

worklife ELEVATED

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UTAH
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Meet the Director

Interview by: Tammy Magee and Brittani Mitchell, DHRM

John Valentine, former President of the Utah Senate and tax attorney with Howard, Lewis & Petersen, John has the experience and knowledge needed to take on the role of Commission Chair for the Utah State Tax Commission.



What made you decide to work for the state?

I never really intended to work in the public sector other than as an elected official. I spent nearly 38 years practicing law as a tax attorney, happy to sue the Tax Commission and the Internal Revenue Service. When the Governor asked me to take the job as Chairman of the Tax Commission, I said: "I guess I'm changing sides."

When did you begin working for the state?

I was appointed by Governor Herbert in August, confirmed by the Senate in September and began work on October 1, 2014. As a Constitutional Officer, I had to be appointed by the Governor and was subject to the advice and consent (confirmation) of the Senate. Article XIII of the Utah Constitution provides that the taxes of the State of Utah are to be administered and supervised by four Tax Commissioners, one of which is appointed to be the Chairman. Under the Utah Constitution, the Chairman and the three Commissioners are appointed by the Governor and confirmed by the Senate.

What other experience do you bring to this position?

Besides 38 years as a tax attorney? I was an adjunct professor of law at Brigham Young University, J. Reuben Clark School of Law. I also spent 26 years in the legislature, including 10 years in the House of Representatives, and 16 years in the Senate. I served two terms as President of the Senate before I came here.

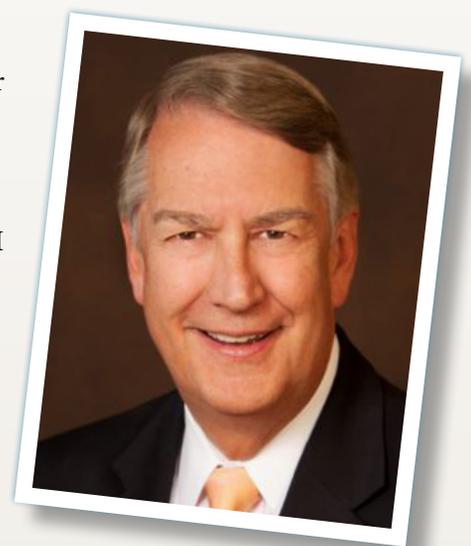
What have you learned about working for the State of Utah?

One thing I've learned is there are some really good people working for the State of Utah, especially in the Tax Commission. People work here because they believe in what they're doing. I guess I didn't really understand this until I came inside the tent and become one of the Tax Commission employees. They are now me; they are my

(continues)

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Meet the Director (continued)

family. The 750 people that work for the Tax Commission have become just like family. We have a “family reunion” every summer in the park as an informal “Tax Commission Meeting.” It’s just fun to get to know the various jobs people do in the Tax Commission. Each has an important role. I’m extremely impressed by the quality of the people, the loyalty, and the integrity they have to the jobs they are doing.

So what do you value in your employees?

There are a couple of things. One is the loyalty they have to the state. The second is the ethics. I’m talking about both a work ethic and an ethic as to do the right thing. When I became Chairman of the Commission, I brought with it a philosophy: “We don’t want to collect the highest possible tax from our taxpayers, especially where there is ambiguity or the law is unclear. Rather, we want to collect the correct tax, the tax the legislature placed into statute, the taxes we’re supposed to collect.” When we don’t meet that standard, we make changes. We’re not afraid to say: “We didn’t do that right, so let’s do it right this time.” I really appreciate that; I appreciate the work ethic and the ethic of trying to do what’s right for the State of Utah and its taxpayers. In a lot of ways, people don’t like the tax collector. They don’t like paying property taxes in November or income taxes in April. As I mentioned before, I practiced law for many years and represented a lot of people who hated taxes. But I’ve found that the people here really try to do the job we hired them to do.

What do you envision for your agency’s future?

I’m convinced the Tax Commission has to be nimble and dynamic as we grow. This happens in a lot of different ways, but often in the terms of technology and how we make things work. Things we used to do by hand we now do by computer. We have reduced the number of full time equivalent employees without laying people off. We invest in our greatest asset, our people, by training and retooling. For example, as full time employees are lost through attrition, such as retiring or moving into other jobs, we take folks who are no longer needed in a particular area and retool them in other areas. As we continue to utilize technology that increases our efficiency, we constantly look for ways to make it more taxpayer and user friendly. We’ll continue to make more adjustments within the Tax Commission to reflect an ever changing world.

