



PROSPER Benefit Calculation Submission Functional Training

PROSPER Benefit Calculation Online Submission Overview

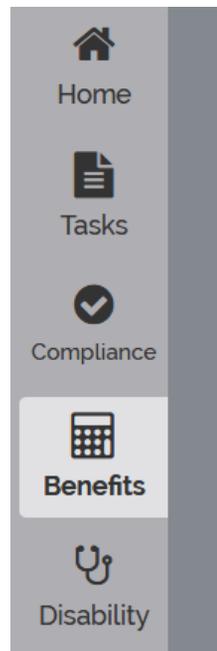
- ▶ New functionality to digitally submit Benefit Calculation Applications through PROSPER.
 - ▶ Calculations you are currently submitting to PERAC via Post-Mail should now be submitted online through PROSPER starting Nov 16.
- ▶ Moving online will result in improved time to completion for Submissions, greater record traceability, instantaneous online notification and automatic digital document record keeping.
- ▶ All Board users with access to the Disability functionality will be automatically granted access
- ▶ If you or a member of your team needs new access to PROSPER, please contact our Help Desk and complete the PROSPER Individual Account Approval Application Form

Agenda

- Review the New Benefits Portal Page
- Submit a Benefit Calculation through PROSPER
 - “Page 1 Review”
 - Adding Multiple Boards (Prior Boards)
 - Attach Required Documents
 - Override functionality
- Reviewing Submission States
 - Request Not Submitted
 - Under Review
 - Completed
 - Withdrawn
- Reviewing Letter Receipts (As a Submitting Board)
- Reviewing 3(8)(c) Letters (As a Prior Board)

Benefits Portal Page

Click on “Benefits”
on the left-hand side
tab to access this
page



To start a new Submission, select the
“Benefit Calculation Submission”
button

Benefit
Calculation
Submission

+ Benefit Calculation Submissions	History
+ Withdrawn	History
+ 3(8)(c) Member Receipts	History

To review Submissions updated within
the last 90 days, expand the Card
Tables by clicking the “+”

Benefit Calculation Submission Table

Expanding the “Benefit Calculation Submissions” table shows all Submissions from the last 90 days

Selecting a Submission’s Row will open that member’s application

Columns can be sorted by selecting the header text

- Benefit Calculation Submissions				History
Member Name	Submit Date	Retirement Date	Retirement	Status
Ross Geller		11/1/2020	Superannuation C	Request Not Submitted
Jill Green	11/4/2020	11/11/2019	Member Survivor Spou...	Complete
Joey Tribbiani	11/3/2020	10/21/2020	Superannuation B	Under Review
Phoebe Buffay		8/31/2020	Accidental Disability - A	Complete

Member Name ▲
Phoebe Buffay
Ross Geller
Jill Green
Joey Tribbiani

Submission states:

Request Not Submitted - Application has not been submitted

Submitted - Application has been submitted to PERAC

Under Review - PERAC needs additional information before approving

Complete - PERAC has approved the Submission

History

Selecting “History” will show all Retirement Benefit Submissions, including those older than 90 days

