



# NEWS TO USE

A newsletter for PERSI employers

June 2012

- Filing for Retirement
- Insurance Issues
- Organizational Changes
- Full Reporting Training
- IRIS Project: Update



## REMINDER: JULY 16 DEADLINE FOR RETIREMENT APPS.



Members can submit a retirement application at anytime; however for members planning an effective retirement date of September 1, 2012, time is of the essence.

Employers are asked to remind employees who are retiring to submit their application to PERSI on or before July 16, 2012 if they want to receive their benefit payments starting September 1<sup>st</sup>.

September is the most popular month for retirement. Three times more applications are processed for September retirements than for any other month throughout the year. If a retirement application is received after July 16<sup>th</sup>, PERSI cannot guarantee it will be processed in time for a September benefit. And for those who are purchasing additional service at retirement, the first benefit payment may be delayed a month or two.

Members with questions or who want more information, should call the PERSI Member Services Answer Center toll-free at 1-800-451-8228 or 208-334-3365 from the Treasure Valley area.

## PERSI CAN'T MAKE INSURANCE CHANGES

When employers refer employees to PERSI about insurance issues, it can create frustration because PERSI isn't able to help. *Employees should be referred to their insurer (e.g., Blue Cross) for changes of any kind.*



*PERSI is unable to stop, start or make changes to a member's insurance.*

## ORGANIZATIONAL CHANGES AT PERSI

PERSI implemented some organizational changes in recent months. A newly established Member Services Group was created with a single manager and two supervisors. Kimberlee Hall, former PERSI Answer Center supervisor, is now the manager of Member Services. Her area of management includes Retirement Services (member counseling) and the Member Services Answer and Processing Center (phones and document processing).

The Retirement Services area is supervised by Lisa Conn, former PERSI Processing Center supervisor.

Lisa oversees staff in the Boise office as well as staff in PERSI's two satellite offices in Pocatello and Coeur D'Alene. All of her staff meets with or provides direct service to members.

The Member Services Answer and Processing Center is led by Melody Hodges, former PERSI trainer. She oversees both the staff who answers calls coming into PERSI and the team who processes PERSI and member documents.

PERSI is in the process of hiring a new trainer to fill the vacancy created by Melody's promotion. Please assure

your employees the current workshop schedule available on the PERSI website will not change. Retirement Specialists are filling in until a new trainer is hired.

Reorganizing PERSI's customer service area was done to enhance the level of service provided to members. Other changes at PERSI include combining the Education and Communications staff into a single team and reorganizing the Fiscal Department, managed by Jim Monroe, to include the Choice 401(k) Plan staff. The

Employer Service Center (ESC), also part of the Fiscal Department, is still managed by Debbie Buck.

Over the coming months, PERSI will feature different departments in the newsletter so employers gain a good understanding of how PERSI is organized and get a feel for the responsibilities associated with each department. PERSI hopes this will help employers know where to seek help and where to direct their employees for assistance.

## FULL REPORTING TRAINING WORKSHOPS SCHEDULED

PERSI FULL REPORTING WORKSHOP - 2012		
SCHOOLS		
Date	Time	Location
Friday, June 22	10:00 am - 12:00 pm	Correctional Industries, Boise
Friday, July 13	10:00 am - 12:00 pm	Correctional Industries, Boise
Tues, July 17	10:00 am - 12:00 pm	Correctional Industries, Boise
Tues, July 24	10:00 am - 12:00 pm	Holiday Inn Express, Hayden/CdA
Thurs, Aug. 2	10:00 am - 12:00 pm	Correctional Industries, Boise
Tues., Aug 7	10:00 am - 12:00 pm	Lewiston Community Ctr, Lewiston
Tues., Aug 21	10:00 am - 12:00 pm	Red Lion Inn, Pocatello
Thurs, Sept 6	10:00 am - 12:00 pm	Correctional Industries, Boise
GENERAL EMPLOYERS		
Date	Time	Location
Friday, June 22	2:00 PM - 4:00 pm	Correctional Industries, Boise
Friday, July 13	2:00 PM - 4:00 pm	Correctional Industries, Boise
Tues, July 17	2:00 PM - 4:00 pm	Correctional Industries, Boise
Tues, July 24	2:00 PM - 4:00 pm	Holiday Inn Express, Hayden/CdA
Thurs, Aug. 2	2:00 PM - 4:00 pm	Correctional Industries, Boise
Tues., Aug 7	2:00 PM - 4:00 pm	Lewiston Community Ctr, Lewiston
Tues., Aug 21	2:00 PM - 4:00 pm	Red Lion Inn, Pocatello
Thurs, Sept 6	2:00 PM - 4:00 pm	Correctional Industries, Boise

Online registration is required for the Full Reporting workshops. Follow this link to register: <http://www.persi.idaho.gov/employers/workshops.cfm>

If you are unable to make it to a meeting for your group (School or General Employer), please register for a workshop you can make. It is important for ALL employers to get the necessary training before you begin full reporting and using the new IRIS system.



Progress continues to be made on the IRIS project. As a reminder, IRIS is the acronym for "Idaho Retirement Information System," PERSI's new pension administration system.

PERSI previously announced it will offer employer training sessions throughout the summer. Because full reporting is such an important

change, PERSI wants to ensure the new requirements and impact of the new eligibility tool are understood. (See schedule above.)

A letter will be going to employers in the coming days that includes a link to the software specs required to utilize IRIS for payroll reporting. PERSI is also conducting a survey to better understand employer needs. A copy will be included with the letter and be available via the PERSI website ([www.persi.idaho.gov](http://www.persi.idaho.gov)).

PERSI's goal is to begin implementing the employer transmittal component of the project in early 2013. The target

date for having all employers on the new system will be set after the surveys are assessed.

Another – and very important – area of focus on the IRIS project has been security. A full security plan is in development, which will address areas such as employer log-ins, passwords, and the confidentiality of member data. In the test environment, all data will be scrambled as a security precaution. PERSI anticipates system testing in August.

This is a busy time, so special thanks to employers for supporting PERSI during this time of change.