

THE LATEST WORD

December 2003

Official IPERS Information ♦ Retain For Your Records

Iowa Public Employees' Retirement System ♦ PO Box 9117 ♦ Des Moines IA 50306-9117
1-800-622-3849 or 515-281-0020 ♦ Benefits Fax Number 515-281-0053 ♦ Accounting Fax Number 515-281-0055
E-mail: info@ipers.org Web site: www.ipers.org

Videoconferencing at IPERS

IPERS has installed an ICN videoconferencing system that will enable IPERS staff to meet with members, employers, and others without leaving the office. The videoconferencing system uses the Iowa Communications Network (ICN) in order to reach as many schools, employers, and members as possible. Currently there are just under 800 ICN videoconference sites in Iowa. In addition to these ICN sites, the system can connect to any videoconference site across the world. The general uses for this capability will be to:

- 1) Assist with counseling members without them traveling to Des Moines;
- 2) Hold general training sessions for members and employers without traveling to Des Moines;
- 3) Originate meetings with people in several cities at the same time; and
- 4) Join in videoconferences originating from other sites so that IPERS staff do not have to travel.

If you wish to schedule a meeting with IPERS staff, please contact Curt Sorteberg at IPERS (515-281-0042) or your local ICN site scheduler so the best day and time

can be reserved on the system. All videoconferences need to be scheduled at least three weeks in advance.

IPERS will also hold some sessions in order to reach a large number of people at one time. The training will be scheduled and notices distributed so members and employers have plenty of time to be aware of the training opportunity and to be added to the videoconference list of sites. We are excited about using this tool and encourage you to help us make effective use of it.

IPERS and W-2s

The end of the calendar year is fast approaching and that means it's time for employers to begin planning 2003 W-2s, the Internal Revenue's Wage and Tax Statement.

The Employer Relations Team receives numerous inquiries about showing IPERS contributions on W-2s. Employee-paid contributions to IPERS may be added to W-2s, but are not required. However, employees may appreciate knowing how much they have contributed to IPERS for the year. If you choose to indicate the amount of IPERS contributions on W-2s, you may add the amount to Box 14 (Other). **DO NOT INDICATE IPERS**

CONTRIBUTIONS IN BOX 12 (Elective Deferrals). IPERS contributions are not elective deferrals.

Remember, you must check the "Retirement Plan" box, regardless of whether the amount of contributions is shown in Box 14.

For other information regarding completion of W-2s, contact the Internal Revenue Service.

Administrative Rules

July was a history-making month for IPERS. On July 3, IPERS celebrated its 50th anniversary as Iowa's largest public employee pension plan. At the same time, IPERS became an independent agency within the executive branch of state government. Legislative action during 2003, in the form of H.F. 534, established IPERS as its own agency and also outlined a procedure for the orderly transition of administrative rules.

Since 1986, IPERS shared agency number 581 of the Iowa Administrative Code with the Department of Personnel. At first, IPERS hoped 581 could be retained in its new identity. However, administrative rules are assigned in an alphabetical

sequence. IPERS was given the choice of choosing an index title as “Iowa Public Employees’ Retirement System,” or “Public Employees’ Retirement System of Iowa.” The first index most closely matched our name and on the advice of the Administrative Rules Editor, IPERS was assigned number 495 which is found under the rules index of “Iowa Public Employees’ Retirement System.” IPERS filed proposed rules on October 24, 2003 to begin the process of transferring its rules to its new assigned number.

Under the Iowa Administrative Procedures Act, Iowa Code chapter 17A, all state agencies are provided with a minimum procedural code which consists of several uniform rules. IPERS’ first move was to write uniform rules such as: public records and fair information practices, declaratory orders, contested cases, agency procedure for rule making, and waivers. These chapters form the foundation of IPERS’ new administrative rule structure.

The first chapter found in IPERS’ new rule is Chapter 1 titled “Organization.” This revised chapter contains general provisions regarding the agency, operational units, definitions, and administration.

IPERS is the state administrative agency for the federal Social Security Administration. It was time to refresh this chapter and the decision was made to rewrite the chapter. A new Chapter 22 can be

found under 495, formerly 581 Chapter 22.

