



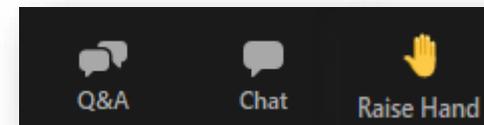
Maine PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Employer Training

Participating Local District - School Support
Teacher

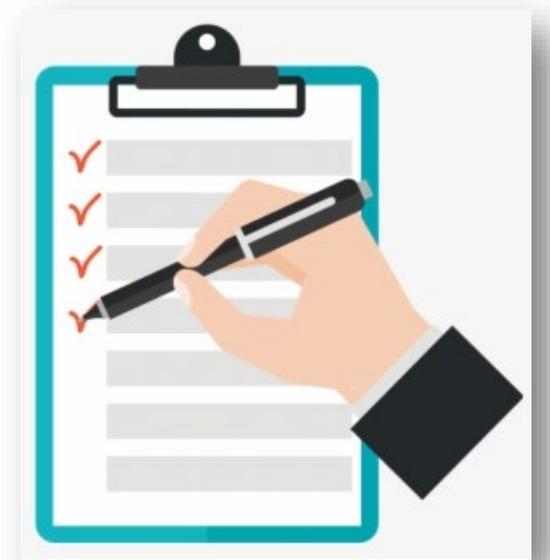
Training Expectations

- Presenter: Vicki Hamlin
Employer Reporting Training Specialist
- Attendee Introductions
- Interruptions during training
- Virtual Webinar Environment
 - Questions/Comments



Training Agenda

- 1. Employer Reporting Unit and MainePERS Background**
2. Accessing Employer Self-Service (ESS)
3. Understanding Eligibility and Enrollment
4. Navigating Employer Self-Service Part 1
5. Navigating Employer Self-Service Part 2
6. Survivor Services and Group Life Insurance (GLI)
7. Additional MainePERS Contacts



Employer Reporting Unit and MainePERS Background

MainePERS Employer Training

Employer Reporting Unit

Business Unit Phone: (207) 512-3200

Business Unit Email: Employer@mainepers.org

- **Employer Reporting Manager**

-

- **Training Specialist**

- Vicki Hamlin
 - (207) 512-3238
 - Vicki.hamlin@mainepers.org

- **Operations Specialist**

- JillAnn Harding
 - (207) 512-3121
 - Jill.harding@mainepers.org

- **Account Associates**

- Alexander Davenport
 - (207) 512-3179
 - Alexander.davenport@mainepers.org
- Lisa Poulin
 - (207) 512-3314
 - Lisa.poulin@mainepers.org
- Debra Bernier
 - (207) 512-3143
 - Debra.bernier@mainepers.org

- Joan Leclair
 - (207) 512-3224
 - Joan.leclair@mainepers.org
- Kathy Saucier
 - (207) 512-3230
 - Kathleen.saucier@mainepers.org
- Kyle Cooper
 - (207) 512-3268
 - Kyle.cooper@mainepers.org
- Michaela Carney
 - (207) 512-3380
 - Michaela.carney@mainepers.org
- Shelby Martin-Bugby
 - (207) 512-3351
 - Shelby.martin.bugby@mainepers.org
- Alecia Paradis
 - (207) 512-3352
 - Alecia.Paradis@mainepers.org

- **Associate**

- JoAnn Nelson
 - (207) 512-3220
 - Joann.nelson@mainepers.org



MainePERS Background

- Maine Public Employees Retirement System (MainePERS)
 - Established in 1942
 - *'Maine State Retirement System'* (MSRS) until 2007
- Benefits Plan Administrator
 - Defined Benefit Plan
 - Participating Local Districts (PLD), Teacher and State
 - Judicial and Legislative
 - Disability Program
 - Group Life Insurance
 - MaineSTART Defined Contribution (DC) Plan

MainePERS Mission Statement

Serving the public with sound retirement services to Maine governments.

MaineSTART Defined Contribution Plan

- Comprehensive Retirement Planning

- Defined Contribution (DC) Plan

- Tax-Advantaged Retirement Savings Program
 - Traditional (pre-tax) and Roth (after-tax)

- One-on-One Retirement Planning Sessions help employees understand and navigate the many retirement tools available to them

MAINE START Visit MaineSTART.org
[Learn more](#) about the tax-deferred Defined Contribution savings program from MainePERS.

- Why MaineSTART?

- Aids with recruitment and retention of employees
 - Ease of administration for payroll clerk
 - Low cost to employee and employer



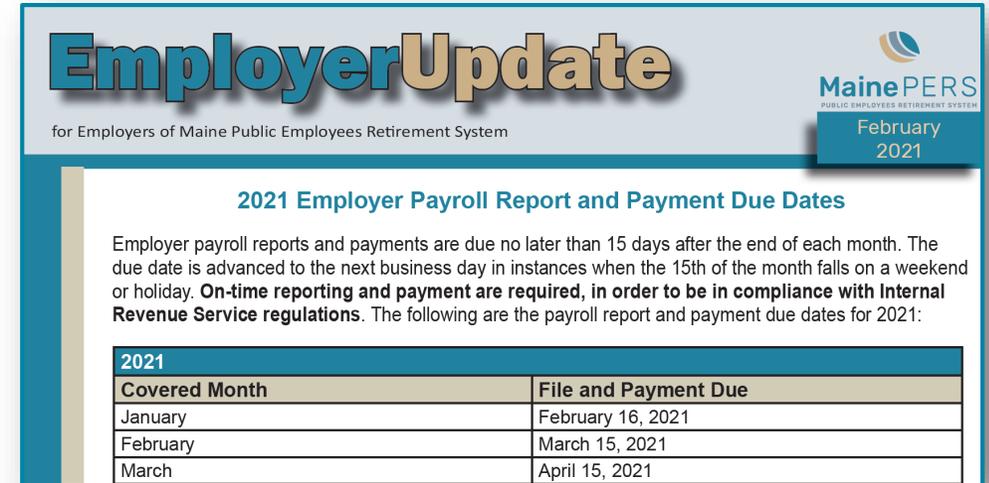
- For More Information or to Schedule a Retirement Planning Session

- Gary Emery, DC Plan Administrator

- Phone: (207) 512-3116
 - Email: gary.emery@mainepers.org

Keeping You Informed

- Employer Update
 - Sent via Email
 - On file with MainePERS
 - On Website
 - MainePERS Website: Employers > Employer Updates
 - Past Employer Updates
 - Last Year
- Targeted Email Messaging
 - Unsubscribing
- Employer Self-Service 'News'
 - ESS Login – Homepage
- Employer Self-Service Knowledge Base



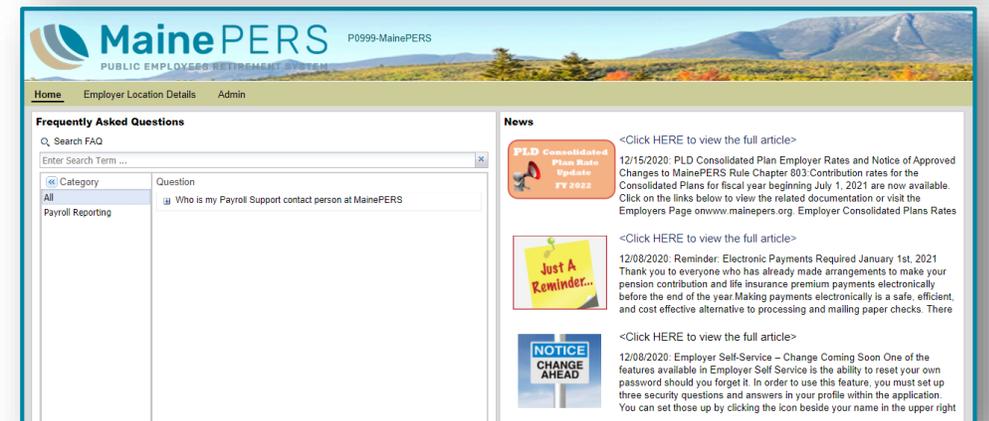
EmployerUpdate
for Employers of Maine Public Employees Retirement System

MainePERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM
February 2021

2021 Employer Payroll Report and Payment Due Dates

Employer payroll reports and payments are due no later than 15 days after the end of each month. The due date is advanced to the next business day in instances when the 15th of the month falls on a weekend or holiday. **On-time reporting and payment are required, in order to be in compliance with Internal Revenue Service regulations.** The following are the payroll report and payment due dates for 2021:

2021	
Covered Month	File and Payment Due
January	February 16, 2021
February	March 15, 2021
March	April 15, 2021



MainePERS P0999-MainePERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Home Employer Location Details Admin

Frequently Asked Questions

Q Search FAQ

Enter Search Term ...

Category	Question
All	Who is my Payroll Support contact person at MainePERS
Payroll Reporting	

News

<Click HERE to view the full article>

PLD Consolidated Plan Rate Update FY 2022
12/15/2020: PLD Consolidated Plan Employer Rates and Notice of Approved Changes to MainePERS Rule Chapter 803 Contribution rates for the Consolidated Plans for fiscal year beginning July 1, 2021 are now available. Click on the links below to view the related documentation or visit the Employers Page on www.maineper.org Employer Consolidated Plans Rates

<Click HERE to view the full article>

Just A Reminder...
12/08/2020: Reminder: Electronic Payments Required January 1st, 2021
Thank you to everyone who has already made arrangements to make your pension contribution and life insurance premium payments electronically before the end of the year. Making payments electronically is a safe, efficient, and cost effective alternative to processing and mailing paper checks. There

<Click HERE to view the full article>

NOTICE CHANGE AHEAD
12/08/2020: Employer Self-Service – Change Coming Soon One of the features available in Employer Self-Service is the ability to reset your own password should you forget it. In order to use this feature, you must set up three security questions and answers in your profile within the application. You can set those up by clicking the icon beside your name in the upper right



T Anderson Maineper

MainePERS Website

- www.maineopers.org

- **Homepage**

- ESS Login
- Contact
- Laws & Rules
- Secured Email
- Forms & Resources
 - Forms > Employer Forms
- MaineSTART

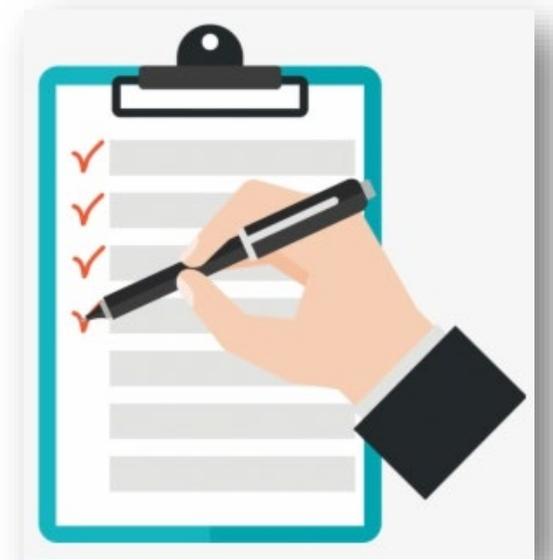
- **Employers**

- Employer Self Service Guides
- Helpful Resources
 - 'MainePERS Terminology'
- Employer Rates & Rate Setting
- Latest News
- Employer Training Sessions
- Employer FAQ's