+ Benefit Calculation Submissions History



First Name Last Name Search Clear

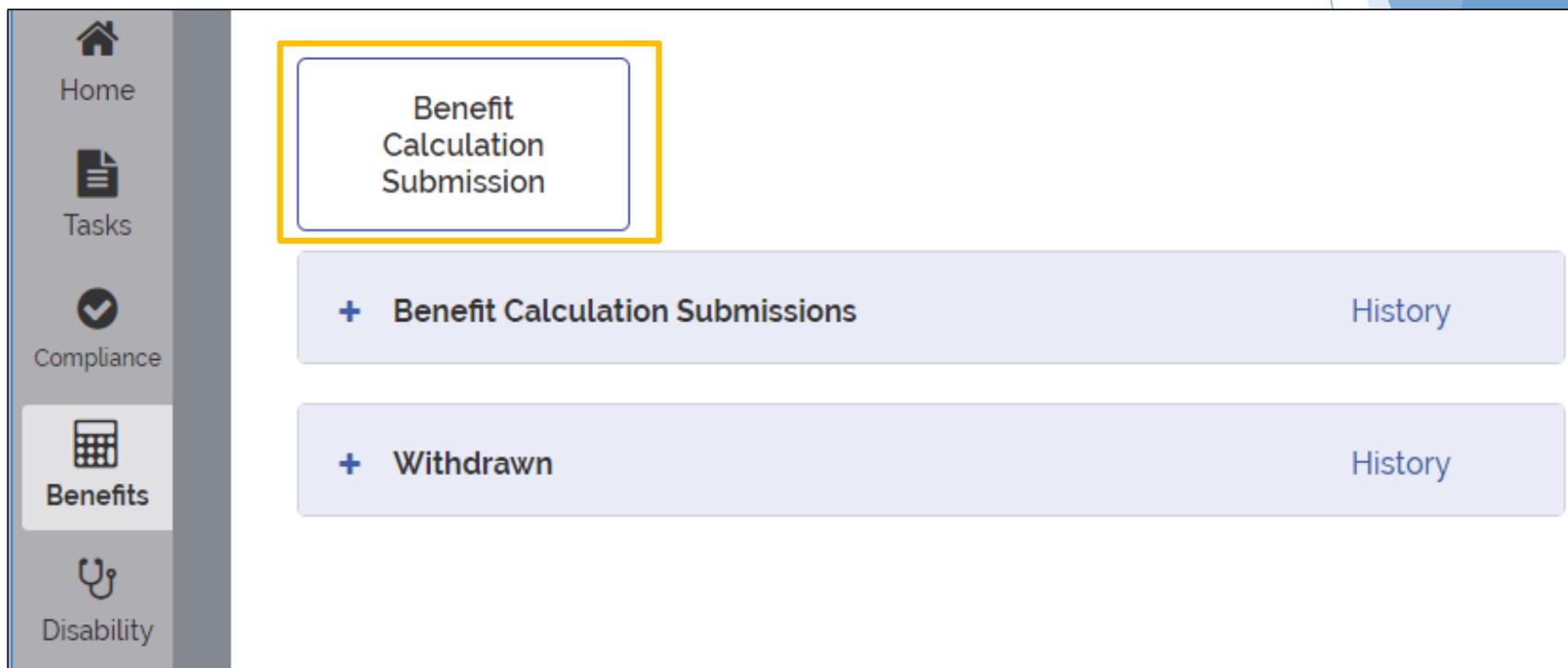
Retirement Application History

Member Name	Status	Created Date	Completed Date
Ross Geller	In Progress	11/2/2020	

Submitting a New Benefits Calculation to PROSPER

From the Benefits Calculation Portal Page:

Click on “Benefit Calculation Submission” to start a new Submission



Benefit Calculation Submission - Page 1

SSN must be verified for the lower section to unlock

PROSPER will auto-populate certain fields if a member's Name and SSN matches what is on file

Will Auto-populate DoB, DoD and Retirement

Once all required fields have been entered, you can continue to the next page

Benefit Calculation Submission

Retirement Member Information

Social Security #* Verify Social Security #*

Member Last Name* Member First Name*

Retirement Type*

Calculation*

Ten Month Year*

Date of Birth*

Employment Start Date*

Date of Retirement*

Date of Death

[Next](#)

Benefit Calculation Submission

Retirement Member Information

Social Security #* Verify Social Security #*

Member Last Name* Member First Name*

Retirement Type*

Calculation*

Ten Month Year*

Date of Birth*

Employment Start Date*

Date of Retirement*

Date of Death

[Next](#)



Benefit Calculation Submission - Page 2

Member Information			
Member Name:	Ross Geller		
Method:	Superannuation C		
SSN:	***-**-4444		
Submitting Board:	Middlesex County (11/1/2010 - 11/1/2020)	Calculation:	Pre-04/02/2012
Prior Board(s):	Add		
Date of Birth:	8/1/1945		
Date of Death:			

Benefit Calculation Submission Documents	
Forms	Complete Attachments
Annuity Saving Funds Detail	<input type="checkbox"/>
Anti-Spiking Worksheet	<input type="checkbox"/>
Calculation Worksheet	<input type="checkbox"/>
Proof of Prior Service	<input type="checkbox"/>
Other Retirement Documents	<input type="checkbox"/>

