

# 91A Prosper

Updates

Hot topics

# Tasks

**MIDDLESEX COUNTY** Massachusetts Public Employee Retirement Administration Commission Hello, Lisa Sign Out

**Tasks**

- g1A Member salary verification is due by 9/21/2018
- g1A Member salary verification is due by 10/25/2018
- Disability Transmittal Board Action Request for Raymond.

**PERAC Memos**

Memo #15/2018 2018 Tobacco Company ...	Memo #14/2018 2018 Interest Payments I...	Memo #13/2018 2018 Mandatory Ethics T...	Memo #12/2018 2018 Perac V...		
Memo #9/2018 2018 Actuarial Data	Memo #8/2018 2018 840 Cmr 10:10(3) & ...	Memo #7/2018 2018 Ncpers 2018 State ...	Memo #6/2018 2018 Buybac...		
Memo #3/2018 2018 Cola Notice	Memo #2/2018 2018 2018 Limits Under ...	Memo #1/2018 2018 2018 Limits Under ...	Memo #0/2018 2017 2017 D...		
Memo #35/2017 2017 Forfeiture Of Retire...	Memo #34/2017 2017 Administrator?s Tra...	Memo #32/2017 2017 Tobacco Company ...	Memo #31/2017 2017 Appropriation Data...	Memo #30/2017 2017 Mandatory Retirem...	Memo #29/2017 2017 Vendor Disclosures

Tasks will remain on the list until the task is completed!

Also on the Home Page are current Tasks and Notifications. Tasks are items that need an action to be taken.

# Board Task-Task Page

The screenshot displays the 'Board Task-Task Page' interface. At the top, the header includes 'BOSTON', 'Massachusetts Public Employee Retirement Administration Commission', 'Hello, Michael', and 'Sign Out'. A left sidebar contains navigation icons for Home, Tasks (highlighted with a red box), Compliance, Disability, 91A, and Members. The main content area is titled 'Task Overview' and shows a summary of tasks for 'Disability Transmittal' (6 Board Action Requests), 'CME' (0 Member Information Requests and 0 Suspension Requests), and '91A' (2 Salary Verifications, 71 Termination Requests, and 0 Excess Requests). Below this is a table titled 'Disability Transmittal - Board Action Requests' with columns for Name and Status Date.

Name	Status Date
Gilbert,	8/22/2018
Lamar	9/26/2018
James	10/5/2018
Christine	10/5/2018
David	10/4/2018
Kenneth,	9/28/2018

Alternate View  
Board will be able to review  
Cases based upon the task.

The task tab allows you to manage tasks based on process. When you select a specific task type, Board Action Request for the Disability Transmittal process, a list of the members in that process with that task will be displayed in a list. Selecting a specific member name brings you to the task that needs to be completed. This view is especially helpful when there are a large number of tasks for more than one process.

# 91A Tab-Select name view details

**MIDDLESEX COUNTY** Massachusetts Public Employee Retirement Administration Commission Hello, Lisa Sign Out

Home  
Compliance  
Disability  
**91A**

**91A Overview** First Name:  Last Name:

**Member 91A Status: 2017** [History](#)

Member Name	Current Status	Incomplete Reason	Document
Donald	Allowable Earnings Determination		
Edward	Special Status		
Daniel	Final Termination		
Robert	Allowable Earnings Determination		
Dennis	Allowable Earnings Determination		
Donald	Allowable Earnings Determination		
Francis	Special Status		

# 91A Tab-Member Card

**STATE**
Massachusetts Public Employee Retirement Administration Commission
Hello, Debr
Sign Out

Home
Compliance
Disability
91A

**Mary**      **Street Address:**      Guardian/POA: No

**State**      **Email:**

**Status Information for 2017 Tax Year**

Final Termination	7/12/2018
Start Termination	6/1/2018
Sent	2/10/2018

**Salary Data**

Year	Current Salary	Annuity	Pension	Dependency	WC Offset	Board Verified
2017		\$1200.00	\$1300.00	\$0.00	\$0.00	<input type="checkbox"/>

**Notifications**

Letter	Date Sent	
Termination	6/1/2018	2

# Noncompliance with 91A Filing

- A termination letter is sent to every member who does not comply with the 91A filing. Additional time is given to the member before PERAC sends the boards the Notification of FINAL TERMINATION. The boards will be able to view all letters sent to the members.

