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Spring 2012

Active Certified & Non-Certified Member Elections

The PSERS Board of Trustees will conduct two elections this fall. One is for an active certified member and one for an active non-certified member, each to serve a three-year term on the Board beginning January 1, 2013.

Members desiring to run for election for the active certified member seat must:

- ☑ Be an active certified member of the System (Certified voting status designated on the annual *Statement of Account*).
- ☑ Submit an affidavit and nominating petition with 500 or more valid signatures of other PSERS active certified members.
- ☑ Submit a completed biographical form.

Members desiring to run for election for the active non-certified member seat must:

- ☑ Be an active non-certified member of the System (Non-certified voting status designated on the annual *Statement of Account*).
- ☑ Submit an affidavit and nominating petition with 250 or more valid signatures of other PSERS active non-certified members.
- ☑ Submit a completed biographical form.

To receive a nomination packet and more information on the duties and responsibilities of Board members, interested members may write to:

Maryann Pavlovic
PSERS Election Coordinator
5 N. 5th St.
Harrisburg, PA 17101-1905

Please be sure to specify in your request that you want information on the active certified or active non-certified member seat.

Your completed affidavit, nominating petition, and biographical form must be returned to Mrs. Pavlovic at the above address by 4:30 p.m. on June 15, 2012. Late receipt will disqualify any candidate from the election ballot.



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PSERS
5 N 5th Street
Harrisburg PA 17101-1905

Toll-Free 1-888-773-7748
Local Calls 717-787-8540
FAX 717-772-3860

Phone Hours
Weekdays
(except holidays):
7:30 a.m. - 5:00 p.m.

Website Address:
www.psers.state.pa.us
Email Address:
contactPSERS@pa.gov

PSERS is proud to be an equal
opportunity employer supporting
workforce diversity.

PSERS Board of Trustee Meeting Schedule

April 27, 2012
June 22, 2012
August 9, 2012
October 5, 2012
December 7, 2012

PSERS Board meetings are held in Harrisburg at PSERS, located at 5 N. 5th Street. In addition to these Board meetings, Committee meetings are held throughout the year. All PSERS Board meetings are open to the public.

For exact meeting times or if you would like to attend and require an accommodation to participate, please call Barbara Book, PSERS Executive Office at 1-888-773-7748, extension 4617.

From the Desk of the Executive Director

"Behind the Scenes at PSERS"

from PSERS Executive Director, Mr. Jeffrey B. Clay...

PSERS continues its series of "Behind the Scenes at PSERS" articles with a tour of the Bureau of Benefits Administration (BBA).

BBA is responsible for administering PSERS' comprehensive pension benefits program and provides professional and technical services to 279,152 active PSERS members and to 194,622 retired PSERS members and their beneficiaries. For example, if you are an active member who has purchased service or applied for a refund, or a retired member who receives a pension benefit from PSERS, then your account has had some interaction with BBA staff.

The Bureau has approximately 70 staff and is organized into three divisions: the Benefit Processing Division, the Benefit Policy and Specialized Service Division, and the Exception Processing Division.

The Benefit Processing Division consists of the Retirement Processing Center and Purchase of Service and Refund Center. In 2011, the division received nearly 29,000 new applications for retirements, purchase of service credit, and refunds. The Division processed over 37,000 transactions.

The Retirement Processing Center determines eligibility and verifies information in member accounts in order to process benefit payments and direct roll-overs.

The Purchase of Service and Refund Center determines eligibility and calculates the cost to the members and employers for the purchase of additional service credit. Staff also processes applications for a refund of contributions and interest for school employees who terminate and are ineligible for a retirement benefit.

The Benefit Policy and Specialized Service Division consists of the Benefit Policy Center and Specialized Service and Quality Assurance Center.

The Benefit Policy Center focuses on the first level of the administrative appeal process, which involves presenting recommendations, supporting legal analyses, and relevant documents to the PSERS Executive Staff Review Committee. In addition, the Center reviews salary contracts that may include non-retirement covered compensation and reviews atypical requests for membership eligibility.

