

MEMORANDUM

TO: All Retirement Boards

FROM: John Parsons, Esq., Executive Director

RE: 2020 Disability Data

DATE: December 21, 2020

In order to make an accurate determination on the statutory limit of your members' 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 2020**. 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 is created. This file will show what we have on your disability retirees. If an address needs to be changed you can now do it yourself by searching for an individual under the Member Update Refinement after clicking on the Members tab, and entering the new address.

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 Sandra King and she will make the change. If the exported list indicates that there is a POA, then the POA documents are not needed.

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, you will notice your report will soon show who has filed an Affidavit. You may also notice a member may have a Special Status such



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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 18, 2021** to ensure accuracy in our member database prior to our mailing of the 2020 Annual Statements of Earned Income (91A), which traditionally takes place in February.

Should you have any questions, or if you need any assistance please do not hesitate to contact Ms. King. Also, if you have no changes to any of your disability retirees please notify Ms. King, at SEKing@per.state.ma.us confirming no changes.

Thank you for your continued cooperation in this matter.

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

Home

Tasks

Compliance

Benefits

Disability

91A

Members

Documents

Admin

Refinements

Death

DIA

Member Search

Member Update

Export Member Info

First Name

Last Name*

Search

Members

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Under the Members tab, select Member Update, then enter name to search, Click to update

The screenshot displays a web application interface for managing members. On the left is a sidebar with navigation icons and labels: Home, Tasks, Compliance, Benefits, Disability, g1A, Members, Documents, and Admin. The main area is divided into sections. The 'Refinements' section on the left lists 'Death', 'DIA', 'Member Search', and 'Member Update'. The 'Members' section on the right shows a search for 'elvis' and a list of members with 'Elvis L Presley' selected. A modal window titled 'Elvis L Presley' is open, showing the 'Member Update' form. The form includes fields for 'Street Address*' (1 test street), 'Street Address 2', 'City*' (Tupelo), 'State*' (Mississippi), 'Zip*' (01453), and 'Phone Type*' (Cell). It also displays 'Email:', 'Phone Type: Cell', 'Status: Active', and 'Social Security: ***-**-1194'. A red note states: '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.' At the bottom right of the modal are 'Cancel' and 'Submit' buttons.