The heart of IPERS’ current administrative rules are found at Chapter 21. IPERS plans to review Chapter 21 and over the next year rewrite the chapter. Each rewrite will be published in the Iowa Administrative Bulletin. As each section of Chapter 21 is rewritten, it will be transferred to a new chapter under 495.

The process of changing administrative rules as a new agency is a big job. Kelly Lovell, as IPERS’ administrative rules coordinator, is overseeing this large project. All references to 581 will eventually be changed on forms, publications, internal policies, and IPERS’ Web site. Each current administrative rule will be reviewed to make certain that directions within each rule point to the correct revised rule. This is a good opportunity to update and “clean up” administrative rules in response to Executive Order No. 8.

If you have questions or suggestions, please feel free to call IPERS and ask for the administrative rules coordinator. IPERS will publish information regarding rule changes on the Web site and in future publications. IPERS is excited to be a new state agency and looks forward to future historic events as Iowa’s largest public employees’ retirement plan.

Sneak a Peek

Do you want to see what ICON, IPERS Connection Online, is all about? Visit our Web site at www.ipers.org and find the link “Sneak Preview” in the ICON paragraph on the Employers Home Page.

While you’re there, click on the “How to Enroll” link. It will give you three easy steps to follow to open up your on-line world, allowing you to enroll your new employees, update their addresses, retrieve past wage reports, and report your quarterly wages.

Calling On All Current ICON Users

Thanks to all the employers who reported wages for the quarter ended June 30, 2003 using the ICON system. It was a great success.

When you report on the ICON system, don’t send us any wage reporting paperwork! A tree and our overloaded filing system will thank you.

FYI:

- ❖ After January 14, 2004, buy-backs will be treated like all other service purchases in that the full actuarial cost will be billed. This means that buy-backs will cost more! If you have questions, please contact our office.

PLEASE POST

IPERS RETIREMENT PLANNING SESSIONS AVAILABLE

IPERS WILL BE HOLDING THE FOLLOWING GROUP PRESENTATIONS AS WELL AS INDIVIDUAL RETIREMENT PLANNING SESSIONS THROUGHOUT IOWA OVER THE NEXT SEVERAL MONTHS. GROUP PRESENTATIONS PROVIDE A GENERAL OVERVIEW OF IPERS ALONG WITH ANSWERS TO GENERAL QUESTIONS. INDIVIDUAL SESSIONS PROVIDE MEMBERS WITH THEIR PROJECTED RETIREMENT BENEFITS AS WELL AS OTHER PLAN PROVISIONS. THESE SESSIONS FILL QUICKLY. THOSE INTERESTED IN INDIVIDUAL COUNSELING SESSIONS SHOULD CALL IPERS AT 1-800-622-3849 TO RESERVE AN APPOINTMENT TIME. LOCATIONS AND TIMES ARE LISTED BELOW.

