Oregon Public Employees Retirement System *December 1, 2007* ♦ *Vol. 13, No. 4*

PERSPECTIVES

Retired Member Edition

Customer service survey results and strategies

PERS' 2007 customer service survey shows improvement in every category compared to the 2006 results. More than 2,500 people responded online and via hard copy during August.

Participants rated PERS in eight areas: timeliness of services, ability to provide services correctly the first time, helpfulness, knowledge and expertise of PERS' employees, availability of information, the overall quality of service PERS provides, the PERS website, and how our service in the past year compared to previous years.

We identified the main issues from the comments we received as shown below. Also provided are PERS' strategies to address the issues.

1. The wait to speak with a PERS Customer Service agent is sometimes long.

Strategies: To address this issue, we have revamped the telephone messaging to direct callers to the PERS website for answers to programmatic questions (how old do I have to be to retire, what is the Individual Account Program, etc.).

We recently added staff to the Information Center to cut down on the wait to speak with a Customer Service agent.

In periods when we anticipate telephone call volumes may increase (mailing of member annual statements, annual cost-of-living adjustments, etc.) we are drawing staff from other divisions so more people are available to answer calls.

2. The time to receive a response to an email or letter can sometimes be long.

Strategies: We recently made more staff available to answer correspondence (emails and letters). As of September 10, 2007, we are answering most emails within three working days (unless the inquiry involves a complex issue requiring research). We are also current on the backlog of letters and are working to provide answers to letters within 10 working days (unless the inquiry involves a complex issue requiring research).

3. It is sometimes difficult to get consistent, accurate answers to questions.

Strategies: To address this issue, we are:
- Continuing to offer core staff training in features of the PERS Tier One/Tier Two and Oregon Public Service Retirement Plan programs;
- Increasing customer service training for all Customer Service Division staff, including training designed specifically for staff who answer telephone calls;
- Using the incoming telephone message to encourage callers to use the website and the A-Z topic listings;
- Distributing internal newsletters to keep staff abreast of changes in business rules, Oregon Administrative Rules, policy decisions, and Board actions; and
- Ensuring Information Center response staff use the same terms as publications and the A-Z topic listings to provide consistent answers.

Numerical results and a comparison of 2006 and 2007 responses are shown on the next page. We will continue to conduct annual surveys that measure and trend improvement in our customer service.

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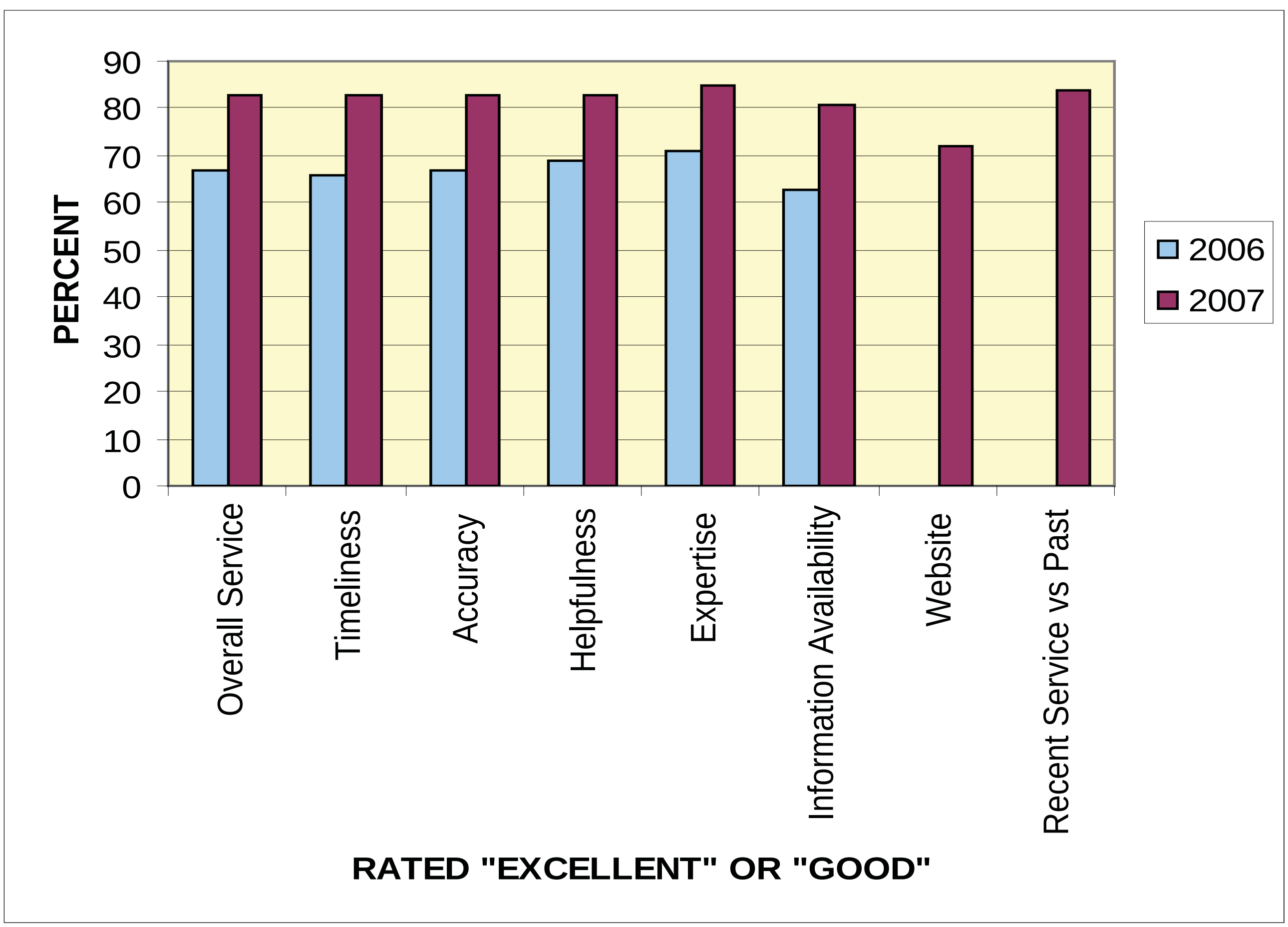
Customer service survey results (continued from page 1)