The screenshot displays the Middlesex County PERAC portal interface. The top navigation bar includes the county name, the commission name, and the user's name (Hello, Lisa) with a Sign Out option. The left sidebar contains navigation links for Home, Compliance, Disability, and 91A. The main content area shows a 'Tasks' section with a notification for a 91A Member salary verification due by 9/21/2018, and a 'Notifications' section with a highlighted 'NEW Termination Notification for Walter I'. A 'Back' button is visible above the email content.

The email content includes the following information:

- Recipient: Daniel
- Street Address: [Redacted]
- Guardian/POA: No
- Middlesex County Email: [Redacted]

The 'Status Information for 2017 Tax Year' section contains the following data:

Final Termination	9/6/2018
Start Termination	9/5/2018
F91A No Response	9/5/2018
Sent	2/10/2018

The 'Salary Data' section is a table with the following columns: Year, Current Salary, Annuity, Pension, Dependency, WC Offset, and Board Verified.

The 'Notifications' section contains a table with the following data:

Letter	Date Sent
Termination	9/6/2018

A red box highlights the '2' in the bottom right corner of the termination notification row, indicating the number of documents attached to that notification.

# Noncompliance with 91A Filing

The screenshot shows the EVERETT web application interface. The header includes the logo 'EVERETT', the text 'Massachusetts Public Employee Retirement Administration Commission', and the user information 'Hello, Lisa Dell Isola' and 'Sign Out'. The left sidebar contains navigation links: 'Home', 'Tasks', 'Compliance', 'Disability', and '91A'. The 'Tasks' section is expanded, showing a list of tasks: '91A Board Action Termination Request for Patrick' (highlighted with a red box), '91A Member salary verification is due by 9/21/2018', and '91A Board Action Termination Request for Patrick'. The 'Notifications' section shows 'NEW Termination Notification for Patrick' and 'Medical Panel Results'. The main content area is titled '91A Board Action Termination Request for Patrick' and features a 'Back' button. The form contains two sections: 'Select Action\*' with a dropdown menu showing 'Termination' and a red box highlighting the options 'Pending', 'Termination', 'Hearing', and 'Deceased'; and 'Date of Action\*' with an empty text box and a link 'Add Termination Attachment'. Below this is another section with 'Select Action\*' set to 'Deceased', 'Date of Death\*' with an empty text box, and a link 'Add Death Certificate'. A blue 'Submit' button is located at the bottom right of the form.

**For Deceased, a date of death and supporting documentation is required.**

# Allowable Earnings Determination

- If a member has a reported earnings amount of \$20,000 or greater, you will see their status as Allowable Earnings Determination. This means that PERAC will ask the boards to provide us with the Retirement Allowance figures, as well as current salaries.
- You will receive an email letting you know that you have a 91A Member salary verification task. You will see a list of the members that you will need to complete the verified data.
- Click on the plus sign to expand the member's information. You can either enter the amount here or download to a CSV file. The current salary, annuity, and pension fields can not be left blank.
- You can save your entries at any time by clicking the Save button at the bottom of your list. Once you have entered all the amounts, you will need to check the box Verified to the right, and hit Submit.
- If we currently have figures on file you will see them, but if no figure is provided or if the amount has changed you will need to enter the correct amount in the boxes provided.
- If the Agency or Position of the Retiree is incorrect or missing please make that change. Right now the only way to make this change is through the CSV option.

**In order for the task to go away you will need to enter the amounts requested. If the task is not completed within 30 days, you will continue to receive reminder tasks.**

# 91A Member salary verification

MASS. TEACHERS
Hello, Erika [Sign Out](#)

**Tasks**

Home

91A Board Action Termination Request for Marthe

Compliance

91A Board Action Termination Request for Darlene Proctor

Disability

91A Member salary verification is due by 9/21/2018

Disability Transmittal Board Action Request for

Disability Transmittal Board Action Request for

**Notifications**

Appointment Confirmed

Disability Transmittal Board Action Request

Disability Transmittal Complete

Back

	Robert	City of Medford	Teacher	<input type="checkbox"/> Verified
+	Eleanor	MASS TEACHERS	TEACHER	<input type="checkbox"/> Verified
+	Janice	Shirley School Dept.	ART TEACHER	<input type="checkbox"/> Verified
+	Patricia	Hamilton Public Schools	Teacher	<input type="checkbox"/> Verified
+	Michael	Dartmouth Public School	Teacher	<input type="checkbox"/> Verified
+	Sandra	Duxbury School Dept	Teacher	<input type="checkbox"/> Verified
-	Lincoln	N. Reading School District	Teacher	<input type="checkbox"/> Verified

Current Salary	\$1200.00	<input type="text"/>		
Annuity	\$1200.00	<input type="text"/>		
Pension	\$1200.00	<input type="text"/>		
Dependency	\$0.00	<input type="text"/>		
WC Offset	\$0.00	<input type="text"/>		

Current Salary, annuity and pension must not be 0.00

Export to CSV
Upload CSV
Save
Submit

# Export to CSV and Upload CSV

- This is an option for larger boards, or if you have multiple members that we require 91A Member salary verification.
- If you choose to Export your list to an CSV file and enter the amounts there, you will have the option to upload that worksheet back into Prosper.



