

Ohio PERS

NEWS

Your Benefit Connection

News and information for retired members of the Ohio Public Employees Retirement System

Three elected to Board of Trustees

There will be three new trustees on the Board beginning in 2015. Charles Latsa, Christopher Mabe and Steve Toth will join the board after winning their respective elections.

passed the Certified Public Accountant and Certified Financial Planner examinations, and also has served as a director of the State Transportation Employees Credit Union.

Mabe ran against current Board member Matt Schulz as state employee representative. Mabe is a correctional counselor at the Lorain Correctional Institution and has served as president of the Ohio Civil Service Employees Association since 2011.

Toth ran against incumbent Board member Sharon Downs as a retiree representative. Toth is an OPERS retiree with 30 years of service in human resources administration and is a member of Public Employee Retirees Inc.

All four trustees will begin four-year terms on Jan. 1.

The governor's appointed investment representative position has not yet been filled after the resignation of Frank Ciotola in April.

Incumbent municipal employee representative Ken Thomas ran unopposed for his seat.

Latsa will replace Heather Link, who did not run, as representative for non-teaching college and university employees. Latsa works as applications manager of Student Administrative Systems at Cleveland State University. He has

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2014 Form 1099R and Benefit Recipient Tax Guide

OPERS will mail Form 1099Rs for tax year 2014 by Jan. 31, 2015. Retirees should expect to receive their Form 1099R by Feb. 15, 2015. **If you wish to access your 1099R prior to receiving it in the mail, you can do so by logging into your OPERS online account after Jan. 23, 2015. Once in your online account, click on "Documents."**

OPERS will not be sending a paper copy of the Benefit Recipient Tax Guide with your Form 1099R. The publication will still be available to view and print on the OPERS website, www.opers.org, or you can contact OPERS to request a paper copy by mail on or after Jan. 31, 2015.

UPDATE for OPERS disability benefit recipients

OPERS NEWS – Your Benefit Connection

is a quarterly newsletter providing news and information to more than 160,000 age and service retirees, disability benefit recipients and survivor benefit recipients of the Ohio Public Employees Retirement System. This publication allows us to communicate vital information concerning retirement benefits and health care coverage to our retirees and also educate them on the services we provide.

CONTACT INFORMATION:

www.opers.org

1-800-222-7377

Monday - Friday

8 a.m. to 4:30 p.m.

newsfeedback@opers.org

It is your responsibility to be certain that OPERS has your current address on file. If OPERS is not made aware of address changes, we cannot guarantee that you will receive important information pertaining to your OPERS account.

This newsletter is written in plain language for use by members of 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 our office or seek legal advice from your attorney.

OPERS is not required to provide health care coverage to retirees or their dependents and will only do so at the discretion of the Board of Trustees.

Continued Medical Treatment

For those disability benefit recipients approved for a benefit with Continued Medical Treatment by the Board of Trustees in June 2014 or after, your Continued Medical Treatment will be monitored by either OPERS or Managed Medical Review Organization (MMro), OPERS' third party administrator.

If you elected to participate in rehabilitative services, your continued medical treatment will be monitored by MMro as part of your rehabilitative services program. If you did not elect to participate in rehabilitative services, your continued medical treatment will be monitored by OPERS. A Continued Medical Treatment Form will be due every six months for the first three years following your benefit effective date. You will receive the first form four months following the initial board decision and the form will be due to OPERS six months following the decision.

Periodic Reviews (formerly Annual Reviews)

The annual medical review process will change for disability benefit recipients who applied prior to Jan. 7, 2013 and all law enforcement officers regardless of their disability application date. The review will be done as necessary, but will occur no later than three years from the benefit recipient's most recent board decision. OPERS will notify these recipients via letter when information is needed for their medical review as well as when an in person examination is needed.

Rehabilitative Services

MMro is reaching out to disability benefit recipients who have elected to participate in rehabilitative services. MMro is currently creating a case management plan for each recipient and is providing them with information about what to expect. Disability benefit recipients who applied for the benefit on or after Jan. 7, 2013 and have either not made a selection or have elected not to participate in rehabilitative services will be given another opportunity to elect to participate in the program and will be contacted by MMro.

Participation in the rehabilitative services program is voluntary. However, OPERS believes the program provides many advantages. All medical and vocational information acquired through the rehabilitative services program may be used in the determination of continued eligibility for a disability benefit. If you have any questions please feel free to contact MMro at 1-866-516-6676.

OPERS offers options for receiving important information

Do you spend an extended period of time away from your permanent address each year? If so, OPERS offers an automated online process to change your mailing address temporarily while leaving your permanent address intact and on file with OPERS.

