



Scott Henderson, Deputy Chief Auditor | PERAC
February 16, 2023

PROSPER Overview

- March 1st Live Date
- New Finance Tab automatically added to Existing Users
 - Finance Tab option will be added to form for New Users
- Downloadable handouts will have additional detailed screenshots for reference
- Cash book submission procedure differs by software
 - PTG clients discussed first, then non-PTG

Slide 2

LOGIN

(1) Enter User Name

(2) Enter Password

(3) CLICK **Sign In**

The screenshot shows the PROSPER login interface. At the top left is the 'PROSPER' logo, and at the top right is the text 'Massachusetts Public Employee Retirement Administration Commission'. Below this are two input fields: 'User Name' and 'Password (Case-sensitive)'. To the right of the password field is a blue 'Sign In' button. Below the 'Sign In' button is a link that says 'Forgot Password?'. At the bottom of the page are three links: 'Accessibility Policy', 'Site Policies', and 'Contact Us'. Three red arrows point from the numbered instructions on the left to the corresponding elements on the page: arrow (1) points to the User Name field, arrow (2) points to the Password field, and arrow (3) points to the Sign In button.

Slide 3

NOTES:

LOGIN (Cont'd)

(4) Enter Answer to Security Question(s)

(5) CLICK **Submit**

PROSPER | Massachusetts Public Employee Retirement Administration Commission

Security Question

Question
What is the street number of the house you grew up in?

Answer*

Submit

Slide 4

LAND ON "HOME" PAGE

(1) CLICK **Finance** Tab

Massachusetts Public Employee Retirement Administration Commission

Home
Tasks
Compliance
Finance
Benefits
Disability
91A

Tasks

- Disability Transmittal Action Request for 84 24 (6 Ordinary)
- CME Suspension Reinstatement for 67 12
- CME Suspension Reinstatement for 56 M 87
- CME Suspension Reinstatement for 28 14
- CME Suspension Reinstatement for 6 L 51

Notifications (Last 90 Days)

- 11/30/2022 Disability Transmittal Complete

PERAC Memos

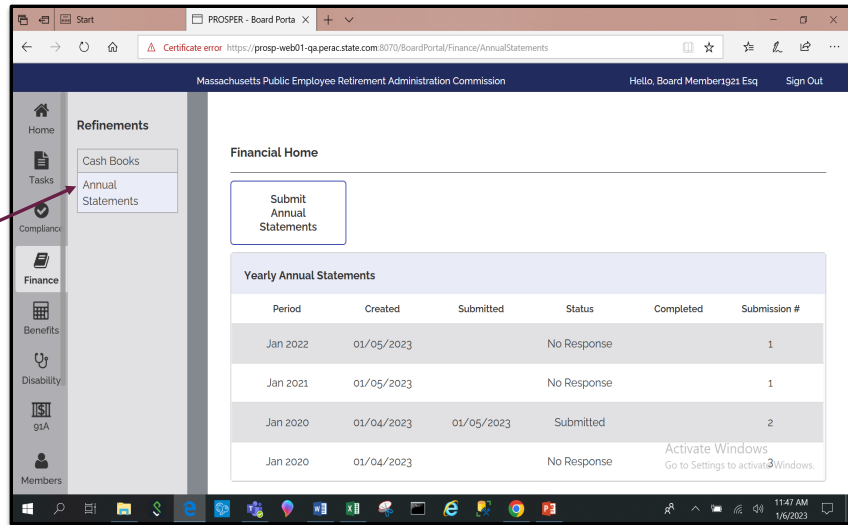
- Memo #12/2050 2050 Republic
- Memo #1/2050 2050 Test
- Memo #32609.1 2022 New Memo > Appr...
- Memo #2022-#2 2022 St#35059
- Memo #17/2022 2022 Mandatory Retirem...
- Memo #14/2022 2022 Supreme Judicial...
- Memo #13/2022
- Memo #12/2022

Slide 5

NOTES:

LAND ON “FINANCIAL HOME” PAGE

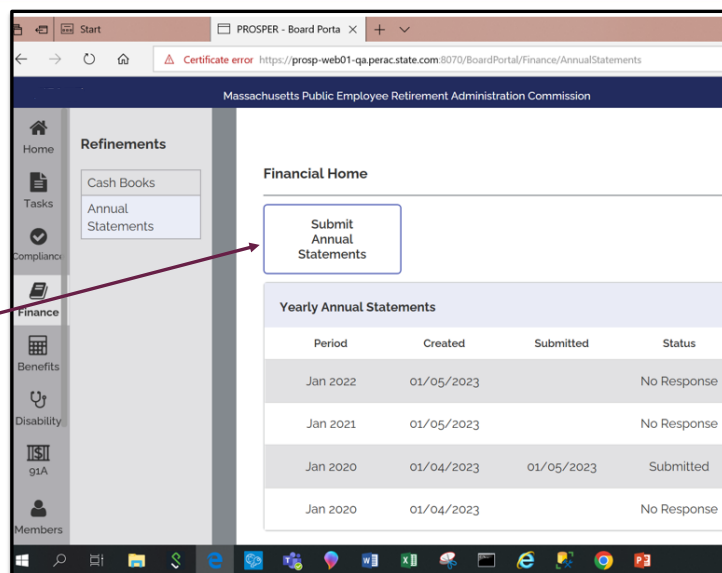
(1) CLICK on **Annual Statements**



Slide 6

LAND ON “ANNUAL STATEMENT” PAGE

(1) CLICK on **Submit Annual Statements**



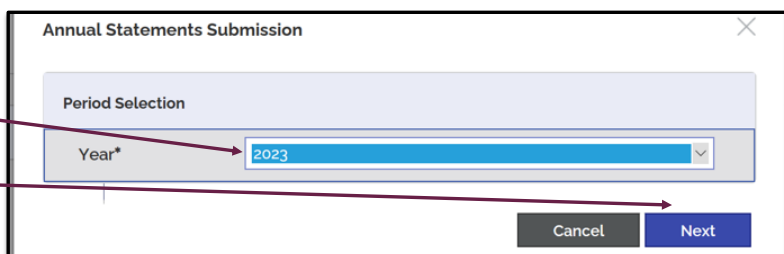
Slide 7

NOTES:

SUBMITTING Annual Statement

(1) Select Year

(2) CLICK **Next**

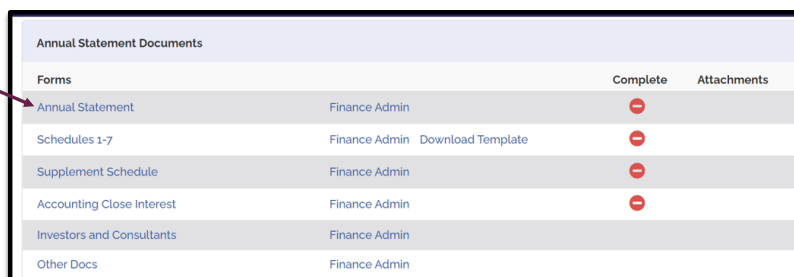


The dialog box titled "Annual Statements Submission" contains a "Period Selection" section with a "Year*" dropdown menu. The year "2023" is selected. At the bottom right are "Cancel" and "Next" buttons. Arrows from the text labels point to the "Year*" dropdown and the "Next" button.

Slide 8

SUBMITTING Annual Statement (Cont'd)

(3) CLICK **Annual Statement**



Annual Statement Documents					
Forms			Complete	Attachments	
Annual Statement	Finance Admin				
Schedules 1-7	Finance Admin	Download Template			
Supplement Schedule	Finance Admin				
Accounting Close Interest	Finance Admin				
Investors and Consultants	Finance Admin				
Other Docs	Finance Admin				

Slide 9

NOTES:

UPLOAD Doc(s)

(1) CLICK **Add Attachment**

Document Upload

Annual Statement (Please Attach)

No attachments uploaded.

[Add Attachment](#)

Close

Slide 10

UPLOAD Doc(s) (Cont'd)

(2) CLICK **Browse**

No file selected

Browse...

Cancel

No attachments uploaded.

[Add Attachment](#)

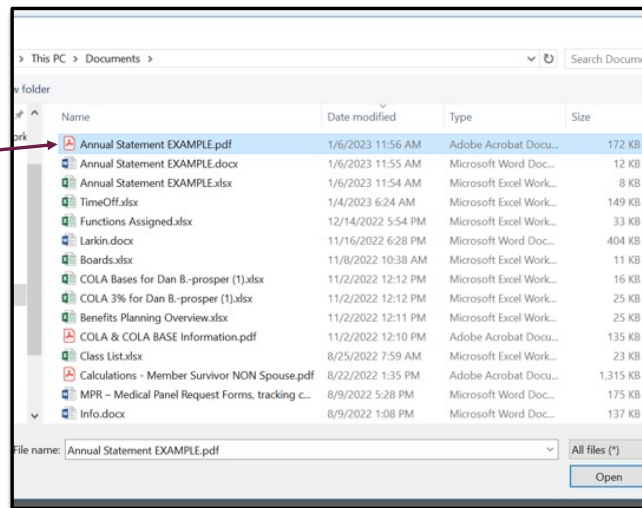
Close

Slide 11

NOTES:

UPLOAD Doc(s) (Cont'd)

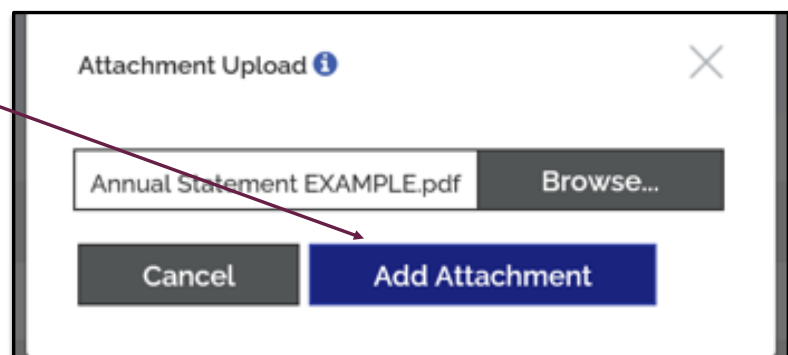
(3) SELECT correct file



Slide 12

UPLOAD Doc(s) (Cont'd)