The second area I envision giving constant attention is to the attacks by fraudsters. We are under constant attack, usually computer generated attacks. So while technology is useful, it is also a bane of the Tax Commission. We have so many things that are automated; we need to make certain we are very careful about how we protect privacy, how we protect the treasury, and how we protect the information that is generated at the Tax Commission. We are constantly on alert that we don’t allow people with nefarious purposes to get into that information or to change information. As we’ve seen in the past couple of years, fraudsters constantly try to file tax returns with your information, to get your refund, and get into your bank accounts. Those are things we need to be constantly vigilant about. Fraudsters are constantly changing the type of attack strategies they use so we need to stay one step ahead of them by changing our analytics and programs that identify frauds, by changing the kinds of things we’re looking for, and by soliciting the help of the public. There were many high profile attacks this year, resulting in the IRS having 11 million compromised tax returns and 56 billion dollars in false claims being paid. We were also attacked, but had different results because we were ahead of the game.

What If you could give one piece of advice to the State of Utah employees, what would it be?

Know that your job is important. If you know that your job is important, you will work hard, you will work in an atmosphere of the ethics I spoke about earlier, both in how hard you work and the way you approach the work. Let me give a small example: Let’s say you needed to obtain something very simple, i.e. a certificate of some sort. You visit the online address the organization instructs you to visit, where it indicates that you need to visit them in person instead. So you get in your car and travel to the location as instructed online, where they inform you that you need to visit different office located clear across town. You finally arrive at the office across town, walk in, and they tell you, “Oh no, no, you have to do that online,” right where you started from. Those kinds of things are annoying, and only happen because people do not view their job as being important. Know that your job is important, because it is. **WE**

Give what you can & lend a helping hand.

It's fall – time for the Utah State Employees' Charitable Fund contributions drive!



- *Donating online is secure, quick and easy*
- *Hundreds of pre-qualified charities participate*
- *Contributions help improve quality of life*



UTAH STATE EMPLOYEES'
CHARITABLE FUND

Lend a helping hand

www.usecf.state.ut.us

September 19 - November 10, 2016

PEHP **medicare**

Come Learn and Ask Questions About Medicare

Are you making the right healthcare choices to enjoy a carefree retirement? If you need help understanding Medicare or have questions, please join PEHP at one of our free [Medicare presentations](#) held across Utah beginning in October. We'll give you an overview of Medicare and PEHP [Medicare Supplement](#) with time to answer your questions.

Go to <https://www.pehp.org/medicaremeetings> for the complete schedule. We look forward to seeing you and answering your questions!

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Roth IRA: Tax-Free Retirement Income

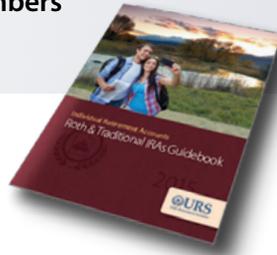
The advantage of a Roth IRA is the potential to withdraw tax-free in retirement.

You pay taxes upfront by contributing after-tax dollars. In return, you enjoy tax-free withdrawals when you meet certain conditions — generally, that the account is at least five years old and you're over age 59½.

Contribute to your URS Roth IRA through payroll deductions. You may also roll funds from other Roth

On the Web

Learn more about the URS Roth IRA: www.urs.org/rothira/members



IRAs or other retirement plans to your URS account.

IRS limits apply to your combined contributions to all

traditional and Roth IRAs.

Because most of your retirement income sources — pension, Social Security, 401(k) — will likely be taxed, the Roth IRA gives you tax diversity in retirement.

Here's another great thing about the Roth IRA: You can withdraw your contributions (not counting any earnings) without taxes or penalties at any time. This makes it perfect for saving for both retirement and unexpected expenses. ■

	401(k) Tax-deferred Pay income tax when withdrawn	457 Tax-deferred Pay income tax when withdrawn	Traditional IRA May be tax deductible Pay income tax when withdrawn	Roth IRA After-tax deposits Tax-free withdrawals
Withdrawals	<ul style="list-style-type: none"> » Retirement » Termination » Age 59½ if still employed » Hardship (Elective deferrals only) 	<ul style="list-style-type: none"> » Retirement » Termination » Age 70½ if still employed » Unforeseeable Emergency 	<ul style="list-style-type: none"> » Any time 	<ul style="list-style-type: none"> » Any time
Early Withdrawal Penalty Tax	<p>Yes — 10% early withdrawal penalty tax if withdrawn before age 59½.</p> <p>Exceptions:</p> <ul style="list-style-type: none"> » you work into the calendar year you turn age 55 » payout based on life expectancy » disability 	<p>No penalty tax</p>	<p>Yes — if withdrawn before age 59½.</p> <p>Exceptions:</p> <ul style="list-style-type: none"> » first home » higher education » payout based on life expectancy » disability 	<p>Contributions: No</p> <p>Earnings: Yes — if withdrawn before age 59½.</p> <p>Exceptions:</p> <ul style="list-style-type: none"> » first home » higher education » payout based on life expectancy » disability <p>(For more exceptions, see IRS Publication 590.)</p>

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The Doctor's in YOUR House!

