



EMPLOYER Outreach

Ohio Public Employees Retirement System • 277 East Town Street • Columbus, Ohio 43215 • 1-888-400-0965 • www.opers.org

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. ▲



Ron Culpepper, one of Employer Reporting's CRMs, is shown here with Virginia Avery (L) and Christy Ahrens (R) from Beavercreek Township, Greene County, an employer in the small employer category.

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Update: Pilot Project

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 important distinction—an employer unit can only choose one form of distribution of employer communications. If an employer chooses electronic distribution, 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 cutover date for electronic distribution. 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 currently produced. The newsletter, 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 input from the pilot program participants. From their input, we'll address issues and accommodate suggestions where possible. Beginning in May 2006, electronic distribution will begin for all employers who have contacted OPERS and submitted their contact distribution list to OPERS. Contact Employer Outreach and sign up today to be a part of this exciting new feature of communication. ▲

Inside OPERS

Opts For Ohio

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 more and 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 served 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 escalated 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."

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.

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 processes were improved 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

experienced 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.

As I leave, I think it's important to recognize the collaborative efforts of the Retirement Board, the OPERS leadership team and staff, the legislature and the thousands of employers, members and retirees who have volunteered for pilot projects, focus groups or offered up individual input. I salute your efforts and willingness to work together. It's safe to say that working together, virtually every challenge was met with innovative and effective solutions—I urge you to continue that winning tradition.

On a more personal note, please accept my thanks for a wonderful six years here in Ohio. I leave knowing you're in good hands with the very talented OPERS Leadership Team in place, led by Blake Sherry who has graciously agreed to serve as interim executive director. They will work with the dedicated OPERS Retirement Board so that the very best services and benefits that available resources can provide are delivered to your employees and retirees.

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

Laurie Fiori Hacking



Julie Reneau is shown at Port Columbus International Airport, an OPERS-reporting employer.

HOMETOWN: Madison, WI

EDUCATION: University of Wisconsin, Madison; Bachelor's of Science

DREAM JOB: "After 22 years of working in public pension systems, they're in my blood. My 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." ▲

News You Can Use

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.

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.

Supervised by Patti Brammer, 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-oriented publications. It's anticipated the Electronic Distribution 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).

- **Data Maintenance**

Led by supervisor Mark Newman, this team is responsible for all retirement contribution report data and member accounts. This is where paper 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.

- **Payments and Compliance**

As its name would imply, the Payments and Compliance group handles all check, wire transfer and EFT payments made into the System. Employer account receivables and employer refunds are also processed here. This group consists of the experts who work with employers to help resolve employee membership questions and other tax or reporting compliance issues that arise. ▲

Mailbox Topic: Overpayments

Q: How Do I Correct An Overpayment I Sent To OPERS?

It's amazing how often an overpayment situation occurs, especially now with the usual year-end issues and this year with the 2006 contribution rate increase. Here's all you need to know to correct an overpayment situation.

Overpayment of Employer's Contribution:

When you discover an overpayment of the employer's contribution has occurred, contact Employer Outreach to notify OPERS of the overpayment. OPERS staff, upon reconciliation of your retirement report may also discover the overpayment. In both scenarios, the overpayment amount will be noted on your next Account Summary.

Please be aware that the overpayment will be held at OPERS as a credit on your account and will appear in the Account Credits section of your summary. This credit amount does not reduce the *Liability Due on mm/dd/yy*, which reflects your current amount due, but is included in the amount indicated as *Balance as of mm/dd/yy*. Any credit amounts should be used to reduce your next remittance of employer liability.

Overpayment of an Employee's Contribution:

If you discover you've overpaid an employee's retirement deduction, you'll need to complete the *Return of Unauthorized Contributions* form (F103). If OPERS finds the overpayment, we'll give you a call to let you know we are initiating a return of contributions. The refund will be sent to you to forward on to the employee.

Why Did the Overpayment Happen?

There are many reasons for over payments, but the situation seems to happen more as employers work to close their books to meet end-of-year requirements. This year, many employers' last pay period of 2005 was actually paid to employees in early January. Because OPERS requires contributions

to be remitted when they are earned, not when they are paid, this resulted in an overpayment of contributions because the 2006 increased contribution rate was withheld even though the pay period(s) ended in December.