(4) CLICK Add Attachment

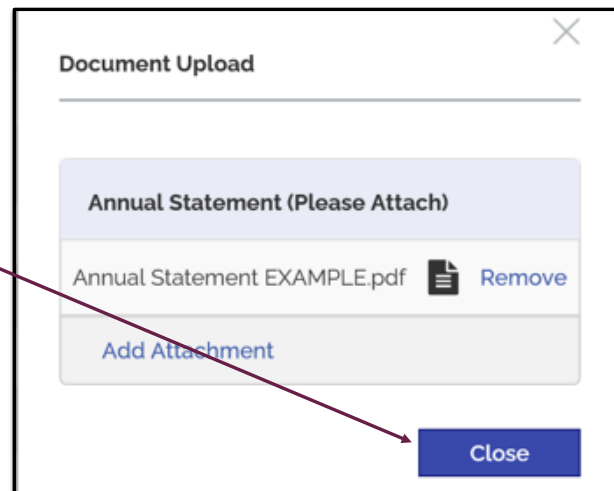


Slide 13

NOTES:

UPLOAD Doc(s) (Cont'd)

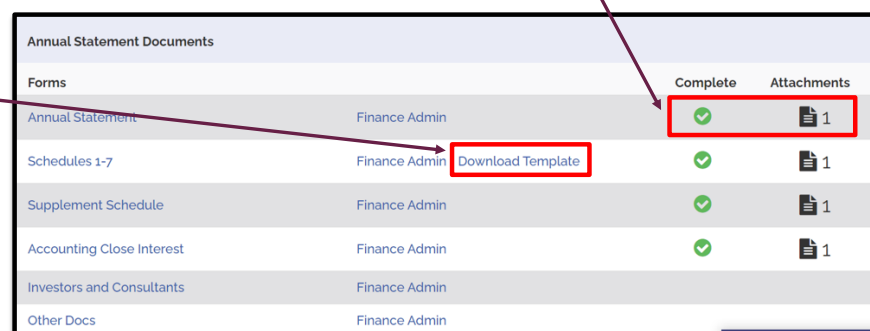
(5) CLICK **Close**



A dialog box titled "Document Upload" with a close button (X) in the top right corner. Inside the dialog, there is a section titled "Annual Statement (Please Attach)". Below this title, it shows "Annual Statement EXAMPLE.pdf" with a document icon and a "Remove" link. Below that is an "Add Attachment" button. At the bottom right of the dialog is a blue "Close" button. A red arrow points from the text "(5) CLICK Close" to the "Close" button.

Slide 14

- You will now see the **Complete** is a **Green** Check and the **Attachment** is there
- Repeat same 5 STEPS for Other Uploads:
 - Schedules 1-7 (Please download and use template)
 - Supplemental Schedule
 - Accounting Close Interest
 - Investors and Consultants (IF APPLICABLE)
 - Other Docs (IF APPLICABLE)



A table titled "Annual Statement Documents" with columns "Forms", "Complete", and "Attachments". The "Forms" column lists various documents, and the "Complete" column shows green checkmarks. The "Attachments" column shows document icons and the number "1". A red box highlights the "Download Template" link next to "Schedules 1-7". A red arrow points from the text "Complete is a Green Check" to the green checkmark in the "Complete" column for "Annual Statement".

Forms	Complete	Attachments
Annual Statement	✓	1
Schedules 1-7	✓	1
Supplement Schedule	✓	1
Accounting Close Interest	✓	1
Investors and Consultants		
Other Docs		

Slide 15

NOTES:

Upload Rules

■ REQUIRED DOCS

- Annual Statement (must be READABLE PDF format)
- Schedules 1-7 (must be XLSX format)
 - **PLEASE DOWNLOAD & USE TEMPLATE**
- Supplemental Schedule (must be READABLE PDF format)
- Accounting Close Interest (must be READABLE PDF format)

■ ONLY IF APPLICABLE

- Other Docs
- Investors and Consultants (must be READABLE PDF format)

Slide 16

- Once ALL Required Documents are uploaded, reach out to the Board Members for certification.

