CRM Initiative Moving Forward

To build on the service-oriented tradition established by OPERS, Employer Outreach has initiated a Customer Relationship Management (CRM) program to enhance better continuity of service for employers. Here’s an overview of the CRM program and how it works:

The CRM Program

To help ensure the target level of service is delivered by the Employer Outreach staff when working with more than 3,200 employers, the CRM program was established. To begin, employers were organized by classification (such as township or county). This categorization of employers was based on the assumption that employers in the same category would likely have similar educational needs to direct to OPERS. Then, an Employer Outreach training specialist was assigned to each employer classification group to be the point of contact for training and educational needs on all topics that may be of concern for employers within their grouping. Topics include reporting compliance, form completion and submission requirements, retirement and disability processing, and legislative processes. The Outreach trainers sent a personal letter of introduction along with a business card to kick off the initiative.

Over time, employers and their designated trainers will build relationships so trainers will be able to anticipate employer needs. And, when anticipation isn’t possible, employers will know exactly who to contact for training and education needs.

First Steps

Initially, the CRM program was piloted in 2005 for training and education purposes only. Employers were grouped into these categories:

- Townships
- Villages
- Cities
- Counties
- Libraries
- Universities
- Hospitals
- Housing and Transit Authorities
- State of Ohio
- Miscellaneous

Each group was assigned to one of two Outreach trainers who were empowered to contact employers to discover the specific training and education needs—and then required to help structure training solutions to meet those needs.

Next Steps – Dedicated Customer Service Representatives

Going forward, the concept will be expanded. Employers can expect to meet their dedicated customer service representative via mail or phone. Outreach’s goal is to become an invaluable partner with you.

Employer Outreach Call Center Still Serves

Of course, sometimes you just need a form or a quick answer. You can still contact the Employer Outreach Call Center and opt to speak to the first available representative or utilize the 24/7 e-mail access.

However, when more personalized service or research is needed, employers will have the option of contacting their very own dedicated customer service representative who will have the personal and professional responsibility to resolve any issue or question—or work with you to identify your needs.
Electronic Distribution for Employer Communications (EDEC) Unveiled

At employer suggestion and after careful research, Employer Outreach is piloting a new program for Ohio public employers during the first four months of 2006—Electronic Distribution for Employer Communications (EDEC). As developed, the EDEC program provides employers with:

- More timely communications, because getting information to you electronically eliminates delays with printing and mailing.
- Availability, because online information can be simultaneously available to multiple users within an organization.
- Archival convenience, because electronic communication eliminates the need for costly storage space.

The EDEC Program

The Electronic Distribution for Employer Communications program is available for those employers who opt-in for this method of communication. If you notify us of your interest, you’ll be sent a program description to review and an agreement to sign that indicates you accept the responsibility for receiving all information electronically. This is an electronic-only application—an employer unit can only choose one form of distribution of employer communications. If an employer chooses electronic delivery, all contacts within that organization must receive information electronically—you will no longer receive a print copy of employer information.

We’ll also ask for an updated list of all current contacts for your organization. Employers are able to sign up multiple individuals or entire departments for electronic delivery. Once the employer-designated contacts are entered into OPERS’ database, they’ll receive an email notice letting them know the exact cut-off date for electronic delivery. When that happens, they’ll receive ongoing communications such as Employer Notices and the Employer Outreach newsletter via electronic delivery only.

Due to the operations-oriented information found in the Employer Notices, we’ll be sending them via email, but in the same format as they are mailed today. From the pilot program participants, however, will be in the electronic-friendly format of headline, synopsis and embedded link to the full article—providing you with the option of more information, when you want it.

Interested?

We’re targeting the EDEC pilot program to continue through April. During the month of April, we’ll gather suggestions from the pilot program participants. From their input, we’ll address issues and accommodate employer suggestion and after agreement to sign that indicates you accept the responsibility for receiving all information electronically. This is an electronic-only application—an employer unit can only choose one form of distribution of employer communications. If an employer chooses electronic delivery, all contacts within that organization must receive information electronically—you will no longer receive a print copy of employer information.

