



PSPRS Local Board Newsletter

"I am looking for a 'dare to be great' situation"

John Cusack (Actor). (1989) Say Anything [Film] 20th Century Fox

In This Issue:

Upcoming Local Board Seminars



Schedule of Upcoming Local Board Training



A Message from the PSPRS Benefits Department



Insurance Update



A Message from the PSPRS Active Members Department



Staff Profile Annette Jorgensen



Staff Profile Dorothy Miller



Information Technology / Website Update

The southern region Local Board Conference for Public Safety Local Board members, secretaries and staff will be on February 11, 2009. The location for the class is at Tucson City Hall in the Council Chambers, 255 W. Alameda, Tucson, AZ. We will start at 9 am and conclude at 4 pm. If you would like to sign up for the Public Safety Local Board conference in Tucson, send an e-mail to don@psprs.com.

The all-day Corrections Officer Local Board conference for members, secretaries and staff for the state of Arizona will be held March 16, 2009. The location of this seminar will be at the PSPRS offices at 3010 E Camelback, Suite 200 Phoenix, AZ. We will start at 9 am and conclude at 4 pm. If you would like to sign up for the CORP Local Board conference in Phoenix, send an e-mail to don@psprs.com.

The northern region Local Board Conference for Public Safety Local Board members, secretaries and staff will be on June 12, 2009. The location for the class is at the Flagstaff City Hall in the Council Chambers, 211 W. Aspen, Flagstaff, AZ. We will start at 9 am and conclude at 4 pm. If you would like to sign up for the Public Safety Local Board conference in Flagstaff, send an e-mail to don@psprs.com.

We will NOT provide breakfast or lunch.

Don Mineer – Local Board Training Coordinator

SCHEDULE OF UPCOMING LOCAL BOARD TRAINING

These meetings are held at the PSPRS office (*unless otherwise indicated). For those not able to attend, the most popular topics will be offered again in the near future. Check our website and this newsletter for more information.

If you would like to sign up for one of the following Local Board seminars, send an e-mail to don@psprs.com.

<u>Date</u>	<u>Time</u>	<u>Topic</u>
2/11/09	9 AM to 4 PM	Southern Region Local Board Conference *To be held at 255 W. Alameda, Tucson, AZ
3/16/09	9 AM to 4 PM	CORP Local Board Conference
6/12/09	9 AM to 4 PM	Northern Region Local Board Conference *To be held at 211 W Aspen, Flagstaff, AZ



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A MESSAGE FROM THE PSPRS BENEFITS DEPARTMENT

Local Board Minutes or Letter Approving Retirement

The Local Board's initial authorization to the Administrative Office to pay disability retirement benefits is on Form P12 – "Notification of Benefits and Election," wherein the Local Board Chairman or Secretary certifies that the Local Board "has determined that the applicant...is eligible for the benefit payments." This gives us the authority to issue the retiree's initial disability retirement benefit. In addition, [A.R.S. Section 38-847 \(M\)](#) provides, "The secretary of the local board shall keep a record and prepare minutes of all meetings, forward the minutes to the fund manager within forty-five days after each meeting and forward all necessary communications to the fund manager".

The minutes of the Local Board meeting at which a disability determination is made should include a concise statement of the medical evidence upon which the Local Board based its findings, identified simply by document dates and author. If a conflict exists in the medical evidence presented to the Local Board, the minutes should contain a brief statement as to how the Local Board resolved the conflict. A copy of the minutes of the Local Board meeting at which a retiree's disability retirement benefit was approved must be placed in the retiree's file to complete the application process.

Minutes, should reflect an effective date of retirement, and that the member's retirement is by reason of disability. An example of how this would be recorded in the minutes follows:

"Board Member (name) moved approval of Mr. Member's accidental disability effective 02/01/09, based on the IME report which indicated Mr. Member has a medical condition which prevents him from performing a reasonable range of duties in his job

Medical Reports and Documentation Supporting Award of Disability

Copies of all medical evidence, including the Independent Medical Evaluation considered by the Local Board in reaching its determination on eligibility should be forwarded to the Fund Manager's Administrative Office for compliance review. The member's application packet should also be included with these documents.



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To All Local Board Staff

It was brought to our attention in January that the Excel spreadsheets would not compute salary on the 5th line of the compensation section if salary was broken down using 5 fields instead of the normal 3 to 4. This error was corrected and both the PSPRS and CORP spreadsheets. The spreadsheet versions are now dated 1/13/2009. Sorry for any inconvenience this may have caused. As always, please report any issues or errors you may encounter while using the Excel spreadsheets to the Benefits Department.