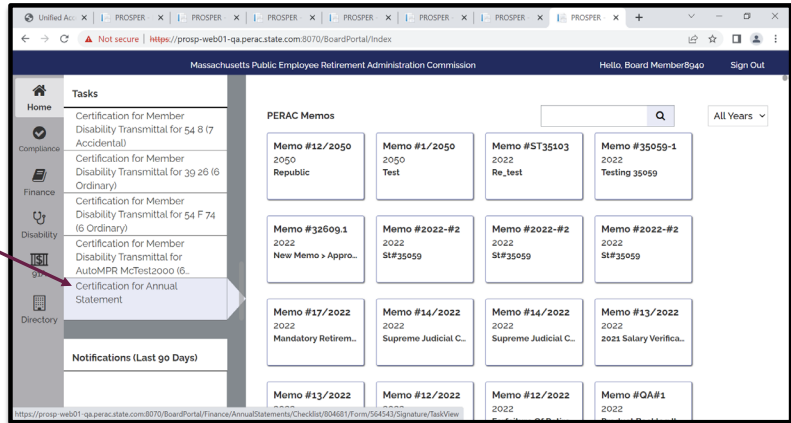
Annual Statement Documents		Complete	Attachments
Forms			
Annual Statement	Finance Admin	✓	1
Schedules 1-7	Finance Admin	✓	1
Supplement Schedule	Finance Admin	✓	1
Accounting Close Interest	Finance Admin	✓	1
Investors and Consultants	Finance Admin	✓	1

Slide 17

NOTES:

CERTIFICATION BY BOARD MEMBERS

- (1) CLICK the **Certification for Annual Statement Tab**



Slide 18

CERTIFICATION BY BOARD MEMBERS (Cont'd)

- (2) Board Member can **Go to Checklist** and see what is actually submitted
- (3) Member signs by adding name
- (4) Check off Acknowledgement
- (5) CLICK **Sign Document**

Slide 19

NOTES:

- You will now see the **Complete** is a **Green** check once the Board Member signs.
- Repeat same 5 STEPS for ALL Board Members who need to Certify Statement.

Massachusetts Public Employee Retirement Administration Commission		Hello, Board
Supplement Schedule	Finance Admin	✓
Accounting Close Interest	Finance Admin	✓
Investors and Consultants	Finance Admin	✓
Other Docs	Finance Admin	✓
Retirement Board Member Certification		✓
	Board Member20357	✓
	Board Member21990	✓
	Board Member8940	✓
	Board M Member3760, Esq	✓
	Board B Member7990	✓

Slide 20

- Once ALL Signatures have been received and Certification is complete, the Annual Statement can be **Submitted**.

Retirement Board Member Certification	✓
Board M Member3760, Esq	✓
Board B Member7990	✓
Board Member8940	✓
Board Member20357	✓
Board Member21990	✓

Withdraw Submit

Slide 21

NOTES:

- Once **Submitted**, you will receive a Message of Completion

✓ COMPLETE: Annual Statement checklist has been successfully submitted to PERAC.

Slide 22

- You can go back to the **Financial Home** Page and see that the Annual Statement has been Submitted.

Financial Home					
Submit Annual Statements					
Yearly Annual Statements					
Period	Created	Submitted	Status	Completed	Submission #
2024	02/03/2023	02/03/2023	Submitted		1
2023	02/03/2023	02/03/2023	Submitted		1
2022	02/03/2023	02/03/2023	Submitted		1
2021	02/07/2023	02/07/2023	Submitted		4
2020	01/06/2023	02/03/2023	Submitted		1

Slide 23

NOTES:



For assistance with **PROSPER**, please contact us at:
617-591-8983 or PER-ProsperHelp@mass.gov

Slide 24

Screen Shots

Slide 25

NOTES:

Unified Access Portal - CGI x PROSPER x +

Not secure | <https://prosp-web01-qa.perac.state.com:8070>

ANNOUNCEMENT: IMPORTANT: Prosper Help desk email address had been changed to PER-ProsperHelp@mass.gov

PROSPER | Massachusetts Public Employee Retirement Administration Commission

User Name

Password (Case-sensitive)

[Forgot Password?](#) [Sign In](#)

[Accessibility Policy](#) [Site Policies](#) [Contact Us](#)

Slide 26

Unified Access Portal - CGI x PROSPER x +

Not secure | <https://prosp-web01-qa.perac.state.com:8070/Account/SecurityQuestion>

PROSPER | Massachusetts Public Employee Retirement Administration Commission

Security Question

Question
 What is the first name of your oldest niece?

Answer*

[Submit](#)

Slide 27

NOTES:

Unified Access Portal - CGI PROSPER - Board Portal

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Index

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member1921 Esq Sign Out

Home Tasks Compliance Finance Benefits Disability 91A Members

Tasks

- Disability Transmittal Action Request for 61 96 (6 Ordinary)
- CME Suspension Reinstatement for 64 72
- CME Suspension Reinstatement for 4 M 17
- CME Suspension Reinstatement for 65 97
- CME Suspension Reinstatement for 66 L 78

Notifications (Last 90 Days)

- 1/22/2023 Disability Transmittal Board Action Request is Late

PERAC Memos

Search: [] All Years [v]