- Important to Note: The only fields that will be accepted back into Prosper are the Current Salary, Annuity, Pension, Dependency, and Worker Comp. You must also change the N to Y in the last column, once the amounts are verified. You can not change the format of the spreadsheet in any way, or Prosper will not recognize it, and will not allow you to upload back into Prosper.

Cannot change the format  
of the spreadsheet.  
Technical issues contact  
Help desk.

# Example of CSV file

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Applicant	FirstName	LastName	SSN	PeracReferenceNumber	AgencyRetiredFrom	Position	CurrentSa	Annuity	Pension	Depender	WorkersC	IsBoardVerified	
2	17611	John	Smith	***_**-0000	100092000	Ayer Police Dept	SGT	0	0	0	0	0	N	
3	8163	John	Smith	***_**-0001	100099210	Billerica DPW	Driver	0	0	0	0	0	N	
4	3107	John	Smith	***_**-0002	100089046	Billerica DPW	Laborer	0	0	0	0	0	N	
5	15464	John	Smith	***_**-0003	100089375	Billerica Fire	FF	0	0	0	0	0	N	
6	21148	John	Smith	***_**-0004	100099833	Billerica Police	Police Officer	0	0	0	0	0	N	
7	31990	John	Smith	***_**-0005	100101888	Billerica Police Dept.	Police Officer	0	0	0	0	0	N	
8	23662	John	Smith	***_**-0006	100091725	BURLINGTON	POLICE OFFICER	0	0	0	0	0	N	
9	8402	John	Smith	***_**-0007	100095878	Chelmsford Cemetery Dept.	Laborer	0	0	0	0	0	N	
10	13378	John	Smith	***_**-0008	100096331	Chelmsford Police	Police Officer	0	0	0	0	0	N	
11	24121	John	Smith	***_**-0009	100100749	CHELMSFORD POLICE		0	0	0	0	0	N	
12	218	John	Smith	***_**-0010	100099431	Chelmsford Police Dept.	Police Officer	0	0	0	0	0	N	
13	7238	John	Smith	***_**-0011	100096041	DEPT PUBLIC BLDGS. WILMINGTON	Painter	0	0	0	0	0	N	
14	19915	John	Smith	***_**-0012	100090283	Dracut DPW	Truck Driver	0	0	0	0	0	N	
15	5563	John	Smith	***_**-0013	100092087	Dracut Fire	FF/EMT	0	0	0	0	0	N	
16	33081	John	Smith	***_**-0014	100093795	Dracut Public Schools	Maintenance	0	0	0	0	0	N	
17	26311	John	Smith	***_**-0015	100091434	Dracut School Dept.	Maintenance Repair	0	0	0	0	0	N	
18	27244	John	Smith	***_**-0016	100099000	Littleton Light Dept.	Lineman	0	0	0	0	0	N	
19	24697	John	Smith	***_**-0017	100101929	N Reading DPW	Spec Heavy Equip Operator	0	0	0	0	0	N	
20	27920	John	Smith	***_**-0018	100090894	North Reading Police Dept.	Lt.	0	0	0	0	0	N	
21	26346	John	Smith	***_**-0019	100100514	Police	Officer	0	0	0	0	0	N	
22	25538	John	Smith	***_**-0020	100089409	SHERIFF	Sr. CO	0	0	0	0	0	N	
23	23910	John	Smith	***_**-0021	100095278	Sheriff's Dept. Middlesex Cty.	Sr. CO	0	0	0	0	0	N	
24	28953	John	Smith	***_**-0022	100090913	Sudbury Fire Dept	FF / EMT	0	0	0	0	0	N	
25	20110	John	Smith	***_**-0023	100091054	Sudbury P.D.	Officer	0	0	0	0	0	N	
26	8876	John	Smith	***_**-0024	100092023	Tewksbury Fire	FF	0	0	0	0	0	N	
27	16084	John	Smith	***_**-0025	100094345	Tewksbury Police Dept.	Police Officer	0	0	0	0	0	N	
28	819	John	Smith	***_**-0026	100096667	Tewksbury Police Dept.	PATROLMAN	0	0	0	0	0	N	
29	4390	John	Smith	***_**-0027	100092469	Tewksbury Police Dept.	Police Lietenant	0	0	0	0	0	N	
30	19984	John	Smith	***_**-0028	100096362	Tewksbury Police Dept.	Police Officer	0	0	0	0	0	N	
31	21157	John	Smith	***_**-0029	100089860	Town of Acton Fire Dept.	Fire Fighter	0	0	0	0	0	N	
32	9619	John	Smith	***_**-0030	100096816	Town of Billerica	Heavy Equipment Operator	0	0	0	0	0	N	
33	24906	John	Smith	***_**-0031	100089416	Town of Billerica	Treatment Plant Operator	0	0	0	0	0	N	
34	8240	John	Smith	***_**-0032	100091218	Town of Billerica DPW	HMEO	0	0	0	0	0	N	
35	34727	John	Smith	***_**-0033	100092268	Town of Billerica Fire Dept.		0	0	0	0	0	N	
36	4440	John	Smith	***_**-0034	100093946	Town of Chelmsford Police Dept.	Police Officer	0	0	0	0	0	N	
37	15136	John	Smith	***_**-0035	100099339	Town of Dracut Police Dept.	Police Officer	0	0	0	0	0	N	
38	4418	John	Smith	***_**-0036	100091483	Town of Lincoln	FF	0	0	0	0	0	N	