The screenshot shows the MainePERS website homepage. At the top left is the MainePERS logo with the tagline 'PUBLIC EMPLOYEES RETIREMENT SYSTEM'. To the right, there is contact information: 'Call us toll free: (800) 451-9800 | local: (207) 512-3100 | 139 Capitol Street, Augusta, ME 04330'. Below this is a navigation bar with buttons for 'Before You Join', 'While Working', and 'Retirement', along with a search bar labeled 'Search MainePERS...' and a 'SEARCH' button. A secondary navigation bar contains links for 'HOME', 'ADMINISTRATION', 'INVESTMENTS', 'LAWS & RULES', 'FORMS & RESOURCES', 'EMPLOYERS', 'ABOUT', and 'CONTACT'. A 'Change text size' option with three 'A's is visible on the right. The main content area features a banner with autumn leaves and the text 'Serving the public with sound retirement services to Maine governments.' Below the banner are three teal buttons: '2020 Benefit Payment Calendar', 'MainePERS Reports', and 'Windfall Elimination Provision & Government Pension Offset'. To the right of these buttons is a 'Welcome' section with a globe icon and a message: 'We have redesigned our site to offer our members a better experience. Please take a few moments to explore the various sections, as some of the information, forms and other content may have moved. If you are having trouble locating a specific item, please use the search bar at the top of this page.' Below the 'Welcome' section is a 'Members' section with a group of people icon and the text 'Find the right information for you:' followed by three links: 'Before you join MainePERS', 'While you are working', and 'In retirement'. To the right of the 'Members' section is an 'Annual Cost-of-Living Adjustment (COLA)' section with a megaphone icon and text: 'On August 13, 2020, MainePERS Board of Trustees adopted the 0.6% Consumer Price Index - Urban Consumers (CPI-U) rate compiled by the U.S. Department of Labor's Bureau of Labor Statistics on June 30, 2020, as the basis for 2020 cost-of-living adjustment (COLA) for all pension plans to which it applies. Eligible recipients will first see the COLA reflected in their September pension payment.'

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(ESS)**
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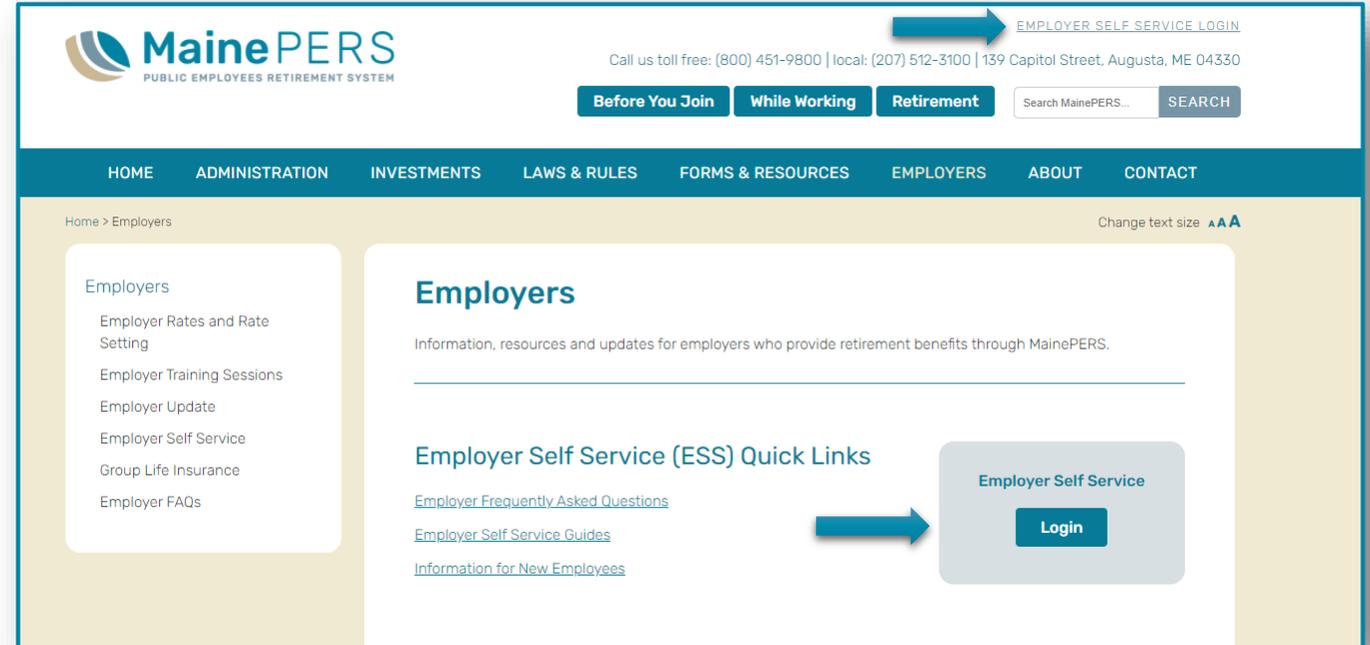


Employer Self-Service Access

MainePERS Employer Training

Employer Self-Service System

- Also Known As “ESS”
- MainePERS Reporting Database
 - Defined Benefit
 - Defined Contribution
 - Group Life Insurance
- Access Login via MainePERS Website
- Browser Requirements: **Google Chrome**
 - ‘Employer Self-Service Desktop Specifications’
 - Out-of-date browser warning



The screenshot displays the MainePERS website interface. At the top left is the MainePERS logo with the tagline "PUBLIC EMPLOYEES RETIREMENT SYSTEM". To the right, there is a toll-free number (800) 451-9800 and a local number (207) 512-3100. A search bar is present with the text "Search MainePERS..." and a "SEARCH" button. Below the header is a navigation menu with links for HOME, ADMINISTRATION, INVESTMENTS, LAWS & RULES, FORMS & RESOURCES, EMPLOYERS, ABOUT, and CONTACT. The main content area is titled "Employers" and includes a sidebar with links such as "Employer Rates and Rate Setting", "Employer Training Sessions", "Employer Update", "Employer Self Service", "Group Life Insurance", and "Employer FAQs". The main content area features a section titled "Employer Self Service (ESS) Quick Links" with links for "Employer Frequently Asked Questions", "Employer Self Service Guides", and "Information for New Employees". A prominent "Employer Self Service" button with a "Login" sub-button is highlighted with a blue arrow pointing to it from the left.



Employer Self-Service Security Administrator

- Security Administrator Responsibilities and Expectations

- ESS User Maintenance
- Location Demographics
- Compromised Employer Location Notification to MainePERS

- Security Administrator Setup

- Employer Location Only
- More than one location = more than one form
- 'Employer Self Service Security Administrator Authorization'

- [MainePERS Website: Forms & Resources > Forms > Employer Forms](#)

Employer Self Service Security Administrator Details		
Employer Code(s):	Employer Location Name:	
P0999	Town of Mayberry	
Employer Location Mailing Address:		Federal Tax ID Number
123 Main Street Mayberry, Maine 12345		12345678-9
Security Administrator Name (First, Last)		Security Administrator MFA Email Address
John Johnson		john.johnson@mayberry.com
MFA Phone Number 1 (required)		MFA Phone Number 2 (required)
207-555-1212		207-555-9898

By signing this form, I acknowledge and accept the duties and responsibilities outlined by MainePERS and agree to comply with applicable security requirements when accessing Employer Self Service.

John Johnson 01/01/2022
Employer Self Service (ESS) Security Administrator Signature Date

By signing this form, I acknowledge and authorize the addition of the Employer Self Service Security Administrator provided on this form.

Mike Smith 01/01/2022
Certified Official Signature Date

Mike Smith mike.smith@mayberry.com 207-555-1212
Certified Official Name Certified Official Email Address Certified Official Title

Form #EM-0003 Rev. 07/21

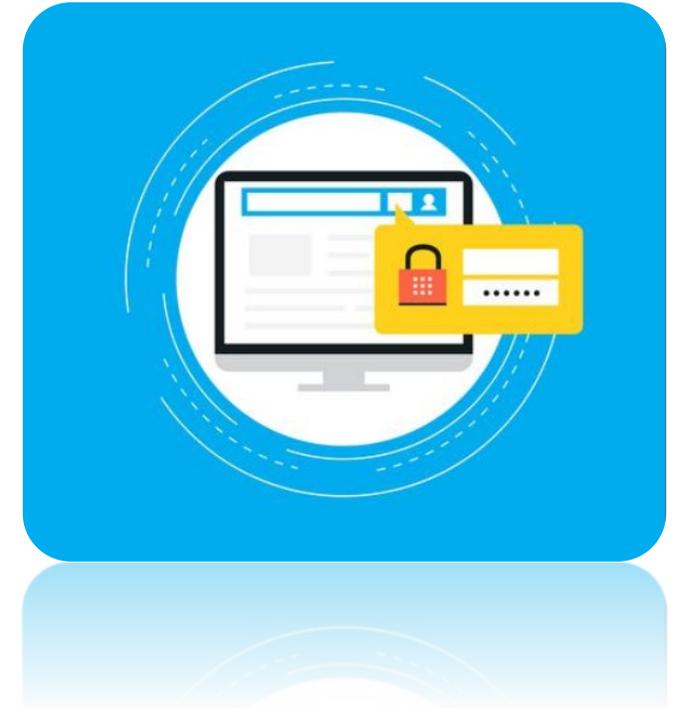
Security Compromised Employers

- Employer Location Server/Individual Desktop Attack
 - Virus, Phishing, Malware, Ransomware, Spyware, etc.
- Notify MainePERS immediately
 - Employer Services Unit
- Isolate the affected Computer if possible
 - Remove the computer from your network to minimize impact to other systems
- Temporary access restriction to MainePERS Systems
 - Employer Self-Service, In-bound emails
 - All users/contacts at Employer Location
- Restoring System Access



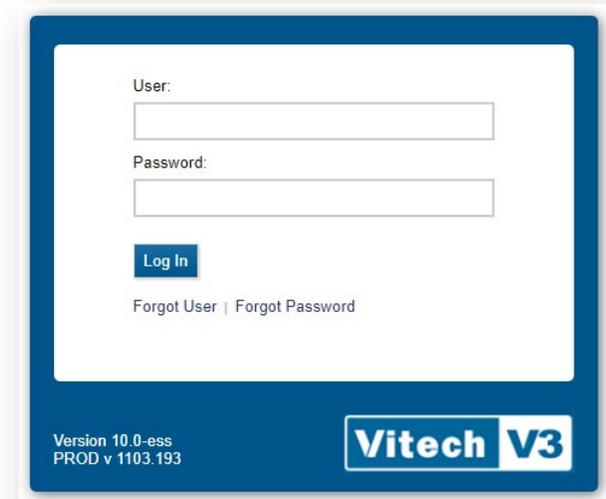
Employer Self-Service Users

- Username: **'P0999_jjohnson'**
 - Preferred Username Formatting
- ESS Security Administrator Creates User Account
 - User's Name
 - Email Address
 - Phone Number(s)
- User Setup Email
 - Email not received
 - Security Questions