TRAVEL SCHEDULE FOR SPRING/SUMMER 2004

SIoux CITY

CONVENTION CENTER
801 4TH ST

JANUARY 26-29, 2004

GROUP PRESENTATION
6:30 PM RM #7 JAN 26
INDIVIDUAL CONSULTATIONS RMS 8, 9, 10
8:30 AM-6:00 PM JAN 27, 28, 29

KEOKUK

SOUTHEAST IOWA COMM COLLEGE
335 MESSENGER RD

FEBRUARY 9 & 10, 2004

INDIVIDUAL CONSULTATIONS
3:00 PM-5:30 PM FEB 9
8:30 AM-6:00 PM FEB 10

FT MADISON

SOUTHEAST IOWA COMM COLLEGE
1602 AVE F

FEBRUARY 11, 2004

INDIVIDUAL CONSULTATIONS
8:30 AM-6:00 PM

BURLINGTON

SOUTHEAST IOWA COMM COLLEGE
1500 W AGENCY RD

FEBRUARY 12, 2004

INDIVIDUAL CONSULTATIONS
8:30 AM-6:00 PM

CHARLES CITY

PUBLIC LIBRARY
106 MILWAUKEE MALL

FEBRUARY 23-24, 2004

INDIVIDUAL CONSULTATIONS
2:00 PM-6:00 PM FEB 23
8:00 AM-6:00 PM FEB 24

IOWA FALLS

ELLSWORTH MUNICIPAL HOSPITAL
110 ROCKSYLVANIA AVE

FEBRUARY 25-26, 2004

INDIVIDUAL CONSULTATIONS
1:00 PM-6:00 PM FEB 25
8:00 AM-6:00 PM FEB 26

CEDAR RAPIDS

GRANT WOOD AEA
4401 6TH ST SW

MARCH 1-4, 2004

GROUP PRESENTATION
WINTER/SPRING RM
6:30 PM MAR 1
INDIVIDUAL CONSULTATIONS
GOTHIC RM
8:00 AM-6:30 PM Mar 2, 3, 4

DAVENPORT

SCOTT COUNTY OFFICE
428 WESTERN AVE
6TH FLOOR

MARCH 15, 17, 18, 2004

GROUP PRESENTATION
6:30 PM MAR 15
INDIVIDUAL CONSULTATIONS
8:30 AM-6:30 PM MAR 17-18

CLINTON

ERICKSON COMM CENTER
1401 11TH AVE N

MARCH 16, 2004

INDIVIDUAL CONSULTATIONS
9:00 AM- 6:30 PM

(See Reverse)

COUNCIL BLUFFS

PUBLIC LIBRARY
400 WILLOW

WATERLOO

HAWKEYE COMM COLLEGE
1501 E ORANGE RD

DUBUQUE

DUBUQUE COMM SCHOOLS
2300 CHANEY RD

SPENCER

SCHOOL ADMIN OFFICES
23 E 7TH ST

FT DODGE

IOWA CENTRAL COMM COLLEGE
330 AVE M

OTTUMWA

SOUTHERN PRAIRIE AEA 15
2814 N COURT ST
CONFERENCE RMS A & B

OSKALOOSA

ISU EXTENSION OFFICE
212 NORTH I ST
AUDITORIUM

MASON CITY

NORTH IA AREA COMM COLLEGE
500 COLLEGE DR
ACTIVITY CENTER

SHENANDOAH

PUBLIC LIBRARY
201 S ELM ST

LAMONI

COMMUNITY CENTER
108 S CHESTNUT

CENTERVILLE

COUNCIL CHAMBERS
312 E MAPLE ST

MARCH 29- APRIL 1, 2004

GROUP PRESENTATION
7:00 PM MAR 29
INDIVIDUAL CONSULTATIONS
8:30 AM-6:00 PM MAR 30, 31, APR 1

APRIL 12-15, 2004

GROUP PRESENTATION
TAMA HALL RM 107
6:30 PM APR 12
INDIVIDUAL CONSULTATIONS
TAMA HALL RMS 103 & 104
8:00 AM- 6:30 PM APR 13-15

APRIL 26-29, 2004

INDIVIDUAL CONSULTATIONS
2:00 PM- 6:30 PM APR 26
8:00 AM- 6:30 PM APR 27-29

MAY 10-11, 2004

GROUP PRESENTATION
6:30 PM MAY 10
INDIVIDUAL CONSULTATIONS
1:00 PM-5:00 PM MAY 10
8:00 AM- 6:30 PM MAY 11

MAY 12-13, 2004

GROUP PRESENTATION
6:30 PM RM 101 MAY 12
INDIVIDUAL CONSULTATIONS
RMS 101 & 103
1:00 PM-4:30 PM MAY 12
8:00 AM-5:00 PM MAY 13

MAY 24-25, 2004

INDIVIDUAL CONSULTATIONS
10:00 AM – 6:30 PM MAY 24
8:00 AM – 6:30 PM MAY 25

MAY 26-27, 2004

INDIVIDUAL CONSULTATIONS
10:00 AM- 6:30 PM MAY 26
8:00 AM- 6:30 PM MAY 27

JUNE 7-10, 2004

GROUP PRESENTATION
6:30 PM RM 101 JUNE 7
INDIVIDUAL CONSULTATIONS
8:00 AM- 6:30 PM JUNE 8
8:00 AM- 6:00 PM JUNE 9-10

JUNE 22, 2004

INDIVIDUAL CONSULTATIONS
9:00 AM- 6:30 PM

JUNE 23, 2004

INDIVIDUAL CONSULTATIONS
1:00 PM -6:30 PM

JUNE 24, 2004

INDIVIDUAL CONSULTATIONS
1:00 PM- 6:30 PM