from the University of Phoenix.

When Washington Mutual was acquired by Chase, Wayne left to open an Allstate insurance office (which he has since closed). About this same time, he also began working for PERSI as an insurance specialist, where he successfully implemented a new automated insurance payment process. If this weren't enough, Wayne also teaches business ethics and organizational behavior at the University of Phoenix in Meridian.

It's clear Wayne comes to his new role with strong qualifications. As a Choice Plan representative, he will be educating members and employers on the importance of saving for retirement and explaining the benefit of supplementing the Base Plan through contributions to the Choice 401(k) Plan. Wayne's goal is to meet with every PERSI employer in the coming year to help answer questions and provide guidance on the best way to explain the Choice Plan to their employees as an additional benefit of being a PERSI member.

Wayne will coordinate with PERSI trainers Mike Mitchell and Melody Hodges on Choice Plan education and will meet with members during and following retirement workshops. (If you want to hold one of the 1½-hour workshops at your office location contact Mike at 287-9291 or Melody at 287-9292.)

## It Takes a Team

Building a strong rapport with employers through personal visits is something employers told PERSI they wanted. This means PERSI will not only tap into its trainers, but also its retirement specialists and others. By putting the PERSI /ACS educators "on the street" to educate employers and answer questions, PERSI hopes to increase interest in supplemental retirement savings and also elevate the knowledge of employers... which is where employees turn first with questions. Over the years, PERSI's IT team has enhanced the Web site to help employers. Having a trainer sit with an employer one-on-one to navigate the employer pages and demonstrate how easy it is to access the portal or download forms and materials, speaks to the personal attention employers like – and PERSI is glad to deliver. Yet another PERSI team is developing a checklist to assist employers with their reporting responsibilities. Meanwhile, Wayne, Mike, and Melody have teamed with Choice Plan Manager Diane Kaiser to develop additional employer and member materials and online tools.

The goal is to educate and assist every PERSI employer. Executive Director Don Drum has taken the lead. He scheduled meetings with employers throughout the state this summer to learn more about how PERSI can help employers explain retirement benefits to their employees. If you are interested in having Don visit your office, contact Cheri Campbell at 208-287-9237 or email her at [cheri.campbell@persi.idaho.gov](mailto:cheri.campbell@persi.idaho.gov).