



# New Employer Resources

Presented by: Cara Doerfler, Service and Implementation Manager  
Ryan Heintz, Benefit Education Specialist



# Objectives

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This session is intended for employers offering MERS Defined Contribution, 457 and Health Care Savings Program.

- During the presentation, we will:
  - Review changes to the participant experience
  - Review the changes to wage/contribution reporting
  - Highlight resources available to employers as the result of portal modifications

MERS Employer Portal

# REDESIGNED

*with your input in mind*

## Enhancements

- Added security
- Streamlined navigation
- Alerts
- Reporting enhancements

The screenshot displays the MERS Employer Portal interface. At the top, there is a navigation bar with links for Plan Alerts, Resource Library, Contact Us, and Logout. The main content area is titled "Plan Summary" and includes several sections:

- Alerts:** A list of alerts with dates and descriptions, such as "02/09/2015 Upload of Compliance Information" and "04/17/2014 Upload of Distribution Form".
- Plan Balances:** A section showing the Plan Balance as \$236,062, the number of investments as 30, and the Plan Outstanding Loan Balance as \$ 0.00.
- Go to Participant:** A search box with a "GO" button and a link to "Click here for name search".
- Participant Status:** A 3D pie chart showing the distribution of participant statuses.
- Disbursements:** A 3D pie chart showing disbursements from 01/01/2015, with a note that counts are from 01/01/2015.
- Web Usage:** A line chart showing web usage for the last 90 days, with a data point for Jul 02.
- Web Transactions:** A bar chart showing web transactions for the last 30 days, with categories like Transfer, Schedule, Rebalance, Allocation, Rate Change, and Disbursements.
- Participant Balances by Age:** A stacked bar chart showing the distribution of participant balances by age group (Over 60, 50 To 59, 40 To 49, 30 To 39, Under 30) across various investment options.

The left sidebar contains a navigation menu with categories like "Manage Site", "Manage My Plan", "Manage My Participants", "Manage My Contributions", "Files and Reports", and "plan resources".

# Temporary Passwords

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- Temporary passwords will be emailed to existing Employer Portal users before October 13<sup>th</sup>
- When you log into the portal for the first time be presented with a few simple setup screens that will walk you through the process of setting up your new password

# Alerts

- Alerts are a new way for MERS to communicate with our customers
- You can search for past plan alerts
- Acknowledge that you have read selected alerts

## Manage Alerts

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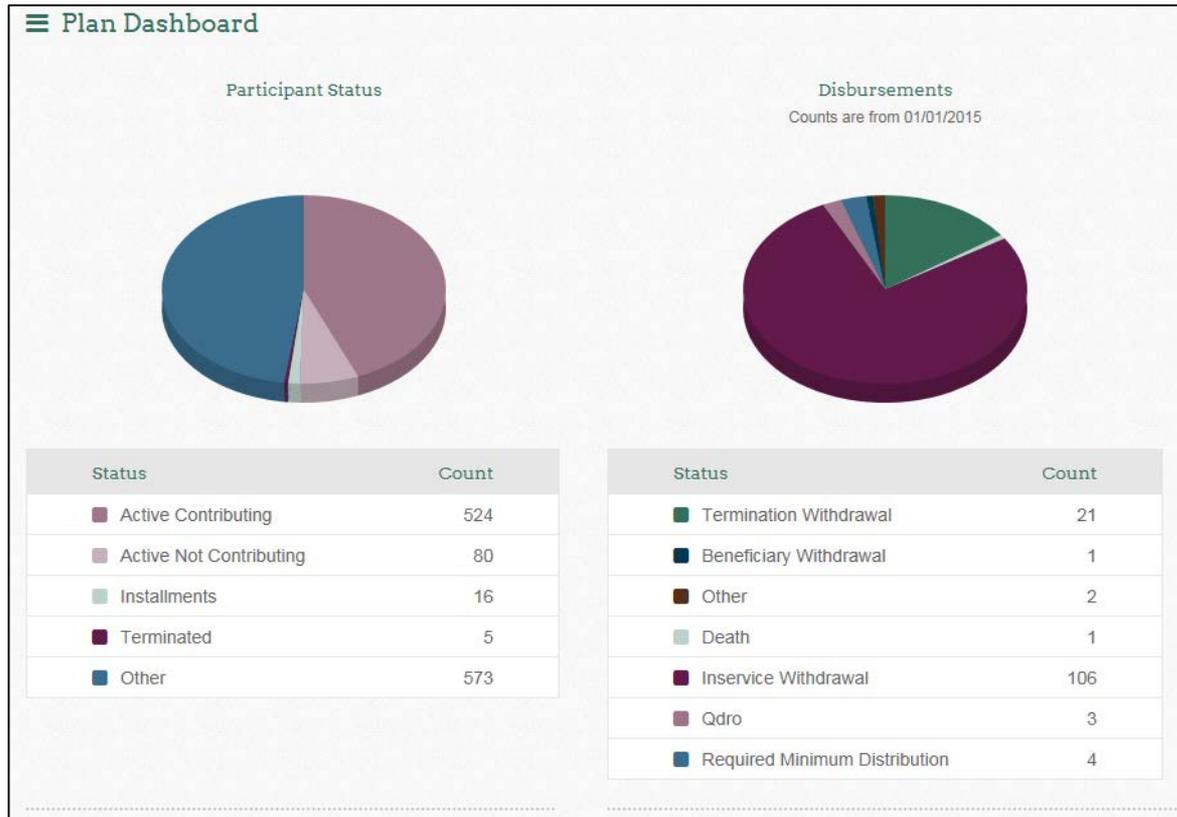
### Manage Alerts

