

Pre-Conference Workshop:

Hands-On Approach to the MERS Employer Portal

Presenters:

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Welcome to the Pre-Conference Workshop

- Introductions
- Overview of MERS Data Security
- Participant Access - myMERS
- Employer Access - Reporting
- User Demonstration

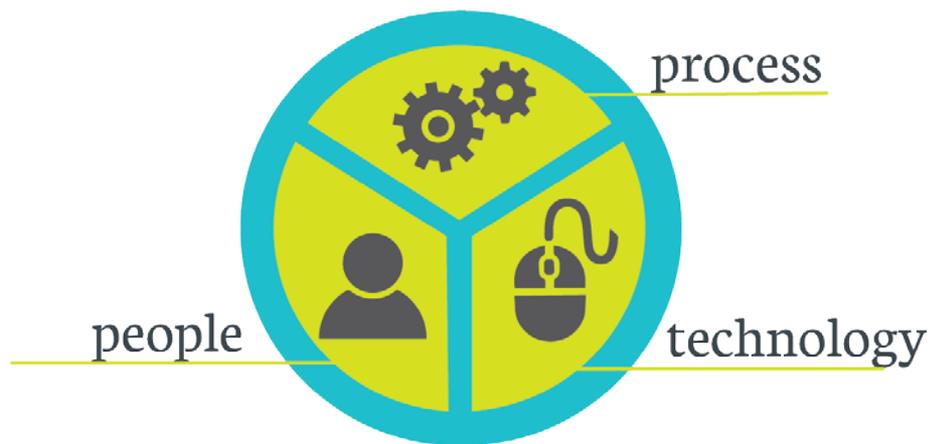
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MERS Data Security

MERS Cybersecurity Protection Initiatives

- Backup and Disaster Recovery Upgrades
- Cybersecurity Awareness Training
- Joined InfraGard
 - FBI/Business cybersecurity information sharing group
- Major Cybersecurity System Hardening
- Access Control Tightening
 - System Time Outs
- Internal Control Evaluation & Remediation
- Major Network Firewall Upgrades
- Cybersecurity Maturity Assessment



MERS Cybersecurity Preparation

- Penetration Testing
- Vendor Security Evaluations
- Log Monitoring & Incident Response
- Password Complexity Increases & Change Requirement (survey)
- Network Segmentation

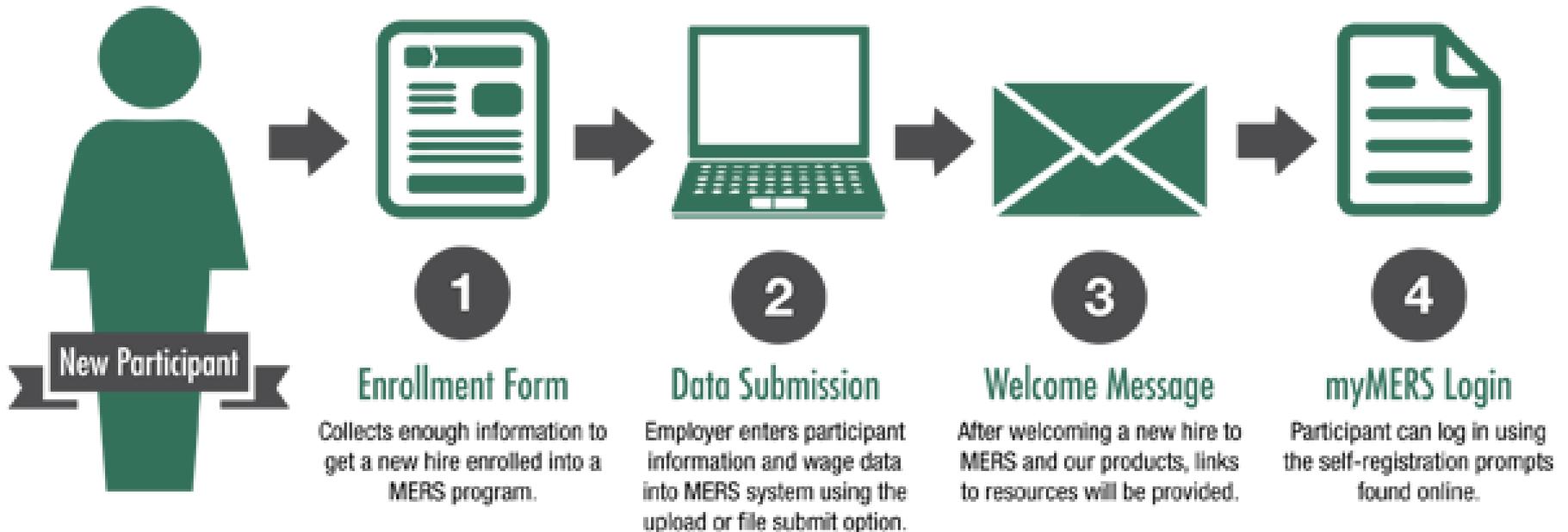
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Participant Access - myMERS

