BENEFITS

Southeastern Converting to the Office of Group Benefits (OGB) Flexible Benefits Plan Effective January 1, 2011
Annual Enrollment Ends on November 12, 2010
Final Meetings on November 10, 2010 in the University Center, Room 133 at 9:00 am, 10:30 am and 1:30 pm

What is the Flexible Benefits Plan?
Administered by the Office of Group Benefits (OGB), the State of Louisiana offers a flexible benefits plan that gives you a way to take home more money in every paycheck. Your eligible premiums and contributions for dependent care and medical care are deducted from your gross salary, before taxes are applied to your earnings.

Benefit Options under the OGB Flexible Benefits Plan:

- **Premium Conversion**: allows you to pay the employee share of your eligible health insurance premiums and other miscellaneous deductions before taxes are calculated on your gross income.

- **Dependent Care Flexible Spending Arrangement (DCFSA)**: allows you to use pre-tax dollars to pay for eligible dependent care expenses for your child, disabled spouse, elderly parent or other dependents incapable of self-care.
• **General Purpose Health Care Flexible Spending Arrangement (GPFSA):** allows you to use pre-tax dollars to pay eligible out of pocket medical, dental, and vision care expenses for you, your spouse and/or other federal tax dependents.

**Facts:**

- There is no fee for premium conversion
- There will be a $3.00 monthly fee for the General Purpose Health Care Spending Arrangement and a $3.00 monthly fee for the Dependent Care Flexible Spending Arrangement. These fees will be pro-rated for 10 pay Faculty to $3.60 per month.
- The Dependent Care Flexible Spending Arrangement and General Purpose Health Care Spending Arrangement are “use it or lose it plans”. (If there is any money left over in your account at the end of the plan year you will lose that money).
- By enrolling in the premium conversion, you are locking your rates in for the plan year. **You cannot make a change to items that are under premium conversion unless you have a qualifying event that meets IRS requirements.**

You must enroll between October 11, 2010 and November 12, 2010. If you are currently enrolled in any of the above plans, you will need to complete a form to continue your participation. If you have any questions, please call the Payroll Office at (985) 549-2188. You may come by the Payroll Office or the Benefits Office to complete your form.

**403b PLAN-ON-LINE ACCESS TO PLANWITHEASE.COM SYSTEM**

ING will be holding demonstrations for the planwithease.com system on November 9, 2010 in the Student Union Theatre. Sessions will be available at 9:00 a.m., 11:00 a.m. and 1:00 p.m. 403b participants should plan to attend one of the demonstrations.

As a participant in Southeastern’s 403b Plan you should log-in and view your account balance information (based on data provided by each approved investment provider). You will also process contribution changes and requests for Exchanges, Transfers, or Rollovers through the on-line system and approved investment providers.

**403b participants are required** to enter any changes to their contributions on-line. Our Salary Reduction Agreement (SRA) Form can be located under the option for forms. You will complete your changes on-line, print and complete the SRA form and return it to the Human Resources Office for processing. Any changes will take at least one payroll cycle to process and be contingent upon confirmation of the change reported through planwithease.com to the Human Resources Office. **We cannot process your change until your transaction appears on the planwithease report and we receive the SRA form.**

Most importantly, planwithease.com will act on behalf of the university to review and approve all distribution requests as allowed under the plan. If your request is approved, you will receive an approval letter which your investment provider will need in order to complete your requested transaction.

There is a Participant User Guide available once you log into the site that should answer most questions. But if you have a question that is not covered, please contact the Human Resources Office at ext. 5655 or 2587.

**PROCEDURES FOR FIRST TIME LOG IN**

1. Access the Internet
2. **Follow the link to www.planwithease.com** and setup your on-line access.
3. Select “Plan Participant Login” located in the lower left portion of the screen
4. Enter your User Id and Password.
   a. Your User ID for your first login is your Social Security Number
   b. Your initial Password is the two digit month of your birth and the last two digits of the year of your birth (mmyy)
   c. Select “Participant” button.
5. Once you are logged in you must select your own User ID and Password.
   a. **User ID** must be between 6 and 12 alpha/numeric characters. (It must contain at least 1 letter and 1 number. Letters are case sensitive. It cannot be the same as your Password or your Social Security Number. It cannot contain 3 letters or numbers in a row that are one character different. For instance you cannot use ABC123.)
   b. **Password** must be between 6 and 8 alpha/numeric characters. (It must contain at least one letter and one number. Letters are case sensitive. It cannot be the same as your Password or your Social Security Number. It cannot contain 3 letters or numbers in a row that are one character different. For instance you cannot use ABC123. It cannot contain two consecutive characters that are the same. For instance apple01, but you could use aple01)
6. The first time you login you will need to choose an “Alternate Verification Question” and provide the Verification Answer for resetting the PIN in case you forget your password.

