

Massachusetts State Employees' Retirement System

You Serve the Commonwealth. We Serve You.



MSRB Operations Update 4.2.20

Program Overview

- General Update
- Information for Retirees and Survivors
- Information for Active Employees
- Conclusion

General Update

- To reduce the risk and opportunities of exposure the MSRB offices are closed to the public and all staff until further notice. During this period MSRB staff are working remotely.
- **Please note: the issuance of regular monthly benefit payments, or other disbursements are not impacted. The next scheduled monthly benefits will be issued on April 30, 2020.**
- Check the MSRB's web site regularly for updates mass.gov/retirement

Information for Retirees and Survivors



Retiree Benefit Verification Form Mailing Postponed

- The retiree Benefit Verification Form mailing scheduled for this spring is being postponed to a later date until the forms can be completed and returned safely. Benefit recipients will continue to receive their monthly benefit as usual.
- Please note: You will not be required to submit a form if you retired or started receiving a benefit this year (2020).



Legislation for Temporary Lifting of Retiree Earnings Limits

- Contained in pending municipal relief bill making its way through the Legislature.
- This waiver would allow most public retirees to serve in public positions for balance of 2020 without restriction on hours or earnings.
- Please note, disability retirees would be excluded and would continue to have earnings limits

Disability Retirees Notification

Annual Section 91A Filing Deadline Extended to July 15

- The new deadline to file the Annual Statements of Earned Income corresponds with the Internal Revenue Service's income tax filing deadline.
- You do not need to contact PERAC's office to request an extension.
- If you have completed your statement already, you may file it now by mail. PERAC's office is currently closed so they are not able to accept in-person submissions.
- If you have questions about the above information you may contact Chanese Brown at cbrown@tre.state.ma.us at the MSRB, or Kate Hogan at PERAC, 617-666-4446.

Information for Active Employees

Current Disability Applicants

Disability Application Medical Panel Examinations Suspended

- PERAC is no longer scheduling medical panel examinations until further notice in connection with applications filed for disability retirement benefits. Many previously scheduled appointments have been cancelled due to the impact of COVID-19.
- The Disability unit at MSRB will continue to submit requests for medical panel examinations for applications which have met the required criteria so any further delay might be reduced when PERAC resumes scheduling.

GIC Annual Benefit Statement Mailing

2020
COMMONWEALTH
OF MASSACHUSETTS

**BENEFITS
THROUGH
THE GIC**

**Annual Enrollment
April 6 - May 1, 2020**

**REVIEW
YOUR
OPTIONS**

Your Agency/Division Number: _____



myGIC Link

GO DIGITAL Use myGIC Link to make changes or corrections to this Benefit Statement.

- Be sure the Preferred email address displayed below is correct
- Go to myGIC Link
- Enter your preferred email and BOB
- Request the Beneficiary Change Form
- Check your email for the requested form
- Follow instructions for completion
- Submit
- Watch your email for confirmation of receipt

This is a personalized annual statement of your Commonwealth of Massachusetts benefits as of February 29, 2020. To change or correct information on this Benefit Statement, please notify the GIC using the enclosed Beneficiary Change Form and return envelope.

If the Preferred email address field below is empty, please add it to your records using the Beneficiary Change Form. Once entered in GIC's system, you will be able to use myGIC Link during Annual Enrollment.

Insured's birth date: _____
Phone number: _____
Email address: _____

HEALTH PLAN BENEFITS

Commonwealth Pays Monthly: _____
Employee Pays Monthly: _____
Total Monthly Premium: _____

DEPENDENTS COVERED BY YOUR HEALTH PLAN

First/Last Name	Relationship*	Date of Birth	Sex

LIFE INSURANCE BENEFITS

Basic Life and Accidental Death & Dismemberment on Insurance Amount:
Commonwealth Pays Monthly: _____
Employee Pays Monthly: _____
Total Monthly Premium: _____

OPTIONAL LIFE INSURANCE

Optional Life and Accidental Death & Dismemberment Insurance Amount:
You are enrolled for optional life insurance coverage as:
Employee pays the full monthly premium.

