



# NEWS TO USE

A newsletter for PERSI employers

January 2007

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## FORMS: Keeping them current and submitting an RS-109

### Keeping Forms Current

As a convenience for members and employers, PERSI posts forms to its Web site. Many employers also post PERSI forms to their own Web sites. This is a wonderful service for employees; however, PERSI cautions employers to make sure they are using the most current form. When PERSI modifies a form, a revision date is placed in the lower left corner of the form. To make it easy for employers to know if they have the most up-to-date form, PERSI added a *Version Log* to the Forms page on its Web site so employers can regularly check to make sure they are using the most current forms both online and as handouts. Even easier, employers can simply add a link to PERSI forms on their Web site or encourage their employees to complete and submit the forms (when possible) directly from the PERSI Web site.

Employers are encouraged to print out the *Version Log* monthly and compare the version dates to the forms they keep on hand or on their Web site. Employers who routinely update the forms on their Web site, add a link to the forms on the PERSI Web site, and discard outdated paper copies provide a valuable service to their employees.

### More On Submitting An RS-109 Form

In the December *News To Use*, the article on submitting the RS-109 form focused on the necessity of getting the form at the time a member retires or is disabled. The article failed to mention two other situations where the RS-109 form is needed:

- When a member passes away; and
- When you receive a letter from PERSI requesting an RS-109 because a member terminated and wants an immediate separation benefit.\*

*\*If an employer's payroll cycle is the first of the month, for example, and an employee resigns on the second day of the month, PERSI won't receive and process the termination until the 10th (or later) of the following month. In this instance, PERSI will send a letter to the employer requesting an RS-109.*

Employers can submit the forms either online or via fax. If an RS-109 request letter was received, the letter should also be sent back to PERSI.

## USING ACTUAL DATE OF HIRE AND TERMINATION DATES

Some employers are using the first day of their pay cycle as the date of hire for new employees regardless of the actual hire date. This can cause problems when a member terminates, and it makes extra work for everyone. PERSI's automated system can determine member eligibility and calculate months of service; however, it is only as accurate as the data provided by the employer.

PERSI recently had a member whose date of hire in the database was listed as May 1, 2006, which was incorrect by nearly a month. The date of hire determines membership eligibility, which determines if money can be left in PERSI or if contributions must be automatically returned.

When employers incorrectly use the beginning of their pay cycle as the date of hire and/or the last day of their pay cycle for the termination date, PERSI's records are probably inaccurate. Actual dates should always be reported.

It is imperative employers provide PERSI with correct dates of hire and termination. Accurate information helps improve the quality of PERSI's records, and ensures members receive proper credit for time worked. If you have questions about dates of hire or termination, or your transmittals, contact the Employer Service Center at (208) 287-9525 or toll-free 866-887-9525.

## PERSI NAMES MANAGER AND EMPLOYEE OF THE YEAR

At its annual year-end luncheon, PERSI announced both the manager and employee of the year. Diane Kaiser, PERSI's Defined Contribution (Choice Plan) Manager was recognized for the various special projects she completed in 2006. Stacy Jones, an IT Systems Analyst, was recognized for assuming the role of project manager for PERSI's reorganization efforts over the past 12 months.



*Executive Director Alan Winkle (l) and Deputy Director Don Drum (r) present Diane Kaiser with her Manager of the Year plaque.*



*Executive Director Alan Winkle (l) and Deputy Director Don Drum (r) present Stacy Jones with her Employee of the Year award.*

### Notes

Working through the Homeward Bound organization, PERSI staff adopted two families for Christmas. The mothers in each family recently experienced serious medical situations. The staff was able to collect toys, clothing, and cash to help the families have a nicer holiday.

Technical Records Specialist [Lenna Strohmeier](#) ran the City of Trees ½ marathon in November and will run in the January Walt Disney "Donald Duck" ½ marathon in Florida. She began training 4 years ago, and has completed both full and half marathons since then.

PERSI Processing Center Manager [Susan Shaw](#) and Retirement Specialists [Lisa Conn](#) and [Melody Hodges](#) volunteered through St. Vincent de Paul to serve meals to people in need. The meals are available 3 evenings a week at Boise's St. Paul's Baptist Church dining room.