

## MEMORANDUM

TO: All Retirement Boards  
FROM: John Parsons, Esq., Executive Director  
RE: 2021 Disability Data  
DATE: December 16, 2021

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 changes that occurred in the year 2021. These changes should include 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 we have on your disability retirees (*Screenshot 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 (*screenshot 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 death notice.

If a member has a Power of Attorney (POA) and needs an address change, please notify Ms. King, at [SEKing@per.state.ma.us](mailto:SEKing@per.state.ma.us) 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.

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



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PERAC no later than **January 14, 2022**, to ensure accuracy in our member database prior to our mailing of the 2021 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 indicating 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**

The screenshot shows the PERAC system interface. On the left is a sidebar with navigation icons and labels: Home, Tasks, Benefits, Disability, g1A, Members (highlighted with a red box), Documents, and Admin. The main area is titled 'Refinements' and contains a list of options: Death, DIA, Member Search, and Member Update (highlighted with a red box). Below this list is a section titled 'Export Member Info' (highlighted with a red box) which includes input fields for 'First Name' and 'Last Name\*' and a 'Search' button. Below the search section is a table header labeled 'Members'.

### **Table B:**

The following screenshot shows how to change an address.

The screenshot shows the PERAC system interface with a modal form open for updating a member's address. The sidebar and 'Refinements' section are the same as in Table A. The modal form has a title bar with a close button. It contains a 'NOTE' in red text: '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.' Below the note are input fields for 'Foreign Address' (with a checkbox), 'Street Address\*', 'Street Address 2', 'City\*', 'State\*' (a dropdown menu showing 'Massachusetts'), 'Zip\*', 'Phone Type\*' (a dropdown menu showing 'Home'), 'Phone Number\*', and 'Email'. At the bottom of the modal are 'Cancel' and 'Submit' buttons.