

Welcome to The Retirement Connection!

We have Launched Our New Website!

We've launched our new website! We are excited to announce the launch of our new and innovative website. We have been hard at work designing the website with your needs in mind. The newly redesigned website is now easier to navigate, faster and more intuitive to serve you better! Visit us at www.sjretirement.com

Watch for the Retirement Academy!

Next in our never-ending quest to provide members more news in different forms to give you choices about how you hear from us, the ORS plans to produce a series of short tutorial videos to address common questions and issues related to retirement. It is called the Retirement Academy, and you will find it on the new website soon. We hope to



focus in on specific topics with each video, providing to-the-point tips or answers to the questions often raised by members. How does one apply for retirement? What happens

when we divorce, or our spouse dies? What is reciprocity and do I qualify? The Retirement Academy will be a valuable tool where members can get fast, accurate information about retirement issues at their convenience. Watch for the Retirement Academy, coming soon at www.sjretirement.com!

More Ways to Go Green!

Thank you to so many members who have opted to join our Go Green campaign by opting to get the *Retirement Connection* via email, helping reduce our carbon footprint by saving paper (and mailing costs!). There are other ways you can Go Green with us, too.

If you are among the small percentage of retirees still getting a paper check each month, please consider how safe, reliable, and convenient it is to get direct deposit instead. The check will arrive on time, every month – no watching the mailbox, no trip to the bank. The pandemic has underscored these advantages. You can also get ORS' pay advice online instead of getting a printed, mailed copy.



Finally, you can choose to get correspondence from ORS via your MemberDirect portal online instead of through the mail.

Please send ORS an email to retirement.dept@sanjoseca.gov if you would like to sign up for these safe, environmentally-friendly options.

If you have questions and need our help signing up, don't hesitate to contact us at retirement.dept@sanjoseca.gov

Quarterly Question

Q: I'm approaching retirement and eager to learn the basics about retirement and also wondering how I can get an estimate of my retirement benefits?

A: Members can learn much about the retirement application process and get an estimate of their benefits due in several convenient ways. Many of the options can be found on our website at www.sjretirement.com. You can go to the Member Direct portal and review your member statement under your account. There is a calculator available in Member Direct to help. We are also creating a new library called Retirement Academy that will soon offer short tutorial videos that include topics such as this and other relevant topics. The Academy will soon be launched and posted on the new website.

Obviously, each member's calculation and ultimate retirement benefits vary, but they are calculated using the years of service and the final average salary. Certain sections of IRS tax code may apply. Whatever your situation, using the calculator at Member Direct will help you estimate the pension benefit you may expect to receive.



Message from CEO Roberto L. Peña

Summer is here, and it has been an eventful quarter. As of this issue, we have more ways than ever to provide you with information about San Jose's retirement systems and your own account, which means you have more options for how you choose to get

news from ORS in the way most convenient for you.

The headliner is that ORS's redesigned website has launched. Hopefully, many of you have already seen it and discovered its improvements and benefits. For starters, the new website is more attractive and far easier to use and to read. You will also find it is easier to search for relevant and updated information of specific interest to you.

The improvements don't stop at the aesthetic. The updated user interfaces and other improvements are the result of hard work by the vendor and staff, and will pay off in greatly increased capacity and new capabilities while being far more user-friendly. In the coming weeks, you will see some of the ways we will take advantage of these improvements. We will provide links to new tools and resources and more.

This has been a complex project leading to multi-faceted change. Staff and our specialized vendor have worked extremely hard to make the new site a reality. We anticipate that we will have bugs to work out along the way and we ask for your patience. Certain advanced features we hope to begin deploying, such as a chat function and survey tool, may not be available right away – we are still planning to add these features.

The new website will enable us to link to or host more new methods of reaching out to our members. There are links to our new Facebook page and Twitter accounts. Of course, the traditional information and news of ORS will continue to appear on the website, easier to find and view, and you can still access your own account information through the Member Direct portal.

Please check out the new website soon and watch with us as we continue to fine-tune the site in our commitment to continually improve services to active and retired members alike.

In closing, the City has started planning for resuming onsite work and re-opening facilities, targeting an initial phase beginning in July to September and a second phase from September to December.

Please note ORS will continue to operate with most employees working 100% remotely for the foreseeable future while we work on implementing a hybrid approach later this year. We will communicate changes to our operations on our website at www.sjretirement.com, via email and on our new social media platforms!

As we transition out of COVID-19 our top priorities are supporting and reinforcing the services to our members, while being mindful of our employees and members health, safety and well-being. Thank-you for your continued support and understanding as we work through this challenging process.

Staffing Updates

Benefits Division Manager **Kathryn Schaefer** pursued other opportunities outside of the City.

Samantha Yamaji, Benefits Analyst, pursued other opportunities outside of the City.

