



News You Can Use!

Important Information for Employees of Oklahoma State University

Human Resources

November 2013

Focus Groups to Discuss Retirement Plans

Last spring, the Retirement Investment Committee recommended some changes to retirement investment opportunities. A copy of the *OSU/A&M Retirement Update* is available online at <http://hr.okstate.edu/benefits>. Cammack LaRhette, the consulting firm who has been working with the Committee will conduct focus groups November 18-21 to gather input from all OSU and A&M campuses before making a final report to administration.

It is anticipated that administration may make a recommendation to the Board of Regents at the March 7, 2014, meeting regarding a single recordkeeping platform. A single platform, maintained by one vendor, would lower fees and costs of the investment options available to employees and retirees and will enhance communications and services. Actual investments offered by OSU/A&M on the single platform can consist of some offered by the record-keeper in addition to investment products offered by other vendors. Also recommended is a continuation of a brokerage option which makes thousands of mutual funds available.

These changes only apply to OSU/A&M defined contribution plans (Defined Contribution Plan/7-11, Alternate Retirement Program, for which OSU provides the contributions, and also the voluntary 403b and 457b plans). It does not affect Oklahoma Teachers' Retirement or current OSU retirement contribution schedules.

Focus groups will be held on the Stillwater, Oklahoma City and Tulsa campuses. Any employee of the OSU/A&M institutions are invited to attend, but reservations on a first-come, first-served basis are required to ensure adequate space is available. Video conference will also be available for several events. Emails will be sent to numerous employees with defined contribution accounts. If you do not receive email information and are interested in attending and wish to make a reservation, please call Employee Services, (405) 744-5449.

How am I Doing? Understanding and Achieving Your Long-Term Financial Goals Tuesday, November 12, 2013

9:30 a.m. - 10:30 a.m.

ITLE Conference Room 126

The seminar will be facilitated by TIAA-CREF retirement experts. Topics will include:

- Preparing for several goals at once.
- Assessing your financial priorities.
- Evaluating factors that impact your retirement.

Sign up today! Space is limited so please RSVP as soon as you can. Register at www.tiaa-cref.org/letstalk1 or call 1-866-8435640, Monday through Friday, from 8:00 a.m. to 7:00 p.m.

Sponsored by TIAA-CREF and OSU Human Resources.

Mandatory Leave Days

OSU will be closed from Monday, December 23, through Wednesday, January 1, 2014. Monday, December 23 and Tuesday, December 31, are mandatory leave days. Employees who have insufficient leave to cover this absence will incur leave without pay for the mandatory leave days only. An employee in his/her 90-day orientation period may use any accrued annual leave to cover these mandatory leave days.

OSU employees receive 12 paid holidays per year. OSU Policy and Procedure Letter 3-0709, University Holidays, is on the Human Resources website, <http://hr.okstate.edu> - click on *Policies and Procedures*.

Keep Your WageWorks Debit Card!

If you re-enrolled in the Flexible Spending Account in 2014, keep your WageWorks debit card! Effective January 1, 2014, your card will be reloaded with your new 2014 goal amount. Remember that a debit card transaction cannot exceed the balance available. If you try to use your card for an amount that exceeds the balance, the entire transaction will be denied. If this happens, you can reduce the amount of the charge to be equal to or less than the balance of your account and pay for the remainder of the expense by other means, such as cash, check or another credit card. Or you can pay for the entire transaction using another form of payment, and then submit a paper claim to WageWorks for reimbursement.

Health Savings Account (HSA) 2014 Enrollment

If you enrolled in a Health Savings Account (HSA) in 2014 and are enrolled in an Flexible Spending Account (FSA) in 2013, your WageWorks debit card will be deactivated as of December 31, 2013. You will not have access to your FSA balance, nor will the grace period for reimbursement apply per IRS requirements. If you need to file for reimbursement for any 2013 FSA claims, you must have the request and transaction completed by December 31, 2013.

HSA participants will receive a packet from BenefitWallet at your home address. Please complete the enrollment to open your HSA account to avoid any penalties or delays in reimbursement or account usage. Questions?

Contact BenefitWallet at 877-635-5472 or visit their website at www.mybenefitwallet.com.

Certificate of Medical Necessity Form

As a reminder, per federal regulations, over-the-counter drugs, “ingestibles,” are ineligible for reimbursement from the Flexible Spending Account unless you have a doctor’s prescription or Certificate of Medical Necessity form. If you have a prescription or *Certificate of Medical Necessity* form for over-the-counter drugs, you will need to submit a paper claim for reimbursement.