From this point forward refer to the “Participant User Guide” to review and manage your 403b plan.

**NOTICE ABOUT ELIGIBILITY TO PARTICIPATE IN 403(b) PLANS**

Did you know that Southeastern offers several 403(b) tax deferred savings plans for employees? You have the opportunity to save for retirement by participating in one or more of these 403(b) plans through payroll deduction. You can participate in Southeastern’s 403(b) plans by making pre-tax contributions to one or more of the 403(b) plans offered.

What do I have to do to contribute to one of the 403(b) plans sponsored by Southeastern?

You can contribute to one of the 403(b) plans once you have completed a salary reduction agreement and returned it to the Benefits Section of the Human Resources Office and enrolled with one of the approved investment providers, approved by Southeastern. The salary reduction agreement gives Southeastern the right to take the elected dollar amount or percentage from your paycheck and contribute those amounts to your 403(b) plan. For a complete list of investment providers available to you through the plan, and their contact information, please visit www.selu.edu/HRO and click on the Benefits link, the Retirement Link and then click on 403B Supplemental Retirement Plans.

How do I know if I am eligible to participate in my school’s 403(b) plan?

All Faculty, Unclassified and Classified Staff are eligible to participate in the 403(b) plans whether Full-time or Part-time.

How much can I contribute?

In general, you may contribute up to $16,500 in 2010. This amount may be adjusted annually. The limits for Calendar Year 2011 are yet to be determined. Also, if you have at least 15 years of service with Southeastern or you are at least 50 years old, you may also be able to make additional catch-up
contributions. Contact Sue Jones in the Human Resources Office for additional information on the amount that you can contribute to a 403(b) plan.

**I am already participating in the 403(b) plan. What other rules about participating should I know?**

If you are already contributing to one of the approved 403(b) plans, you may change your contribution amount or percentage by completing a new salary reduction agreement and returning it to the Benefits Section of the Human Resources Office. If you are increasing your payroll deduction you must have a calculation performed to ensure that you're within the limits to contribute. Your “Total Maximum Exclusion Allowance” calculation may be obtained by contacting your 403(b) plan provider or contacting Sue Jones in the Human Resources Office for assistance. Please refer to [www.selu.edu/HRO Benefits](http://www.selu.edu/HRO) link for specific plan rules regarding how frequently you are allowed to change your contribution amount or percentage.

**TRSL OFFERS ONLINE WORKSHOPS & PHONE COUNSELING SESSIONS FOR MEMBERS**

**Online workshops**
TRSL will conduct the following web-based workshops this fall for members:
- Tuesday, October 12 - Retirement Eligibility
- Tuesday, November 16 - Understanding DROP
- Tuesday, December 7 - Return-to-Work

TRSL retirement educators conduct the training by teleconference while the presentation is viewed online. Take advantage of this great opportunity to learn more about these topics and get answers for any questions you have. The sessions will begin at 4 pm.

To register for an online workshop, follow the instructions below:

1. Go to [www.trsl.org](http://www.trsl.org), and click “Workshops” from the left-hand menu.
2. From the “Workshops” page, click “Register Online.”
3. Enter the required information and select the appropriate workshop from the drop-down menu.
4. You will receive a confirmation message once you submit your registration.
5. TRSL will also send a reminder confirmation the Friday prior to the workshop with instructions on entering the online session. These instructions will include a link to the workshop website, the toll-free number to use for the audio portion of the workshop, and a special number you will need to key in so you can join the meeting.

**Individual Phone Counseling**
TRSL has also added more opportunities for you to get one-on-one counseling through their 30-minute individual phone counseling sessions. These sessions are now offered every other month for members who are within two years of eligibility for retirement or DROP. These counseling sessions take place on Fridays between 9 a.m. and 4 p.m. Upcoming sessions are listed below:
- Friday, October 15, 2010
- Friday, December 10, 2010
- Friday, February 11, 2011
- Friday, April 15, 2011

To schedule a phone counseling session on one of these days, please contact TRSL at 225-925-6446, ext. 7093.
TRSL UPDATED WEB-SITE NOW AVAILABLE

The Teachers' Retirement System of Louisiana (TRSL) has recently upgraded their web-site. Please visit the TRSL website www.trsl.org for valuable information about your retirement system. The resources in the member section of this website provide important information about your TRSL membership, including retirement eligibility requirements, benefit calculations and upcoming retirement workshops.