[Withdraw](#) [Submit](#)

Adding Additional Boards

Member Information			
Member Name:	Ross Geller		
Method:	Superannuation C		
SSN:	***-**-4444		
Submitting Board:	Middlesex County (11/1/2010 - 11/1/2020)	Calculation:	Pre-04/02/2012
Prior Board(s):	Add		
Date of Birth:	8/1/1945		
Date of Death:			

Add Prior Boards

Board Name*	Employment Start Date*	Employment End Date*	Ten Month Year*
Middlesex County	<input type="text" value="11/01/2010"/>	<input type="text" value="11/01/2020"/>	<input type="text" value="No"/> ▼

[Add More Boards](#)

✕

Add Prior Boards

Board Name* Middlesex County	Employment Start Date* 09/01/2010	Employment End Date* 05/15/2020	Ten Month Year* Yes ▾	
Board Name* Quincy ▾	Employment Start Date* 09/01/2000	Employment End Date* 06/12/2010	Ten Month Year* Yes ▾	Remove
Board Name* Essex Regional ▾	Employment Start Date* 09/01/1980	Employment End Date* 06/06/2000	Ten Month Year* Yes ▾	Remove

[Add More Boards](#)

Cancel
Save

Added information will reflect on to the main page upon selecting “Save”

Submitting Board:	Middlesex County (9/1/2010 - 5/15/2020, 10-Mo.)
Prior Board(s):	Quincy (9/1/2000 - 6/12/2010, 10-Mo.) Essex Regional (9/1/1980 - 6/6/2000, 10-Mo.)

Benefit Calculation Submission Documents

In the “Benefit Calculation Submission Documents”, Rows that have a “Red Stop Sign” require an uploaded attachment for submission
Each Retirement type has its own unique attachments required. Meaning you’ll always know what documents are required for each Retirement type

Benefit Calculation Submission Documents	
Forms	Complete Attachments
Annuity Saving Funds Detail	⊖
Anti-Spiking Worksheet	⊖
Calculation Worksheet	⊖
Proof of Prior Service	
Other Retirement Documents	

Withdraw **Submit**

Annuity Saving Funds Detail (Please Attach)

Please upload the full document.
Select Add Attachment for multiple documents.

Override Required Attachment ⓘ **Add Attachment**

Cancel **Submit**

Attachment Upload ⓘ

No file selected **Browse...**

Cancel

Override Feature

If I have one PDF document that contains all the information I need for Submission, do I need to break apart and/or upload it multiple times for each row?

No!

You only need to upload a single document once and select “Override” on the remaining worksheet rows

Benefit Calculation Submission Documents		
Forms	Complete	Attachments
Accidental Disability Retirement Checklist	✓	📄 1
Annuity Saving Funds Detail	✓	Override
Calculation Worksheet	✗	
Payroll Records	✗	
Transmittal Approval Copy	✓	📄 1
Worker's Compensation Details (If Offset)		
Other Retirement Documents		

Withdraw **Submit**

Annuity Saving Funds Detail (Please Attach)

Please upload the full document.
Select Add Attachment for multiple documents.

Override Required Attachment ⓘ

Cancel **Save**

Checklist Completion

After all rows have had an attachment uploaded or have been denoted with “Override” Submit can be selected

Benefit Calculation Submission Documents		
Forms	Complete	Attachments
Annuity Saving Funds Detail	—	
Anti-Spiking Worksheet	—	
Calculation Worksheet	—	
Proof of Prior Service		
Other Retirement Documents		

Withdraw **Submit**

Benefit Calculation Submission Documents		
Forms	Complete	Attachments
Annuity Saving Funds Detail	✓	1
Anti-Spiking Worksheet	✓	Override
Calculation Worksheet	✓	Override
Proof of Prior Service		
Other Retirement Documents		

Submit

✓ SUBMITTED: Form was submitted on 10/15/2020

Returning to a Submission

You can return to a partially completed Submission at any time.

Rows marked “Request Not Submitted” can be continued to be worked on until “Submit” is selected

This allows for multiple individuals to work together to complete a submission

- Benefit Calculation Submissions				History
Member Name	Submit Date	Retirement Date	Retirement	Status
Ross Geller		11/1/2020	Superannuation C	Request Not Submitted
Jill Green		11/11/2019	Member Survivor ...	Request Not Submitted

What happens next?