New Participant Process

MERS New Participant Process



myMERS, Cont.

- User Access
- Full Picture Report Builder
- Events

Participant Name
Address
City, State Zip

Dear Participant First Name,

As a benefit of your employment with [Employer Name], you have recently been enrolled in the following Municipal Employees' Retirement System of Michigan (MERS) plan(s):

- Defined Contribution Plan
- Health Care Savings Program

To learn more about your MERS benefits, visit mersofmich.com/newhire where you will find videos, publications and forms, calculators and other informational resources.

As a MERS participant, you have free 24/7 access to your retirement account information through your myMERS online account. You can view your account details, update contact information, find forms and

need a personal identification to the address you have on file

mail.
ct.
m(s). Submission instructions

ere to help. Representatives are
benefcenter@mersofmich.com.

myMERS: Home

Select Plan

Please select a Plan

GO

Events

Whether you're close to retirement, looking for ways to save money for retirement, or trying to understand your retirement plan better, we have events to suit your needs.



Resources

No matter where you are in life, the more you know about handling your finances, the better your chances of reaching your goals.



myMERS, Cont.

- Participant Transactions
- Statements/Resources

My Profile Resource Library Contact Us

Summary
My Balance
My Contributions
Change my Investments
Investment Performance
My Statements
Distributions

Personal Statements

My Statements

My Confirmations

Personal Statements

To open, click on a statement document below.

 [Statement for 04/01/2016 to 06/30/2016](#)

 [Statement for 01/01/2016 to 03/31/2016](#)

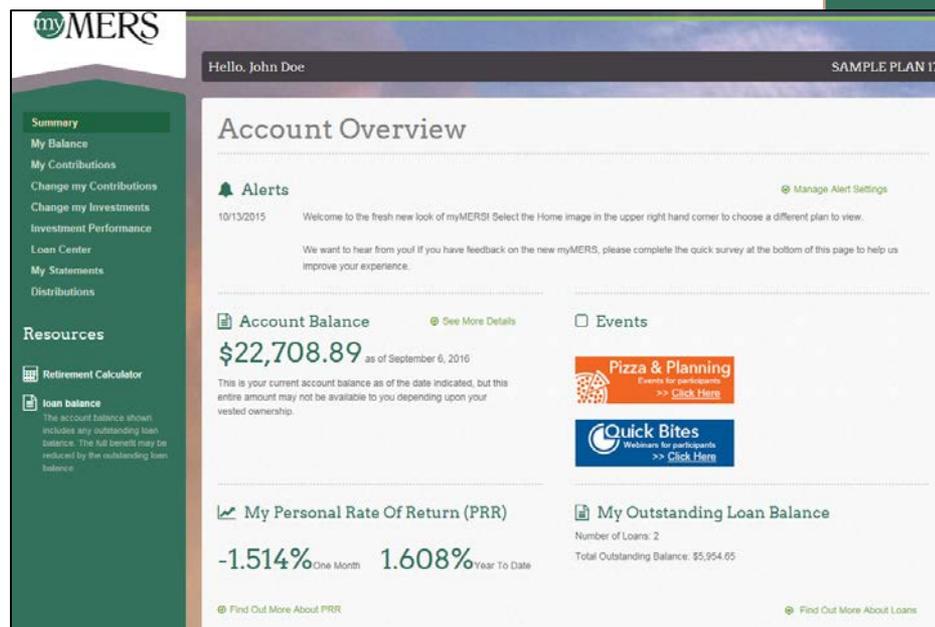
 [Statement for 10/01/2015 to 12/31/2015](#)

