



MSBO
Office of Retirement Services (ORS)
Processors Workshop
MELG Building – Onsite or Webinar
Monday, September 25, 2017

Agenda

- 8:00 am **Registration**
- 8:30 am **Setting the Stage**
Presenter(s): Robert Dwan, MSBO
- 8:40 am **Reporting Tips**
Presenter(s): Kathleen Hamilton and Peggy Liepa, Payroll Advisory Team (PAT)
Creating bi-weekly “to-dos”
Updating pay and contracts *before* uploading reports to ORS
“Cheat sheet” for matching your deduction codes to ORS rates
Preventing ORS errors *before* you finalize pay
Reconciling download details *before* making timely payment to ORS
Employee defined contribution (DC) election before first paycheck
Reconciliation when going from Pension Plus Plan to DC
- 9:30 am **Hire Processing Procedures – New Hires and Retirees**
Presenter(s): Bobby Hoppes and Josey McCloud, ORS and Elizabeth Eastway, PAT Member
Information needed for hires
Benefit plans and selecting options
Deadlines
Exceptions
- 10:00 am **Break**
- 10:15 am **Reportable/Nonreportable Compensation Issues**
Presenter(s): Bobby Hoppes and Josey McCloud, ORS
Post-employment payments – early retirement incentives
Normal salary increases
Other compensation reporting
- 10:45 am **Returning to Work – Retirees, Core Services, and Critical Shortage**
Presenter(s): Bobby Hoppes and Josey McCloud, ORS and Elizabeth Eastway, PAT Member
Employment class and wage codes
Income reporting: Reporting Instruction Manual Chapter 9
- 11:15 am **Staff Training and Communications**
Presenter(s): Bobby Hoppes and Josey McCloud, ORS
Staff training suggestions on MiAccount
Working with other staff representatives (unions etc.)
Updating ORS contacts
General communication procedures on ORS matters
- 11:45 am **3% Update and Implementation of Latest Reform**
Presenter(s): Bobby Hoppes and Josey McCloud, ORS
Tax-deferred payment agreement changes
4% mandatory employer contribution first report
- 12:45 pm **Adjourn**