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I hope you’ll agree with me that much has been accomplished during the past six years we’ve worked together. Specific to employers, the Employer Reporting department has worked hard to partner with all employers so that the retirement contribution reporting and contribution payment process is easy to enhance timeliness and accuracy. In addition, they implemented innovative programs in the areas of training, communications and customer service to help ensure that you, their primary stakeholder, are kept up-to-date on all information that you may need.

On a more global level, I’m certain you’ll agree that the past six years have been action-packed. I would suggest the two biggest challenges OPERS faced were the volatile marketplace we experienced at the beginning of the century and the escalating health care costs, both of which emphasized throughout the nation. I believe that, in both arenas, OPERS has acquitted itself well.

OPERS weathered the three-year economic downturn of 2000–2002 and, by adhering to the Retirement Board—recommended long-term investment strategy, was positioned positively to take advantage of the strong markets of 2003-2005. Of course, I’m pleased with the investment results but I’m proud of the manner in which OPERS emerged from the challenges of a period of market decline.

The Retirement Board’s decisive action of implementing the Health Care Preservation Plan (HCPP) was also a milestone. Although not mandated, the Retirement Board recognized the importance of health care coverage to the financial status of OPERS retirees. They also recognized that health care coverage, although not guaranteed, is a strong recruitment tool for employers. Therefore, the far-reaching action of approving the HCPP was significant in that it will help OPERS extend the Health Care fund’s solvency period.

Laurie Fiori Hacking: Minnesota Bound

By the time you receive this publication, I will have started my new position as executive director for the Minnesota Teachers Retirement Association. However, because the employer group is such an important stakeholder and partner, I’d like a few moments of your time for a personal farewell.

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Best wishes for a productive and healthy 2006—and beyond.

HOMETOWN: Madison, WI
EDUCATION: University of Wisconsin, Madison; Bachelor’s of Science
DREAM JOB: “After 22 years of working in public pension systems, the dream job would be serving as a consultant for public pension systems across the nation.”
CAREER PHILOSOPHY: “The responsibilities of those who work in the public pension arena are significant. We must protect this service that touches so many lives. My goal is to never lose sight of the fact that our actions today will profoundly impact the financial security of future generations.”

Inside OPERS

Why would anyone choose to leave a fulfilling career position, situated in a city with world-class educational, recreational and cultural activities? Julie Reneau, director of benefits at OPERS, is quick to point out that in “my mind, I wasn’t leaving; I was joining. I chose to come to OPERS almost 14 months ago because of the strong commitment to member services and benefits that I discovered here.”

She explains, “I really wasn’t looking for a new opportunity, but a colleague encouraged me to come out, just for a visit. Well, one visit became three, and I was visited more impressed each time I came to OPERS. In many ways, this is my dream job—not only because of the OPERS emphasis on member services and retiree benefits—but also because of the commitment of resources to support that emphasis.

With almost two decades of experience within the public pension arena, Reneau is uniquely qualified for the director of benefits position. During her career, Reneau has worked in increasingly more responsible positions; most recently, she served as administrator of the Division of Retirement Services at Wisconsin’s Department of Employee Trust Funds. There, she managed five departments and a staff of 100, with responsibilities that included all benefits and service delivery, board relations, and strategic communications.

As OPERS’ director of benefits, Reneau has again accepted more career responsibility. She works with a staff of more than 220 and directs the activities of five areas: Benefits Administration, Defined Contributions, Member Services, Communications, and Issue Resolution (an ombudsman service that handles employment complaints and, when finding systemic issues, recommends broad solutions). Simply put, Reneau’s areas of responsibility touch every OPERS member, retiree and beneficiary—the very folks for whom employers have contributed and reported through OPERS’ history.

Working closely with her department heads, Reneau’s cites her main goal as stepping up the customer focus. “This is not a big-bang approach, but a constant evolution of how we can improve what we do so that services, accuracy and efficiency are all enhanced.”

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The Reneau family resides in the Westerville area. As a career-oriented mother of three, Reneau’s leisure time is somewhat limited. However, she notes that she loves to cook and share the results by entertaining friends, but balances that activity with a variety of fitness activities. Her current fitness pursuit is training in earnest for the Chicago Marathon slated for October.
One Stop Shop For Employers

Employer Reporting has nearly 50 employees to professionally and accurately serve Ohio’s 3,200 public employers. What exactly, does the Employer Reporting department encompass? Working to serve as a partner for all public employers, Employer Reporting is comprised of three areas:

• Employer Outreach
  This is the section with which employers interact most often, Employer Outreach handles employer training (seminars, on-sites and one-on-one) and communications via the support of the Employer Call Center.

