

Field

REPORT

June 2004



State Employees' Retirement System

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www.state.il.us/srs

New Retirement Coordinator Link

External Links



www.state.il.us/srs

We are pleased to debut a new Retirement Coordinator link providing you with most of the information you need to do your job as a Retirement Coordinator. This link is located at the bottom of the listing of SERS External Links (shown at left).

Some of the features of the new RC section include:

- The RC manual online for easy reference.
- An archive of all past issues of the SERS *Field Report* newsletter.
- A FAQ area for any questions you may have about interacting with SERS.
- A list of the email addresses for all SERS staff.
- The ability to complete Form 524 online, as well as download forms, brochures, and the member handbook.
- Information on all aspects of the SERS Field Services Division, including workshop descriptions; the latest workshop schedules; the ability to download Form 521 to complete and give to the member; descriptions of the Benefit Seminar, 60-Minute Seminar, and One-on-One Counseling; biographies of all Field Services staff; and a directory of Field Services phone numbers and email addresses.

Layoff Sessions

The SERS Field Services Representatives are available to assist any agencies that may need to schedule layoff sessions.

Our Reps will provide SERS information to all members who may be laid-off. If your agency needs assistance with this issue, contact Vickie at 217-785-6979.



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Benefit Fairs & Seminars

Last year we participated in 21 **Benefit Fairs**, but this year all but three were canceled due to the current insurance dilemma. Agencies can reschedule their dates once the Benefit Choice period is finalized.



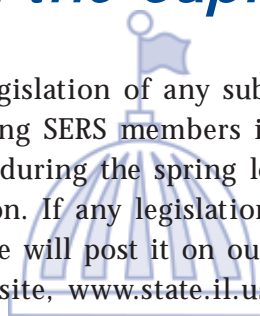
Benefit Seminars are conducted throughout the state, and explain SERS benefits and entitlements in detail. If your agency would like to hold a Benefit Seminar, contact Vickie at 217-785-6979.



Summer officially begins on
Monday, June 21, 2004.
The season of fun & sun continues
through September 21.

At the Capitol

No legislation of any substance affecting SERS members is likely to pass during the spring legislative session. If any legislation does pass, we will post it on our agency website, www.state.il.us/srs.



Follow Up

We are following up on a request from last year. Do you know of any retirees from your agency who get together occasionally for lunch, coffee, bridge, etc?

Marlys Vala is our Field Rep who runs the Myths and Realities of Retirement (MRR) program, and also meets with senior groups to talk about topics related to retirees.

The MRR topics include:

- Health & Life Insurance
- Medicare
- Survivor Benefits
- Long-Term Care Insurance
- Consumer Frauds & Scams
- Financial & Estate Planning

Marlys would appreciate getting a contact person's name, phone number or email address to possibly set up a meeting. Her phone number is 217-785-6976 and email is mvala@srs.state.il.us.

SERS has received several new beneficiary forms with different addresses than what is on the member's W-4 form.

A new address on a beneficiary form doesn't automatically update the member's address with SERS.

Please remind your employees that if they change their address they also need to complete a new W-4 form.

Workshop Information

We now have a SERS Attendance Verification stamp for agencies that require employees to get a workshop attendance verification. Have your employees bring their green confirmation letter to the workshop.

The Field Representative will stamp and initial their letter at the end of the workshop to verify their attendance. You may request that the stamped letter be returned to you after the workshop.

**SRS
ATTENDANCE
VERIFICATION**

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The SERS 2004 preretirement workshops have filled up quickly. All members receiving a rejection letter will automatically receive a 2005 confirmation date. Any member who received a ETC rejection notice was placed in a ETC on September 1 & 2 in Springfield.

The 2005 schedule will be finalized by July. The new schedule will be printed in an upcoming Field Report and also appear in the August SERS-O-GRAM. Registration will begin September 1, 2004 for the 2005 workshops.

The remaining 2004 dates include:

IYF:

6/1 Chicago
7/13 Mt. Vernon
9/28 Springfield
10/12 Matteson
10/26 Collinsville

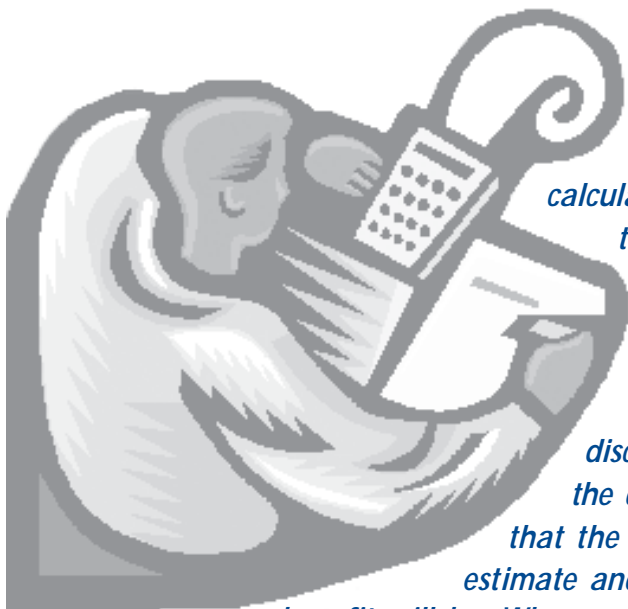
ETC:

11/17 & 18 Peoria

CDR:

8/5 Collinsville
9/16 Springfield
9/23 Carbondale
9/30 Schaumburg
10/14 Peoria
10/21 Springfield
11/18 & 12/2 Chicago

The Benefit Calculator is Coming!



We are working on a benefit calculator that will be a new feature of our website. The calculator allows our members to enter data to get an unofficial estimate of what their SERS retirement benefit will be.

There will be a disclaimer when they open the calculator telling them that the information is strictly an estimate and not what their actual benefit will be. When we finish testing the calculator, it will be placed on our website sometime this summer.