Employer Self-Service Login and Multi Factor Authentication

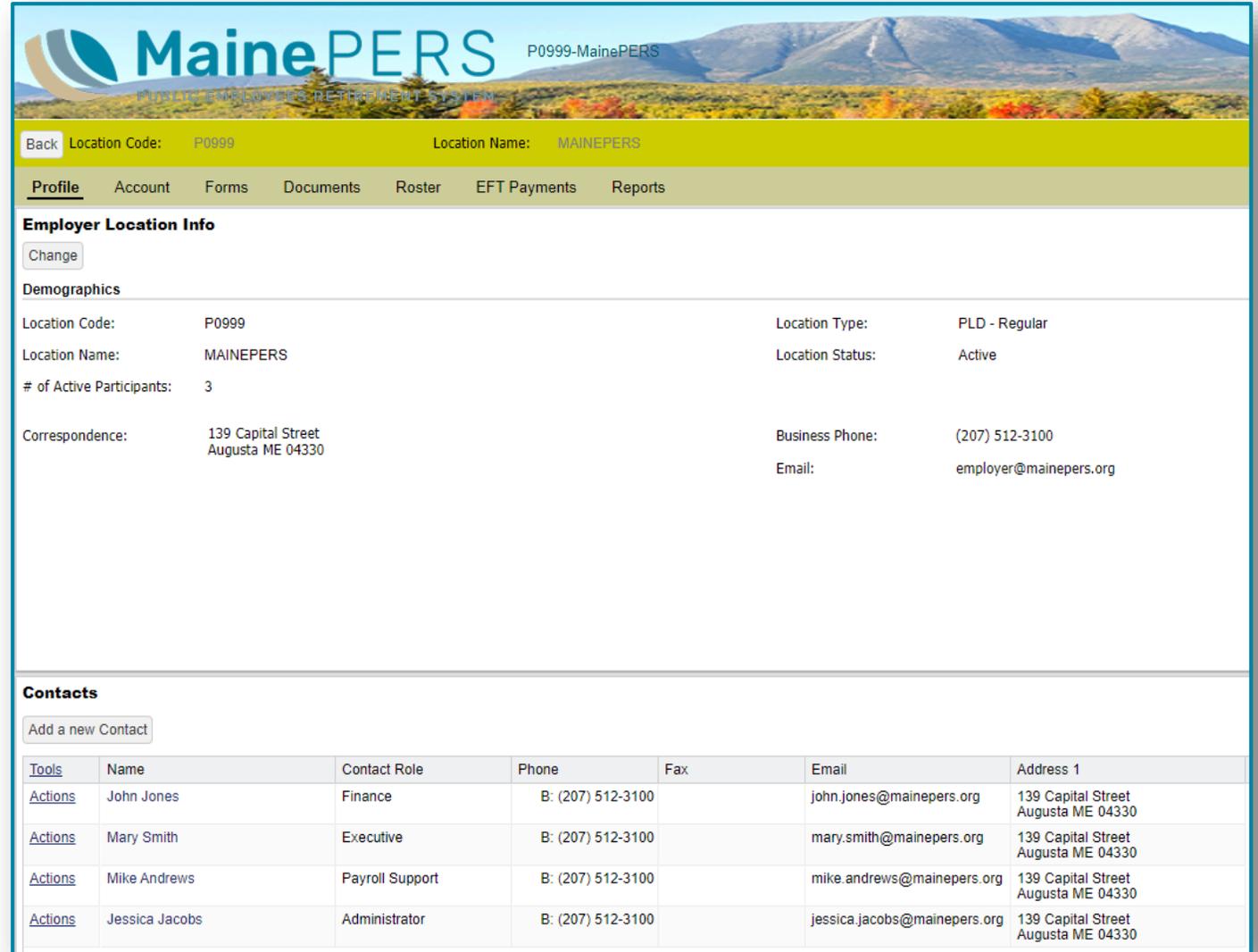
- ESS Login Screen
 - Username
 - Password
- Forgot User | Forgot Password
- Multi-Factor Authentication (MFA)
 - “Twilio”
- Account Locked Out
 - ESS: Security Administrator
 - MFA: MainePERS Employer Services Unit



The screenshot shows a login interface with a white background and a blue border. It features two input fields: 'User:' and 'Password:'. Below the password field is a blue 'Log In' button. At the bottom of the form area, there are links for 'Forgot User' and 'Forgot Password'. The footer of the page includes the text 'Version 10.0-ess' and 'PROD v 1103.193' on the left, and the 'Vitech V3' logo on the right.

Employer Self-Service 'Profile' Tab

- Employer Location Information
 - Employer Demographics
 - Location Details
- Contacts
 - Primary Payroll Contact
 - Security Administrator
 - Chief Financial Contact
 - Chief Executive Contact
- Contacts vs. Users
- ESS Roles



MainePERS P0999-MainePERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Back Location Code: P0999 Location Name: MAINEPERS

Profile Account Forms Documents Roster EFT Payments Reports

Employer Location Info
Change

Demographics

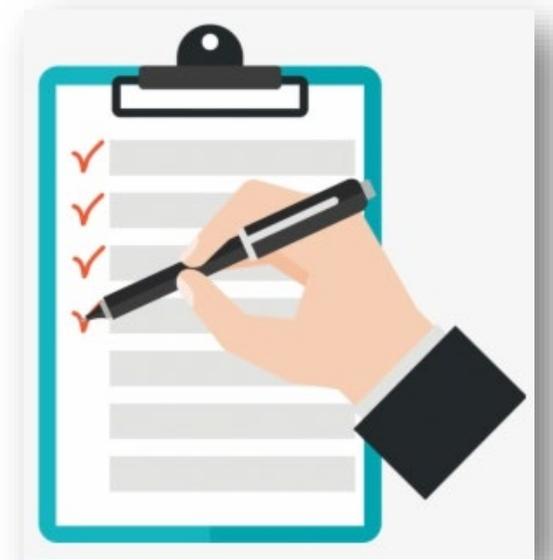
Location Code:	P0999	Location Type:	PLD - Regular
Location Name:	MAINEPERS	Location Status:	Active
# of Active Participants:	3		
Correspondence:	139 Capital Street Augusta ME 04330	Business Phone:	(207) 512-3100
		Email:	employer@mainepers.org

Contacts
Add a new Contact

Tools	Name	Contact Role	Phone	Fax	Email	Address 1
Actions	John Jones	Finance	B: (207) 512-3100		john.jones@mainepers.org	139 Capital Street Augusta ME 04330
Actions	Mary Smith	Executive	B: (207) 512-3100		mary.smith@mainepers.org	139 Capital Street Augusta ME 04330
Actions	Mike Andrews	Payroll Support	B: (207) 512-3100		mike.andrews@mainepers.org	139 Capital Street Augusta ME 04330
Actions	Jessica Jacobs	Administrator	B: (207) 512-3100		jessica.jacobs@mainepers.org	139 Capital Street Augusta ME 04330

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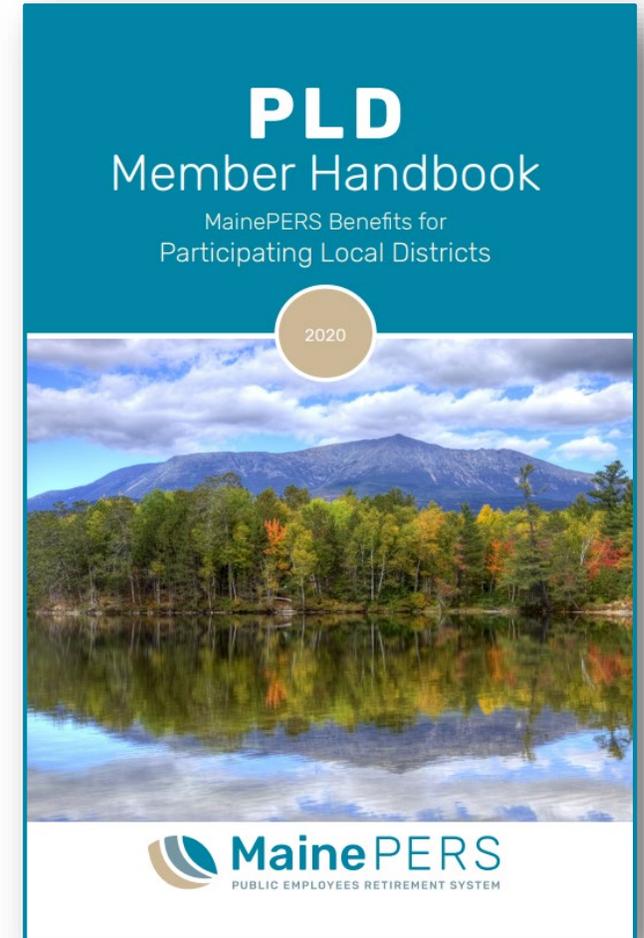


Understanding MainePERS Eligibility and Enrollment

MainePERS Employer Training

PLD Plan Eligibility

- What is a 'PLD'?
 - Participating Local District
 - Varies by Location
 - Age 60 and Age 65
- Membership
 - One-time Irrevocable Election
 - Varies by Location
 - Optional
 - Section 218 Agreement
 - Elected/Appointed Officials
 - New Plan Provisions
 - LD711: Transfer from Alternate Retirement Plan
 - LD1103: Limited Period Open Enrollment
 - Mandatory
- Always check with MainePERS



LD711: Transfer from Alternate Plan

- Varies by Employer Location
 - Must take Certified Action
- Transfer from alternate Qualified Plan
- Transfer in at any time
- Irrevocable election
 - Cannot withdraw – same employer
- Pre-tax Deduction
- Original Hire Date
- Membership/Participation Start Date
- Rate Category/RSN
 - Same as regular membership

MainePERS PUBLIC EMPLOYEES RETIREMENT SYSTEM		P.O. Box 349 Augusta, ME 04332-0349 Telephone: (207) 512-3100 Toll-free: 1-800-451-9800 Fax: (207) 512-3101 Maine Relay: 711		TRANSFER FROM ALTERNATE PLAN APPLICATION FOR MEMBERSHIP	
TO BE COMPLETED BY EMPLOYEE				Gender: <input checked="" type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Other	Phone: <input checked="" type="checkbox"/> Home/ <input type="checkbox"/> Cell (207) 555-1212
Member's Name:					
(Prefix)	Mike	(First)	Smith	(MI)	(Last)
Social Security Number:		Date of Birth (mm/dd/yyyy):		Personal E-mail Address:	
9	9	9	01	01	mike.smith@email.com
9	9	9	01	01	
Mailing Address:					
123 Main Street		Augusta		ME	04330
(Street/PO Box)		(City/Town)		(State)	(ZIP)
<input checked="" type="checkbox"/> I wish to join the Maine Public Employees Retirement System and understand that my application and membership are governed by MainePERS laws and rules. I agree to deductions from my compensation at the rate required by MainePERS law for the plan in which I am participating. I understand that this election is final and applies to all current and any future employment I have with this employer in a position with optional membership.					
I hereby certify that all of the statements on this application are true and correct to the best of my knowledge and belief.					
Mike Smith				01/14/2022	
Signature				Date	
TO BE COMPLETED BY EMPLOYER					
Employer Location Code:		Employer Location Name:			
P0999		Maine Public Employees Retirement System			
Original Hire/First Eligibility Date (mm/dd/yyyy):			Membership Start/Participation Begin Date (mm/dd/yyyy):		
01 01 1999			01 01 2022		
Title of Position:					Position Class Code:
Town Clerk					09901
Plan Class:	Personnel Status Code:	Rate Schedule:			
110AC	11	57			
(See the MainePERS payroll manual for explanation of codes.)					
Employee is paid: <input checked="" type="checkbox"/> by Calendar Year (Jan-Dec) <input type="checkbox"/> by Fiscal Year (July-June) <input type="checkbox"/> by School Year (Sept-Aug) <input type="checkbox"/> by School Year (Aug-July)					
If PLD eligibility is based on hours, total hours worked in the last 12 consecutive months: _____					
I certify that this employee originally declined to participate in MainePERS in order to participate in an alternate retirement plan that qualifies under 18252-B and now wishes to participate in MainePERS.					
The above information relating to present employment is true and correct to the best of my knowledge.					
Terri Anderson				01/14/2022	
Employer Section Completed By (Signature)				Date	
Terri Anderson		(207) 555-1212		terri.anderson@mainepers.org	
Print/Typed Name		Phone		E-mail	
PLEASE RETAIN A COPY FOR YOUR RECORDS					
Form #CL-0102B Rev. 9/21					