 [Statement for 07/01/2015 to 09/30/2015](#)

 [Statement for 04/01/2015 to 06/30/2015](#)

 [Statement for 01/01/2015 to 03/31/2015](#)

 [Statement for 10/01/2014 to 12/31/2014](#)



myMERS

Hello, John Doe SAMPLE PLAN 17

Account Overview

Alerts Manage Alert Settings

10/13/2015 Welcome to the fresh new look of myMERS! Select the Home image in the upper right hand corner to choose a different plan to view.

We want to hear from you! If you have feedback on the new myMERS, please complete the quick survey at the bottom of this page to help us improve your experience.

Account Balance See More Details

\$22,708.89 as of September 6, 2016

This is your current account balance as of the date indicated, but this entire amount may not be available to you depending upon your vested ownership.

Events

Pizza & Planning
Events for participants
[Click Here](#)

Quick Bites
Webinars for participants
[Click Here](#)

My Personal Rate Of Return (PRR)

-1.514% One Month **1.608%** Year To Date

[Find Out More About PRR](#)

My Outstanding Loan Balance

Number of Loans: 2
Total Outstanding Balance: \$5,954.05

[Find Out More About Loans](#)

Resources

- Retirement Calculator
- loan balance
The account balance shown includes any outstanding loan balance. The full benefit may be reduced by the outstanding loan balance.

myMERS, Cont.

Defined Benefit Home

Inbox

Records

My Statements

DB Calculator

Resource Library

Glossary

Contact Us

SAMPLE Employer

Summary Beneficiary Employment Payment Calculation

Need Help ?

i Your actual retirement eligibility date may be different based on changes in benefits or service credit. The date shown assumes future uninterrupted service credit will be earned until retirement.

Summary

Employer:	SAMPLE
Projected Service:	30 years 0 months
Current FAC:	\$79,867.68
myEstimated Retirement Date:	5/1/2038
myCurrent Service:	8 years 3 months

myBenefit Provisions In Effect as of 9/13/2016

Benefit Program:	Benefit B-3 (80% max)
Final Average Compensation:	Benefit FAC-3 (3 Year Final Average Compensation)
Vesting:	6 Year Vesting
EE Rate:	Member Contribution Rate 4.00%
Other Provisions:	Benefit F55 (With 30 Years of Service) E2 2.5% COLA for future retirees (01/01/2005)

myContributions

Pre-Tax:	\$16,606.41
Post-Tax:	\$0.00
Interest:	\$115.90
Total:	\$16,722.31

myBeneficiary

Primary:	
Contingent:	
Survivor:	

Online Requests

- [Pension Verification](#)
- [Request a Benefit Estimate](#)

Forms

- [Beneficiary Change Request](#)
- [Application for Defined Benefit Retirement](#)
- [Certification of Qualified Fund Rollover](#)
- [Electronic Funds Transfer - Direct Deposit Authorization](#)
- [Pension Federal Tax Withholding Authorization](#)
- [Pension State Tax Withholding Authorization](#)
- [Personal Information Form](#)
- [Refund Application](#)
- [Verification of Other Govt Service Credit](#)

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Employer Portal Overview - Wage and Contribution Reporting

Defined Benefit Reporting Options

Upload Method

The Upload Method Does:

- Work most optimally for employers who report for more than 10 employees
- Allows for data to be streamlined and avoids some manual entry from payroll system