- Memo #12/2050 2050 Republic
- Memo #1/2050 2050 Test
- Memo #ST35103 2022 Re_test
- Memo #35059-1 2022 Testing 35059
- Memo #32609.1 2022 New Memo > Appro...
- Memo #2022-#2 2022 St#35059
- Memo #2022-#2 2022 St#35059
- Memo #2022-#2 2022 St#35059
- Memo #17/2022 2022 Mandatory Retirem...
- Memo #14/2022 2022 Supreme Judicial C...
- Memo #14/2022 2022 Supreme Judicial C...
- Memo #13/2022 2022 2021 Salary Verifica...
- Memo #13/2022 2022
- Memo #12/2022 2022
- Memo #12/2022 2022
- Memo #QA#1 2022

Slide 28

Unified Access Portal - CGI PROSPER - Board Portal

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member1921 Esq Sign Out

Home Tasks Compliance Finance Benefits Disability 91A Members

Refinements

- Cash Books
- Annual Statements

Financial Home

Submit Annual Statements

Yearly Annual Statements

Period	Created	Submitted	Status	Completed	Submission #
2024	02/03/2023	02/03/2023	Submitted		1
2023	02/03/2023	02/03/2023	Submitted		1
2022	02/03/2023	02/03/2023	Submitted		1
2021	02/03/2023		Not Yet Submitted		1

Slide 29

NOTES:

Unified Access Port x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member1921 Esq Sign Out

Home Refinements Cash Books Annual Statements Compliance Finance Benefits Disability 91A Members

Annual Statements Submission

Period Selection

Year* 2021 2020 2021 2022 2023 2024

Cancel Next

Period	Created	Submitted	Status	Completed	Submission #
2024	02/03/2023	02/03/2023	Submitted		1
2023	02/03/2023	02/03/2023	Submitted		1
2022	02/03/2023	02/03/2023	Submitted		1
2020	01/30/2023	02/03/2023	Submitted		1

Slide 30

Unified Access Port x PROSPER - Board P x PROSPER - Board P x PROSPER - Board P x PROSPER - Board P x PROSPER - Board P x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements/Checklist/804656

