

PERSPECTIVES

Retired
Member
Edition

COLA increases in August 1 payment

The 2009 cost-of-living adjustment (COLA) for PERS retirees and beneficiaries receiving a monthly benefit is 2 percent.

The increase is effective July 1, 2009, and payable with the August 1, 2009 benefit payment.

Tier One and Tier Two members who retired on or before July 1, 2009, will receive a 2 percent COLA.

For OPSRP Pension Program retirees and beneficiaries who have been retired for less than 12 months, the COLA is pro rated based on the number of months the benefit was received before July 1, 2009.

COLAs reflect the annual Consumer Price Index for the Portland-Salem area and are capped at 2 percent.

The Bureau of Labor Statistics of the U.S. Department of Labor publishes the Consumer Price Index.

Internal Revenue Service releases additional tax tables

The Internal Revenue Service (IRS) released new tax withholding tables that incorporated the Making Work Pay tax credit in March 2009. The IRS mandated that PERS (and other public retirement systems) use the new tax tables. Those tables decreased the amount of taxes withheld from a monthly benefit.

The IRS has now given retirement systems, including PERS, the option to use additional tax tables issued following the Making Work Pay tax table change required in March 2009. The IRS has provided two options:

1. Use the tax tables issued in March 2009, or
2. Combine the March 2009 tax tables AND the new additional tax tables.

PERS, like most other public retirement systems, has decided to leave the current (March 2009) tax withholding tables in place. When we changed the tax tables for the April 1, 2009 benefit payment, several hundred benefit recipients submitted new W-4P forms. If we change the tax tables again, those benefit recipients would have to resubmit new W-4P forms once again. Those who did not make a change can still submit a new W-4P to change their withholding if they so choose.

Contacting Customer Service

Telephone: 503-598-7377 or toll free 888-320-7377

Fax line: 503-598-0561

Website: <http://oregon.gov/PERS>

Email: customer-service.pers@state.or.us

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

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Notify PERS

Please remember that PERS must be notified 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 is located 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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Long term care insurance can help with expenses and personal needs

Have you ever thought about what you would do if you lost the ability to take care of yourself? Americans are living longer today than ever before. As we age, our needs change, and we may need assistance in our daily activities.

For many, the expense of long term care could have a significant impact on their financial security.

PERS offers long term care insurance to its retirees and eligible dependents through UnumProvident. The long term care plan is flexible and offers you a variety of options. You can customize the plan to meet your needs.

If you are interested in learning more about this insurance, UnumProvident provides informational meetings for PERS retirees.

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

Long term care provides 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
Aug 6	Roth's Hospitality Center 1130 Wallace Road NW Salem	9:30 - 10:30 a.m.
Sept 10	Holiday Inn Express 20615 Grandview Dr Bend	9:30 - 10:30 a.m.
Oct 15	Rivershore Grill 1900 Clackamette Dr Oregon City	9:30 - 10:30 a.m. Please park in hotel parking lot
Nov 5	Roth's Hospitality Center 1130 Wallace Road NW Salem	9:30 - 10:30 a.m.
Dec 3	Seaside Convention Center 415 First Ave Seaside	10:00 - 11:30 a.m.

Best times to call PERS Customer Service

Our busiest telephone volume days are Mondays and the first three business days of the month. In addition, we experience an increase in the number of telephone calls from 8:30 a.m. to 10 a.m. each day.

Calls are placed in a queue and answered in the order received. If you place a call to us during these high volume periods, please be patient.

For your protection, PERS staff does not release benefit or account information to any party without first obtaining your permission.

Customer Service: 503-598-7377 or toll free 888-320-7377.

PERS Survey

PERS wants to know if our customer service meets your expectations and what we can do to improve. You can take this short survey online at <http://oregon.gov/PERS> or by filling out this page and mailing it to PERS by the end of August 2009. We will provide the results in a future issue of *Perspectives*. Thank you for your feedback!

Please mail your completed survey to: PERS
 P.O. Box 23700
 Tigard, OR 97281-3700

Customer Satisfaction Survey

Thank you for taking the time to fill out our Customer Satisfaction Survey. Your answers will help us provide excellent customer service to our members. Please use a separate sheet of paper for additional comments.

1. What is your membership status?

- Retired
- Active member
- Inactive member (no longer working for a PERS-covered employer but not yet retired)

2. When was the last interaction you had with PERS?

- Within the last 30 days.
- Within the last 60 days.
- Within the last six months.
- Within the last year.
- More than a year.

(Survey is continued on page 4)

PERS Survey (continued from page 3)

3. Please answer the following questions about the services PERS provides to its members.

How do you rate...	Excellent (1)	Good (2)	Fair (3)	Poor (4)	Don't Know (5)
The timeliness of the services PERS provides?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PERS' ability to provide services correctly the first time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PERS' helpfulness?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The knowledge and expertise of PERS employees?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The availability of information at PERS?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The overall quality of service PERS provides?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our service in the past year compared to previous years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The PERS website?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. If you would like to elaborate on any of your answers to questions 1-3, please comment here.

5. If you have used the PERS website, please answer the following questions:

	Yes	No
a. Was the PERS website easy to navigate?	<input type="checkbox"/>	<input type="checkbox"/>
b. Did you find the information you wanted?	<input type="checkbox"/>	<input type="checkbox"/>

c. If you did not find the information you were seeking, please let us know what information you could not find.

6. Are there any changes you would make to the PERS website?