• Payments and Compliance
  Payments and Compliance group handles employer refunds are also processed Employer account receivables and prelist monthly retirement contribution reports are routed and reviewed for accuracy. Data Maintenance also processes enrollment records and exemption forms, and sets up nearly 40,000 new member accounts every year.

• Data Maintenance
  Led by supervisor Mark Newman, this group most recently steered Ohio’s public employer population through the contribution reporting accuracy standards project, and continues to design ongoing enhancements to the electronic Employer Contribution System (ECS).

New for 2006, the Employer Outreach group is piloting an electronic distribution project for Employer Communications (EDEC) project will result in more timely communication of OPERS information to all employers who choose to receive publications via the electronic distribution channel.

Employer Outreach is also rolling out a customer service initiative this year to provide every employer a designated service representative for their retirement educational needs and questions (see related article on page 1 of this newsletter).

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What’s in a name? Contribution Reporting is now officially known as Employer Reporting. OPERS management recognized this is the section with which employers interact most often, Employer Outreach handles employer training (seminars, on-sites and one-on-one) and communications via the support of the Employer Call Center.

Employer Reporting: New Name, New Initiatives

What’s in a name? Contribution Reporting is now officially known as Employer Reporting. OPERS management recognized that the title of Employer Reporting better reflects the group’s breadth of interactions with employers.

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Electronic payments are completely secure; OPERS uses the same security as credit card companies and financial institutions.

Using the ECS online payment system saves you time—you’ll find there’s less paperwork than with a paper payment that may help you eliminate delinquency penalties as well as save you the cost of producing a paper check for remittance.

In addition, the ECS online payment system is flexible; you have the ability to:

- Correct any errors you might find,
- Schedule payments in advance, cancel a payment, and view your payments.

To find out more about how online payments can make a difference in contributing retirement payments report a (or click as it were), contact your Employer Outreach representative today.
Alterations Not Accepted

Employers are reminded that altering or changing standard OPERS forms is not acceptable. We’ve found when forms are modified, the changes frequently eliminate necessary information—slowing processing time as staff attempts to decipher the employer’s actual intent. Some modifications being made by employers are even rendering the form invalid. OPERS has a committee of representatives that review all forms and make necessary modifications to conform with changes in state and federal law.

Feedback Forum

Since we know you may have ideas on how to make some of OPERS’ forms more user-friendly, we’ve created a forms feedback mechanism for you. The next time you request an OPERS form from the OPERS Web site, take a moment to find the feedback icon located on the request page, highlighted on the screen shot to the right:

Simply click on this icon and follow the prompts to give us your thoughts and ideas about the OPERS forms you use every day. We encourage you to take a moment to let us know what’s working and what’s not—and be as specific as you can.

What happens then? Your input will be gathered and reviewed. Every month, the OPERS Forms Committee meets and reviews the forms used by employers, members, and retirees. With your feedback, the committee will have the advantage of input from the individuals and organizations that actually use the forms.

Need Contribution Verification Information Fast?

Let’s face it; sometimes you simply need information and the quicker, the better. Employers frequently contact us to request a verification of contributions—usually because your organization is having an external audit. When you need a verification of contributions, you can save time by sending your request for verification of contributions directly to the attention of the Payments and Compliance Department. Here’s the address for direct routing and faster turnaround:

OPERS
ATTN: Payments and Compliance
277 E. Town St.
Columbus, OH 43215

Annual statements vs. W-2 forms: Which one is accurate?

Employers may be getting questions from employees who notice a discrepancy between their OPERS annual statements (slated to be mailed in March/April) and their W-2 forms generated by their employer. The answer is...both forms can be correct, even if each shows a different amount for wages earned. Here’s why:

• The OPERS Annual Statement will reflect the salary amount earned in a given year, regardless of when wages were actually paid. Employees may have the situation where the first paycheck paid in January 2006 was for a payroll period ending in December 2005.

• The W-2 required by the Internal Revenue Service will show the wage amount actually paid in a given year. So, that same bi-weekly pay that shows up in January 2006 isn’t counted as 2005 income.