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member1921 Esq Sign Out

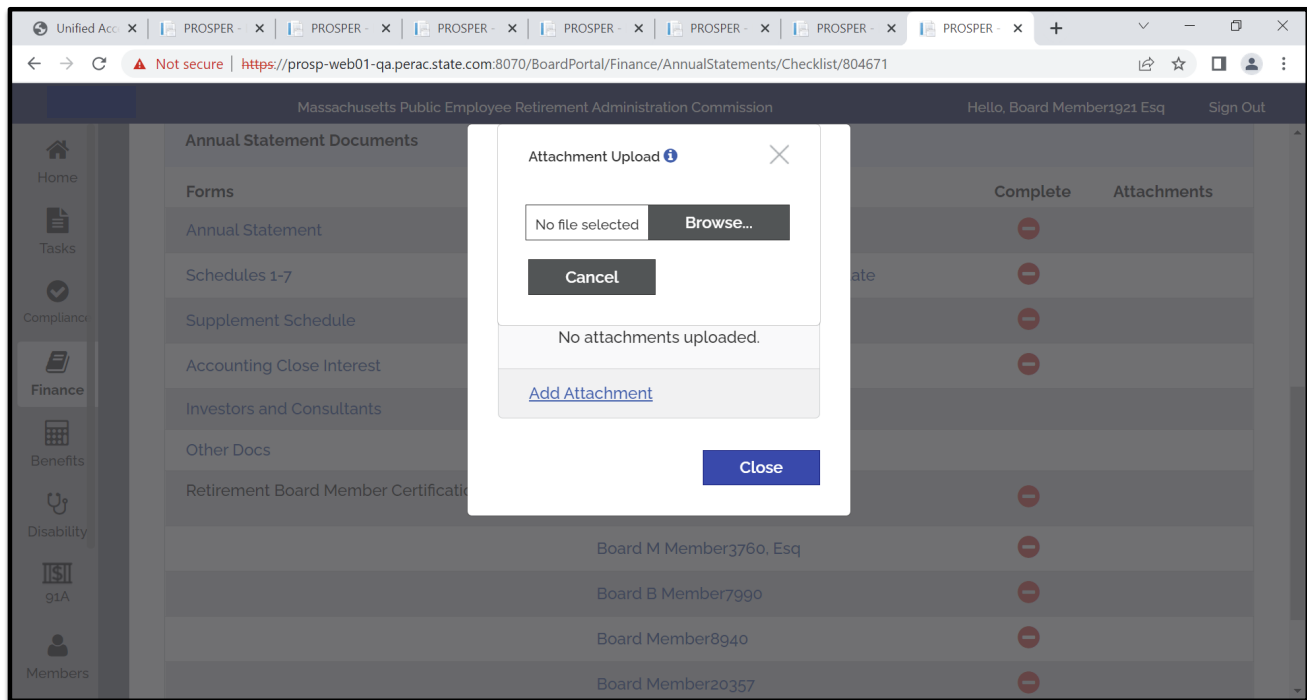
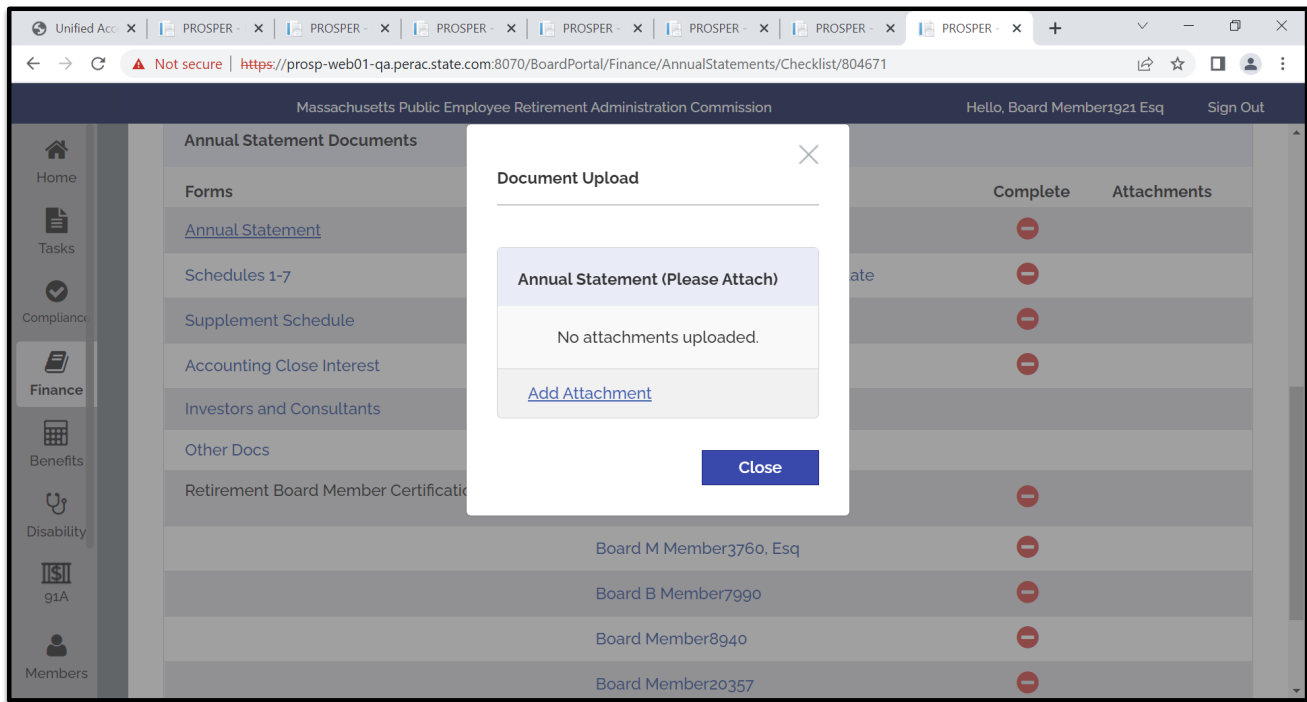
Home Tasks Compliance Finance Benefits Disability 91A Members

Annual Statement Documents

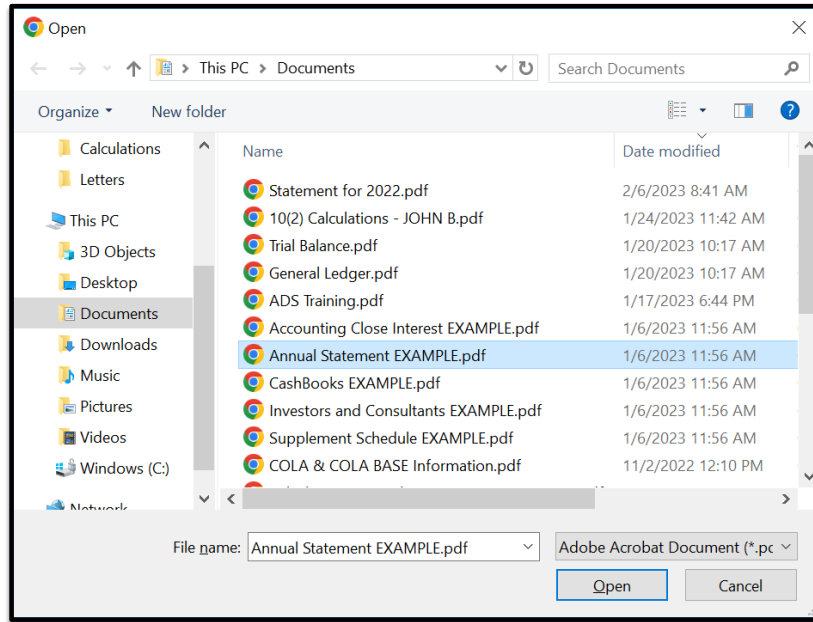
Forms	Complete	Attachments
Annual Statement	Finance Admin	-
Schedules 1-7	Finance Admin Download Template	-
Supplement Schedule	Finance Admin	-
Accounting Close Interest	Finance Admin	-
Investors and Consultants	Finance Admin	
Other Docs	Finance Admin	
Retirement Board Member Certification		-
	Board M Member3760, Esq	-
	Board B Member7990	-
	Board Member8940	-

