CITY OF SAN JOSE
CAPITAL OF SILICON VALLEY

The Retirement Connection

Office of Retirement Services (ORS) Volume 2, Issue 2 • April 2021

Welcome to The Retirement Connection!

Check the State and County websites for the rollout of vaccinations!

Vaccine availability and eligibility is changing rapidly. Healthcare providers must follow the State's prioritization plan and determine which prioritized populations they have the supply to vaccinate. For residents in California information on who will be eligible next is available on the States vaccination website.

If you are interested in getting vaccinated, check this website regularly at: https://covid19.ca.gov/vaccines for updates on the expansion of vaccine eligibility.

The County of Santa Clara will update their website at: https://www.sccgov.org/sites/covid19/Pages/COVID19-vaccine-information-for-public.aspx regularly as new information becomes available.

Members: Help us Keep Improving!

This is the second issue of The Retirement Connection's second year in publication. We are learning how to choose and share news that is useful or interesting to our members, and we want your help to get even better. The Retirement Connection is just one vehicle among many we hope will increase outreach using varied platforms to suit members' diverse preferences for getting information.

Please take just a minute or two to give us feedback. Are the articles helpful and interesting? Is the newsletter attractive, appealing and are the articles easy to read and understand? Do you have ideas for future articles or items you'd like to see in the newsletter? You can send your feedback to us at retirement.dept@sanjoseca.gov. We know that some of the best ideas could come from our members. Please use **"Newsletter Feedback"** in the subject line. Your thoughts on any of the above will be much appreciated!



Help Us Go Green!

We urge members to consider requesting their Retirement Connection newsletter by e-mail in order to reduce our carbon footprint and to help reduce the cost of printing. If you would like to Go Green, and receive your copy via email or access it on our website, send us a request at retirement.dept@sanjoseca.gov and provide an updated email address. Please use **"Newsletter Go Green"** in the subject line.

Quarterly Question

Q: **What is the easiest way for me to access information about my retirement account?**

A: Our MemberDirect portal was added to our website specifically to make access to your account information easy, convenient, and secure. It allows members to get up-to-date information on their retirement 24 hours a day. For example, you can find your employee contributions, your current years of service and benefit information, personal information, nominated beneficiaries, and even an estimate of your earned benefit. You can also get forms such as an application for retirement, beneficiary designation, and if you are retired or no longer working for the City, change of address or name forms. If you are already retired, you will find details about your monthly benefit, including information such as your direct deposit status, year-to-date benefits, nominated beneficiaries, insurance and tax forms as well as insurance deduction and tax withholding. Retirees are also able to access and print their 1099R form including 2020 and past years. Access the member portal via our website at: www.sjretirement.com, or go directly to the MemberDirect portal at: https://memberdirect.sjretirement.com. If you do not have an account, there are sign up instructions on our website.



Message from
CEO Roberto L. Peña

It's hard to believe that as of the publication of this issue of the newsletter, it has been over a year since the COVID-19 pandemic took our lives by storm and changed everything about how we live, work and play. Here at ORS, I felt it was the perfect opportunity to reflect on where we are, what we've learned and how we had to change so we could continue to serve our members.

As for an update – as of this writing, Santa Clara County recently moved to the orange tier, still subject to the significant restrictions required to keep us safe and help lower our infection rates, and the City of San Jose remains in compliance with those restrictions. It is encouraging to see infection gradually declining, we still don't have a clear indication of when we might see sustained success.

But as with most people and businesses, we can report good news. In thinking back one year to the jarring news that a global pandemic meant shutting down most workplaces, closing schools, and dramatically restricting our lives, most of us would have never imagined we could cope as well as we have, or that one year later, we would still be living with these limitations. But here we are and cope we have.

Focusing selfishly on what it has meant here at ORS, I am proud of the creative ways we have found to adapt to the new reality. Technology allowed us to quickly adapt and become proficient at platforms like Zoom and MS Teams to continue conducting Board and staff meetings, planning, and day-to-day tasks that require staff members to gather, but in a virtual way. Our file-heavy workload made some of this very challenging, but we were up to it. We even managed to conduct open enrollment and ongoing services to members in a virtual world.

None of this would have been possible if staff had not adopted quickly to remote workplaces, used their mobile devices to provide needed connections, and simply exercised both the patience and discipline to continue devoting a full-time work week to serving our members. They are my unsung heroes, and I appreciate and thank everyone for their hard work.

Finally, we have learned that some of our coping tools and strategies will be valuable resources in the future. While none of us know when we will re-open and feel freedom again, we do know that many of the techniques that allowed us to succeed over the past year will remain part of the "new normal," whatever that might be.

Did you know...

...that retirees are able to access and print their 1099R form from the Member Direct Portal including 2020 and past years? Also, the IRS Federal and State of California Tax deadline has been extended for some individual taxpayers!

The Treasury Department and Internal Revenue Service have announced that the federal income tax filing due date for individuals for the 2020 tax year will be extended from April 15, 2021, to May 17, 2021.

The Franchise Tax Board (FTB) announced that, consistent with the Internal Revenue Service, it has postponed the state tax filing and payment deadline for individual taxpayers to May 17, 2021. Note: The postponement only applies to individual taxpayers, and it does not apply to estimated tax payments, which are still due on April 15.

For more details on Federal tax deadlines visit www.irs.gov.

For more details for the State of California Tax deadlines visit https://www.ftb.ca.gov/.

Be Aware and be Alert for Potential Email Scam!

The ORS has received reports that some members are getting emails from a third party appearing as though they came from the City of San Jose and inviting the members to attend their meetings. Some who have received these misleading emails have asked if ORS uses third-party vendors to calculate retirement estimates. The answer is NO! When we email members, we always use a City email address containing **"sanjoseca.gov**" Please check senders' email addresses carefully to ensure the email is truly from us.