LIFE INSURANCE BENEFICIARIES

First/Last Name	Percent

DENTAL/VISION PLAN BENEFITS

Commonwealth Pays Monthly: _____
Employee Pays Monthly: _____
Total Monthly Premium: _____

DEPENDENTS COVERED BY YOUR DENTAL/VISION PLAN

First/Last Name	Relationship*	Date of Birth	Sex

LONG TERM DISABILITY BENEFITS

Employee pays the full monthly premium.

HCSA AND DCAP BENEFITS

TOTAL ESTIMATED GIC BENEFITS

Total monthly contribution by the Commonwealth: _____
Total monthly employee contribution: _____
Total monthly premiums (approx.): _____

NOTE: You must notify the GIC of a legal separation, divorce or remarriage. Coverage for a former spouse ends upon remarriage.

Do not return this to the GIC. Use it to compare with your PERSI. Please and rates open to be published in the Beneficiary Decision Guide. Do not use for tax purposes.

THIS IS NOT A BILL. DO NOT SEND PAYMENT.

Is your Massachusetts State Employees' Retirement System beneficiary information up-to-date?

THIS INFORMATION IS PROVIDED BY A SEPARATE AGENCY AS A CONVENIENCE TO GIC MEMBERS.

NOTE: The information below is intended for state employees and employees of certain public entities who are members of the State Employees' Retirement System. Only these employees have received the State Retirement Board Beneficiary Change Form with this GIC Statement. Employees of agencies, including MassPort, the MWRA, and Redevelopment and Housing Authorities should contact their appropriate retirement system for beneficiary information.

As a member of the State Employees' Retirement System you can designate a beneficiary or beneficiaries to receive certain benefits or payments should you pass away while still in active service and before your retirement. Upon your death, your designated beneficiary(ies) can receive the lump sum payment of your accumulated retirement deductions plus interest. They can also receive payment for any unused vacation and sick time owed to you by your employing agency.

Carefully review the information provided below for accuracy and, if necessary, update your beneficiary data on the enclosed State Retirement Board **Beneficiary Change Form**. Mail the completed form to the State Retirement Board in the enclosed blue addressed envelope.

PLEASE NOTE: the beneficiary or beneficiaries you may designate for life insurance purposes with the Group Insurance Commission, as listed on the reverse of this statement, are not valid for retirement purposes.

STATE EMPLOYEE RETIREMENT SYSTEM BENEFICIARIES*

FIRST/LAST NAME	RELATIONSHIP	DATE OF BIRTH	TYPE	PERCENTAGE

*If you made a beneficiary designation prior to the current calendar year, the Board's records in 1993. If they were listed above, they may not properly reflect designations received and in record with the GIC and remain valid. However, if you are not certain of the designator, or you are unable to locate a beneficiary, we encourage that you send an updated Beneficiary Change Form.

PLEASE NOTE

- If you wish to add or delete a beneficiary, you must fill out the enclosed **Beneficiary Change Form** and mail it to the State Retirement Board.
- If any of your beneficiary data listed above is inaccurate, please submit a beneficiary correction request** via e-mail to: a.b@tre.state.ma.us. Be sure to put "Beneficiary Correct on" in the subject line.

**For information purposes, please include your State Retirement Board ID number (to receive mail) for any Social Security Numbers which are your only or one of the highest rates to receive Social Security benefits. If you are a former spouse, please include the Social Security Number of the former spouse. If you are an employee, please include your Employee ID number. A State Retirement Board staff member will review your request and process it in accordance with Board policies.

Selection of a beneficiary as outlined above does not impact an eligible spouse's right to elect a retirement allowance under Option D should you pass away prior to retirement. You may file an Option D Beneficiary Form naming one eligible beneficiary to receive a lifetime retirement allowance should you die prior to retirement. For more information and to access the Option D Form, please visit the State Retirement Board website, mass.gov/retirement.