Is there a particular area you'd like to see covered in an upcoming Mailbox? Let us know by contacting Employer Outreach with your question. ▲

Answer:

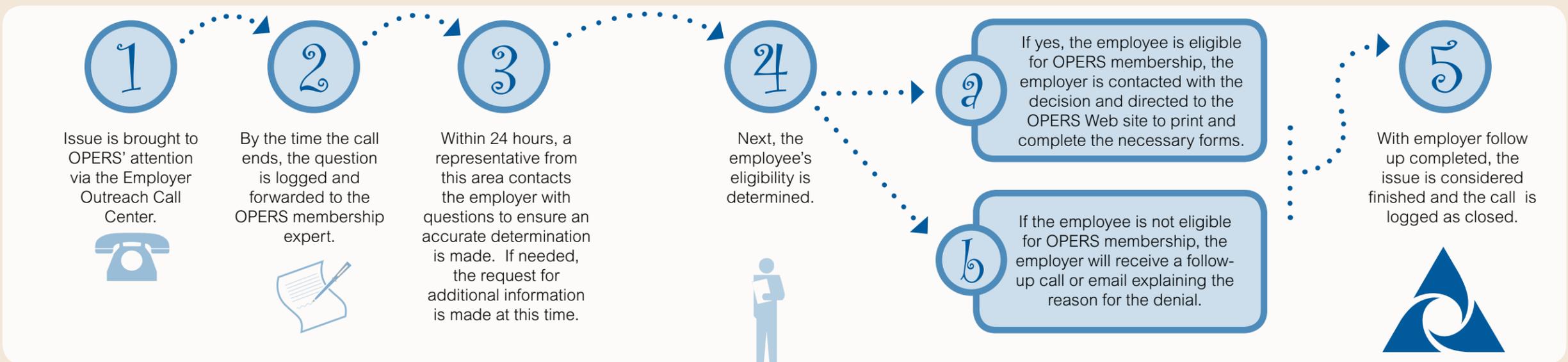
The average life of a basic employer issue at OPERS is about two and a half days; more complex issues may take slightly longer as expertise from other OPERS areas is sometimes required.

Question: What is the life cycle of an employer question at OPERS?

The diagram on the right outlines the life cycle of an issue or question when it comes to the Employer Reporting department.

Let's take for example:

A basic call from an employer seeking assistance in determining if an employee is eligible for membership in OPERS. Related concerns center around the manner in which retirement contributions must be withheld:



ADDITIONAL PURSUITS

As part of the ongoing service offered by Employer Reporting, the new Customer Relationship Management (CRM) initiative will have staff reviewing all call logs for repetitive questions. They'll also look for recurring issues and work to offer more topic-specific education and/or communications to address those items that matter most to employers.

Online Payments In Your Future?

In the financial services industry, online payments are the way of the future. Access to and use of electronic remittance of payments due vendors and other institutions is gaining in popularity, and OPERS offers this capability as well.

A few online payment facts:

- Since the online payment capability was added to ECS in 2004, almost 20% of all employers have elected to use this option for payment remittance.

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

- Using the ECS online payment option saves you time—you'll find there's less paperwork than with a paper payment.

- Online payments may save you money; with one click you can make a 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 OPERS online payment capability is flexible; you'll always 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 your retirement contribution reporting a snap (or a click, as it were), contact your Employer Outreach representative today. 📍

Employer Honor Roll

Final 2005 Honor Roll posted

Congratulations to the employers listed below that signed up for ECS during the FOURTH QUARTER of 2005 (October-December), earning ECS Honor Roll Status:

THESE EMPLOYERS SIGNED UP FOR REPORTING AND PAYMENT VIA ECS:

Ashtabula Metropolitan Housing Authority
Auburn Township
Battle Run Fire District
Berkshire Township
Brookfield Township
City of Beachwood
City of Celina
City of Hubbard
City of Maple Heights
City of Martins Ferry
City of Massillon
City of Warren
City of Xenia
Cleveland Area Metro Library System
Corrections Commission of Southeast Ohio
Coventry Township
Dillonvale-Mt. Pleasant Waste Water District
Evergreen Union Cemetary
Green Township
Hamilton County Public Library
Harrison Township
Henry County
Hocking Metropolitan Housing Authority
Lawrence Township
Liberty Township
Logan County Law Library
Madison Township
Milton Township
New Madison Public Library
North Canton Public Library
Northeast Champaign County Fire District
Ohio Housing Finance Special Payroll
Pickaway County
Portsmouth Public Library
Sandusky County
Shelby County
Stark County District Library
Tri Division Ambulance District
Village of Brewster
Village of Byesville

Christine F. Gregory
Susan M. Plavcan
Tammy L. Riley
James E. Smith
Sylvia L. Addicott
David A. Pfaff
Patrick T. Smith
Jo Ann Oakes
Kathleen A. Klipan
Betty A. Kinnan
Patricia A. Pentello
David N. Griffing
Bill McCarthy
Mary E. Powers
Michelle Jewell
Joanne M. Murgatroyd
Ramona L. Rensi
Tammie L. Brown
Debra A. Middleton
Molly D. DeFosse
Tammy L. Faucett
Alana E. Meyer
Mary R. Colliton
Jerrilyn R. Kirkbride
David L. Gwilliams
Dorothy R. West
Barbara D. Adams
Leni Schulz
Kimberly A. Chowning
Farilyn M. Buchman
Sally A. DeLong
Laura Miller
Lisa A. Burroughs
Linda S. Woods-Jones
Linda S. Cole
Amy M. Hausfield
Russell E. Humerickhouse
Betsy A. Tomblin
Karen K. King
Tracey D. Cain

Village of East Sparta
Village of Germantown
Village of Loudonville
Village of Maineville
Village of Nashville
Village of New Richmond
Village of Oakwood
Village of Republic
Village of Walbridge
Village of West Jefferson
Wayne Township

THESE EMPLOYERS SIGNED UP FOR THE REPORTING FUNCTION OF ECS:

Adams County Hospital
Allen County
Ashtabula County Airport Authority
Ayersville Water & Sewer District
Bloom Township
Cambridge Public Library
City of Berea
City of Broadview Heights
City of Brunswick
City of Cleveland Heights
City of Defiance
City of Eastlake
City of Fairlawn
City of Fairview Park
City of Geneva
City of Lyndhurst
City of Macedonia
City of Marion
City of Milford
City of New Philadelphia
City of North Olmsted

John L. Rice
Rebecca S. Jamison
Sandra L. Lavengood
Melissa Miracle
Donna L. Barnes
Donna J. Hammons
Monique M. Nelson
Teresa L. Sutter
Patricia A. Crawford
Jack R. Herrel
Mary J. Westfall

Angel D. Osman
Anthony M. Stechschulte
Betty R. Cochran
Hope Okuly
Maurice I. Hines
Richard E. Goodwin
Janice M. White
Elizabeth L. Hale
William M. White
Patti A. Wilhelm
Marlene B. Cripe
Lynne J. Gilles
Theresa A. Rowland
Merlyn Santiago
Mary A. Hill
Jackie K. Kincade
Maggie M. Osysko
Barbara A. Rissland
Keely S. Wharton
Peter W. Metropulos
Tracy A. Mason
Janie Moore
Harry D. Steger
Cathy J. Casebeer
Danielle Fusco

Employer Honor Roll

THESE EMPLOYERS SIGNED UP FOR THE REPORTING FUNCTION OF ECS:

City of Northwood
City of Norwood
City of Olmsted Falls
City of Parma Heights
City of Shaker Heights
City of Solon
City of South Euclid
City of Vermilion
City of Washington Court House
City of Waverly
City of Willowick
City of Wilmington
Clay Township
Cleveland Law Library
Coal Township
Cumberland Trail Fire District
Dayton Metro Library
Garrettsville-Freedom-Nelson JFD
Green Township
Hartland Township
Highland Township
Holmes County
Hubbard Township Park Commission
Jackson County
Jefferson Township
Lebanon Correctional Institute
Liberty Township
Lorain County Metropolitan Parks
Loudonville Public Library
Madison Township
Mahoning and Columbiana Training Assoc
Marion Public Library
Mason Township
Massillon Public Library
Mechanic Township
Medina Public Library
Mercer County District Library
Miami County
Milton Township
Monroe Township
Montville Township
Morgan County
Nelsonville Public Library
Ohio Building Authority
Ohio Public Defender Commission
Ohio State Board of Pharmacy
Ohio Veterans Home
Paulding County
Paulding County Library
Perry County
Pickaway Correctional Institute
Pickaway County Public Library
Pike County
Richland Correctional Institution
Rome Township
Ross County
Rossford Public Library
Southwest Mercer Fire District
Springfield Metropolitan Housing Authority
Sycamore Community Library
Sylvester Memorial Public Library
Toledo Law Association
Trimble Township Waste Water Treatment

Sandra L. Welch
Laura K. Zimmerman
Sharon K. Mansfield
Betty Ruscitti
Frank K. Brichacek
Fred J. Wendel
Joseph G. Filippo
Marsha L. Earls
Tom L. Riley
Terra J. Thornsberrry
John E. Simmons
Mary Kay Vance
Sharon D. Miller
Leslie A. Hall
Karen K. Fulton
Darlene A. Pempek
Kenneth Basista
Tracy L. Brunner
Donald E. Dravenstott
Sandy L. Motolik
Cheryl J. Cross
Jessica D. Ellis
Arlene S. Angelo
Brenda L. Preston
Sandra C. Best
Ed F. Sauer
Kathryn J. Gulbis
Denise Thompson
Susan L. Burwell
Myron T. Miller
Maryellen E. Sandor
Cheryl A. Corbin
Richa Shepherd
Marcy J. Holm
Daniel L. Muse
Judith A. Scaife
Connie K. Pifer
Sharon E. Feltner
Douglas E. Pauly
Charlie L. Sheller
Mary Pawlowski
Jenny Cordray
Stephen P. Hedges
Kevin T. Fenlon
Vincent M. Conner
Karen E. Prather
Robert D. Day
Darlene R. Jordan
Wilma S. Mullins
Diana K. Shriner
Elizabeth A. Thompson
Angela K. Agosta
Teddy L. Wheeler
Gayle L. Bowling
Jeanette M. Gage
Mary J. Greene
Cynthia L. Hollie-Selz
Pamela A. Hicks
Sandra M. Hiltibran
Sue L. Schafer
Anita B. McManus
Kathy P. Thomas
Joy J. Hemsley

Tuscarawas County Public Library
Village of Addyston
Village of Alexandria
Village of Antwerp
Village of Arcanum
Village of Bloomville
Village of Bluffton
Village of Bradner
Village of Bratenahl
Village of Cuyahoga Heights
Village of Fort Recovery
Village of Glenmont
Village of Gratis
Village of Groveport
Village of Hartville
Village of Haskins
Village of Highland Hills
Village of Jeromesville
Village of Moreland Hills
Village of Newburgh Heights
Village of Newcomerstown
Village of Oak Hill
Village of Peebles
Village of Phillipsburg
Village of Pleasantville
Village of Powhatan Point
Village of Reminderville
Village of Sabina
Village of Shreve
Village of South Zanesville
Village of Urbancrest
Village of Walton Hills
Village of West Farmington
Village of Yellow Springs
Vinton County
Violet Township
Wayne Township
Wheeling Township
Williams County Public Library
Windham Township
Windsor Township
Wood County District Library
Worthington Public Library
Youth Services - Freedom Center
Zanesville Metropolitan Housing Authority

Jeremy J. Hines
Margaret A. Dozier
Judy L. Reid
Carole J. Fillmore
Lori A. Huffman
Amy L. Alt
N. Jill Caskie
Janice A. Stump
W. James Gallagher
Barbara A. Lepkowski
Janet L. McCain
Ed R. Stivers
Olivia A. Hill
Amy M. Hartung
Anna M. Erb
Lisa D. Heft
Delores Safford
Karol A. Lapp
Claudette E. Pesti
Marge Lanzola
Terry R. Veselenak
Linda K. Grubb
Shelia A. Browning
Brenda K. Etter
Kathryn E. Jenkins
Pauletta F. Petho
Linda R. Baker
Karma J. Henson
Gloria J. Yockey
Charlene K. Watts
Jean Y. Hines
Janet M. Pavlic
Jacqueline P. Mitton
Peggy R. Alexander
Christy E. Reed
Jim E. Van Kannel
Rose M. Bates
Delma D. Staser
Kathleen F. Whitman
Jayme M. Neikirk
Carla A. Slusher
Linda K. Joseph
Karen W. Bell
Mona D. Reed
Teresa A. Brandford