Slide 31

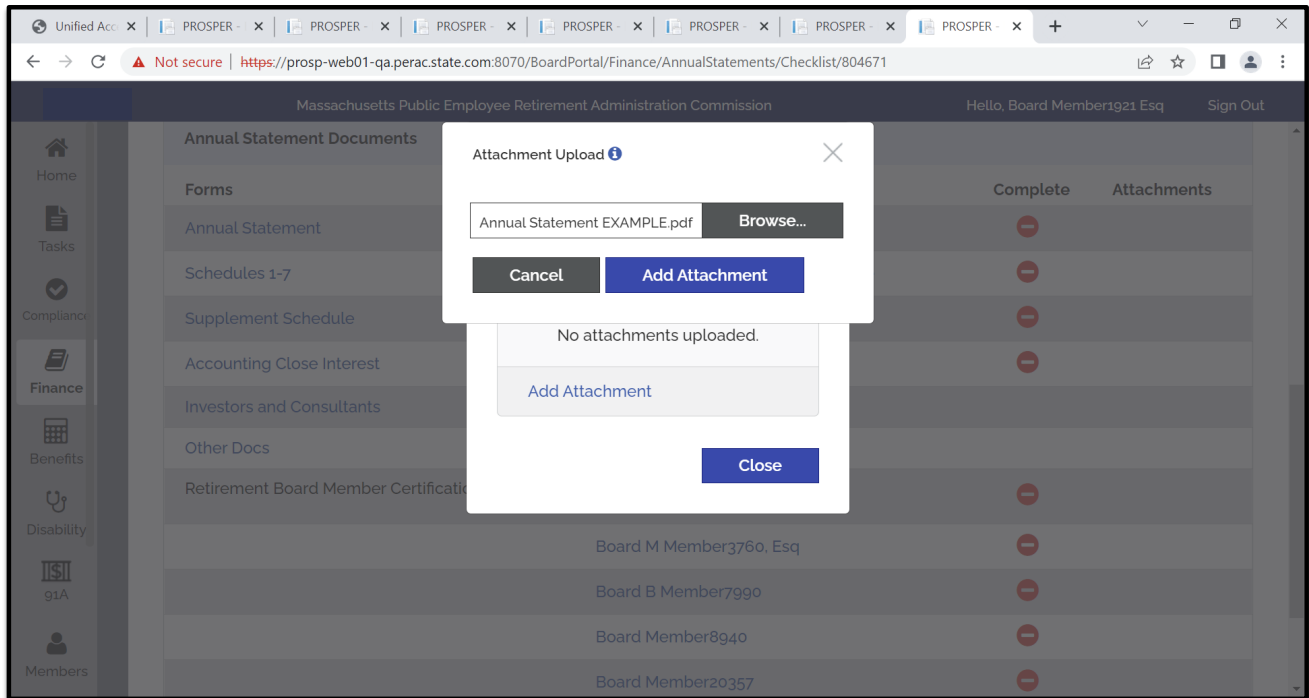
NOTES:



NOTES:



Slide 34



Slide 35

NOTES:

Unified Acc x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements/Checklist/804671

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member1921 Esq Sign Out

Home Tasks Compliance Finance Benefits Disability 91A Members

Annual Statement Documents

Forms

Annual Statement

Schedules 1-7

Supplement Schedule

Accounting Close Interest

Investors and Consultants

Other Docs

Retirement Board Member Certification

Document Upload

Annual Statement (Please Attach)

Annual Statement EXAMPLE.pdf Remove

Add Attachment

Close

Complete Attachments

1

Board M Member3760, Esq

Board B Member7990

Board Member8940

Board Member20257

Slide 36

Unified Access Portal - CC x Mail - kristy.batchelder@ x PROSPER - Board Portal x PROSPER - Board Portal x PROSPER - Board Portal x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements/Checklist/804590

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member20127 Sign Out

Home Tasks Compliance Finance Benefits Disability 91A Members

Submission #: 1

Annual Statement Documents

Forms

Annual Statement Finance Admin Complete Attachments 1

Schedules 1-7 Finance Admin Download Template Complete Attachments 1

Supplement Schedule Finance Admin Complete Attachments 1

Accounting Close Interest Finance Admin Complete Attachments 1

Investors and Consultants Finance Admin

Other Docs Finance Admin

Retirement Board Member Certification

27 43

Activate Windows

Go to Settings to activate Windows.