LD 1103: Limited Period Open Enrollment

- Varies by Employer Location
 - Must take Certified Action
- Optional Membership
 - Previously Declined
- 5 Year Limited Enrollment Period
 - Annually September 1st – November 1st
- After-tax Deduction
- Original Hire Date
- Membership/Participation Start Date
- Rate Category/RSN

Plan	EE Paid	ER Paid
Age 60	54	55
Age 65	57	58



MainePERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

P.O. Box 349
 Augusta, ME 04332-0349
 Telephone: (207) 512-3100
 Toll-free: 1-800-451-9800
 Fax: (207) 512-3101
 Maine Relay: 711

**LIMITED PERIOD OPEN ENROLLMENT
APPLICATION FOR MEMBERSHIP**

TO BE COMPLETED BY EMPLOYEE Gender: Male Female Other Phone: Home/ Cell (207) 555-1212

Member's Name: (Prefix) (First) (MI) (Last) (Suffix)

Social Security Number: Date of Birth (mm/dd/yyyy): Personal E-mail Address:

Mailing Address: (Street/PO Box) (City/Town) (State) (ZIP)

I wish to join the Maine Public Employees Retirement System and understand that my application and membership are governed by MainePERS laws and rules. I agree to **after-tax deductions** from my compensation at the rate required by MainePERS law for the plan in which I am participating. I understand that this election is final and applies to all current and any future employment I have with this employer in a position with optional membership.

I do not wish to join the Maine Public Employees Retirement System.

Mike Smith 01/14/2022
Signature Date

TO BE COMPLETED BY EMPLOYER

Employer Location Code: Employer Location Name:

Original Hire/First Eligibility Date (mm/dd/yyyy): Membership Start/Participation Begin Date (mm/dd/yyyy):

Title of Position: Position Class Code:

Plan Class: Personnel Status Code: Rate Schedule:

(See the MainePERS payroll manual for explanation of codes.)

Employee is paid: by Calendar Year (Jan-Dec) by Fiscal Year (July-June) by School Year (Sept-Aug) by School Year (Aug-July)

If PLD eligibility is based on hours, total hours worked in the last 12 consecutive months: _____

Please indicate which open enrollment period applies by placing a check in the appropriate box:

a. Employee has more than 5 years of employment on November 1, 2021

b. Open Enrollment during employee's first year of employment

c. Open Enrollment during employee's second year of employment

d. Open Enrollment during employee's third year or employment

e. Open Enrollment during employee's fourth year of employment

f. Open Enrollment during employee's fifth year of employment, or for an employee whose fifth year of employment anniversary falls between November 1, 2021 and November 1, 2022

The above information relating to present employment is true and correct to the best of my knowledge.

Terri Anderson 01/14/2022
Employer Section Completed By (Signature) Date

Terri Anderson (207) 512-3229 terri.anderson@mainepers.org
Print/Typed Name Phone E-mail

PLEASE RETAIN A COPY FOR YOUR RECORDS Form #CL-0102A Rev. 9/21

PLD Plan and Retirees Returned to Work (RRTW)

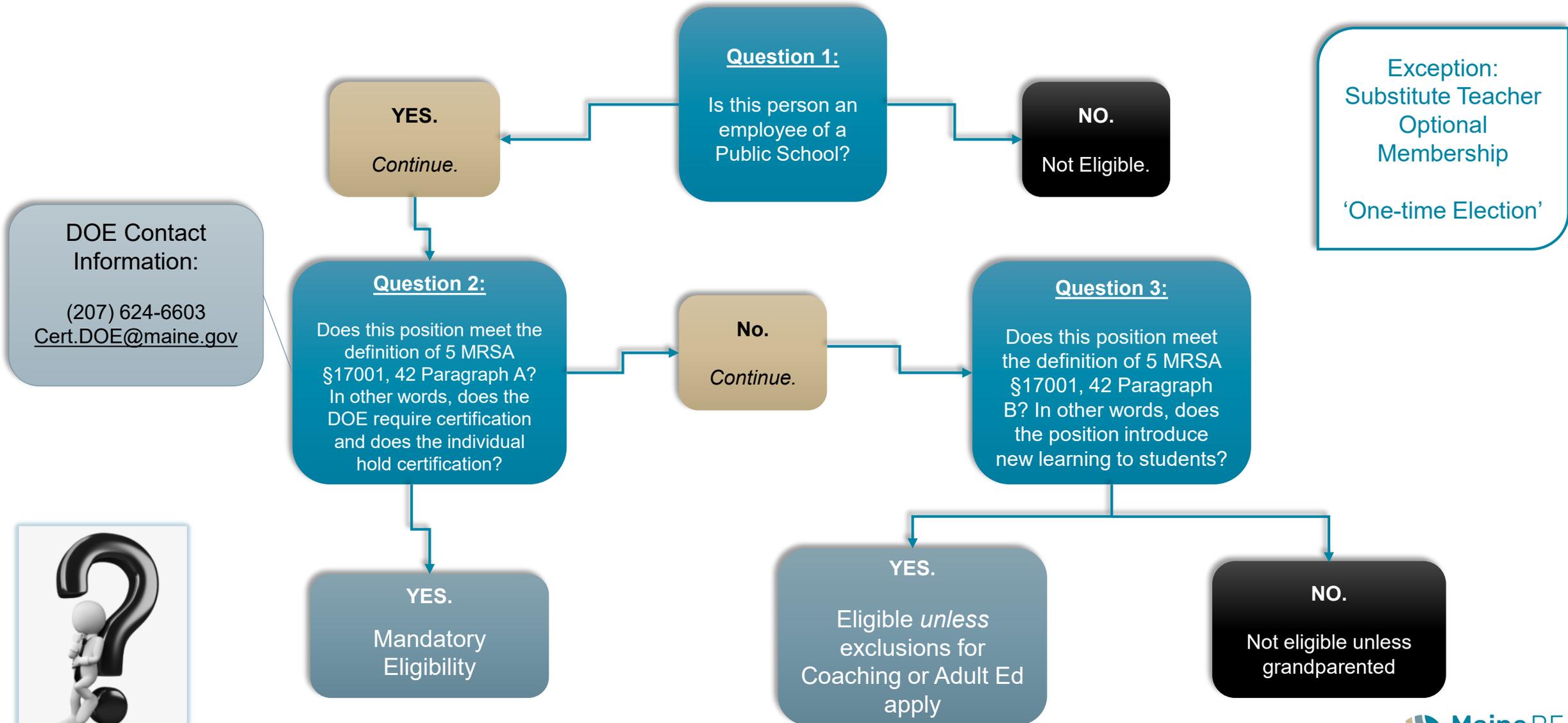
- Retirees Returned to Work
 - ‘Same Employer’
 - PLD vs. State/Teacher
 - Consolidated PLD vs. Non-Consolidated PLD

Pre-Retirement Employer	Post-Retirement Employer	“Same Employer”?
Legislative or Judicial Retirement Program	State/Teacher	Yes
	Consolidated PLD	No
	Non-Consolidated PLD	No
Consolidated PLD	Consolidated PLD	Yes
	Non-Consolidated PLD	No
	State/Teacher	No
Non-Consolidated PLD	SAME - Non Consolidated PLD	Yes
	ANOTHER - Non-Consolidated PLD	No
	Consolidated PLD	No
	State/Teacher	No

- Participating Local District (PLD): Reporting Retiree Returned to Work (RRTW) Employees
 - RRTW – Inactive as of 06/30/2021
 - RRTW2 – All PLD Retirees
- Always check with MainePERS



Teacher Eligibility Determination



Teacher Eligibility Determination

- Job Description Submission
 - 'Official' Job Description
 - DOE Certification
 - 'Official' Job Title
 - Email: teacher@mainepers.org
- 'Same Employer'
 - Same Tax Identification Number (TIN)
 - Confirm with MainePERS
- Basis for Membership
 - Current or prior work in a position covered by the MainePERS State or Teacher plan
 - Not Refunded
 - Contact Employer Services for assistance with determination



Teacher Eligibility Determination

- Optional Membership
 - ‘One-time’ irrevocable Election with the ‘Same Employer’
 - Substitute Teachers (Y0209)
- Known Eligibility Issues
 - Adult Education (Y0210)
 - Coaches (Y0155, YEX**, Y0104)
 - Prior Basis
 - School Secretary (Y1001) & Dietician (Y0408)
 - Grandfathered
- Definition of ‘Teacher’
 - [MainePERS Website: Laws & Rules](#)
 - [Title 5 MRSA Part 20 Chapter 421: General Provisions §17001, paragraph 42](#)



Teacher Plan Contribution Rates

- Employee Contributions
 - Set by Statute
 - Currently set at **7.65%**
 - Pre-tax deduction
- Employer Contributions
 - Subject to change July of Each year
 - Currently set at **4.47%** (07/01/2023 - 06/30/2024)
- Grant-Funding Employer Contributions
 - Regular and Retirees returned to work (RRTW)
 - Admin = 0.59%
 - Unfunded Actuarial Liability (UAL) = 14.51%
 - Total GF Rate = **15.10%**
 - Total ER Contribution on Regular EE = 19.57%
 - Total ER Contribution on GF RRTW = 15.10%



State/Teacher Plan and Retirees Returned to Work (RRTW)

- Retirees Returned to Work (RRTW)
 - ‘Same Employer’
 - State/Teacher vs. PLD
- Always check with MainePERS

Pre-Retirement Employer	Post-Retirement Employer	“Same Employer”?
State Employees (all branches) and Teacher Members	State/Teacher	Yes
	Consolidated PLD	No
	Non-Consolidated PLD	No

