

# Retirement Report

Update for Nebraska School Employer Contacts

Fall 2015

## Explore the NPERS Employer Reporting Home Page

Each year, after the completion of the legislative session, six employer reporting (ER) workshops are conducted across the state to educate reporting agents on new legislation and revisit ongoing and current reporting issues. These workshops also provide school reporting agents an opportunity to interact with the NPERS staff and other ER agents.

While valuable, these sessions are a “one time” training opportunity and the duties of reporting agents are a year round task! To help provide ongoing, year-round assistance, our office maintains a school ER page on our website. This webpage is the primary repository of reporting agent information and contains multiple tools to assist you with your reporting agent duties. This page can be accessed via the navigation buttons on the NPERS home page by clicking the “School” link found under the “Employer Reports” section; or by logging into your ER account.

**Official Nebraska Government Website**

Welcome Back,  
Employer :

Search:  **Go!**

### Employer Reporting Home Page

You have successfully logged into our web site.

**Employer Information**

Employer :  
Employer Number :  
e-mail Address :

**Account Links**

[Change Web Profile](#) - Click here to change your web profile.  
[Work on ER Reports](#) - Click here to create /update your employer report.  
[Work on Exmptn Info](#) - Click here to create /update your Salary Info report.

[Retirement Plan Eligibility Calculator](#)  
[School Manual for Employer Contacts \(pdf\)](#)  
[Forms for School Employer Contacts](#)  
[New Member Information Packet \(pdf\)](#)  
[Newsletters & Summer Training Seminars](#)

**Messages from NPERS**

- Materials used at the 2015 summer workshops are now available - see above link.

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## Eligibility Estimator

One of the ER tools demonstrated at this year's workshops was the eligibility calculator. This tool is designed to guide school reporting agents through the sometimes complicated process of determining plan eligibility.

The eligibility calculator will walk you through a series of yes or no questions to help determine if an employee should or should not be enrolled in the school retirement plan. The complexity of determining employee eligibility is often the catalyst for improper enrollment. Many of the common eligibility errors we encounter could have been avoided by using this tool. NPERS strongly encourages all reporting agents to take advantage of this calculator.

## School Manual for Employer Contacts

This is your guide to the various duties required of ER agents. NPERS updates this manual as needed to reflect changes in legislation, federal regulations, and our rules and regulations. The .pdf format contains a "linked" table of contents allowing fast access to specific topics. In addition, some internet browsers enable a search function of .pdf files (often a right mouse click) allowing you to search for key words within the document. Email notification will be sent to reporting agents when updates are made to this manual.

## New Member Packet

The new member packet provides new members with a brief and easy to read synopsis of their retirement plan and a list of the retirement forms you should be providing to them upon enrollment. This document can

be printed and provided in "hard copy" or distributed electronically via email. Email distribution provides links to forms on the NPERS website, which ensures you are providing proper and up to date forms, and helps reduce printing costs for your school.

## Newsletters

Each year NPERS publishes Accounting and Auditing newsletters for reporting agents. These newsletters contain information on current audit and accounting issues, and provide refresher information on legislative changes and other topics of interest. These newsletters are stored for two years on our website and we send email notification to school reporting agents when they are published.

## It's Complicated...

Even with these web based tools and workshops, it's not unusual to run into situations when you will require "hands on" assistance. Please do not hesitate to contact our office when you need additional help. The service you provide as reporting agents is critical to ensuring the school employee's retirement plan is properly administered and benefits are accurately provided to all plan participants.



# Reminders from NPERS Accounting

Making Adjustments seems to be an ongoing problem for many. The problems range from being uncertain as to how to do them at all, to making them twice in error. If you notice that an employee has missed some contributions, or contributed when they shouldn't have, please be sure to fill out an Adjustment Report Form, which can be downloaded from our website, [npers.ne.gov](http://npers.ne.gov). Please be aware that entering an amount in the Make-Up Payments section is not the same as filing an adjustment, and can suspend your reports. If you have questions about completing an Adjustment Report please contact Caleb Taylor at 402-471-6098. We are always glad to help out.

Web reporters who send only a check to our office should be sure to indicate the county/district number on the check, as well as the month of the report. Without this information, it can be difficult to track down where the payment belongs. If you are an ACH debit school we cannot accept checks for adjustments or other matters. All payments must then come out of the ACH Debit.

If you do not pay by ACH, why not consider giving it a try? It would mean no lost checks in the mail. For web reporters, there is nothing to mail in. Once you confirm, you are done! If you, or NPERS, make an adjustment to your report, the correct amount is figured at that moment and the correct amount will be withdrawn; no overage/underage amounts to worry about. Payments would always match your report. There are forms on our webpage [npers.ne.gov](http://npers.ne.gov) to sign up for ACHD.

Please note that NPERS is compiling an extensive list of questions and scenarios that have been presented over the last few months having to do with Eligibility and Return to Work. The intent is to share with the Legislature, the goal being to simplify language and definitions in statute so that all interested parties can determine answers more quickly and accurately. Please stay tuned for further updates as the process continues.



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## Good Luck, Lyra!

We are sad to report Lyra Narumalani has resigned her position with the NPERS Accounting department. We will miss her in accounting and wish her well in her future endeavors!

## Welcome aboard, Caleb!

Please join us in welcoming Caleb Taylor as our new member on the NPERS Accounting team. As school reporting agents, you will now be working closely with Caleb as he fills Lyra's position. Caleb is originally from California, growing up in Ventura, just north of Los Angeles. His family also lived amongst the giant redwoods in Eureka, way up in northern CA. Caleb married his high school sweetheart, Livia, just last year and reports, "we've gone on tons of adventures together!"

Caleb is currently attending classes at SECC in the Bus/AD program for Accounting. His goal is to get his CPA and to go into Forensic Accounting. You can contact him at 402-471-6098.