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August 2015

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Closed Plan Member Handbook

We are pleased to announce the release of our **revised** [Closed Plan Handbook](#)! This updated version includes several new features and topics, including interactive links to brochures, handbooks, websites, etc. Please take some time to review the new handbook, which can be viewed on our website www.mpers.org. If you have any questions, please feel free to contact us!

Membership/Termination Forms

A question we often receive is “What dates should be used on the *Membership Record* and *Termination of Employment?*”. On the *Membership Record* the “Date of Employment” is just that, the date the member becomes employed in a **benefit eligible** position. On the *Termination of Employment* the “Employee’s Last Day Paid”, should be the last date you consider the person an employee. For example, it should be the later of 1) the last day the employee physically works for you or 2) the last day you have them covered under a leave of absence (including time coded as sick leave or annual leave). If the member’s employment ends on a holiday and you plan to pay them for that holiday, this date should be included. Generally speaking, the effective dates you use on the ESMTs in SAMII are the dates our system will use for the member’s hire and termination dates. **As a reminder, please complete and submit these forms to MPERS within two weeks of the member’s hire or termination!** Any delay in receiving these forms could delay the processing of the member’s prior service, or correspondence sent after termination (including how to obtain a refund of employee contributions).

MPERS Processing of Active Member Payroll Part 1 - Hires/Terminations

Now that we’ve discussed the forms, below is an explanation of how MPERS processes hires & terminations...

Twice a month, MPERS receives customized payroll files from OA based on information pulled from SAMII (one for MoDOT & one for Patrol). These files are then loaded into our pension administration system, which is called *PensionGold (PG)*. Once these files are loaded, the system looks for several things. For this edition, we will focus on Hires & Terminations. In future editions we will discuss what additional features MPERS reviews, such as salary or contribution discrepancies, leaves of absence, missing information, etc.

New Hires/Re-hires

An employee is officially enrolled as a member of MPERS the first time we receive and load their payroll information from SAMII (generally around 2 weeks after they began their employment). At that time, members are able to create and view their account via Secure Member Access.

Once enrolled, the member is automatically flagged to receive a welcome letter explaining their benefits and membership in MPERS. There are two different versions of this letter, one for Closed Plan & Year 2000 Plan members and another for 2011 Tier members. The system determines which version is sent based on the member’s contribution code loaded from the SAMII file. Samples of these letters were provided in the May 2015 edition of *The HR Connection*.

When the SAMII file is loaded into PG, a report listing all new hires (and re-hires) is generated for MPERS Payroll staff (Angel Backes & Tammy Kroll) to review. Payroll compares the information listed on the *Membership Record* (such as date of birth, gender, hire date, and location) with the data received from SAMII. They also review the plan a member has been placed in and the contributions received.

At this time the *Membership Record* is also reviewed to determine if the member is eligible for prior creditable service they've listed under either "Prior MOSERS Service" or "Prior MPERS Service", and to note any service that has been checked under "Other Prior Service". If the member is **eligible*** to receive their prior MPERS credit, it is immediately restored and added to their record. However, for all MOSERS service, a request must be submitted for the service to be verified & transferred (this process could take up to a month after service has been requested). Once prior service has been added to the member's record, a letter is sent to advise them of their updated retirement service credit total. A copy of this letter is also sent to the employer and employee benefits. Prior service cannot be verified or transferred until we receive a *Membership Record*, which is why it is so important to submit to MPERS within two weeks of hire. Once the member's records have been reviewed, updated and verified, the *Membership Record* and any accompanying documentation are saved to the member's file.

*** If the member was not previously vested, or there was a break in service of 30 days or more, they must wait until they are re-employed for one year before they can restore their prior service credit.**

Terminations

If a member terminates their employment, their status in PensionGold is automatically updated to either "Terminated" or "Deferred" (vested) through the payroll files received from SAMII. These members are then added to a separate report for Payroll to review.

Payroll compares the SAMII data received with the information keyed on the *Termination of Employment*. They then review the member's service credit and salary to verify that the dates & information in PG matches the documentation in the member's file. Once verified, the *Termination of Employment* and any accompanying documentation are saved to the member's file. Within 45 days of termination, MPERS will send a letter and benefit estimates to vested members illustrating their first eligibility for early & normal retirement.

2011 Tier

As part of the review process, Payroll reviews the terminated members' employee contribution balances. Within 45 days of termination, MPERS will send a letter explaining the member's options regarding their service & employee contributions (more detailed information regarding this process was included in the July 2015 edition of *The HR Connection*).

If you have any questions about either the hire, or termination process, please feel free to contact us. Additional information is also available in the [HR Reference Manual](#).

Pre-Retirement Seminars for August

August 18, 2015 – Sikeston

August 26, 2015 – St. Louis

August 27, 2015 – St. Louis