Tami Imai was promoted from Staff Specialist to Benefits Analyst.

Benefits Staff Specialist **Thomas Alston** retired in April and we wish him the very best in his retirement.

Welcome to ORS!

Connie Molloy, Senior Benefits Analyst



Fascinating Members: We know you are out there!

Here at the Office of Retirement Services we realize that among our thousands of active employee and retired members there are many remarkable people with fascinating hobbies, talent, or exceptional dedication to causes and achievements. Do you play with the symphony or sell as an established artist? Commit countless hours to a charitable mission? Compete in a sport at a high level? Have you traveled to exotic locations or climbed Mt. Everest? We want to hear your stories and share them with members through The Retirement Connection newsletter and maybe social media.

Please contact us at retirement.dept@sanjoseca.gov if you would like to share your story, or if you know of someone either actively employed or retired from the City of San Jose who you think would be a worthy subject of a profile.

Profile:

ORS Information Technology Team

The ORS IT group is comprised of 3 staff. They are responsible for supporting all our systems and applications.

Eran Amir

ORS Department IT Manager

Eran joined the Office of Retirement Services in September 2019. He oversees the IT group, in addition to administering all systems and applications. He has had the opportunity to work on a number of Member oriented projects since his onboarding including the Open Enrollment website, MemberDirect, and most recently our new website.

May Cheung

Information System Analyst

May is the longest serving member of the current IT group and as such is an oracle on the history of ORS IT systems! She joined the Office of Retirement Services in October 2000. May works primary on our Pension Administration System, and supports our internal staff, as well as providing support to our MemberDirect users.

Peter Pham

Network Technician

Peter joined the Office of Retirement Services in April 2017. Peter is kept busy supporting our internal staff with their IT needs, including providing desktop support and resolving connectivity issues. Peter is also responsible for ORS IT inventory control, server backups and setting up computer equipment.



Did you know?

ORS is now on Facebook and Twitter!



Member's Online Account Information More Secure Than Ever!

Beginning on August 2, 2021, the Office of Retirement Services (ORS) will add an additional layer of security to its online portal, known as MemberDirect. The added security will require members to verify their identity via multiple independent steps each time they log into the MemberDirect portal. Once enabled, a member will enter their username and password as usual. Next, the Multi-Factor Authentication system (MFA) will issue a unique, one-time code that can be sent either as a text message or email to the member. This code will then need to be entered into the portal to complete the login process and access personal information. While this is an extra step for members, it greatly increases security for your account. It is similar to the secure login system used by many online systems that deal with sensitive, personal information.



Coming soon:

Members will be able to securely upload multiple files to a message that they send to ORS via the Message Center area of MemberDirect and will receive a notification email each time ORS staff respond to their message.

Quarterly Question

Q: How do I create an account in MemberDirect?

A: Go to the Office of Retirement Service's MemberDirect portal at <https://memberdirect.sjretirement.com>.

On the window that pops up, click the link "To request a PIN to enroll in MemberDirect, please **CLICK HERE**."

On the page that opens, fill out the form to request an enrollment letter with instructions on how to enroll in MemberDirect. This letter will contain a special PIN number that is unique to each member. Please allow time for this letter to arrive either via email or the US postal service.

Follow the instructions in the letter very carefully to complete your enrollment in MemberDirect.



PRESORT
STANDARD
U.S. Postage Paid
Santa Clara, CA
PERMIT No. 294

The Retirement Connection

1737 N. First Street, Suite 600, San Jose, CA 95112

Executive Editor: Barbara Hayman

Editor: Linda Alexander

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

PLEASE KEEP US INFORMED

Make sure we have your updated email and mailing address. Please complete a change of address form if your email or mailing address changes.

 Printed on Recycled Paper

Federated City Employees' Retirement System Trustees

Trustee, Chair vacant

Spencer Horowitz, Vice Chair

Anurag Chandra

Julie Jennings

Mark Keleher

Elaine Orr

Trustee, Vacant

Police and Fire Dept. Retirement Plan Trustees

Drew Lanza, Chair

Andrew Gardanier, Vice Chair

Sunita Ganapati

Howard Lee

Eswar Menon

Nick Muyo

Richard Santos

Vincent Sunzeri

Trustee, Vacant

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 and September. Upcoming meetings will be held on the following dates:
August 5 September 9 October 7

Federated Board meetings are held on the 3rd Thursdays of each month except in July and September. Upcoming meetings will be held on the following dates:
August 19 September 23 October 21

BOARD UPDATES

Trustee Jay Castellano, Federated Retiree Representative has resigned from the Board. Thank you for your service and we wish Jay well!

The Board vacancies for recruitment are 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

September 6
Labor Day

October 11
Columbus 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 "About us"/"Office Staff" or email us at retirement.dept@sanjoseca.gov