You will not be able to use your flexible spending account debit card.

The *Certificate of Medical Necessity* form is completed by both the employee and the licensed physician and is available on the WageWorks website, www.wageworks.com.

Need Computer Training?

Have you checked out OSU’s new online training portal, Skillsoft? From your desk, you can access hundreds of online classes including computer training modules. Classes available include Microsoft Office applications including instruction in using MS Office with Macs. There are also Adobe classes available including InDesign, Photoshop, Dreamweaver and Captivate to name a few. Most of the classes are about an hour to an hour and a half in length.

To access the Skillsoft portal, go to <https://app.it.okstate.edu/skillsoft/>. You will enter your O-key information, and then choose “Run”. You must have Java installed on your computer for Skillsoft to operate.

We also offer many live computer training courses on campus. Please visit our training calendar at http://hr.okstate.edu/training/staff_dvpt13 to see current offerings. More classes will be added to begin in January.

Stillwater Public Education Foundation Donations

As you are completing your annual contribution forms for payroll, please consider giving to the Stillwater Public Education Foundation (SPEF). With public schools receiving fewer and fewer state dollars it is vital for the community to help our schools provide the quality education Stillwater children deserve. Because of the generosity of the Stillwater community, SPEF has been able to provide over \$700,000 for the past 20 years to our schools and teachers to improve learning opportunities from preschool to high school. For example, last year SPEF funded the purchase of Graphing Calculators and science laboratory equipment for the high school, funded a visiting author for the elementary school, and Art materials and resources for the middle school.

Support Stillwater schools by completing the payroll deduction form found at the following link: <http://www.spef.stillwaterschools.com/contribute/payroll-deduction-donations/>.

Please send, through campus mail, your completed payroll deduction form for processing to Christine Ormsbee, SPEF Allocations Co-Chair, ITLE/Telecommunications, OSU Stillwater campus.

Training Opportunities

November

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| 6 | Word 2010 Level III (Day 2 of 2) |
| 6 | The Indispensable Employee |
| 7 | New Employee Orientation |
| 7 | ITLE Tour |
| 8 | Q&A Drupal Training Session |
| 12&13 | Excel 2010 Level II (Day 1&2) |
| 12 | Safety is Everybody’s Business |
| 12 | Information Security Awareness |
| 18 | Payroll Processing |
| 19&20 | Access 2010 Level III (Day 1&2) |
| 19 | Bad Debt Assessment |
| 19 | Bursar Processes |
| 20&21 | Access 2010 Level II (Day 1&2) |
| 20 | Purchasing Card Training |
| 20 | Leadership Principles for Difficult Conversations |
| 20 | Time Management - It’s a Breeze |
| 21 | New Employee Orientation |
| 21 | Using Imagery to Advance Your Social Efforts |
| 22 | Pivot Tables and Charts in Excel 2010 |

For a description of classes or to register, go to <http://hr.okstate.edu>, or call Training Services, (405) 744-5374. Also, find us on Facebook, Twitter and LinkedIn.

403(b) and 457(b) Contributions for Calendar Year 2014

The calendar year 2014 maximum contribution limit for the supplemental 403(b) TDA plan and the supplemental 457(b) plan remains the same at \$17,500. Employees at least age 50 may contribute at the Age 50+ catch-up limit of \$5,500 provided they have adequate OSU compensation.

Minimum contributions are \$15 per month.

For more information, including a current listing of available vendors for each plan, go to <http://hr.okstate.edu/benefits/infosheets.htm>.

Questions? Contact Employee Services, (405) 744-5449.

Follow OSU Human Resources on Facebook and Twitter!

OSU Human Resources has a Facebook page and a Twitter account. Important and general information is communicated, including what’s going on in Human Resources, benefits information, training opportunities, what’s going on around campus, and more!

- Follow OSU Human Resources on Facebook: Go to the Human Resources website, <http://hr.okstate.edu> and click on the Facebook icon. If you are logged in to Facebook, search for *Oklahoma State University Human Resources* - and “Like” us!
- Follow OSU Human Resources on Twitter: *ok-stateHR*.

TIAA-CREF Visits

TIAA-CREF representatives will be on the Stillwater campus for financial planning and retirement advice to meet one-on-one with employees:

- November 12th, 13th, 14th

Appointments fill up fast! To make an appointment, schedule online at www.tiaa-cref.org/schedulenow or call TIAA-CREF at 1-800-732-8353.