The Specialized Service and Quality Assurance Center is responsible for both processing complex benefit requests and for quality assurance. Much of the work is generated by the review and implementation of portions of Domestic Relations Orders that address the distribution of pension benefits when a divorce occurs. This area also calculates benefits for members affected by Section 415(b) of the IRS code and is

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responsible for the calculation of a workers' compensation offset. A team of auditors reviews and approves retirement and death benefit calculations, requests for payment, and purchase of service calculations.

The Exception Processing Division is responsible for a variety of benefit requests which involve manual or special processing. It houses the Manual Processing and Multiple Service Membership Center and the Disability and Death Benefit Center.

The Manual Processing and Multiple Service Membership Center is responsible for a variety of benefit requests such as frozen annuity calculations, intent to change recalculations, and the calculation of retirement benefits for Multiple Service (MS) members who are retiring from the State Employees' Retirement System (SERS) or PSERS. MS Membership processes requests for MS membership eligibility and the calculation of purchase of service requests.

The Disability and Death Benefit Center handles all requests for disability benefits. Medical examiners work with BBA staff to obtain sufficient and current medical information. BBA staff review annual earnings affidavits and calculate both initial and final disability retirement benefits. Staff calculate and arrange for payment of death benefits when members die prior to or subsequent to retirement, including the return of checks issued after death and the collection of premium assistance.

The System Support Center is comprised of a team of management analysts who serve as the BBA's link to information technology (IT). The analysts work closely with IT consultants and PSERS entire staff to ensure the effectiveness of business processes. They are also responsible for project management, training, system design, workflow analysis, and user acceptance testing as well as the implementation of new business processes, new systems and system enhancements.

PSERS, including BBA, is not immune from these difficult economic times. Like many others, PSERS staff is "doing more with less." By streamlining processes, leveraging technology through computer system enhancements, and cross-training staff, BBA is able to maximize all of its resources to provide timely service to PSERS members.

PSERS last increase in staff complement was in 2008 when four positions were added. Since that time, PSERS has experienced a significant increase in workload due to the implementation of recent legislation that increased the complexity of the System and a large increase in the number of retirements over the past year.

During calendar year 2011, PSERS saw a 34% increase in retirement applications processed over 2010 (Over 13,000 in 2011 and over 9,000 in 2010). Nearly 55% of the retirement applications were received between April 2011 and June 2011.

Keeping Your Address Current

It is important to make sure that you always keep your address up to date with PSERS. Throughout the year, PSERS mails our newsletters and other important and timely information, as well.

If you are currently working in a Pennsylvania public school:

• **Report any change of address to your employer. Your employer will submit the information to PSERS.**

If you left employment and have deferred receiving your retirement benefit until later:

You should submit your address change to PSERS in writing. Mail your information to:

PSERS
5 N 5th Street
Harrisburg, PA 17101-1905

You must include your signature and at least the last four digits of your social security number in the letter to assure proper identification of your account.

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PSERS' efforts to increase efficiency have continued to positively impact PSERS' operations and in particular, BBA's processing of retirement benefits. In 2011, nearly 85% of the retirement applications processed were finalized in one-step as compared to nearly 70% in 2010. This means most retiring members are now able to receive final payments in a matter of weeks and not months as in years past.

Historically, PSERS paid retirement benefits in two steps: a reduced initial benefit within about 10 weeks of retirement based on information on file with PSERS at that time and then a final benefit with retroactive monies within about 18 months of the retirement date using final information. Over the past few years PSERS staff has worked closely with employers to improve accuracy and timeliness of reporting, which allows BBA to process more retirements as one-step. The one-step benefits are being paid in an average of less than four weeks after all the necessary information is received from school employers.

The direct result of these improved efficiencies is a reduction in duplicated work that enables BBA staff to process higher volumes without increasing staff

size. In particular, August 2011 was a peak month for BBA staff as over 4,000 retirement applications were processed by BBA staff.

Efforts to prevent and reduce existing backlogs in other areas have also continued. In 2009, there were more than 25,000 Purchase of Service (POS) applications to be processed by BBA staff. At the end of calendar year 2011, there were approximately 5,000 POS applications remaining to be processed. This reduction occurred despite 10,732 new POS applications being received that year.

In closing, I greatly appreciate the comments and feedback members have shared about the "Behind the Scenes" series of newsletter columns. Notwithstanding the challenges that face both the Commonwealth and PSERS, we will continue to operate the System for the exclusive benefit of our members and work diligently on your behalf behind the scenes at PSERS. Efforts to improve processes and the efficiency of PSERS' operations will continue. We will provide more information in upcoming "Behind the Scenes" articles in future newsletters.