To Local Board Support Staff:

Retirees who need to update their name, address, tax withholdings, direct deposit, or beneficiary information are required to submit these changes on the appropriate retirement forms by the 10th of the month for the month they want the change to take place. These forms are available on our website or from our office. We will accept them by mail or fax. Changes received after the 10th will be processed the following month. This information was printed on the November, December and January checks and direct deposit notices. We will continue to print this announcement for the next several months. We will no longer accept requests that are not on the appropriate official form.

Forms

As a reminder, please use the forms and spreadsheets dated 9/2008 in upper right corner. Forms received after January 1, 2009, that are not dated 9/2008 will be sent back to the Local Boards for non-compliance.

Please note we have revised the "U3 Lump Sum Distribution" form again. The new form is dated 12/08. We have removed the option to rollover non-taxable distributions. The special tax notice was also updated to reflect this change. We apologize for any inconvenience this may have caused.

INSURANCE UPDATE

January open enrollment changes for the ADOA and ASRS programs are reflected in the January checks. Changes may be due to premium changes or subsidy changes. Questions regarding premiums are best answered by the insurance provider. Questions on subsidy amounts may be directed to PSPRS health insurance staff, Annette Jorgensen and Stacey Alcott.



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A MESSAGE FROM THE ACTIVE MEMBERS SERVICES DEPARTMENT

Transfer Tidbits:

If a member accepts a new position, in a different plan, with a **new employer**, they have the option of transferring their service time or taking a refund. For example, a member who is currently in Public Safety as a Peace Officer with Phoenix Police who transfers to Navajo County and takes a position as a Corrections Officer will now contribute to the Corrections Officer Retirement Plan. The member can transfer their Public Safety time to CORP, or take a refund of their contributions.

However, if the member takes a **new position**, in a **different plan**, with the **same employer**, they do not have the option of refunding their contributions. So a member, who worked for Maricopa County Sheriff as a Peace Officer in Public Safety and then takes a position with Maricopa County as a Corrections Officer, will now contribute to the CORP plan. Since this member works for the **same employer**, Maricopa County, they only have the option of transferring their Public Safety time to CORP, or may refund when they terminate with their current employer. In both of these options you have another choice, to leave your monies on account. We will address this option in a future newsletter because it's important to note that even if you leave monies on account, you may not be eligible for a retirement benefit.

LEGAL COMMENT REGARDING REDUCED HOURS

The PSPRS has been receiving questions recently regarding the status of members whose work hours may drop below 40 hours per work week. Please check our website for up-to-date information. www.psprs.com

STAFF PROFILE – ANNETTE JORGENSON – INSURANCE DEPARTMENT

Annette Jorgenson started at PSPRS in January 1997. Other than the one year she worked in benefits processing retirement, her area of responsibility has been the retiree health insurance program and the firefighter cancer insurance program. Annette grew up in Washington State and moved to Arizona in 1992 for some "warmer" weather, although she sometimes misses the rain, lakes and green that surrounded her in Washington. She loves working for PSPRS and always enjoyed getting to know the different representatives from our employers. If you haven't spoken to her before, please give her a call and introduce yourself.



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STAFF PROFILE – DOROTHY MILLER – ACTIVE MEMBER DEPARTMENT

Dorothy Miller joined PSPRS team August 2006. She is currently in Active Member Department handling record management and transfer forms for PSPRS, CORP, and EORP; including verifying contributions for PSPRS and CORP. She is the first line of contact to make sure all documentation is accurate and complete. She enjoys working in Active Member Department and with everyone in PSPRS.

INFORMATION TECHNOLOGY/ WEB SITE UPDATE

Our web site www.psprs.com now offers four new “feature” additions to our Video Training Library. These screen capture presentations will walk you through, step by step, “How to Process a Normal Retirement”, “How to Process a Disability Retirement”, “How to Process a Survivor Benefit” and “How to Process a Guardian Benefit”. These videos designed for streaming or download and it’s an easy method for busy board members and staff to keep current on our information and procedures.

Find them on line at www.psprs.com

- Click on “local board training”
- Click on “local board training presentations”

Each link on the PSPRS website takes you to a user friendly display which will automatically prompt you to install the needed software elements. These videos are viewable though all major internet browsers including Internet Explorer, Firefox, and Safari. QuickTime player is required to view these videos. You may need to consult with your IT department before beginning the install process. Different streaming sizes are available to work with your internet speed. DVDs will be made available soon.

Please visit our training page for more information.

http://www.psprs.com/Admin_Training/Video_local_board_training.htm

NEWSLETTER ARCHIVES / BACK ISSUES

We would also like to remind our readers that back issues of this newsletter are available for viewing or download on our website ([Click for Newsletter Archive](#))