

MEMORANDUM

TO: All Retirement Boards

FROM: John W. Parsons, Esq., Executive Director

RE: 2023 Disability Data Changes

DATE: December 13, 2023

In order to make an accurate determination on the statutory limit of your member's post retirement earnings as a disabled public retiree, we need to maintain an accurate and current disability retiree database. We respectfully request that you review the list of your board's disability retirees in PROSPER and make all necessary address and status changes that occurred in the **year 2023**. These changes should be made when a member is deceased, confined to a nursing home, has waived his/her allowance, has returned to active status, and/or has had a change of address.

To locate the list in PROSPER you will need to enter through the **Members** tab, select **Member Update**, and then after clicking on **Export Member Info**, a CSV file will be created. This file will show what information we have regarding your disability retirees. (*Screen shot shown below - Table A*).

If an address needs to be changed you can now do it yourself by searching for an individual under the **Member Update Refinement** within the **Members** tab. From there, you will be able to enter the new address. (*Screen shot shown below - Table B*).

If a member is deceased, you will need to update PROSPER by accessing the member through the **Members** tab, clicking on **Member Search**, entering the member's name and clicking **Search**. After you select the member you are looking for, a window will open where you can enter the date of death and upload either a death certificate or a death notice.

If a member has a Power of Attorney (POA), and needs an address change please notify Sandra King, at Sandra.E.King@mass.gov and she will make the change. If the exported list indicates that there is a POA, then the POA documents are not needed. However, if you are adding a POA for a member the POA documents must be emailed in .PDF format to Ms. King.



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Please note, due to Chapter 176 of the Acts of 2011, certain disability retirees no longer need to file the Annual Statement of Earned Income. As a result, your report will show who has filed an Affidavit. You may also notice a member may have a Special Status such as *Waived*, *Modified*, *Nursing Home*, or *Special Act*. If any of these Statuses are incorrect or need to be adjusted, please comment next to such member, and email the list back to Ms. King.

If any member is missing from the list, please add them at the bottom of the list with a comment, and email it back to Ms. King. It is imperative that all information be updated or returned to PERAC no later than **January 15, 2024**, to ensure accuracy in our member database prior to our mailing of the 2023 Annual Statements of Earned Income (91A), which usually takes place in February.

Also, if you have no changes to any of your disability retirees please send an email to Ms. King stating there will be no changes. Should you have any questions, or if you need any assistance please do not hesitate to contact Ms. King.

Thank you for your continued cooperation in this matter.

Table A:

Under the **Member** tab, select **Member Update**, then **Export Member Info**



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Table B:

The following screen shot shows how to change an address.

The screenshot displays a web application interface with a sidebar on the left containing navigation links: Home, Tasks, Compliance, Benefits, Disability, 91A, Members, Documents, and Admin. The main content area is titled 'Export Member Info' and shows a list of members with 'Anton Chekhov' selected. A modal form for 'Anton Chekhov' is open, displaying the following information:

Anton Chekhov

9 Secondary Drive
Township
RU
34442

Email:
Phone Type:
Phone:

Status: Active
Social Security: ***-**-1234

NOTE: Use this form to update Member's actual address.
If you need to add or update Member's Guardian or POA information,
contact PERAC instead.

Foreign Address ☐

Street Address* 1 Main St

Street Address 2

City* City

State* Guam

Zip* 99999

Phone Type*

Phone Number*

Email

Cancel **Submit**

/cjc

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