Applying to Purchase NQPT Service Deadline

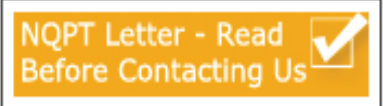
Non-qualifying part-time (NQPT) service is part-time employment in a Pennsylvania public school where you worked less than 80 days (if hired on a per diem basis) or 500 hours (if hired on an hourly basis) within a single school year. An application to purchase NQPT service credit must be received within specific deadlines and while you are an active contributing member.

Those who are Class T-C and Class T-D members of PSERS and who were active members of PSERS on July 1, 2011, will have until June 30, 2014 to apply to purchase NQPT service credit. Notification of this deadline has been mailed directly to members. Those Class T-C and Class T-D members who were not active on July 1, 2011, but again became active members of PSERS after July 1, 2011, will have one year from the date of notification to submit a request to purchase this type of service credit. A mailing providing notification of this deadline will be forthcoming.

Those who are Class T-E and Class T-F members of PSERS will have one year from the date of their notification included in their welcome packet to apply. The welcome packet specifically states your deadline to apply.

Before you contact PSERS to inquire about whether or not you have NQPT employment, you should read the information about NQPT service on the PSERS website at www.psers.state.pa.us/nqpt.htm. Many of your questions may be answered on this page of the website.

Applications to apply may be found on the PSERS website, www.psers.state.pa.us.



Under the www.psers.state.pa.us website, under the Forms button, and then under Purchase of Service. You may also contact PSERS to receive a copy of the form. The correct form on which to apply for this purchase is the *Purchase Credit for Part Time Service* (PSRS 100).

Submitted applications will be held for processing until your eligibility window closes. We delay the processing to determine if the service is actually non-qualifying part-time service or qualifying part-time service. If you apply to retire prior to the processing of your application(s), PSERS will process your application(s) in conjunction with the processing of your retirement benefit.

Foundations for Your Future (FFYF)

As a part of its educational outreach, PSERS provides *Foundations for Your Future* seminars for active members. PSERS regional representatives present these seminars throughout the school year to provide all active members with general information about PSERS benefits and services. Attendance at a *Foundations for Your Future* seminar will help you begin to plan for your retirement early in your career. During these programs, PSERS examines topics such as benefit options, withdrawal of contributions, rollovers, taxes, and legislative actions affecting PSERS.

Listed below are seminars scheduled from April 2012 through August 2012 (not inclusive, more dates may be added in some areas). Seminars prior to April are listed on the PSERS website at www.psers.state.pa.us.

If you need directions to any of the locations, please contact your regional office, the PSERS Member Service Center at 1-888-773-7748, or access the PSERS website. If there is a demand for additional seminars during the year, PSERS may add seminars and post them to the PSERS website. PSERS employers in the area will receive seminar notices as well. **Please Note:** Advance registration is not required to attend any of these seminars. If you require an accommodation to participate, please contact your PSERS regional office.

As this printed schedule is subject to change due to weather or other unforeseen conditions, we highly suggest that prior to leaving for a meeting, you verify the dates and times listed through the schedule posted on the PSERS website. If a school location experiences an emergency/weather closing, the meeting will be canceled.

Southwest Region, Toll-Free 1-888-773-7748, extension 5775 Counties Served: Allegheny, Fayette, Greene, & Washington

County	City	Location & Address	Date	Time
Allegheny	Homestead	Allegheny I.U., McGuffey & Sullivan Rooms, 475 E. Waterfront Dr.	April 11, 2012	4:30 p.m.
			July 19, 2012	1:00 p.m.
Fayette	Uniontown	Holiday Inn Uniontown, Appalachian Ridge Room, 700 W. Main St.	July 12, 2012	1:00 p.m.
Greene	Waynesburg	Waynesburg Central High School, Auditorium, 30 Zimmerman Dr.	July 11, 2012	1:00 p.m.
Washington	Washington	Trinity Middle School, Auditorium, 50 Scenic Dr.	July 25, 2012	1:00 p.m.