The Upload Method is Not:

- The best option for employers managing 10 employees or less
- A direct input from your payroll system

Rollover Method

The Rollover Method Does:

- Work most optimally for employers who report for 10 employees or less
- Includes all reported participants from previous report – and contribution amounts may be copied (terminated rolls off)

The Rollover Method is Not:

- The best option for employers with more than 10 employees
- The best option for employers who report for hourly employees where wages/contributions vary (due to system timeouts)

Plan Management

The screenshot displays the MERS Employer Portal interface. At the top left is the MERS logo with the text "Municipal Employees' Retirement System" and "Employer Portal". Below the logo is a navigation bar with the following items: "Defined Benefit Home", "Program Summary", "Wage Reporting", "Members", "ePayment", "Resource Library", and "Contact Us". The "Wage Reporting" menu item is expanded, showing a dropdown list with the following options: "Prepare Report", "Make Corrections", "Voluntary Contributions", "Reporting History", and "Unsubmitted Reports".

The main content area is titled "Defined Benefit" and contains a "Getting Started" section. The text reads: "Welcome to the MERS Defined Benefit Plan reporting section of the Employer Portal. Here you can easily and securely:" followed by a bulleted list of actions:

- Report wage and service
- Correct existing information
- Run reports
- View payroll history
- View an individual work history

At the bottom of the "Getting Started" section, there are three links with icons: "Read the Manual" (with a book icon), "Questions & Answers" (with a question mark icon), and "Watch a Video Tutorial" (with a computer monitor icon).

A secondary inset screenshot on the right shows a close-up of the "Wage Reporting" menu item in the navigation bar, which is also expanded to show the same dropdown list of options as seen in the main screenshot.

PDA Reporting Options – Upload

The Upload Method Does:

- Work most optimally for employers who report for more than 10 employees
- Allow reporting contacts to manage contribution information for existing participants and adjust employment status in one place
- New hires can be added to the file and no forms returned to MERS
- Include the option of entering wages per pay period reported
- Allows users to manage their report outside of the system and avoid timing out issues

The Upload Method is Not:

- The best option for employers managing 10 employees or less
- Always a direct pull from your payroll system

Reporting Options – Manual Entry

The Manual Entry Method Does:

- Work most optimally for employers who report for 10 employees or less
- Include a copy function so that employers can roll over everything reported from previous report
- Allow you to sort by employment status so you can narrow down your reporting

The Manual Entry Method is Not:

- A good option for employers with more than 10 employees
- An option for those employers who require an unlimited amount of time to manually key in contributions (due to system timeouts)
- Allow for wages or employment status to be modified
- Include reporting for new hires – that must be done outside of reporting

Resources for You

The screenshot shows the MERS website interface. At the top left is the MERS logo with the text 'Municipal Employees' Retirement System'. To the right are links for 'Home', 'Forms', and 'Help'. Below the logo is a navigation bar with tabs for 'EMPLOYEE', 'RETIREE', 'EMPLOYER', 'MEDIA', and 'MERS'. A search bar is located to the right of these tabs. A large dark overlay menu is open, listing various services. A yellow arrow points to the 'Wage and Contribution Reporting' item in the 'Work Scenarios' section. Below this menu, there are sections for 'Programs' and 'Quick Links'. At the bottom left, there are social media icons for Facebook, Twitter, and LinkedIn, and a Facebook profile picture of a man. At the bottom right, there are sections for 'Account Access', 'Communications', and 'Upcoming Events'.

MERS
Municipal Employees' Retirement System

Follow Us → Home Forms Help

EMPLOYEE RETIREE EMPLOYER MEDIA MERS Search...