LASERS UPDATED WEB-SITE NOW AVAILABLE

The Louisiana State Employees' Retirement System (LASERS) has recently upgraded their web-site. Please visit the LASERS website www.lasersonline.org for valuable information about your retirement system. The website contains information about the LASERS Board of Trustees, investment allocations and experience, LASERS staff, recent legislation, forms and much more. Also, you may subscribe to the Daily Beam weblog to receive updates on current events. In addition to the general information on the website, active members and retirees can use the site to securely access their LASERS records. Active members can also create a Benefit Estimate.

COUNTDOWN TO RETIREMENT - RECOMMENDED STEPS FOR LASERS MEMBERS

12 - 18 months away from retirement
- Finalize any purchases or transfers of time to have included in your retirement benefits.
- Attend a PREP workshop.
- Request a counseling appointment with a LASERS Representative.
  This can be done in the Baton Rouge office or at Individual Counseling Sessions held periodically throughout the State.
- Obtain an estimate of benefits through an appointment or by mail using Form 5-01, Request for Retirement Estimate, on the LASERS website www.lasersonline.org.

6 months away from retirement
- File a retirement application with your Human Resources office. You will also need:
  A copy of your birth certificate
  A copy of your Social Security card
  A copy of the birth certificate of your beneficiary
  A copy of the Social Security card of your beneficiary
  A copy of marriage license, if Option 4A is selected
  A Judgment of Divorce, if applicable

- Additional forms to complete (on the LASERS website):
  Form 4-05, Authorization for Direct Deposit
  Form 6-02, Insurance Premium Deduction Authorization, if applicable (available to agency representatives only)
  Form W4-P, Withholding Certificate for Pension or Annuity Payments
  Form 4-04, Spousal Consent Form, if applicable

What to Expect as an Applicant for Retirement
- LASERS will issue a notification to you when application is received
- Delay in submission of retirement documents will delay your retirement benefit
• Your first retirement check should be issued within 45 days of the effective date of your retirement, provided all required documentation has been received
• Your first retirement check will be mailed to your home address; future checks will be directly deposited to your financial institution
• If you selected an IBO, 80 percent of the IBO amount will be transferred to Great West shortly after the effective date of your retirement provided all required documents are received and the balance will be transferred once your retirement has been finalized, usually 3-4 months.
• You must pay your insurance premiums directly through your Payroll Office until deductions from your retirement check are activated (generally 3-4 months).

LOUISIANA 457 DEFERRED COMPENSATION PLAN

What is a 457 deferred compensation plan?

A governmental 457 deferred compensation plan is a retirement savings plan that allows eligible employees to supplement any existing retirement and pension benefits by saving and investing pre-tax dollars through a voluntary salary contribution. Contributions and any earnings on contributions are tax-deferred until money is withdrawn. Distributions are usually taken at retirement, when many participants are typically receiving less income and may be in a lower income tax bracket than while working. Distributions are subject to ordinary income tax.

Why Should I Participate in the Plan?

You may want to participate if you are interested in saving and investing additional money for retirement and/or reducing the amount of current state and federal income tax you pay each year. You may also qualify for a federal income tax credit by participating in the 457 Plan. For more information about this tax credit, please contact Chris Burton at Great West Retirement Services at 1-800-937-7604.

Who is Eligible to Enroll?

All current full-time and part-time Louisiana public employees are eligible to participate in the Louisiana 457 Deferred Compensation Plan.

How Do I Enroll?

Visit the website www.louisianadcp.com and enter through the Guest portal. Choose the option to “Enroll Now” and follow the directions to complete your enrollment. You may also visit the Human Resources Office to enroll.

What Are the Contribution Limits?

In 2010, the maximum contribution amount is 100% of your includable compensation or $16,500, whichever is less. Limits for 2011 have not yet been determined.

There are two different opportunities to catch-up and contribute more during the final years of your career:
• Participants turning age 50 or older in 2010 may contribute an additional $5,500.
• Participants in the three calendar years prior to normal retirement age can contribute more (up to double the annual contribution limit—$33,000 in 2010) through the Standard Catch-Up provision. The amount will depend upon the amounts that you were able to contribute in previous years but did not.
• You may not use the Standard Catch-Up provision and the Age 50+ provision in the same year.
• Contributions to a 403b plan and a 457 plan do not offset each other.
NEW EMPLOYEE ORIENTATION

The final 2010 orientation for new classified and unclassified employees will be held on Wednesday, December 8th in the Human Resources Office Conference Room. Registration begins at 8:30 a.m. and the program will run from 8:45 a.m. to 11:45 a.m. Attendance is mandatory for classified employees and unclassified employees are expected to attend. To register for the program, please contact Jan Ortego at Jan.Ortego@selu.edu or at phone extension 5771.

