

Employer Advisory Committee Meeting Minutes-  
August 20, 2009

**DRS Staff Members Present:**

George Pickett, Chairperson  
Yvonne Haukom, Secretary Supervisor  
Amanda Persell, Administrative Assistant  
Kim Smith, Employer Support Manager  
Kathy Wilson, PSID Project Manager  
Keoni Fontaine, Management Analyst  
Sheryl Hall, ASD Project Manager  
Gayle McGee, PSID Project Manager  
Michelle Hardesty, Plan Administrator  
Ken Goolsby, Information Technology Specialist  
Kareen Morlan, Accounts Payable Lead  
Lanette Barton, Audit Supervisor  
Monette Jenney, Trust Accounting Manager

**Employer Members Present:**

Angie Gill, WSP  
Candy Hoelsing, DSHS  
Cindy Lee, King County Metro  
John Boesenberg, State Board for Community and Technical Colleges-  
Information Technology  
Nancy Savage, Pierce County  
Sandy Collins, WSP  
Sheryl Gordon, Green River Community College

**Employer Members Present via Conference Call:**

Claudia Kay, Port of Seattle  
Katy Dwyer, UW  
Lynn Guyton, Puyallup SD  
Nancy Pooler, Port of Seattle

**Welcome and Announcements**

Chairman Pickett welcomed everyone to the meeting and thanked everyone for attending. He began by welcoming the newest member, John Boesenberg with State Board for Community and Technical Colleges-Information Technology, who has replaced committee member John Goetz, Center for Information Services. Marcia (Mopsy) Moore is retiring and is no longer on the committee. There are no new DRS announcements.

### **SERS Auto Transfer**

Chairman Pickett introduced Kathy Wilson, PSID Project Manager. 2009 Legislature passed SB 5303 which stops auto transfer of prior PERS Plan 2 service credit to SERS Plan 2. Current and inactive SERS Plan 2 members, who had PERS Plan 2 service credit transferred after September 2000, can request in writing to have that service credit moved back to PERS Plan 2 from September 1, 2009 through November 30, 2009. All eligible members will receive a letter from DRS along with an election form. Eligible members must complete and return the form to DRS if they elect to transfer their service credit back to PERS Plan 2. New SERS members hired on or after August 1, 2009 with prior PERS Plan 2 history will now be recognized as newly hired SERS Plan 2 members with plan choice rights.

### **Domestic Partners**

Chairman Pickett introduced Keoni Fontaine, Management Analyst. The State Legislature passed ESHB 1445 which allows domestic partners the ability to receive benefits in all situations where currently only spouses can receive benefits in Washington State Patrol Retirement System (WSPRS) and HB 1616 which applies to domestic partners in the Law Enforcement Officers and Fire Fighters (LEOFF) retirement system. Communications and publication updates were implemented for LEOFF and WSPRS in July. HB 5688 which is an all encompassing bill is on hold for now since a referendum petition was filed with the Secretary of State. Updates on Referendum 71 can be found on the Secretary of State website.

(<http://www.secstate.wa.gov/elections/initiatives/referendum.aspx?y=2009>)

DRS is still awaiting the outcome, but will make the necessary changes to the remaining retirement plans communications and publications if applicable.

### **OASI**

Chairman Pickett introduced Sheryl Hall, ASD Project Manager. The transition from Employment Security Department (ESD) to DRS went smoothly. All documents and program files were transferred to EDIMS (Electronic Document Imaging Management System). The program came with 1½ Full Time Equivalent (FTEs). Recruitment took place and Eleanor Conway and Melanie Piccin were the successful candidates. DRS is working closely with ESD to close the program and budget at ESD by the end of the month. Education seminars will be planned to assist in educating employers of this program. It was suggested by the committee to include employer participation and opinions when issues arise to assist in possible solutions. Should employers have questions on OASI, they can send an e-mail to [oasi@drs.wa.gov](mailto:oasi@drs.wa.gov), by phone 360-664-7316, or log onto the DRS Employer web site. DRS' goal is to communicate with employers, and is requesting patience while staff is learning the program.