Work Scenarios

- New Hire
- Terminations & Retirements
- Rehires & Transfers
- Annual Actuarial Valuations (AAV)
- Changing To The MERS Defined Contribution Plan
- Unfunded Liability
- GASB 68
- Disability
- Wage And Contribution Reporting

Resources

- Forms
- Publications
- Events
- MERS Regional Contacts
- Help
- Log In

Programs

- Defined Benefit Plan
- Defined Contribution Plan
- Hybrid Plan
- Health Care Savings Program
- Retiree Health Funding Vehicle
- 457 Program
- Group Life & Disability Insurance Program
- MERS Premier Advantage
- Investment Services Program

Quick Links

- MERS Investments
- MERS Board
- Legislative Updates
- MERS Employers (Act 88)
- Plan Documents

Account Access

(Employers & ...)

LO

First time use Click

Communications

View a list of rece... sent to participant

View Comm

Upcoming Events

MERS Event

Pizza & Plan

Morning Brea

Quick Bite W

Annual Conf

Facebook

FACEBOOK

sm/Employer/Work-Scenarios/Wage-and-Contribution-Reporting

- MERS Website
 - www.mersofmich.com
- MERS Service Center
- Regional Team

Additional Resources

The screenshot shows a web application interface for a 'Plan Summary'. On the left is a dark green sidebar with a menu. The main content area is white and contains several sections:

- Manage Site:** Select Plan, Participant Search
- Manage My Plan:** Summary (highlighted), Plan Features, Balances, Investment Performance, Manage Loans, Check Disbursements
- Manage My Participants:** Select Participant, Pending Activity, View Statements, Transfer Participants
- Manage My Contributions:** Contribution Deposits
- Files And Reports:** Retrieve Files, Submit Files, Utilities, Request Reports
- Resources:** sponsor newsletter, plan dashboard participant status definitions

The main content area includes:

- Plan Summary:** Alerts (Manage Alert Settings), Plan Balances (Plan Features, Go to Participant), Contribution Deposit (Contribution details)
- Plan Analytics:** Participant Status (pie chart), Disbursements (pie chart)
- Web Usage:** Web Usage, Activity Log, Web Transactions, Transaction Log

The 'Go to Participant' section contains a search form:

Source	Trade Date	Amount
No disbursements yet for this plan year		

The 'Participant Status' pie chart is accompanied by the following table:

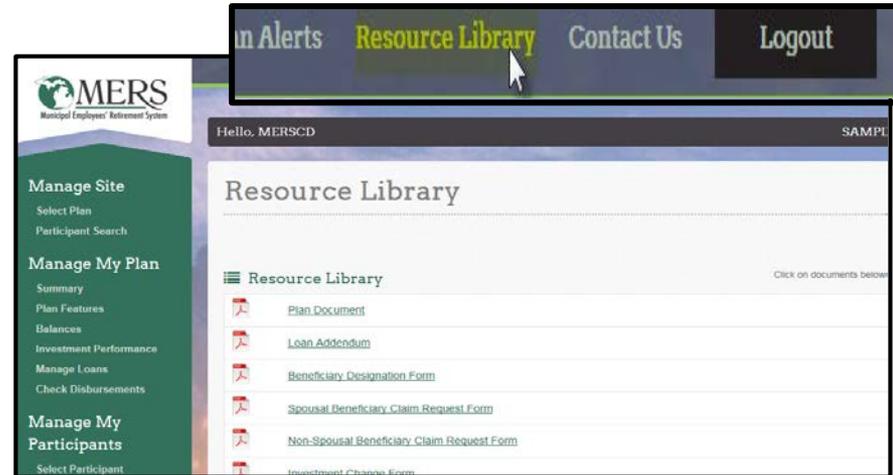
Status	Count
Active Not Contributing	52
Enrolling Not Contributing	4
Terminated With Balance	2
Other	2

Accessing plan and participant transactional activity is more intuitive than ever before

Plan Management

Employer quarterly statements and management reports are located within the selected plan – **Retrieve Files**

Utilize the **Resource Library** to access forms specific to your plan



Request Plan Reports and securely Submit Files

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User Demonstration

Contacting MERS

MERS of Michigan
1134 Municipal Way
Lansing, MI 48917

Phone: 800.767.6377
www.mersofmich.com

LET'S GET SOCIAL!