Slide 37

NOTES:

Unified Acc x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Index

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member8940 Sign Out

Tasks

- Home
- Compliance
- Finance
- Disability
- 91A
- Directory

PERAC Memos

Memo #12/2050 2050 Republic

Memo #1/2050 2050 Test

Memo #ST35103 2022 Re_test

Memo #35059-1 2022 Testing 35059

Memo #32609.1 2022 New Memo > Appro...

Memo #2022-#2 2022 St#35059

Memo #2022-#2 2022 St#35059

Memo #2022-#2 2022 St#35059

Memo #17/2022 2022 Mandatory Retirem...

Memo #14/2022 2022 Supreme Judicial C...

Memo #14/2022 2022 Supreme Judicial C...

Memo #13/2022 2021 Salary Verifica...

Memo #13/2022

Memo #12/2022

Memo #12/2022

Memo #12/2022

Memo #QA#1 2022

https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements/Checklist/804681/Form/564543/Signature/TaskView

Slide 38

Unified Acc x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x PROSPER - x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Index

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member8940 Sign Out

Tasks

- Home
- Compliance
- Finance
- Disability
- 91A
- Directory

Retirement Board: State

Name: Board Member8940

Checklist: [Go to 2021 Checklist](#)

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

First Name* **MI** **Last Name*** **Suffix**

Board Member8940

The electronic signature must match the name Board Member8940

☒ I acknowledge that I am electronically signing this form*

Sign Document

official board member of said retirement system, and that on the thirty-first day of December last, all of the herein-described assets were the absolute property of said retirement system, free and clear from any liens or claims thereon, except as stated, and the following statements, with the schedules and explanations therein contained, annexed, or referred to, are a full and correct exhibit of all the assets, liabilities, income and disbursements, changes in fund balances, and of the conditions and affairs of the said retirement system on the said thirty-first day of December last, and for the year ended on that date, according to the best of my information, knowledge, and belief, respectively.

Slide 39

NOTES:

Unified A x PROSPER x PROSPER x PROSPER x PROSPER x PROSPER x PROSPER x PROSPER x PROSPER x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements/Checklist/804671

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member1921 Esq Sign Out

Home Tasks Compliance Finance Benefits Disability 91A Members

Supplement Schedule	Finance Admin	✓	1
Accounting Close Interest	Finance Admin	✓	1
Investors and Consultants	Finance Admin		
Other Docs	Finance Admin		
Retirement Board Member Certification		✗	
	Board M Member3760, Esq	✗	
	Board B Member7990	✗	
	Board Member8940	✓	
	Board Member20357	✗	
	Board Member21990	✗	

Withdraw Submit

Slide 40

Unified x PROSP x PROSP x PROSP x PROSP x PROSP x PROSP x PROSP x PROSP x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements/Checklist/804671

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member1921 Esq Sign Out

Home Tasks Compliance Finance Benefits Disability 91A Members

Supplement Schedule	Finance Admin	✓	1
Accounting Close Interest	Finance Admin	✓	1
Investors and Consultants	Finance Admin		
Other Docs	Finance Admin		
Retirement Board Member Certification		✓	
	Board M Member3760, Esq	✓	
	Board B Member7990	✓	
	Board Member8940	✓	
	Board Member20357	✓	
	Board Member21990	✓	

Withdraw Submit

Slide 41

NOTES:

Unified x PROSP x PROSP x PROSP x PROSP x PROSP x PROSP x PROSP x PROSP x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements/Checklist/804671

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member1921 Esq Sign Out

Home Tasks Compliance Finance Benefits Disability 91A Members

COMPLETE: Annual Statement checklist has been successfully submitted to PERAC.

Notes

Comments	Date	Updated By
Not found		

Annual Statement Submission Checklist

Submission Information

Period:	2021
Submitted:	2/7/2023
Rejected:	
Approved:	

Slide 42

Unified x PROSP x PROSP x PROSP x PROSP x PROSP x PROSP x PROSP x PROSP x

Not secure | https://prosp-web01-qa.perac.state.com:8070/BoardPortal/Finance/AnnualStatements

Massachusetts Public Employee Retirement Administration Commission Hello, Board Member1921 Esq Sign Out

Home Tasks Compliance Finance Benefits Disability 91A Members

Refinements

Cash Books

Annual Statements

Financial Home

Submit Annual Statements

Yearly Annual Statements

Period	Created	Submitted	Status	Completed	Submission #
2024	02/03/2023	02/03/2023	Submitted		1
2023	02/03/2023	02/03/2023	Submitted		1
2022	02/03/2023	02/03/2023	Submitted		1
2021	02/07/2023	02/07/2023	Submitted		4
2020	01/26/2022	02/02/2022	Submitted		4

Slide 43

NOTES:

COMMONWEALTH OF MASSACHUSETTS

Public Employee Retirement Administration Commission

Five Middlesex Avenue, Suite 304 | Somerville, MA 02145

Phone: 617-666-4446 | Fax: 617-628-4002

TTY: 617-591-8917 | Web: www.mass.gov/perac