TRAINING DATABASE

In an effort to maintain accurate employee professional development and training records, faculty and staff are asked to inform the Training Section of any conference, seminar or other training attended. A training questionnaire can be found on the Human Resources website at:

http://www.selu.edu/admin/hr/documents/trainingquestionaire.pdf

Once the form is completed, it may be emailed to Jan Ortego at Jan.Ortego@selu.edu or faxed to the Human Resources Office at 549-2308. Additionally, if the training resulted in a license or certification, a copy of that document should be faxed to 549-2308 or sent via campus mail to SLU 10799. If there are any questions, please email Jan Ortego or call at extension 5771.

Additionally, if your department or organization is holding a seminar or conference on campus which includes our staff members, please send a copy of the sign-in roster, with w numbers if possible, to Jan Ortego, SLU 10799.

CPTP PROGRAMS OFFERED ON CAMPUS

Individual Differences and Diversity in the Workplace
The Comprehensive Public Training Program (CPTP) and the Human Resources Office are sponsoring a free seminar open to all employees. The program, entitled “Individual Differences and Diversity in the Workplace” will be held on Thursday, December 9th in Room 139 of the University Center.

This 1-day class (8:15 a.m.-3:30 p.m.) will examine the ways we handle the individual differences of people in the workplace. Participants will learn how and why we have different perceptions about people, and how those perceptions can affect teamwork and productivity in positive and negative ways. Participants will practice dealing with different dimensions of diversity in structured exercises, and learn how to create a climate in which all employees' contributions are recognized and appreciated.

Pre-registration and supervisory approval are necessary for attendance. For more information and to register, please contact Jan Ortego at Jan.Ortego@selu.edu or at extension 5771 for more information.

Effective Presentation Skills
The Human Resources Office and the Louisiana Comprehensive Public Training Program are sponsoring a free workshop on Thursday and Friday, November 18th and 19th. The program is entitled Effective
Presentation Skills. It will meet both days from 8:15 a.m. to 3:30 p.m. in the University Center, Room 139.

This 2-day class is designed to provide participants the necessary classroom skills for trainers. Participants will learn 13 ways to improve the use of visuals, to understand the correct ways to use easel pads, and how to avoid 10 deadly sins common to many presentations. The class also introduces participants to proper "platform" skills, and provides tips on how to turn audience resistance into something useful. The class includes opportunities for participants to make at least two presentations and receive feedback on those presentations. This class presumes that (1) some participants may not have had any presentation experience, and (2) other participants have had a great deal of experience in delivering presentations – and the needs of both types will be addressed.

*This class is open to managers, trainers, and staff who make formal presentations as part of their current job responsibilities.*

Pre-registration is required by the state. Please contact Jan Ortego in the Training Section of the Human Resources Office at extension 5771 or at Jan.Ortego@selu.edu for registration information.

**MIND LEADERS ON-LINE TRAINING PROGRAMS**

The State Division of Administration, through its CPTP program, offers a state of the art, e-learning program for state employees called “Mind Leaders”. This is a computer-based source of interactive courses available over the Internet 24 hours a day, 7 days a week.

The three categories of courses offered online are Computer Skills Courses, Professional Development Courses and Business Skills Videos.

In order to access these classes, employees will need an enrollment key that they can obtain by contacting Jan Ortego via email at Jan.Ortego@selu.edu. Graduate assistants and student workers are not eligible to use these courses.

*IF YOUR SUPERVISOR MANDATES THIS TRAINING, IT WILL NEED TO BE COMPLETED DURING WORK HOURS. IF YOU CHOOSE TO DO THIS TRAINING AFTER WORK HOURS, IT WILL BE CONSIDERED VOLUNTARY AND WILL NOT BE COMPENSATED.*

**EMPLOYEE SELF SERVICE**

Step by Step instructions on using the Employee Self-Service module in PeopleSoft 9 are available to help faculty and staff members navigate to view their personal information. Please access the link below for detailed assistance:

http://www.selu.edu/resources/howdoi/leonet/hr_selfserve/index.html

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**PEOPLESOF I–IMAGE NOW**

*To All Budget Unit Heads:*  
The Human Resources Office has placed an ImageNow button in the PeopleSoft system under Job Data for viewing of documents on personnel within your department. Some of the documents for viewing include: Appointment Letter, Hiring Proposal, Resume and Transcripts just to name a few. To access
these documents you will click on the ImageNow button under the ID number. You may receive an error message, if so please call Mae Everett at Ext. 5431 for assistance. The screen will then open up into WebNow 6 and it will look like a spreadsheet. You will double click on the document you want to view. Please note there are some documents that you will not be able to view due to confidentiality.