Ratings for the eight survey questions

How do you rate...	Excellent (1)	Good (2)	Fair (3)	Poor (4)	Don't Know (5)
The overall quality of service?	49%	29%	8%	8%	6%
The timeliness of services PERS provides?	51%	28%	7%	9%	5%
PERS' ability to provide services correctly the first time?	49%	28%	6%	10%	7%
PERS' helpfulness?	52%	26%	8%	9%	5%
The knowledge and expertise of PERS employees?	46%	30%	7%	6%	10%
The availability of information at PERS?	46%	28%	9%	10%	7%
The PERS website?	16%	19%	7%	5%	53%
Our service in the past year compared to previous years?	33%	24%	6%	8%	29%

Percent of respondents rating "excellent" or "good" (the State's Key Performance Measures do not include the "Don't Know" responses; the numbers in the graph have been rebaselined to exclude those responses)



Notify PERS of a death

Please remember that you must notify PERS of the death of a member, alternate payee, and/or beneficiary receiving PERS benefits. Send a copy of the death certificate to:

PERS
P.O. Box 23700
Tigard, OR 97281-3700

Perspectives is published by the Oregon Public Employees Retirement System for the benefit of PERS/OPSRP members and employers. Address all correspondence to **PERS, P.O. Box 23700, Tigard, OR 97281-3700**. PERS headquarters office is at **11410 SW 68th Parkway, Tigard, Oregon.** **Phone 503-598-PERS** or toll free **888-320-7377; TTY: 503-603-7766.** Telephone hours are 8:30 a.m. to 5:00 p.m., Monday through Friday, except holidays. PERS' Internet address is **http://oregon.gov/PERS.**

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HealthBeat

Long term care meetings continue. Pre-registration is not required.

Long term care is the type of care received when someone needs assistance with daily living activities, either at home or in a facility. This can be due to an accident, an illness, or advancing age. The need for long term care is not limited to the elderly. Anyone who cannot function independently may need the protection of long term care insurance. Accidents and unexpected illness can happen at any time and at any age. These meetings explain the options available to PERS retirees and do not require pre-registration.

