



MICHIGAN OFFICE OF RETIREMENT SERVICES

Big Plans. Small Steps.

P.O. Box 30171 • Lansing, MI 48909-7671

Toll Free: 800-381-5111

Local: 517-284-4400

Fax: 517-284-4416

www.michigan.gov/psru

Back-To-School Checklist – 2021

Use this checklist as a reminder of back-to-school reporting and new employee preparation tasks.

Preparing for new employees:

- ☐ For employees who are new to MPSERS, provide the [Retirement Plan Election Guide](#) and [Retirement Plan Decision Guide](#). You may either email your new employees these links or print these documents from the links.

NOTE: New members must make their retirement election through miAccount. The election will not be available until the DTL1 and DTL4 records have posted creating a MPSERS account.

- ☐ Voya Financial® offers webinars for employees entitled to the Pension Plus 2 and Defined Contribution election. Presentations include the New Employee Orientation, 401(k) & 457 Plans Overview, and more. The New Employee Orientation is also available as an on-demand webinar. Contact Voya® at 517-284-4422 for more information or to schedule a live webinar for your employees.

Reporting new employees:

- ☐ Before reporting new employees, request proof of Social Security numbers to verify they are correct. This helps prevent reporting incorrect information to ORS and Voya® and eliminates wasted time in entering adjustments for corrections. **IMPORTANT: Always contact ORS with any SSN issues or corrections before taking any action.**
- ☐ Use the Member Benefit Plan link on the Employer Reporting website to determine whether the employee is (1) new to the retirement system, (2) a current MPSERS member who is new to your reporting unit, or (3) a MPSERS retiree (if a retirement effective date is displayed). See [RIM 6.02](#).
 - 1) **New to the retirement system:** Provide member the [Retirement Plan Election Guide](#) and [Retirement Plan Decision Guide](#) and refer them to www.michigan.gov/orsmiaccount and PickMiPlan.org to make a retirement election. See [RIM 7.11.00.01](#) and [RIM 7.11.00.02](#).
 - 2) **Current MPSERS member who is new to your reporting unit:** Report member based on the benefit plan shown on the Member Benefit Plans link.
 - 3) **MPSERS retiree:** see [RIM Chapter 9](#) and [Reporting Retirees](#) on the Employer Information website.

Other reporting reminders:

- ☐ For members who were reported with the summer spread wage code (08), switch to regular wage code (01).
- ☐ On DTL4 records, report total gross earnings (for both active employees and retirees). This includes cash in lieu of benefits, bonuses payments, or any other form of compensation reported on a W-2. See [RIM 4.01.01](#).
- ☐ Retirees who would like to learn more about how working after retirement impacts their pension can review the new [e-learning module: Working After You Retire](#).

Tax-Deferred Payment (TDP) Agreements and Addendums:

- ☐ Ask new employees who are existing MPSERS members whether they had a TDP agreement with their previous employer, and if so, process their [TDP Agreement Addendum \(R0625C\)](#) promptly. See [RIM 10.09.01](#).