Pre-Retirement Employer	Post-Retirement Employer	“Same Employer”?
Legislative or Judicial Retirement Program	State/Teacher	Yes
	Consolidated PLD	No
	Non-Consolidated PLD	No
Consolidated PLD	Consolidated PLD	Yes
	Non-Consolidated PLD	No
	State/Teacher	No
Non-Consolidated PLD	SAME - Non Consolidated PLD	Yes
	ANOTHER - Non-Consolidated PLD	No
	Consolidated PLD	No
	State/Teacher	No

Membership Application

- ‘Forms’ Section
 - ‘Application for Membership’ (CL-0102)
- ‘Submission of Membership Application’
 - MainePERS Website: Employers > Employer Self Service Guides > Quick Reference Guide
- Form Inconsistencies
 - State: ME (2 letter abbreviation)
 - Auto-fill
 - Member Demographic Issues (DOB, SSN, etc.)
 - Teacher Plan: Adult Education (Y0210)
 - No Prior Basis – Contact MainePERS

Change in Member Employment	PLD	Teacher	State
1. ER LOC: Employer Location	Yes	Yes	Not required for a department/ agency transfer only
2. RSN: Rate Schedule Number ¹	Yes	Yes	Yes
3. POS: Position Code	Yes	Changing to special codes ²	No
4. PSC: Personnel Status Change Code	Yes	ONLY when changing to RRTW (53)	ONLY when changing to RRTW (53)
5. Plan Class Code ³	Yes	Yes	Yes

Membership Application

- Member Demographics
- Membership Election 
 - *"I wish to join..."*
 - Retiree Returned to Work (RRTW)
- Optional Membership Only
 - Choose Corresponding Option
- Employer Demographics
- Membership/Employment Details
- Form Sign-Off
 - Submit in ESS
 - Paper Copy: Employer Back-up

 P.O. Box 349
Augusta, ME 04332-0349
Telephone: (207) 512-3100
Toll-free: 1-800-451-9800
Fax: (207) 512-3101
Maine Relay: 711

APPLICATION FOR MEMBERSHIP

TO BE COMPLETED BY EMPLOYEE Gender: Male Female Non-Binary Phone:

Member's Name: (Prefix) (First) (MI) (Last) (Suffix)

Social Security Number: Date of Birth: Gender: Male Female Other E-mail Address:

Mailing Address: (Street/ PO Box) (City/Town) (State) (ZIP)

I wish to join the Maine Public Employees Retirement System and understand that my application and membership are governed by MainePERS laws and rules. I agree to deductions from my compensation at the rate required by MainePERS law for the plan in which I am participating. I hereby certify that all of the statements on this application are true and correct to the best of my knowledge and belief.

FOR THOSE WITH OPTIONAL MEMBERSHIP ONLY: I do not wish to join the Maine Public Employees Retirement System and understand that the opportunity to enroll at any future date will be subject to MainePERS laws and rules.

I am a MainePERS retiree returning to work with an employer participating in the same plan from which I retired.

TO BE COMPLETED BY EMPLOYER

Employer Location Code: Employer Location Name:

Membership Start Date (mm/dd/yyyy): If PLD eligibility is based on hours, total hours worked: in the last 12 consecutive months: in the last 18 consecutive months:

Title of Position: Position Class Code:

Plan Class: Personnel Status Code: Rate Schedule:

(See the MainePERS payroll manual for explanation of codes.)

Employee is by Calendar Year (Jan-Dec) by Fiscal Year (July-June) by School Year (Sept-Aug) by School Year (Aug-July)

Is employee electing not to enroll at this time? Yes No If "Yes" check ONE of the boxes in a - i explaining on what basis the employee declined membership or is electing not to enroll

a. Substitute teacher member

b. Elected or appointed official

c. Maine Community College System employee electing to participate in an alternative plan provided by MCCC

d. Maine National Guard member who has been on active State service for more than 5 consecutive days after 7/30/2004

e. PLD employee in a position covered by a Social Security Section 218 agreement

f. Non-PST employee of a PLD electing to participate in an employer provided defined contribution or deferred compensation plan(s) that meets the requirements of 5 MRSA §18252-B

g. Chief administrative officer of a PLD

h. PLD employee in the Consolidated Plan who is not subject to the Municipal Public Employees Labor Relations Law

i. Current employee of an entity on the date that it becomes a PLD

If your PLD has joined the defined contribution (401(a)) and/or deferred compensation (457) plan(s) offered through the PLD Consolidated Plan, does this employee participate in either of those plans? Yes No

The above information relating to present employment is true and correct to the best of my knowledge.

Certifying Official Signature Date

Print/ Typed Name Phone E-mail

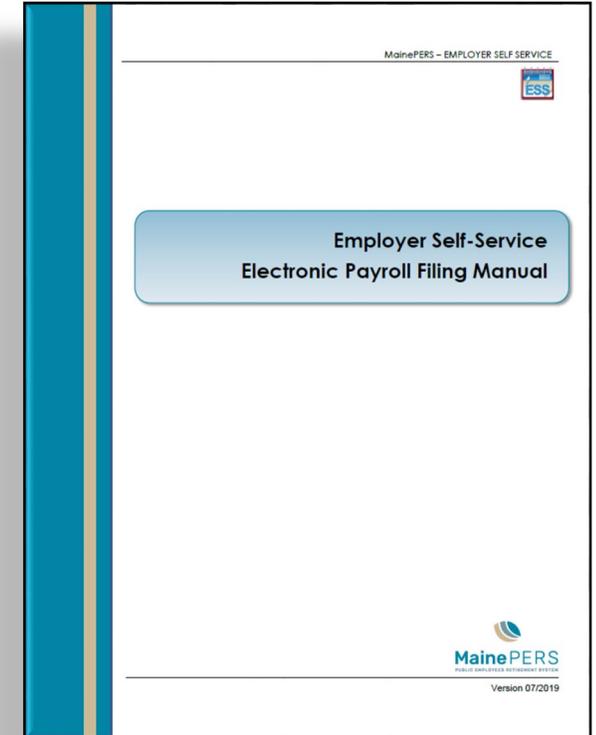
NOTE: In accordance with the Personal Privacy Protection Law, you are hereby advised that pursuant to the Retirement and Social Security Law, the Retirement System is required to maintain member records. The records are necessary to determine eligibility for and calculation of benefits. Failure to provide information may result in ineligibility for benefits. The System may provide certain information to your employer.

PLEASE RETAIN A COPY FOR YOUR RECORDS

Form MCL-0102 Rev. 1/16

MainePERS Coding

- 'Electronic Payroll Filing (EPF) Manual'
 - Appendices, Page 32 – 39
 - MainePERS Website: Employers > Employer Self Service Guides > ESS Manuals & Guides
- **'Plan Class'**
 - PLD: Varies by Employer (i.e. 110AC, 3102C, etc.)
 - State/Teacher Plan
- **'POS':** Position Code
 - Plan Specific (Teacher vs. PLD vs. School Support PLD)
- **'PSC':** Personnel Status Code
 - Contributing Member vs. Retiree Returned to Work (RRTW/RRTW2)



MainePERS Coding

- **‘RSN’**: Rate Schedule Number or Rate Category
 - **PLD: Age 60 vs. Age 65 Plan**
 - PLD Participation date prior to 07/01/2014
 - **Determines expected contribution rate for member or employer**
 - Contribution Rates – Updated Annually on July 1st
 - PLD
 - EE & ER Rates subject to change Annually
 - State/Teacher
 - EE – Set by Statute
 - ER – Updated Annually
 - **Retiree Returned to Work (RRTW)**
 - PLD: 10/02/2018 – 5% UAL (RRTW2)



• **Contract Year**

Employee is paid:

by Calendar Year (Jan-Dec)

by Fiscal Year (July-June)

by School Year (Sept-Aug)

by School Year (Aug-July)

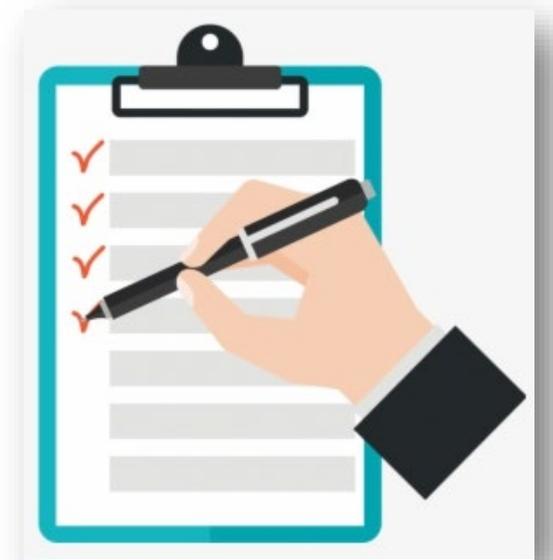
Training Agenda

- ~~1. Employer Reporting Unit and
MainePERS Background~~
- ~~2. Accessing Employer Self-Service (ESS)~~
- ~~3. Understanding Eligibility and Enrollment~~

4. Navigating Employer Self-Service

Part 1

1. Navigating Employer Self-Service Part 2
2. Survivor Services and Group Life Insurance (GLI)
3. Additional MainePERS Contacts



Employer Self-Service Navigation Part 1

MainePERS Employer Training

Employer Payroll Report and Payment Due Dates

- Employer Payroll Report and Payment Due Dates
 - 15th of following month
 - MainePERS Website: Employers > Employer Reporting
- “How soon can I upload my file?”
 - First day, following last pay date for month
- Monthly Payroll Reminders from MainePERS
 - Payroll Due Reminder
 - Late Payroll/Payment Reminder
 - Seven Day Late Payroll/Payment Reminder
 - Collection Referral to MainePERS Accounting and Finance Unit

Employer Reporting

Payroll Filing

MainePERS requires most employers to report employee payroll information on a monthly basis. The due date for monthly employer payroll filings is the fifteenth day of the month following the payroll filing period being reported. This due date applies to the Monthly Payroll Detail Filing and the applicable payment. Payments should be made electronically by the applicable due date. Chapter 201 of the MainePERS Rules provides for interest to be assessed on delinquent payments.