Date	Location	Meeting Time	Seats
Jan 14	Rivershore Grill 1900 Clackamette Dr. Oregon City	9:30 - 10:30 a.m.	75
Feb 11	Roth's Hospitality Center 1130 Wallace Rd. NW Salem	9:30 - 10:30 a.m.	75
Mar 10	Holiday Inn Express 20615 Grandview Dr., Bend	9:30 - 10:30 a.m.	50
Apr 7	Rivershore Grill 1900 Clackamette Dr. Oregon City	9:30 - 10:30 a.m.	75

2008 schedule to mail retiree benefit checks from Salem

2008 Paydate	Date check mails from printing facility in Salem...
January 1	December 31, 2007 (Monday)
February 1	January 31 (Thursday)
March 1	February 29 (Friday)
April 1	March 31 (Monday)
May 1	April 30 (Wednesday)
June 1	May 30 (Friday)
July 1	June 30 (Monday)
August 1	July 31 (Thursday)
September 1	August 29 (Friday)
October 1	September 30 (Tuesday)
November 1	October 31 (Friday)
December 1	November 28 (Friday)

Annual tax statements to be mailed in January 2008

In January 2008, PERS will mail an Internal Revenue Service Form 1099-R to each individual who received a benefit or an account balance refund payment from PERS in calendar year 2007. You will receive more than one 1099-R if you received your monthly benefits *and*

- police and fire unit benefits,
- beneficiary benefits,
- turned age 59 1/2 in 2007, or
- directly rolled over your benefit.

If you do not receive your 1099-R by February 11, 2008, you may request a duplicate by writing or faxing your request to PERS. Signed Change of Address forms may be faxed to 503-598-0561.

The check stub included with your December 1, 2007 benefit payment shows the amount of PERS Health Insurance Program premiums paid in 2007 if you are part of that program.

Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

OMB No. 1545-0119

Form 1099-R

2007

CORRECTED ☐

VOID ☐

Payer's Name, Address, and ZIP Code
STATE OF OREGON
Public Employees Retirement System
P.O. Box 23700, Tigard OR 97281-3700

Payer's Federal Identification Number Payee Account Number
93-6001869

Recipient's Name, Street Address, and ZIP Code

1. Gross Distribution

2a. Taxable Amount

2b. Taxable Amount Not Determined ☐

Total Distribution ☐

3. Capital Gain (included in box 2a)

4. Federal Income Tax Withheld

5. Employee Contributions or Insurance Premiums

7. Distribution Code

9a. Your Percentage of total Distribution

9b. Total Employee Contributions

10. State Income Tax Withheld

11. State/Payer's State Number
OR / 0669077-0

12. State Distribution

COPY C For Recipient's Records

This information is being furnished to the Internal Revenue Service.

Dept. of the Treasury-Internal Revenue Service

Each box on the form has a corresponding number below with an explanation of the contents of the box.

1. Total payments paid to you by PERS during 2007.
2a. Taxable portion of your payments as calculated by PERS. If Box 2a is blank, there will be an "x" in Box 2b marking taxable amount not determined.
2b. If there is an "x" in this box, marking taxable amount not determined, you and/or your tax advisor need to determine what part of your gross payment is taxable. Because of IRS rules, PERS does not determine the 2007 taxable amount for payments commencing in 1992 or before (generally, for retirements prior to December 1, 1992).
3. Amount included in Box 2a that qualifies for IRS Form 4972 capital gain.
4. Amount of federal tax, if any, withheld from your payments during the calendar year 2007.
5. Non-taxable contributions, if any, recovered tax-free during 2007. Does *not* include health insurance premiums (see note at top of page).
7. Distribution Code which represents what type of payment you received during 2007.*
9a. If a total distribution was made to more than one person, this is the percentage you received.
9b. Not used.
10. Amount of state income tax, if any, withheld from your payments during the calendar year 2007. PERS withholds state income tax only for Oregon.
11. PERS' Oregon business identification number.
12. Total payments paid to you by PERS during 2007.

*Distributions from qualified retirement plans such as PERS made to you before you reach age 59 1/2 may be subject to an additional tax of 10 percent. The Distribution Code in Box 7 identifies whether the distribution is subject to the additional tax or qualifies for an exception to the additional tax.

1- Early distribution, no known exception applies (used only if person has not reached age 59 1/2).
2- Early distribution, exception applies (not subject to an additional tax).
3- Disability.
4- Death benefit.
7- Normal distribution (age 59 1/2 or older).
A- May be eligible for 10-year tax option (see Form 4972).
G- Direct rollover to an IRA.
H- Direct rollover to a qualified retirement plan.

For additional information, you can request the following publications from the IRS: Publication 575, *Pension and Annuity Income*, Publication 939, *General Rule for Pensions and Annuities*, or Publication 524, *Credit for the Elderly or the Disabled*. The toll-free number to request IRS forms is 800-829-3676.