



# ***MSRB***

## ***Retiree eNews Bulletin***

### ***MARCH 2024***

#### **Reminder: Annual Statements of Earned Income (Section 91A) Due April 15**

As a reminder, all disability retirees, including those who retired under accidental disability, are required by law (M.G.L. c. 32, § 91A) to submit a statement of their earnings to PERAC (Public Employee Retirement Administration Commission), which mails disability retirees an Annual Statement of Earned Income every year. The deadline for this year is April 15, 2024.

All pertinent W-2 forms, 1099 forms, other requested tax forms, proof of income, and any other documentation requested by PERAC must be included with the statement. [For more information, visit PERAC's Annual Statement of Earned Income FAQs online.](#)

This year, PERAC is offering a new option of filing electronically through an online portal. Information on filing in PROSPER will be included in the mailing from PERAC. If you have not received your statement or have questions, please contact PERAC at 617-666-4446.

#### **GIC Annual Enrollment**

The Group Insurance Commission's (GIC)

#### **Retroactive Retirement Allowance Benefit Adjustments Update**

The Benefit Adjustment process for retroactive payments made in December 2021 is near completion. Of the approximately 2,200 cases received, 2,124 have been processed through the March 2024 payroll. Those remaining require problem resolution from the agency.

Adjustments for the retroactive payments made in calendar year 2022 started in March 2024. The 2022 information was submitted to SRB throughout 2023. In January 2024, another contract was finalized. SRB is working with agencies to have them submit the required information.

Once a contract is negotiated, the agencies are required to submit to SRB the necessary salary increase information based on the approved contract. Until such time that SRB receives the required information, the member's retirement allowance adjustment cannot be done. SRB works with the agencies to educate them on the details that need to be submitted. The volume created challenges due to staff constraints, but equally, receipt of information from the agencies must be

Annual Enrollment period is April 3 - May 1, 2024. You can review your health, dental, and life insurance benefit options and compare plan offerings during this time. [The Benefit Decision Guides are available to view on the GIC website.](#)

If you have questions about your GIC health and other insurance benefits or premiums, please contact them at 617-727-2310 or complete their online [Contact the GIC request form](#).

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## UniCare is Becoming Wellpoint

The Massachusetts Group Insurance Commission (GIC) recently announced that UniCare will change its name to Wellpoint on July 1, 2024. Per GIC, this is being done to “reflect their mission to supporting GIC members’ whole health.”

To learn more about the name change, [click here](#).

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## WEP/GPO Check In

In December, we reported on a hearing held in Baton Rouge, Louisiana, on the bill [H.82](#), also known as the “Social Security Fairness Act of 2023.” [This hearing](#) included statements from members of the House Committee on Ways and Means and members of the public who testified on how the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO) have impacted them.

H. 82 has 308 co-sponsors in the House and is currently with the House Committee on Ways and Means. A similar bill in the Senate, [S.597](#), has 51 co-sponsors and is currently with the Senate Committee on Finance. Neither bill has had any legislative action taken on them.

In July of 2023, another bill was filed in the House to repeal the Windfall

timely and accurate. SRB has most recently added resources to speed up the process.

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## Federal and State Tax Filing and Payment Deadline Approaching!

Due to the Patriots' Day holiday, the IRS Tax deadline to file returns in Maine and Massachusetts is April 17, 2024. For most other states, the deadline is April 15, 2024. Taxpayers requesting an extension will have until October 15, 2024, to file.

This IRS has a page covering the filing deadlines for if you live in an area affected by disaster situations. [Click here to get information for your state](#).

[For more information and filing resources, click here.](#)

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## Jury Duty Scam on the Rise

A report from the Department of Justice’s website warned of a scam reported in Florida and other parts of the country. This scam occurs as a phone call that a person may receive from someone claiming to be a U.S. Marshal or government official, and the scammer indicates that the individual failed to show up for jury duty and now must pay a fine to avoid arrest.

The report from the U.S. Attorney of the Middle District of Florida indicates that the scammer may provide convincing information or “spoof” the phone number on the caller ID.

The report reminds the reader that a court will always send a jury summons via the mail and never ask for credit/debit card numbers, wire transfers, or payments over the phone. If you did

Elimination Provision and the Government Pension Offset. [H.R.4583](#), also known as the “Social Security 2100 Act,” has 183 co-sponsors and is currently with the House Subcommittee on Health. A similar bill, [S.2280](#), was filed in the U.S. Senate. S. 2280 has four co-sponsors and is before the Senate Committee on Finance.

If you have any questions on the bills noted above, please contact your [U.S. Representative](#) or [U.S. Senator](#).

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## Beware of Tax Filing Misinformation and Scams!

According to the IRS Newsroom, there is an increase in misleading or inaccurate tax information being shared on social media. These scams can involve common tax documents like Form W-2, pandemic-related scams, or a scam involving unclaimed refund money.

[Click here to review their guide on tax scams and consumer alerts that may target you](#), and note that the IRS recommends reviewing their official website or social media channels to fact-check information and learn how to fill out forms accurately.

As a reminder, the IRS doesn’t initiate contact with taxpayers by email, text messages, or social media channels to request personal or financial information. [Click here to view their guide on how to tell if someone actually works for the IRS](#).

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Is there something you would like us to communicate in an upcoming **Retiree eNews Bulletin**? If so, let us know!

Email your request or comments to [MSRBCommunications@tre.state.ma.us](mailto:MSRBCommunications@tre.state.ma.us).

We look forward to hearing from you!

disregard a summons, you will be contacted by mail and may have to appear before a judge. This order will always be in writing. Fines are only imposed once an individual appears in court. [Click here to learn more](#).

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***Spring rolled in on March 19th! We wish everyone a healthy spring season!***

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Past issues of our newsletter publications can be found on our [website](#).

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**Note: MSRB phones are answered Monday through Friday, 8:00 a.m. to 5:00 p.m., except on state holidays.**