To view current and/or acknowledged alerts, select a date range. To refine the search enter a word or text to locate a specific alert.

Search alerts From:  To:  Word Search:

Subject▲	Date▼	<input checked="" type="checkbox"/>
<b>Upload of Compliance Information</b>	02/09/2015	
The file Chad_Doyle_192083_-_DRO_Upload.pdf was uploaded by		

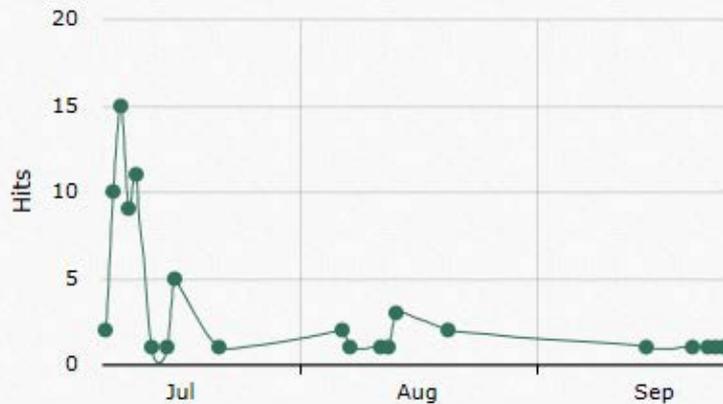
# Plan Dashboards



# Web Analytics

## Web Usage

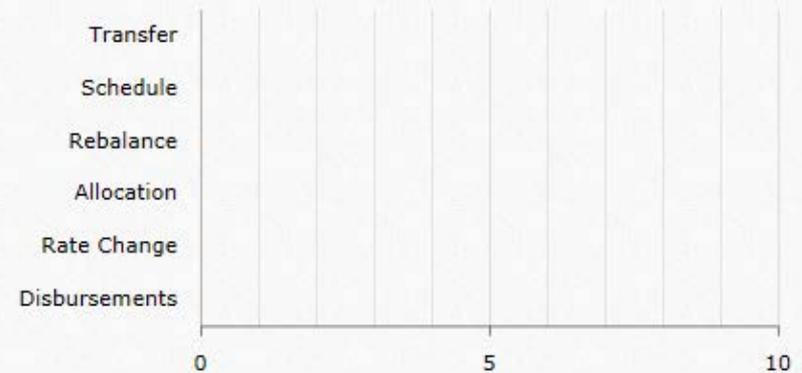
Activity Log



This shows web usage for the last 90 days.