When retirees log into their account through opers.org, they have the option of indicating a “permanent” address and a “mailing” address. When there are two different addresses within a retiree’s account, our system is designed to send mail to the mailing address. Most of our publications are sent at a bulk rate and therefore, will not be forwarded.

The best way to be sure you receive all OPERS mailings is to update your “mailing” address online when you are going to be away from your permanent address for more than a couple of weeks. Once you have returned to your permanent address, simply go online, log into your account and make your mailing address the same as your permanent address.

Changing your mailing address has no impact on how taxes are taken out of your benefit check or how health care coverage is administered. These items are dictated by your permanent address.

OPERS also offers you the option to set your correspondence preference to either “Electronic” or Mail”. Account specific information will always be sent by mail, but this feature allows you to choose between electronic or mail delivery for general publications.

Both of these features can be accessed by logging into your online account. If you haven’t yet registered for an online account, you can do so quickly and easily by visiting www.opers.org.

OPERS Educational Opportunities

Seminars - The OPERS education staff presents seminars on a regular basis throughout the state. The 2015 seminars listed below will include a Medicare presentation by an Ohio Seniors Health Insurance Information Program representative and a Connector Readiness presentation by an OPERS educator. You can register for a seminar through your online account by selecting “Tools and Resources” then “Seminars and Counseling” or by calling OPERS.”

2015 Seminars

Reynoldsburg - Jan. 7
Independence - Jan. 8
Perrysburg - Jan. 14
Cuyahoga Falls - Jan. 15
Youngstown - Jan. 20
Lima - Jan. 22
Sharonville - Jan. 28
Columbus - Jan. 29
Athens - Feb. 11
Zanesville - Feb. 25
Dayton - March 11
Cincinnati - March 25
Bellville - April 15
Columbus - April 29
Strongsville - May 6
Sharonville - May 13
Mentor - May 20

Webinars and recorded presentations

OPERS conducts weekly, “live” webinars to provide our membership with an understanding of the upcoming changes to retiree health care coverage. Visit www.opers.org and click on “Seminar Options” under the heading of “Retirees” to register for webinars. OPERS has also made available some recorded presentations. These presentations cover a variety of topics and can be found by visiting www.opers.org and clicking on “Seminar Options” under the heading of “Retirees” to view available recorded presentations.



Ohio Public Employees
Retirement System

277 East Town Street Columbus, OH 43215-4642

Ohio PERS

NEWS

YOUR BENEFIT CONNECTION

PRSRT STD
US POSTAGE

PAID

COLUMBUS OH
PERMIT NO 177

2015 benefit payment schedule

Pension benefit payments will be issued on the first business day of the month. If that day falls on a weekend or holiday, payments will be issued on the last business day of the previous month (except January when, for tax purposes, the payment must be issued on the first business day of the month). 2015 payment dates are listed at right.

2015 Benefit Change Notices

Each time your pension amount changes, OPERS issues a Benefit Change Notice. Most retirees will see a difference in their pension amount due to health care premium changes in 2015. You will receive a Benefit Change Notice reflecting the difference in January. If there are tax changes resulting in a change in your pension amount, you will receive a Benefit Change Notice reflecting these changes in February. You will also receive a Benefit Change Notice when you receive any cost of living adjustment. Remember, you can log into your online account at any time to see your current benefit amount as well as any deductions.

2015

January 2, 2015

January 30

February 27

April 1

May 1

June 1

July 1

July 31

Sept 1

October 1

October 30

December 1

OPERS Board of Trustees

Elected Board Members

Sharon M. Downs
Retired Members

Heather Link
State College and
University Employees

Sean Loftus
County Employees

John W. Maurer
Retired Members

Matthew Schulz
State Employees

Cynthia Sledz
Miscellaneous Employees

Ken Thomas
Municipal Employees

Statutory Board Member

Bob Blair
Director, Department of
Administrative Services

Appointed Board Members

Vacant
Investment Expert
Governor Appointee

Robert Smith
Investment Expert
Treasurer of State
Appointee

James R. Tilling
Investment Expert
General Assembly
Appointee

Karen Carraher
Executive Director

The 11-member OPERS Board of Trustees is responsible for the administration and management of OPERS. Seven of the 11 members are elected by the groups that they represent (i.e., college and university non-teaching employees, state, county, municipal, and miscellaneous employees, and retired members); the Director of the Department of Administrative Services for the state of Ohio is a statutory member, and three members are investment experts appointed by the Governor, the Treasurer of State, and jointly by the Speaker of the Ohio House of Representatives and the President of the Ohio Senate.