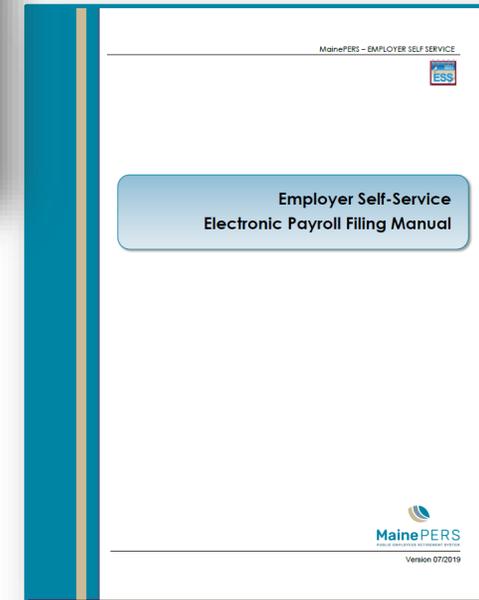
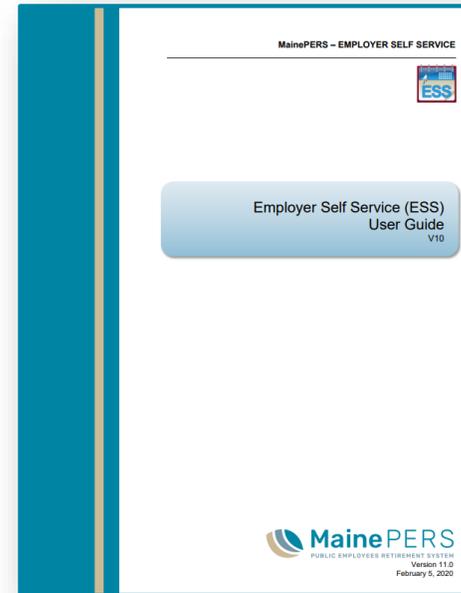
Employer Payroll Report and Payment Due Dates

Employer payroll reports and payments are due no later than 15 days after the end of each month. The due date is advanced to the next business day in instances when the 15th of the month falls on a weekend or holiday. **On-time reporting and payment are required, in order to be in compliance with Internal Revenue Service regulations.** The following are the payroll report and payment due dates for 2022:

Covered Month	Due Date
January	February 15, 2022
February	March 15, 2022
March	April 15, 2022
April	May 16, 2022
May	June 15, 2022
June	July 15, 2022
July	August 15, 2022
August	September 15, 2022
September	October 17, 2022
October	November 15, 2022
November	December 15, 2022
December	January 17, 2023

Payroll Work Report

- “What is a Payroll Work Report?”
- Manual Entry or Electronic (**EPF**)
 - Quick Reference Guides
 - EPF
 - Manual
 - Manual Filer Column Headings
- Resources
 - [MainePERS Website: Employers > Employer Self Service > Guides > ESS Manuals & Guides](#)
 - ‘Employer Self-Service User Guide’
 - ‘Electronic Payroll Filing Manual’
 - ‘Employer Self- Service Validation Guide for Electronic Payroll Filing’
 - ‘Employer Self-Service Validation Guide for Manual Payroll Filing’
- Creating Monthly Work Report Shell



Payroll Work Report

- Payroll Work Report Sections

- Header
- Details
- Summary

- Member Demographics

- Name
- SSN & DOB

- Earnable Compensation

- Employee Contribution (EES) Details



MainePERS

P.O. Box 349
 Augusta, ME 04332-0349
 Telephone: (207) 512-3100
 Toll-free: 1-800-451-9800
 Fax: (207) 512-3101
 Maine Relay: 711

EARNABLE COMPENSATION

When an employee is eligible for membership, their earnable compensation is reported to MainePERS. Payments that are not earnable compensation are not reported to MainePERS. Earnable compensation is "salaries and wages paid for services rendered in an employment position, subject to...inclusions, exclusions, and limitations." The examples below are intended as guidance regarding what is and is not earnable compensation.¹

Earnable Compensation Guide		
Payment Type	Earnable	Not Earnable
Regular wages	Earnable	
Retroactive payments for back wages	Earnable	
Interest paid on retroactive payments		Not Earnable
Overtime Pay	Earnable	
Shift Differential Pay	Earnable	
On-Call Pay	Earnable	
Workers' compensation payments	Paid to replace wages is earnable	Any non-wage reimbursement ² is not earnable
Educational Pay (including pay received for pursuing or obtaining an academic or professional credential)	Paid as an ongoing part of salary/wages is earnable	One-time, sporadic or temporary compensation is not earnable
Expense reimbursements		Not Earnable
Allowances for meals, clothing, phones, vehicle, travel, lodging, technology	Room and/or Board as a fringe benefit.	Not Earnable- including reimbursements.
Payment in lieu of benefits ³		Not Earnable
Sick leave bank or from accruals donated to a member by other employees including any accruals earned as a result of sick bank pay status		Not Earnable
Bonus or incentive payments (recruitment, retention, contract signing)		Not Earnable
Any payment that is not for services rendered		Not Earnable
Any payment not paid at the time services are rendered ⁴		Not Earnable
Longevity pay	Paid as an ongoing part of salary/wages is earnable	One-time, sporadic or temporary compensation is not earnable
Tax Sheltered Annuity, Deferred Compensation, Defined Contribution	Contributions paid as an ongoing part of salary or wages is earnable	Payments made in lieu of another benefit, employer matching contributions, or any payment not directly tied to services rendered are not earnable
Administrative Leave	<ul style="list-style-type: none"> • Facility closures (storm, facilities issues, contagious outbreak) is earnable • For routine investigation up to 30 days is earnable (beyond 30 days contact MainePERS) 	<ul style="list-style-type: none"> • After individual sick/vacation leave exhausted if not regularly available to all employees is not earnable; • Discretionary separation payment is not earnable; • For a period the employee did not work due to a suspension or termination is not earnable

Continued on reverse

Payroll Work Report, continued

- Additional Payroll Details
 - (Base) Rate of Pay
 - Pay Rate Code
 - Full-Time Equivalent Details
 - 'What is Full Time Equivalent?'
- 'Wage Averaging' (Teacher Plan and School Support Only)
 - 'Wage Payment Option Reporting & Contribution Payment'
 - Hourly or Daily Employees
 - Base Rate of Pay



Questions?
Comments?



Break Time!

Employer Account Details

1. 'Account Tab'
2. Account Activity
 - 'Transaction History'
3. Activity Filter
4. Action Buttons
 - 'Upload File'
 - DC Contribution
 - EPF Contribution
 - GLI Level
 - 'File History'
 - 'Schedule Payment' (EFT)
 - 'Payment History'
 - EFT Only

The screenshot shows the 'Account' tab selected in the navigation menu. The page contains several filters and action buttons. A table below displays transaction history with columns for Activity Date, Trans #, Trans Type, Trans Identifier, Trans Status, Report Status, Due Date, and Balance. Two transactions are listed, both with a balance of \$3,845.62.

Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance
Actions	10/01/2020	2946180	Work Report	11/16/2020 P0999*	Open	Prebill	11/16/2020	\$3,845.62
Actions	11/01/2020	2946521	Work Report	12/15/2020 P0999*	Open	Initial	12/15/2020	\$3,845.59

Electronic File Upload & 'File History'

- 'Account' Tab

- 'Upload File'

- 'EPF Contribution'

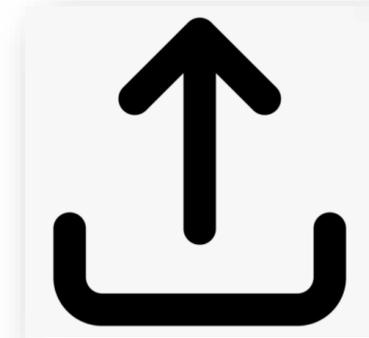
- File Name Format: 'P0999 July 2020 Payroll', 'TSABC 08/2020 Payroll, etc.'

- 'File History'

- File Definition

- Status

- Date Range



File History														
Close														
File Definition:		All			Date Range:		01/30/2020 To: 12/15/2020							
Status:		All												
Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start	File Process Start	Duration	Rows Loaded	Rows Added	Rows Deleted	Rows Processed	Inserted By
Actions	93146	Completed	11/19/2020	EPF Contribution	P0999 October 2020 Final	Processed Successfully	11/19/2020	11/19/2020	2 sec	5			3	ESS_TANDE...
Actions	93145	Validated	11/19/2020	EPF Contribution	P0999 10/2020 A	Validated Successfully	11/19/2020	11/19/2020	1 sec	5			0	ESS_TANDE...
Actions	93144	Validated	11/19/2020	EPF Contribution	P0999 October 2020 A	Validated with Errors	11/19/2020	11/20/2020	< 1 sec	5			0	ESS_TANDE...
Actions	93143	Completed	11/18/2020	EPF Contribution	P0999 October 2020	Voided	11/18/2020			5			0	ESS_TANDE...
Actions	93102	Validated	10/23/2020	EPF Contribution	P0999 10/2020	Validated with Exceptions	10/23/2020	11/19/2020	1 sec	5			0	ESS_TANDE...
Actions	93101	Ready	10/23/2020	EPF Contribution	P0999 October 2020 (2)	Loaded with Errors	10/23/2020			6			2	ESS_TANDE...
Actions	93100	Ready	10/23/2020	EPF Contribution	P0009 October 2020	Loaded with Errors	10/23/2020			6			2	ESS_TANDE...

Payroll File Processing Stages

- Stage 1: Pre-Validation
 - ‘Loaded with Errors’
 - Automatically Voids Upload
 - Must upload New File



File History						
Close						
File Definition:	All	Date Range:	01/30/2020	To:	12/15/2020	
Status:	Loaded with Errors					
Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status
Actions	93100	Ready	10/23/2020	EPF Contribution	P0009 October 2020	Loaded with Errors
Actions	93101	Ready	10/23/2020	EPF Contribution	P0999 October 2020 (2)	Loaded with Errors

Standard Import Details Report For 93101 P0999 October 2020 (2)

As Of Date: 12/15/2020
Generated On: 12/15/2020 13:47:25
Page 1 of 1

Parameters

Detailed Record Status: Errors
Sort By: Record Seq No

Import Record Seq No	Data String	Detail Record Status	Error Message
5	I0004P0999 MAINEPERS 102020100220201016202010302020 M M001996220 00166005 0004 00 0 S	Error	No detail records exists for batch.

- ‘Not Processed’
 - File format accepted
 - Needs Validation

Standard Import Report

- What is the ‘Standard Import Report’?
 - “Exception Report” or “Error Report”
- Detailed Breakdown of File Data by Employee
- Relation to EPF User Guides



Standard Import Details Report			
For 93144 P0999 October 2020 A			
<u>Parameters</u>		As Of Date: 12/15/2020	
Detailed Record Status:	Exceptions	Generated On: 12/15/2020 13:44:31	
Sort By:	Record Seq No	Page 1 of 1	
Import Record Seq No	Data String	Detail Record Status	Error Message
2	I0004P0999 102020999770001JONHSON, BRIAN 006458000 0101197011 09906 A 00836735 00700000000000000000C000000 000000 O 110AC000001 10302020N D	Exception	D23.8 - SSN 999770001 employee retirement contributions submitted do not match due amount of \$677.76.