# Excess Notifications

The screenshot shows a web portal interface for the Massachusetts Public Employee Retirement Administration Commission. The header includes the location 'BOSTON', the organization name, the user name 'Hello, Michael', and a 'Sign Out' link. A left sidebar contains navigation options: Home, Compliance, Disability, and 91A. The main content area is divided into 'Tasks' and 'Notifications'. The 'Tasks' section lists several 'g1A Board Action Excess Request for Jane Doe' items and a 'g1A Member salary verification is due by 5/15/2018' item. The 'Notifications' section lists three 'NEW Excess Notification for Jane Doe' items, with the top one highlighted by a red box. To the right, an email preview shows a 'Back' button, a greeting 'Dear Boston,', a message about a 'g1A Form' update with a link, and a signature 'PERAC'.

PERAC will mail a letter to each member that has exceeded their allowable earnings. At the same time the boards will receive a notification. At this time the boards are instructed to notify the member of their options to repay or provide them a chance to be heard by the board.

# Excess Documents

SPRINGFIELD Massachusetts Public Employee Retirement Administration Commission Hello, Susai Sign Out

Home  
Compliance  
Disability  
91A

91A Overview First Name: Last Name:

Member 91A Status: 2017 History

Member Name	Current Status	Incomplete Reason	Document
Holly	Extension		
Kevin	Extension		
Roni	Excess		1040 W-2 W-2 Excess Letter
JAQUAN	Special Status		
John	Special Status		
Thomas	Special Status		
Mary	Special Status		

Once a member has been found in Excess, and after PERAC sends the member an Excess letter, a notification will be sent to the board and all documentation associated with the member will be viewable.

# Excess Action

Upload copies of your letter to member.

The screenshot shows the user interface for the Massachusetts Public Employee Retirement Administration Commission (PERAC). The header includes the location 'BOSTON', the organization name, the user name 'Hello, Michael', and a 'Sign Out' link. A left-hand navigation menu contains 'Home', 'Tasks', 'Compliance', 'Disability', and '91A'. The 'Tasks' section is expanded, showing a list of 'g1A Board Action Excess Request for Jane Doe' items, with the top item highlighted. The main content area is titled 'g1A Board Action Excess Request for Jane Doe' and features a 'Back' button. The form contains three input fields: 'Select Action\*' (with a dropdown menu), 'Date of Action\*', and 'Comments'. A red box highlights the dropdown menu, which lists the following options: 'Appeal to Court', 'Board vs. PERAC', 'Paid in Full', 'Board Hearing', 'Paid through Ret. allowance deductions', and 'Other'. A blue arrow points from the dropdown menu to the 'Select Action\*' field. A 'Submit' button is located at the bottom right of the form.

The retirement board must submit to PERAC what, if any, action was taken against the member as a result of the member being found in excess. A reminder notice will be sent every 30 days until a response is sent to PERAC.

# Disability Data Updates