Southeast Region, Toll-Free 1-888-773-7748, extension 5575 Counties Served: Bucks, Delaware, Montgomery, & Philadelphia

County	City	Location & Address	Date	Time
Bucks	Quakertown	Quakertown Area High School, 600 Park Ave.	August 1, 2012	10:00 a.m.
Delaware	Morton	Delaware County I.U., Education Service Center, Rooms 171 & 172, 200 Yale Ave.	April 10, 2012	4:30 p.m.
			July 10, 2012	10:00 a.m.
			August 22, 2012	10:00 a.m.
Montgomery	Kulpsville	Holiday Inn Lansdale, 1750 Sumneytown Pk.	July 11, 2012	10:00 a.m.
			August 16, 2012	10:00 a.m.
Philadelphia	Philadelphia	Philadelphia School District Education Center, Auditorium, 440 N. Broad St.	April 11, 2012	4:30 p.m.
			July 12, 2012	10:00 a.m.
			August 8, 2012	10:00 a.m.
Philadelphia	Philadelphia	Ramada Philadelphia Northeast, 11580 Roosevelt Blvd.	July 19, 2012 August 14, 2012	10:00 a.m. 10:00 a.m.

Southcentral Region, Toll-Free 1-888-773-7748, extension 5675
Counties Served: Adams, Cumberland, Dauphin, Franklin, Fulton, Huntingdon, Juniata, Lancaster, Lebanon, Mifflin, Perry, & York

County	City	Location & Address	Date	Time
Cumberland	Summerdale	Central Penn Conference Center College Hill & Valley Rd.	July 10, 2012	10:00 a.m.
Dauphin	Harrisburg	PA State Farm Show Building, 2300 N. Cameron St., Enter via Maclay St. to Maclay St. Lobby, Meeting Room B	July 19, 2012	10:00 a.m.
Franklin	Chambersburg	Chambersburg Area Middle School, Auditorium, 1151 E. McKinley St.	April 2, 2012	4:30 p.m.
York	York	York Suburban High School, 1800 Hollywood Dr.	April 5, 2012 July 24, 2012	4:30 p.m. 10:00 a.m.

Northeast Region, Toll-Free 1-888-773-7748, extension 5375
Counties Served: Lackawanna, Luzerne, Monroe, Northampton, Pike, Susquehanna, Wayne, & Wyoming

County	City	Location & Address	Date	Time
Lackawanna	Archbald	Valley View Jr./Sr. High School, Auditorium, 1 Columbus Dr.	April 3, 2012 August 7, 2012	4:30 p.m. 10:00 a.m.
Luzerne	Nanticoke	Luzerne County Community College, Educational Conference Center, Auditorium 132, 1333 S. Prospect St.	July 11, 2012	10:00 a.m.
Monroe	Bartonsville	Howard Johnson, Banquet Room, 63 Route 611	April 11, 2012 August 15, 2012	4:30 p.m. 10:00 a.m.
Northampton	Easton	The Eastonian Banquet and Convention Center at the Holiday Inn Express, 90 Kunkle Dr.	July 24, 2012	10:00 a.m.
Pike	Milford	Delaware Valley High School, Auditorium, 252 Route 6 and 209	July 26, 2012	10:00 a.m.
Susquehanna	Montrose	American Legion Gardner - Warner Post 154, RR 4, Elk Lake Rd.	April 9, 2012 August 9, 2012	4:30 p.m. 10:00 a.m.
Wayne	Hawley	Wallenpaupack High School, Library, HC 6	May 22, 2012 August 28, 2012	4:30 p.m. 10:00 a.m.

Centraleast Region, Toll-Free 1-888-773-7748, extension 5475
Counties Served: Berks, Carbon, Chester, & Lehigh

County	City	Location & Address	Date	Time
Berks	Reading	Reading-Muhlenberg Career & Technology Center, Warren Rd.	August 8, 2012	11:00 a.m.
Carbon	Jim Thorpe	Jim Thorpe Area High School, 1 Olympian Way	August 9, 2012	11:00 a.m.
Chester	Downingtown	Chester County I.U., 455 Boot Rd	July 20, 2012	11:00 a.m.
Lehigh	Allentown	Rodeway Inn & Conference Center, 1151 Bulldog Dr.	August 16, 2012	11:00 a.m.