THESE EMPLOYERS SIGNED UP FOR ONLINE PAYMENT CAPABILITY:

Firelands Ambulance Service
Franklin Public Library
German Township
James A. Rhodes State College
Jefferson Emergency Rescue District
Medical University of Ohio at Toledo
Moorefield Township
New Holland Union Cemetery
Rockford Carnegie Library
St. Marys Public Library
Toledo-Lucas County Criminal Justice
Village of Georgetown
Village of Gloria Glens
Village of Green Springs
Village of Navarre
Village of New Knoxville
Village of West Liberty

Tammy L. Montgomery
Teresa Kohl
Peggy D. Hupp
Kari M. German
Julie A. Stansfield
Donna S. Gibson
Janet L. Dyer
Mavis L. Yourchuck
Robert P. Maurer
Robert P. Maurer
Lisa M. Noel
Ginny L. Colwell
Sheri L. Potter
Daniel L. Reese
Maryann Heestand
Janet F. Hall
Cindee M. Boyd

GOLD STARS AWARDED FOR IMPLEMENTING NEW REPORTING ACCURACY STANDARDS

Kudos to the employers listed below for attaining gold-star status. These employers were the first in their category (small, medium, large) to successfully submit a retirement contribution report using the new accuracy standards that became effective in November 2005. Bravo and thank you for your hard work!

SMALL EMPLOYER ENTITY (fewer than 100 employees) Top five STAR PERFORMERS:

Johnson Township, Champaign County
Ross Township, Greene County
Danbury Township, Ottawa County
Monterey Township, Putnam County
Jerome Township, Union County

MEDIUM EMPLOYER ENTITY (between 101-1,000 employees) Top five STAR PERFORMERS:

City of Cuyahoga Falls
City of Youngstown
Hamilton County Public Library
Greater Dayton Regional Transit Authority
Clinton County Memorial Hospital

LARGE EMPLOYER ENTITY (more than 1,000 employees) Top five STAR PERFORMERS:

Youngstown State University
Summit County
City of Cleveland
Greater Cleveland Regional Transit
City of Toledo

Info to Go

Changes on OPERS Forms

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.

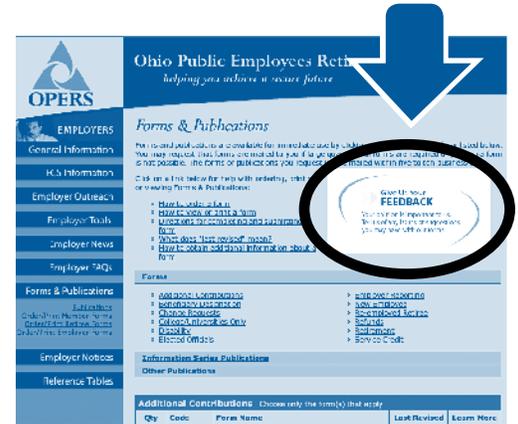
Feedback Forum

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. ▲

This newsletter is written in plain language for use by public employers who are subject to coverage under the Ohio Public Employees Retirement System. It is not intended as a substitute for the federal or state law, namely the Ohio Revised Code, the Ohio Administrative Code, or the Internal Revenue Code, nor will its interpretation prevail should a conflict arise between it and the Ohio Revised Code, Ohio Administrative Code, or Internal Revenue Code. Rules governing the retirement system are subject to change periodically either by statute of the Ohio General Assembly, regulation of the Ohio Public Employees Retirement Board, or regulation of the Internal Revenue Code. If you have questions about this material, please contact the Employer Outreach Office at 888-400-0965, or seek legal advice from your attorney.



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