After submission to PERAC, the corresponding Member's row will appear in the Benefits Calculation Submissions table with a Status of "Submitted"

- Benefit Calculation Submissions				
Member Name	Submit Date	Retirement Date	Retirement	Status
Chad Holder		8/25/2020	Accidental Disability - A	Submitted
John Holder	10/15/2020	8/25/2020	Superannuation A	Submitted
Stephen Tyler	10/15/2020	12/31/2020	Superannuation A	Submitted

Under Review

If there are any concerns with a Submission, PERAC staff may set it as “Under Review”

Benefit Calculation Submissions				History
Member Name	Submit Date	Retirement Date	Retirement	Status
Joey Tribbiani	11/3/2020	10/21/2020	Superannuation B	Under Review

Opening the Submission will show additional details provided by the PERAC staff at the top of the page

! ALERT - This Benefit Calculation Submission has been put under review. The following questions were asked:

- <PERAC Staff> on 10/15/2020 at 12:00 PM
Attached Document is not the correct Calculation Worksheet

Submissions put “Under Review” can be changed and updated as if they were in the “Request Not Submitted” State. Alternatively, a Submission may need to be withdrawn.

Withdrawing a Submission

A Submission may need to be Withdrawn

Can be withdrawn:

Before submitting to PERAC (Request Not Submitted Status or Under Review Status)

After submitting for PERAC Review, please contact the PERAC Actuarial Unit if you need to withdraw

Withdrawn Submissions will display within the Withdrawn Table

Benefit Calculation Submission Documents

Forms	Complete	Attachments
Annuity Saving Funds Detail	—	
Anti-Spiking Worksheet	—	
Calculation Worksheet	—	
Proof of Prior Service		
Other Retirement Documents		

[Withdraw](#) [Submit](#)

Withdrawn				History
Member Name	Submit Date	Retirement Date	Retirement	Withdrawal Date
Phoebe Buffay		8/31/2020	Accidental Disa...	11/6/2020

Complete

After PERAC staff approves a Submission, it will appear with a status of “Complete”

Benefit Calculation Submissions					History
Member Name	Submit Date	Retirement Date	Retirement	Status	
Jill Green	11/4/2020	11/11/2019	Accidental Disability - A	Complete	

Within a “Complete” status Submission, a new table called “Benefit Notification and Documentation” will appear at the bottom of the Submission’s page.

This table will contain PERAC’s Board Approval Letter(s) that were historically sent through the Post Mail.

Benefit Notification and Documentation		
Documents	Complete	Attachments
Board Approval Letter - (Middlesex County)		 1

Reviewing 3(8)(c) letters (As a Submitting Board)

If the Submission had Prior Boards added, then the Submitting Board will see their own letters, as well as all accompanying 3(8)(c) letters digitally sent to other Boards

Benefit Notification and Documentation		
Documents	Complete	Attachments
Board 3(8)(c) - Letter - (Middlesex County)	✓	📄 1
Board Approval Letter - (Cambridge)	✓	📄 1
Calculation Checklist - (Cambridge)	✓	📄 1

Reviewing 3(8)(c) letters (As a Prior Board)

If a Benefit Calculation Submission has been approved with your Board denoted as a “Prior Board”, then that Member’s name will appear under the “3(8)(c) Member Receipt” table

Selecting an Member’s Row under the 3(8)(c) Member Receipts table will show that Member’s information as well as the 3(8)(c) letter

+ Benefit Calculation Submissions			
+ Withdrawn			
- 3(8)(c) Member Receipts			
Member Name	Retirement Date	Approval Date	Submitting Board
William Jenkins	8/18/2020	11/9/2020	State

3(8)(c) Member Letter Receipts

Member Information	
Name	William Jenkins
SSN	***-**-0005
Date of Birth	11/14/1964
Submitting Board	State
Status	Approved

Benefit Notification and Documentation	
Documents	Attachments
Prior Board Approval Letter - (Boston)	
Calculation Checklist	 2

Live Demo



Questions ?