Centralwest Region, Toll-Free 1-888-773-7748, extension 5875
Counties Served: Armstrong, Bedford, Blair, Cambria, Indiana, Somerset, & Westmoreland

County	City	Location & Address	Date	Time
Blair	Altoona	Ramada Inn-Altoona, I-99, exit 31, (Plank Road)	August 8, 2012	10:00 a.m.
Cambria	Ebensburg	Admiral Peary AVTS, Room 204, 948 Ben Franklin Hwy.	August 2, 2012	10:00 a.m.

Centralwest Region, Toll-Free 1-888-773-7748, extension 5875 (continued)				
County	City	Location & Address	Date	Time
Indiana	Indiana	Quality Inn, 1545 Wayne Ave.	August 10, 2012	10:00 a.m.
Westmoreland	Youngwood	Westmoreland County Community College, Commissioners Hall, 145 Pavilion Ln.	July 27, 2012	11:00 a.m.

Northwest Region, Toll-Free 1-888-773-7748, extension 5175
Counties Served: Beaver, Butler, Clarion, Clearfield (DuBois Area School District only), Crawford, Erie, Forest, Jefferson, Lawrence, Mercer, Venango, & Warren

County	City	Location & Address	Date	Time
Butler	Butler	Butler Area SD Intermediate School 120 Campus Ln.	August 9, 2012	1:00 p.m.
Clarion	Clarion	Riverview I.U., 270 Mayfield Rd	July 26, 2012	1:00 p.m.
Erie	Edinboro	Northwest Tri-County I.U., 252 Waterford St.	July 24, 2012	1:00 p.m.
Lawrence	New Castle	Lawrence County Career Tech Center, 750 Phelps Way	April 3, 2012	4:30 p.m.
Venango	Franklin	Rocky Grove Jr./Sr. High School, Auditorium, 403 Rocky Grove Ave.	August 7, 2012	1:00 p.m.

Northcentral Region, Toll-Free 1-888-773-7748, extension 5275
Counties Served: Bradford, Cameron, Centre, Clearfield (all districts except DuBois Area), Clinton, Columbia, Elk, Lycoming, McKean, Montour, Northumberland, Potter, Schuylkill, Snyder, Sullivan, Tioga, & Union

County	City	Location & Address	Date	Time
Bradford	Towanda	Towanda Area High School, Large Group Instructional Room, 1 High School Dr.	April 17, 2012	4:30 p.m.
Clearfield	Hyde	Clearfield Area High School, Auditorium, Old Route 879	July 31, 2012	1:30 p.m.
Elk	Kersey	Red Fern Banquet and Conference Center 421 Old Kersey Rd.	April 24, 2012 July 11, 2012	4:30 p.m. 1:30 p.m.
Lycoming	Williamsport	Holiday Inn Williamsport, 100 Pine St.	July 26, 2012	1:30 p.m.
Northumberland	Montandon	Central Susquehanna I.U., Main Building, Lawton Ln.	April 4, 2012	4:30 p.m.

Southcentral Region Office Moved!

In March 2012, the PSERS Southcentral regional office moved from Mechanicsburg, Pennsylvania, to the PSERS headquarters building at 5 N. 5th Street in Harrisburg, Pennsylvania.

Directions to the regional office may be found through our website, www.psers.state.pa.us, under the Regional Offices button on the left-hand side of the web page, or contact the office at its toll-free phone number, 1-888-773-7748,

extension 5675. Local callers please use the office's new local phone number, (717) 720-6335.

The new fax number for the Southcentral regional office is (717) 783-9606.

Onsite parking is limited and on a first-come, first-served basis. Preference is given to those with scheduled appointments. Nearby garage and metered on-street parking is also available.

The Southcentral office serves PSERS members who currently work or worked for employers in Adams, Cumberland, Dauphin, Franklin, Fulton, Huntingdon, Juniata, Lancaster, Lebanon, Mifflin, Perry, and York Counties.

**PSERS
5 N 5th Street
PO Box 125
Harrisburg PA 17108-0125**

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**Don't let a simple mistake when completing an application become a costly mistake!
PSERS offers Exit Counseling for our members!
As retirement season approaches, don't forget...
Contact your PSERS Regional Office for assistance!**

**Public School Employees' Retirement System
Important Information from the
Commonwealth of Pennsylvania**