Filtering the Standard Import Report

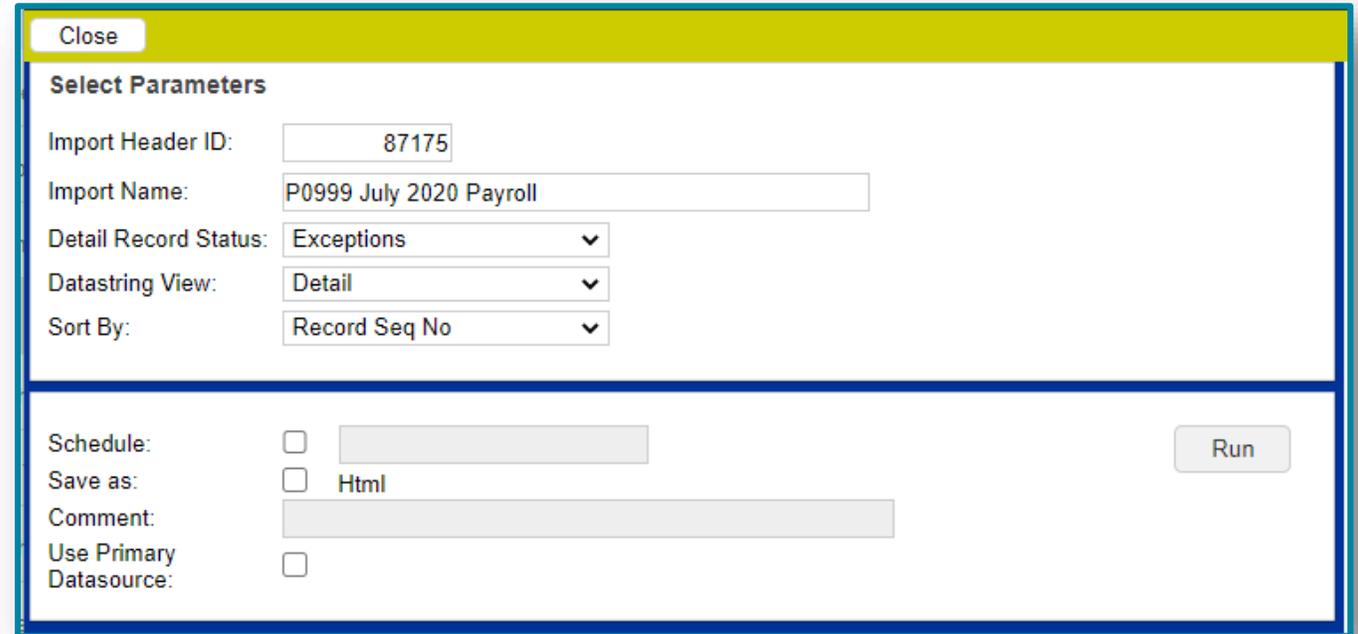
- Select Parameters for Filtering

- Detail Record Status

- Errors/Validated with Errors
 - Exceptions/Validated with Exceptions

- Datastring View

- 'Detail' not 'Summary'



The screenshot shows a 'Select Parameters' dialog box with a yellow header and a blue border. It contains the following fields and options:

- Close button (top left)
- Import Header ID: 87175
- Import Name: P0999 July 2020 Payroll
- Detail Record Status: Exceptions (dropdown)
- Datastring View: Detail (dropdown)
- Sort By: Record Seq No (dropdown)
- Schedule: [text box]
- Save as: Html
- Comment: [text box]
- Use Primary Datasource:
- Run button (top right)

- Pop-up Blocker

- Disable for mainepers.org



Payroll File Processing Stages

- Stage 2: Validation
 - **‘Validated with Errors’**
 - Identify Errors
 - Standard Import Report
 - EPF Manual & Validation Guide
 - Corrected within ESS
 - Payroll File Details
 - ‘View Row’ Tool
 - Re-validate
 - Repeat process until Errors are cleared
 - Cannot validate file without corrections

Import Record Seq No	Data String	Detail Record Status	Error Message
3	I0004P0999 102020999770002WALLACE, AMBER 005767100 0720196411 09901 A 00554530 00407600000000000000C000000 000000 O 110AC000001 10302020N D	Error	D36.3 - SSN 999770002 rate schedule number not on participant employment.

The screenshot displays the MainePERS web application interface. The main window shows the 'Details' section for an import record. The 'View Row Tool' is open, displaying a list of fields and their values for the selected record. The record is identified as 'Validated with Errors'.

Name	Value
Seq No	
Import Detail Status	Validated with Errors
Transmitter Code	I0004
Employer Code	P0999
Reporting Month/Year	102020
Employee Social Security...	999770002
Employee Name	WALLACE, AMBER
FTE Annual Contracted ...	005767100
Filler	
Date of Birth	07201964
Personnel Status Code	11
Bargaining Unit Code	
Position Classification C...	09901
Filler	
Filler	
Excess/Payback Status	
Filler	

The main application window shows the following details:

- File Name:** EPF Contribution
- Import Description:** P0999 October 2020 A
- File Load Date:** 11/19/2020

The 'Summary' section shows a table with the following data:

Tools	Seq No	Import Detail Status	Header
Actions	1	Validated Successfully	I0004MAINEPERS 139 CAPITOL ST., AUGUSTA ME

The 'Details' section shows a table with the following data:

Tools	Seq No	Import Detail Status	Transmitter Code	Employer Code	Reporting
Actions	2	Validated with Errors	I0004	P0999	102020
Actions	3	Validated with Errors	I0004	P0999	102020
Actions	4	Validated with Errors	I0004	P0999	102020

Payroll File Processing Stages

- Stage 2: Validation
 - **‘Validated with Exceptions’**
 - Identify Exceptions
 - **Must** be reviewed every month before processing
 - Standard Import Report
 - EPF Manual & Validation Guide
 - Corrected within ESS
 - Payroll File Details
 - ‘View Row’ Tool
 - Re-validate
 - Repeat process until correctable Exceptions are cleared
 - Some exceptions will not require action
 - Failure to review an correct exceptions may result in additional adjustments if not addressed prior to final submission

Import Record Seq No	Data String	Detail Record Status	Error Message
3	I0004P0999 102020999770002WALLACE, AMBER 005767100 0720196411 09901 A 00554530 00300000000000000000C000000 000000 O 110AC000011 10302020N D	Exception	D23.8 - SSN 999770002 employee retirement contributions submitted do not match due amount of \$407.58.



MainePERS P0999-MainePERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Details

Save Cancel

File Name: EPF Contribution: File Load Date: 10/23/2020
Import Description: P0999 10/2020

Summary **Details**

View Rows: Show All Rows Display Rows: From

Tools	Seq No	Import Detail Status	Header
Actions	1	Validated Successfully	I0004MAINEPERS 139 CAPITOL ST., AUGUSTA M

New Row Validate Process Void Download

Tools	Seq No	Import Detail Status	Transmitter Code	Employer Code	Report
Actions	2	Validated Successfully	I0004	P0999	102020
Actions	3	Validated with Exceptions	I0004	P0999	102020
Actions	4	Validated Successfully	I0004	P0999	102020

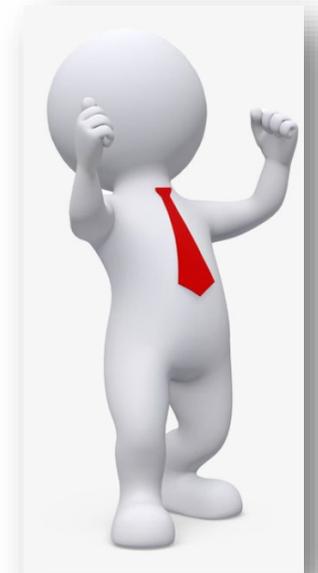
View Row Tool

Name	Value
Seq No	
Import Detail Status	Validated with Exceptions
Transmitter Code	I0004
Employer Code	P0999
Reporting Month/Year	102020
Employee Social Securi...	999770002
Employee Name	WALLACE, AMBER
FTE Annual Contracted ...	005767100
Filler	
Date of Birth	07201964
Personnel Status Code	11
Bargaining Unit Code	
Position Classification C...	09901
Filler	
Filler	
Excess/Payback Status	
Filler	

OK Cancel

Payroll File Processing Stages

- Stage 3: Post-Validation
 - **‘Validated Successfully’ or ‘Validated with Exceptions’**
 - Manual Filer: ‘Initial Status’
 - Errors & Exceptions
 - Identified, reviewed & corrected
 - Ready for Final Submission/Processing
 - Editing and Voiding of File still allowed
 - **Payroll Pay Dates & ‘Transaction Date’**
 - Same as Last Payroll Date
 - **‘Voiding’ an Uploaded File**
 - Any file prior to final submission may be voided
 - Do not ‘Void’ while in process



Final Work Report Submission and Remittance Report

- Stage 4: Submission and Remittance
 - **Submit File to MainePERS**
 - Electronic Payroll Filer
 - Manual Filer
 - **View ‘Due Amounts’**
 - Optional
 - **Remittance Report**
 - ‘Reports’ Tab
 - ‘Employer Remittance Report’
 - Date: 1st of month
 - Based on Work Report Submission
 - Save as .pdf

Due Amounts						
Close						
Name: WALLACE, AMBER						
SSN: 999770002						
Tools	Fund	Amount	Job Category	Start Date	Stop Date	Member %
	EEC	\$407.60				
	Pre-Retirement	\$407.60	REG1	07/01/2020	06/30/2021	0.0735
	SCP Payments	\$0.00	REG1	07/01/2020	06/30/2021	0
	ERC	\$560.08				
	ER Contributions	\$560.08	REG1	07/01/2020	06/30/2021	0.101
	ER Paid EE Contributions	\$0.00				
	UAL Contributions	\$0.00				
	Administrative Revenue	\$0.00				
	IUUAL	\$0.00				

Employer Remittance Report	
Employer Code:	P0999
Payroll Identifier:	PR 10/01/2020
Transaction #:	2946180
Retirement Financial Data	
Employee Contributions	\$ 1,660.05
Employer Contributions	\$ 2,185.57
Adjustments	
Total Remittance	
Total due:	\$ 3,845.62

Additional Considerations

- Adding a member/employee to a Payroll Work Report
 - **Electronic Filer (EPF)**
 - Adjustment
 - Contact MainePERS for Manual Entry of Employee Data
 - [How to add a member to an Electronic Payroll File](#)
 - **Manual Filer**
 - Add in Employer Self-Service (ESS)
- Deleting a member/employee off from a Payroll Work Report
 - Completed in Employer Self-Service (ESS)



Grant (Federal) Funded Monies

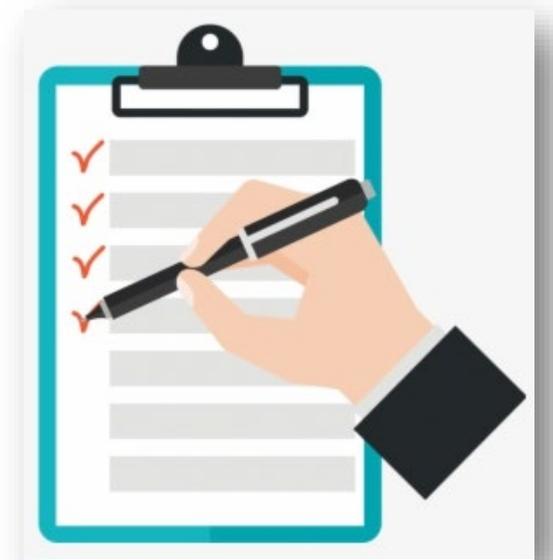
- Teacher Plan ONLY
- Rates
 - MainePERS Website: Employers > Employer Rates & Rate Setting > Teachers
- Reporting Grant Funded Money to MainePERS
 - Transmitted via Payroll File
 - Basis Summary
 - Retirees Returned to Work
- Grant Funding Adjustments



Summary	Detail	<u>Basis Summary</u>			
Plan:	Teacher Plan	<input type="button" value="Add"/>			
<input type="button" value="Delete Selected"/>					
<u>Tools</u>	<input type="checkbox"/>	Grant Funded/Optional Retirement Comp	Grant Funded/Optional Retirement Contrib	Grant Funded Comp Adjustment	Grant Funded Contrib Adjustment
	<input type="checkbox"/>	\$109,271.77	\$16,336.13	\$0.00	\$0.00