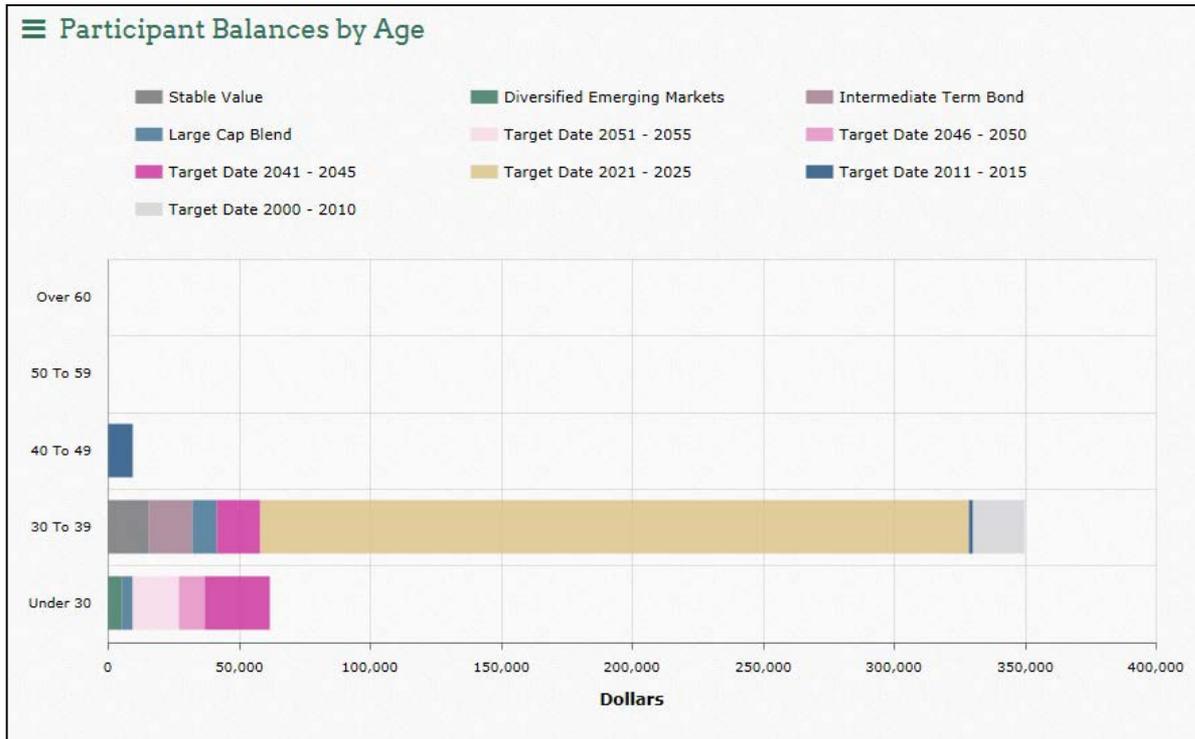
## Web Transactions

Transaction Log



This shows transactions for the last 30 days.

# Plan Summary Information



# Reporting Template changes

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- For all reports submitted on 10/13 or after, a new CSV template will be needed
- Employer Wage and Contribution Reporting for these templates and the file schema from [mersofmich.com](http://mersofmich.com)

# Demonstration

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The screenshot shows the MERS website interface. At the top right, there are links for 'Contact Us' and 'Logout'. The main content area is titled 'Plan Browse' and includes search filters for Plan Name, Plan ID, Div Code, Count, Assets, and Plan Status. Below the filters is a 'Search Results' table with columns for PlanID, Div Code, Plan, City, Plan Status, Count, Assets, and Service. A red arrow points from the text 'We want to hear your feedback!' to a 'Give Feedback' link in the footer, which is circled in red.