### **Web Redesign Project**

Chairman Pickett introduced Gayle McGee, PSID Project Manager, who presented a PowerPoint presentation which provided a sneak peek of the new DRS web redesign to be unveiled tonight at 5:30 p.m. In response to market conditions, a redesigned web site was launched in August 2008. At that time, DRS asked for customer feedback and received quite a few comments that people were unable to find information. Based on that initial feedback, in January 2009, an official project was implemented to redesign the DRS Internet to make it easier for customers to navigate through the site and find the information they need. The design focused on using current content and not having to re-write content. The redesigned employer home page will be implemented tonight, but the remainder of the employer pages will be redesigned and implemented in phase 2. The implementation date has not been determined yet.

### **Retirement Packet**

Chairman Pickett introduced Michelle Hardesty, Plan Administrator, who talked about changes in the retirement packet. Currently the Retirement Packet is not available on-line. Ultimately, the goal is to have the retirement application available on-line. Only members who are within two years of retirement are able to receive the Retirement Packet, which can be obtained by contacting DRS directly. The packet is currently under redesign to simplify the process. User testing has been positive. It is anticipated the redesigned packets for PERS Plan 2 and 3 will be distributed before November. Changes for all other plans are to be completed by the end of the year. Please report any feedback to Michelle Hardesty.

### **Annual Statements**

Chairman Pickett informed the committee that DRS is still considering how to distribute paper annual statements this year. DRS acknowledges educational employers interest for on-line annual statements and employers belief that DRS should directly mail statements. Among the options being considered are continue with the current process which requires educational employers to deliver annual statements to employees, direct mailing from DRS, and any other concepts that might effectively distribute annual statements. ; However, budget restraints hinder a direct mail from DRS. Chairman Pickett will entertain any recommendations and/or comments from employers. It was also suggested ESS incorporate Web site training in their Statewide Training materials. Doing so will encourage more on-line applications and would be beneficial to both DRS and employers.

### **Interruptive Military Service**

Chairman Pickett introduced Ken Goolsby, Information Technology Specialist, to discuss HB 1548. This piece of legislation provides a total of five years of no-cost service credit to Plan 2 and 3 members for all systems if the member had interruptive military service during a "period of war" and the member established reemployment with the same employer. Members, who paid for interruptive military service credit, can receive a refund of the contributions paid. Employer contributions will be paid by employer, the Accounts Receivable department within DRS will perform credit redistributions on behalf of the employer. Debit and credit allocations will reflect on employer Account Receivable statement. A letter and refund request form will be mailed to the approximately 450 members eligible for refunds. Eligible members must complete and return the refund request form to DRS in order to receive a refund.

### **Open Discussion**

Candy Hoelsing of DSHS commented Department of Personnel came out with a nice GAAP edit message tool electronically to get benefits; Candy would like to request a cease order of hard copies of these transmittals. Patty Orchard, DOP, recognizes this and DOP is working on it.

Nancy Savage of Pierce County would like DRS to notify employers when a member is deceased. Chairman Pickett recognizes the concerns that employers have; however, DRS hasn't devised a methodology for this. Claudia Kay of Port of Seattle commented that they have contacted DRS' Information Services Division for a customized report for their organization. Chairman Pickett noted that some special data requests can be accommodated; however, a data sharing agreement and costs are involved. These typically stem from a Public Disclosure Request (PDR) either by an employer or by an individual; it's not a task that DRS can perform on a regular basis.

Nancy Savage of Pierce County suggested a death date function added to Member Reporting Verification (MRV). Chairman Pickett thanked everyone for their suggestions. DRS' goal is to assist in making it easier for employers to submit their monthly reporting.

Next meeting is November 19, 2009 at DRS.