State Retirement Board staff will not disclose beneficiary information over the telephone or electronically. Please contact us if you have questions on how to designate a beneficiary.

Please note that you will need to make new beneficiary selections when you retire.

Massachusetts State Retirement Board
1-617-367-7770 (Boston Office) — 1-413-730-8135 (Springfield Office)
1-800-392-6014 (within Massachusetts only)
www.mass.gov/retirement

Be sure to check page 2 for your current Retirement Board beneficiaries on file.



Update for Buybacks (Service Purchases)

A few updates from the Buyback Department

- Payments made via personal checks will be processed when feasible.
- We appreciate your patience while we continue to review and process the current backlog of service purchase requests.
- The best way to communicate with the Buyback department is by email: buyback@tre.state.ma.us

Submitting Documents

- Mail delivery to MSRB offices will be intermittent and managed weekly. We encourage you to continue mailing documents to avoid duplication, especially if your request is not time sensitive. Please mail materials to the Boston office.
- If you do email documents to the MSRB please remember:
 - Do not include your entire Social Security Number (SSN), dates of birth, bank account numbers in any email correspondence or on forms; please just include the last 4 digits of your SSN or your MSRB ID number if you know it.
 - Be sure to ***make yourself a copy*** of any documents (such as a retirement or buyback application) that you mail to the MSRB office.
 - Direct your email to the appropriate MSRB email box

E-mail Contacts

- SRB Main email: srb@tre.state.ma.us
- Communications: MSRBCommunications@tre.state.ma.us
- Survivor Benefits (report a member or survivor's death):
survivorbenefits@tre.state.ma.us
- Refunds/Rollovers – Manager Diana Reyes: dreyes@tre.state.ma.us
- Buyback (Service Purchases): buyback@tre.state.ma.us
- Board Reporting: EBR@tre.state.ma.us
- Manager Tamarra Desruisseaux: tdesruisseaux@tre.state.ma.us
- Disability – Manager Chanese Brown: cbrown@tre.state.ma.us
- Legal – Individuals who have legal documents to submit for review, such as proposed or draft domestic relations orders and worker's compensation lump sum agreements, or documents related to a pending appeal before the Division of Administrative Law Appeals (DALA), may submit them to: msrb-legal@tre.state.ma.us

Telephone Contacts

- **Telephone: (617) 367-7770, then select one of the following options:**
 - If you have a question about a retirement payment, direct deposit, mailing address or federal tax withholding, **press 1**
 - If you are calling about a service purchase or buyback, **press 2**
 - If you are calling about a refund or rollover request or payment, **press 4**
 - If you are calling to report the death of a benefit recipient, **press 5**
 - If you have questions about disability retirement benefits, **press 6**
 - If you have questions about regular retirement benefits, **press 7**
 - If you are calling about an employer reporting matter, **press 1**

Website and Social Media

www.mass.gov/retirement

-View all our forms, information,
and view our upcoming seminar
schedule



twitter.com/MassStateRet

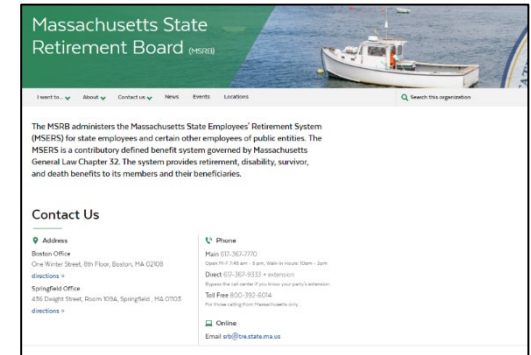
-For all the latest stories and news!
-Tweet at us with @MassStateRet



facebook.com/mass.state.retirement

-Home to our live show
Weekly Coffee or Tea With MSRB
Every Wednesday at 10:00*

*Schedule permitting





Questions?