Coming Soon! New "Retirement Academy" Videos!

The Office of Retirement Services is proud to announce our plans to launch *The Retirement Academy* in the coming months. This will provide a curriculum of short tutorial videos to help address some of the challenges our active and retired members encounter.

Profile: ORS Benefits Analyst Team

Stacee Fischer, Benefits Analyst



Q: Tell us about your career here at ORS.

A: I have worked for ORS for nearly 9 years, most recently serving as a Benefits Analyst. I counsel and assist members with their queries, including educating them on the retirement process. I also oversee disability retirement applications and help navigate applicants through the disability process.

Q: How has COVID made the work challenging?

A: Remote working during the shutdown presented many technical challenges! It did require changes to our internal processes, however, I am very proud of how we adjusted, partially due to major strides we made in advancing virtual operations before the pandemic took hold.

Q: What gives you the most satisfaction about your work?

A: There is a terrific spirit of teamwork that exists within ORS. Professionally, I enjoy and value the considerable breadth of technical knowledge needed to manage employee benefits. I really enjoy meeting and communicating with retirees and getting to work closely with disability applicants.

Q: Who is Stacee Fischer outside of the Office?

A: I grew up in Contra Costa County and came to San Jose after high school. I love spending time along the ocean near Santa Cruz and Monterey. In my spare time my fiancé is teaching me to play golf, we also enjoy playing our ukuleles.

Theresa Sitchler, Interim Senior Analyst

Q: How long have you been with ORS and what are your duties?

A: I have been with ORS for just over 5 years as a analyst, recently serving as interim Senior Analyst for the Benefits team. My work involves setting up benefits for new retirees and serving existing retirees.

Q: Has your work been more challenging, or different, since COVID?

A: Yes, work has been more challenging with COVID restrictions. Dealing with issues of connectivity and Internet speed, for example. We perform most of our duties remotely, though the office is still closed, we continued to process the mail to ensure our operations continue.

Q: What gives you particular satisfaction about your work?

A: It's as simple as the reason we work here, to take care of members. After that, I focus on the team, making sure we have what we need to fulfill that first concern.

Q: Tell us a bit about your background.

A: I was born here in California, but raised in Texas. I came back to California in 2003 and earned a dual Bachelor's degree in 2008 in Business and Accounting.

Anh Trinh, Benefits Analyst

Q: Tell us about your service at ORS?

A: I first joined the ORS team for a special project in 2015. I have worked on many assignments, when a Benefit Analyst job opened, I applied and was hired.

Q: How has COVID affected your work?

A: It was challenging in the beginning, especially since our work was so dependent on paper. But we adapted and learned how to help serve our members remotely. I am so grateful for technology that is making meetings easier and a new norm. I really miss seeing my co-workers.

Q: What gives you the most satisfaction about the work?

A: I feel satisfied when I help a member understand their benefits. And of course, I love to deliver the news to a member that they are eligible for the retirement they've applied for.

Q: Who is Anh off duty?

A: I love watching movies, especially dramas. I picked up crocheting a few years ago and really enjoy making things for my friends and family while I watch TV.

Q: What would you like to share about your background?

A: I was born and raised in Vietnam. After high school, I came to the US as an international student and went to college in Orange County and then UC Riverside. I moved here after marrying my husband, who is from San Jose. Shortly after, I started working at ORS.

Samantha Yamaji, Benefits Analyst

Q: Tell us a bit about your service with ORS.

A: I've been with ORS as a benefits analyst since 2017. I meet with people during stressful, difficult times in their lives. Retirement is a very big chapter and change in their lives and not always easy to navigate.

Q: What's most satisfying about the work?

A: I'm so happy when I'm able to make a difference and offer guidance not easily available outside this office as they go through a major life change. We have some very kind and patient members, and I appreciate when they think of me as their ally in the process.

Q: Can you share a little about who Samantha is and where she comes from?

A: I was born and raised here in San Jose and have lived throughout the Bay Area all my life. I enjoy spending time with friends and family and I love traveling. I like art, fishing, animals, and being outdoors.

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The Retirement Connection

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GO GREEN!

Send ORS an email to retirement.dept@sanjoseca.gov if you would like to receive your copy of the newsletter electronically, via email or if you prefer to access the newsletter online at our website www.sjretirement.com

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Upcoming Board Meetings

COVID-19 virus has had an impact on our operations. ***Meetings are being held by teleconference.*** *Please check our website for the latest information.*

Police and Fire Board meetings are held on the 1st Thursdays of each month except in July. Upcoming meetings will be held on the following dates:
May 6 June 3 August 5

Federated Board meetings are held on the 3rd Thursdays of each month except in July. Upcoming meetings will be held on the following dates:
April 15 May 20 June 17

BOARD UPDATES

Trustee Qianyu Sun, Federated Employee representative has left the City to pursue other opportunities. Thank you for your service and we wish you well! The vacant Trustee employee representative recruitment is posted on the City Clerk's website at: https://sanjose.granicus.com/boards/w/923860ac785826ef.

All meetings unless otherwise posted on the Agenda, are at City Hall, 200 E. Santa Clara Street, Wing Rooms 118-120. Meetings are also live-streamed on our website at www.sjretirement.com.

Upcoming Office Closures

May 31st
Memorial Day

July 5th
Independence Day

CONTACT US!

408-794-1000 or 1-800-732-6477
Our staff directory can be found on our website at: www.sjretirement.com
Click on "Contact us" or email us at retirement.dept@sanjoseca.gov