[Register here](#) today so when the “unexpected” happens, you’ll see a doctor faster, easier and cheaper 24/7/365.

Enroll in Telemedicine at no cost to you. By using Amwell’s telemedicine, you’ll see a doctor for a reduced co-pay, and find the path to wellness more quickly.

Be sure to enter Service Key: PEHP

Medical Plan	Primary Care	Specialist
The STAR Plan	\$40	\$75
Traditional Plan	\$10	\$35





Phased Retirement

Here's what you need to know about this voluntary program.

The Legislature is testing an approach to help state employees ease into the major life change of retirement.

It's called Phased Retirement. It's a voluntary program for employers that may allow you to work half time (20 hours) while collecting half of your retirement benefits. If you participate in phased retirement, you'll generally be treated as a part-time employee, in terms of medical, leave, or other benefits. Once you retire completely, you'll begin to get 100% of your monthly retirement allowance.

Check with your employer to see if Phased Retirement may be in both of your best interests. This option is available, beginning January 1, 2017, only if your boss and agency agree in writing. It's a pilot program that will expire in 2021 unless the Legislature chooses to extend it.

[See Senate Bill 19 for full details about Phased Retirement.](#)

PEHP Answers Questions About Your healthcare?

Q: How long do I have to get my child's birth certificate to PEHP? What happens if I don't get it in time?

A: You have 60 days from the child's date of birth to add them to your PEHP coverage. Simply log into your PEHP account and click "Online Enrollment" under the "My Benefits" section. Once the baby has been added to your online account you will have an additional 60 days to send PEHP a copy of the birth certificate. If PEHP does not receive a copy of the birth certificate within 60 days, your child's medical, dental and pharmacy claims will be held and not paid until the PEHP receives a copy of the birth certificate.

Q: I was seen for a preventive service. Why was I charged?

A: When the scope of your visit increases, realize that you may get charged. Routine visits for preventive services are covered at no cost to you when you see a doctor contracted in your network. However, you will be billed for additional services at this visit. An "additional service" could be something as minor as a discussion with your doctor about a past or current condition. Ask your doctor how the visit will be billed; PEHP is required to pay based on how it's billed.

Q: Where do I find an in network provider? How do I make sure all providers are contracted in my network?

A: Get the best benefit by visiting doctors, hospitals, and other providers contracted in your network. Search for providers at www.pehp.org, log into your member account and click "Find and Select a Provider" under the "My Benefits" menu. Make sure every person and every facility involved in your care is contracted in your network. For example, just because your doctor is in your network, don't assume the lab he/she uses is also in your network. Be sure to verify at www.pehp.org. If you get medical equipment – such as a brace or sling – at the doctor's office or hospital, it will likely be billed by a different provider. Make sure that provider is contracted in your network. If your doctor refers you elsewhere for services? You know what to do. Always verify, and not just by asking your doctor or his/her staff. They may not know, or the network may change without their knowledge. If there is ever a question, you can also call PEHP Customer Service to verify.

PEHP Customer Service

M-F 8 a.m. to 6 p.m.

801.366.7555 or 800.765.7347

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Dear Utah State Employee,



With the countless campaign commercials, debates, mailers, and signs around, we know you've heard there is a presidential election going on. But you may be wondering what else will be on your ballot. A ballot in Utah County, for example, has 4 federal offices, 5 statewide executive offices, 2 state legislative offices, 1 county office, 1 state school board, 14 judges, 3 constitutional amendments, 2 local bond propositions, and a partridge in a pear tree.

Vote.Utah.Gov has made it easy for you to find out more information about your voting choices. You can view your sample ballot, your polling location, the profiles of each candidate running for office, as well as . You'll be able to see the arguments for and against each constitutional amendment and any other ballot propositions.

Depending on your county, you may have several options in casting your ballot. In most counties, your ballot will automatically be mailed to you; this must be postmarked by November 7th. Your county may also offer in-person early voting starting October 25th and ending November 4th. And, of course, every county will at have at least one polling location open on Election Day.

To find out more information, please view our [FAQs](#) or go to Vote.Utah.Gov. Not registered? It's not too late! The deadline for in-person and online registration is November 4th. 



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