



Back-To-School Checklist – 2017

Use this checklist as a reminder of back-to-school reporting tasks.

Reminders for New Employees (updated per PA 92 of 2017)

- Before reporting new employees, request proof of Social Security numbers to verify they are correct. This helps prevent reporting incorrect information to ORS and Voya Financial® and eliminates wasted time in entering adjustments for corrections.
- Use the Member Benefit Plan link on the Employer Reporting website to determine whether the employee is (1) new to the retirement system, (2) a current MPSERS member who is new to your reporting unit, or (3) a MPSERS retiree (if a retirement effective date is displayed). See [RIM 6.02](#).
 - 1) **New to the retirement system:** provide employee the **updated** version of *Your Retirement Plan Election brochure and form (R0940C)*. It will have a revision date of July 2017. See [RIM 7.11.00.01](#) and [RIM 7.11.00.02](#) and the [FAQs about PA 92 of 2017](#).
 - 2) **Current MPSERS member who is new to your reporting unit:** Report member based on the benefit plan shown on the Member Benefit Plans link.
 - 3) **MPSERS retiree:** see [RIM Chapter 9](#) and [Reporting Retirees](#) on the Employer Information website.

Tax-Deferred Payment (TDP) Agreements and Addendums:

- Review any new TDP agreements as soon as you receive them. Fax the signed, completed TDP agreements to ORS (517-322-1116) by **5:00 p.m. EDT, September 29, 2017** (the deadline for eligible members to purchase service credit.) To avoid the last-minute rush, fax completed agreements as soon as you have reviewed them.
- Ask new employees who are existing MPSERS members whether they had a TDP agreement with their previous employer, and if so, process their *TDP Agreement Addendum (R0625C)* promptly. See [RIM 10.09.01](#).

2017 Reform (PA 92 of 2017)

- Destroy old Retirement Plan Election brochures and forms (anything with a revision date before July 2017).
- On the first report with a record begin date on or after October 1, 2017, begin making the 4% mandatory employer contribution for employees hired on or after September 4, 2012 with the DC plan.
- Review the [FAQs about PA 92 of 2017](#).

Reporting

- For members who were reported with the summer spread wage code (08), switch to regular wage code (01).
- Web Administrators should review and update the contact information for reporting unit staff on the [Employer Reporting](#) website.
- Report total gross earnings for retirees who return to work in the pay periods they were paid. This includes cash in lieu of benefits, bonuses payments or any other form of compensation as reported on an employee W-2. For more information on reporting compensation for retirees, see [RIM Chapter 9](#).
- On DTL4 records, report total gross earnings (for both active employees and retirees). This includes cash in lieu of benefits, bonuses payments or any other form of compensation reported on a W-2. See [RIM 4.01.01](#).
- Make sure all payroll staff have access to the FTS user name and password as needed. See [RIM Chapter 14](#).