**Plan Browse**

Find Plan Name:  or Plan ID:  [GO](#) [Clear](#)

or Div Code:

Count Low:  Count High:  Assets Low:  Assets High:

Plan Status:

Service:

**Search Results**

PlanID	Div Code	Plan	City	Plan Status	Count	Assets	Service
<a href="#">626418</a>	110088	MERS <input type="text"/> DC	Lansing	Active	6	\$251	Full
<a href="#">656795</a>	300370	MERS <input type="text"/> HCSP	Lansing	Active	220	\$1,383	Full
<a href="#">656796</a>	300371	MERS <input type="text"/> HCSP	Lansing	Active	14	\$89	Full
<a href="#">657311</a>	400110	MERS <input type="text"/> 457	Lansing	Active	150	\$5,034	Full

**Contact Us**  
Please call the MERS Service Center weekdays at 800.767.MERS(6377)

**Give Feedback**  
Click here to take a quick survey and inform us on your experience.

1134 Municipal Way | Lansing, MI 48917 | www.mersofmich.com | 800.767.MERS(6377)

We want to hear your feedback!

# New Enrollment Process



# Reminders for October 13

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- Temporary passwords will be emailed to existing Employer Portal users before October 13<sup>th</sup>
- When you log into the portal for the first time be presented with a few simple setup screens that will walk you through the process of setting up your new password
- For all reports submitted on 10/13 or after, a new CSV template will be needed – no changes to Defined Benefit

# Additional Resources

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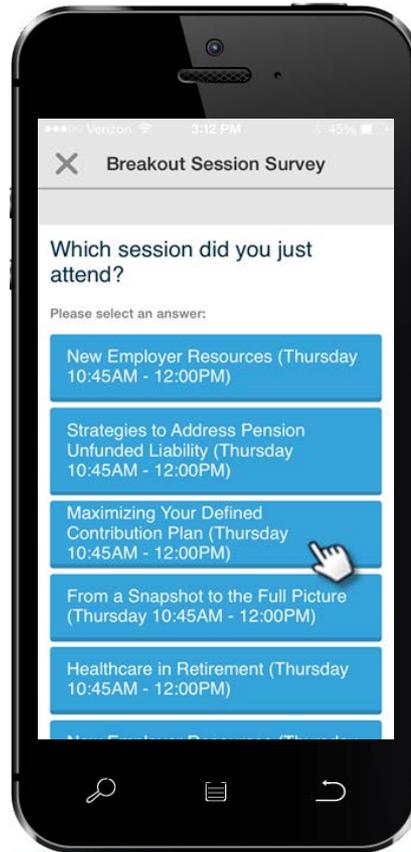
- [mersofmich.com](http://mersofmich.com) website
  - Work Scenarios
  - Life events
- Regional Team
- Regional Morning Breaks
- Communication to HR, Primary, Reporting contacts, for example:
  - Municipal Matters
  - CEO News

# Please Complete a Session Survey!



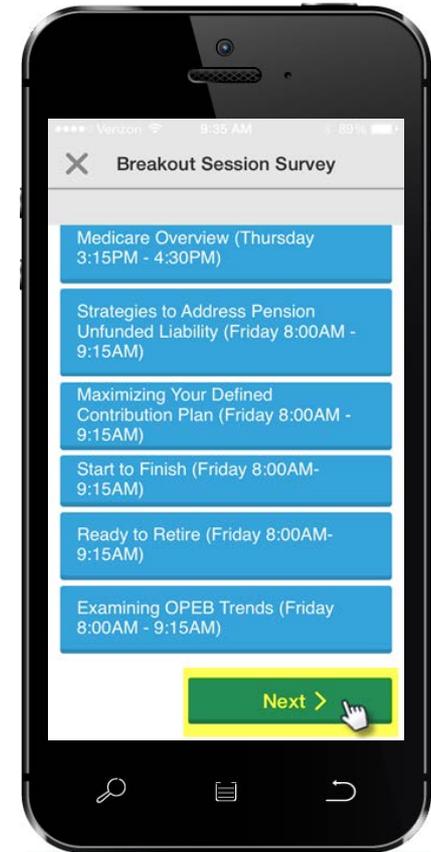
## Step 1:

Locate and access the  
**“Breakout Session  
Surveys”** Icon



## Step 2:

Select the date and  
time of the session you  
just attended



## Step 3:

Scroll down and click  
**“Next”** to complete  
the survey