Training Agenda

- ~~1. Employer Reporting Unit and
MainePERS Background~~
- ~~2. Accessing Employer Self-Service (ESS)~~
- ~~3. Understanding Eligibility and Enrollment~~
- ~~4. Navigating Employer Self-Service Part 1~~
- 5. Navigating Employer Self-Service
Part 2**
6. Survivor Services and Group Life
Insurance (GLI)
7. Additional MainePERS Contacts

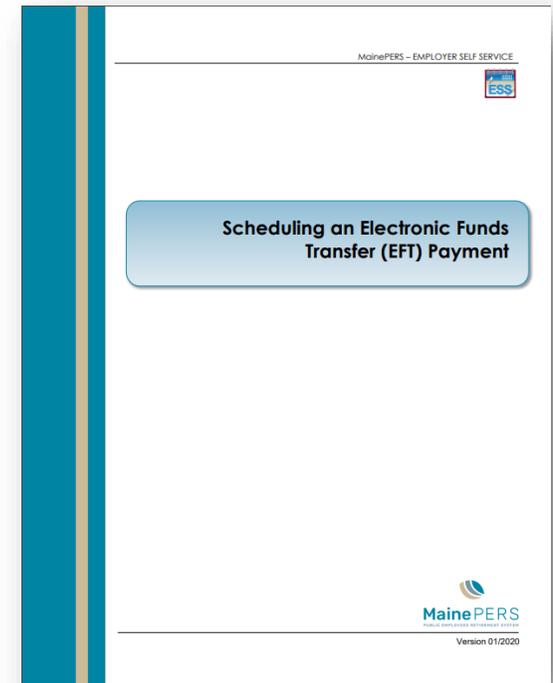


Employer Self-Service Navigation Part 2

MainePERS Employer Training

Payment to MainePERS

- EFT Transition Deadline: **December 31, 2020**
 - Mandatory switch to Electronic Funds Transfer
- Electronic Funds Transfer
 - ACH Credit vs. ACH Debit
 - ACH Debit: Entered in ESS
 - ACH Credit: Send email to Account Associate and accounting@mainepers.org
- 'Scheduling an Electronic Funds Transfer Payment'
 - MainePERS Website: Employers > Employer Self Service Guides
- Credits on Employer Account



Payroll Work Report Adjustments

- “How do I know if an adjustment is required?”
 - Initiated by Employer
 - Initiated by MainePERS
 - **MainePERS Employer Reporting Assistance Program**
- Submitting a Work Report Adjustment
 - **Employer Self-Service (ESS): ‘Forms’ Section**
 - Single Employee Payroll Adjustment Form
 - Multiple Member Payroll Adjustment Form
- ‘Quick Reference for Adjustments’
 - Single
 - Multiple



Completing and Submitting Adjustment

- ER Code & ER Location – Auto Populate
- Social Security Number and Name - Required
- Payroll Identifier – 06/2020, or 08/19, etc.
- Original Row vs. New Row
 - ‘Comp’ – Earnable Compensation
 - ‘EES’ – Employee Contributions
 - ‘Hours’ or ‘Days’
 - ‘Pay Rate Code’, ‘POS’, ‘PSC’ and ‘Plan Class’
 - ‘RSN/Rate Category’
 - ‘Payback/SCP’
 - ‘FTE Days’, ‘FTE Hours’, ‘Weeks/Yr’ and ‘FTE Contract’
- Comments Section & Final Submission



Adjustment Form Examples

- Example 1

- Single Employee Payroll Adjustment Form
 - Entered Correctly

- Example 2

- Multiple Employee Payroll Adjustment Form
 - Adding/Deleting a Member



- Example 3

- Single Employee Payroll Adjustment Form
 - Entered Incorrectly

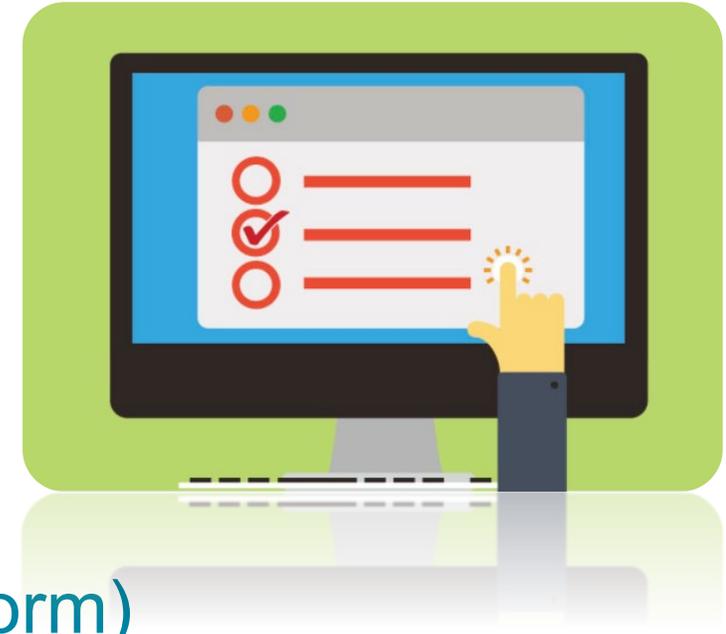
'Documents' and 'Roster' Tab

- 'Documents' Tab
 - Monthly Group Life Insurance (GLI) Bill, if applicable
 - Age 60/65 NRA Roster – PLD Only
 - 'Green Sheets' – PLD Only
- 'Roster' Tab
 - List of all Reported Members
 - Active or Terminated
 - Member Contract Details
 - Member Demographics



'Forms' Tab

- Forms in Progress
 - 'Save as Draft'
- Submitted Forms
 - Back to 2011
- Online Forms
 - Personnel Status Change Form (PSC Form)
 - Vacation/Sick Leave Form
 - Employer Preliminary Benefit Certification Form (ER PB Cert Form)
 - Member/Benefit Recipient Data Update Form



Personnel Status Change Form

- AKA 'PSC Form'

- Teacher/PLD Employers
- 'Save as Draft'

1. Member Demographics

- Name, SSN, DOB
- ER Code & Location: Auto-Fill

2. Leave of Absence Begin or Return

- LOA Dates: Begin & End
- Reason for LOA

3. Termination/Separation

- Reason for Termination
- EFFECTIVE DATE
 - Void if submitted prior to this date

4. Certifying Signature

- Auto-fill and Electronic Signature

The form is titled 'MainePERS PERSONNEL STATUS CHANGE FORM (For Teacher/PLD Employers)'. It includes contact information for MainePERS (P.O. Box 349, Augusta, ME 04332-0349) and a note about the timeliness of the form. The form is divided into four numbered sections: 1. Member Demographics (Name, Social Security Number, Date of Birth, Employer Location Code and Name), 2. Leave of Absence Begin or Return (LOA BEGIN/END dates, Reason for LOA), 3. Termination/ Separation (Reason, EFFECTIVE DATE), and 4. Certifying Signature (Signature, Date, Print/ Typed Name, Phone, E-mail). The form is currently filled out with 'MainePERS' as the certifying official and '08/21/2020' as the date.

MainePERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

P.O. Box 349
Augusta, ME 04332-0349
Telephone: (207) 512-3100
Toll-free: 1-800-451-9800
Fax: (207) 512-3101
Maine Relay: 711

PERSONNEL STATUS CHANGE FORM
(For Teacher/PLD Employers)

NOTE: The timeliness of MainePERS receiving this form is important. The information provides the basis for granting creditable service, processing a retirement application or offering Group Life Insurance conversion rights.

1 Member Name: [Prefix] [First] [MI] [Last] [Suffix]
Social Security Number: [] Date of Birth: []
Employer Location Code: [] Employer Location Name: Maine Public Employees Retirement System

2 Leave of Absence Begin or Return
LOA BEGIN: []
LOA END: []
Reason: Seasonal Layoff Worker's Compensation FMLA
 Sabbatical Military Leave Suspension
 Authorized Leave of Absence Unauthorized Leave of Absence

3 Termination/ Separation
Reason: Terminated Employment Separated from Membership Deceased
 No longer eligible for Group Life Insurance
EFFECTIVE DATE: []

4 Certifying Signature
The above information is true and correct to the best of my knowledge.
[T] MainePERS [] 08/21/2020 []
Certifying Official Signature Date
[T] MainePERS [] [] []
Print/ Typed Name Phone E-mail

Form #: MM-0001 Rev. 1/16

Vacation/Sick Leave Form

- Submit at time of termination

- 'Vacation & Sick Leave Reporting Form Instructions'

- MainePERS Website: Employers > Employer Self Service Guides > ESS Manuals & Guides

- All employees, not just retirees

1. Member Demographics

- Name, SSN, DOB
- ER Code & Location: Auto-Fill

2. Final Pay Information

- Date of Last Paycheck
- Regular Pay: Total for Month or Bi-Weekly Pay
- Other Pay: Stipends, Longevity Pay, etc.

- RRTW Leave Accruals

3. Vacation/Sick Leave Payment

- Vacation/Sick Leave accruals not report on payroll

4. Accrued Leave Information

- Prior to any payment

- **Accrued Vacation Time, Days or Hours**

- **Accrued Sick Time, Days or Hours**

5. Teacher Member Information, if applicable

- 180 days or 7 hours, for example

6. Certifying Signature

- Auto-fill and Electronic Signature



MainePERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

P.O. Box 349
Augusta, ME 04332-0349
Telephone: (207) 512-3100
Toll-free: 1-800-451-9800
Fax: (207) 512-3101
Maine Relay: 711

**VACATION AND SICK LEAVE
REPORTING FORM**

1 Employee Name: (Prefix) (First) (MI) (Last) (Suffix)

Social Security Number: Date of Birth:

Employer Location Code: P0290 Employer Location Name: Maine Public Employees Retirement System

2 Final Pay Information

Date of last paycheck:

Regular Earnings: \$

Vacation Pay: \$

Sick Leave Pay: \$

Other Pay (Describe): \$

Other Pay (Describe): \$

Total Final Pay Reported to MainePERS: \$

3 Vacation or Sick Leave payment, in excess of 30 days, which is **not** reported on the payroll filing report.

\$

4 Accrued Leave Information

Total accrued vacation before any payment: # hours or days.

Total accrued sick leave before any payment: # hours or days.

5 Teacher Member Information (complete this section for Teacher members only)

How many days per year are prescribed for the position held by this employee?

If this employee is paid hourly, how many hours per day does this employee work?

6 Certifying Signature

I certify that the above is the true and correct representation of the final earnable compensation, as defined in 5 MRSA §17001 Sec. 13. I recognize that any misrepresentation or omission may result in the delay of the payment of retirement benefits to this employee, and legal action as permitted by statute.

T MainePERS 09/02/2020
Certifying Official Signature Date

T MainePERS
Print/ Typed Name Phone E-mail

Form #: CL-0050
Rev. 1/16

Employer Preliminary Benefit Certification Form & Member/Benefit Recipient Data Update Form

Employer Preliminary Benefit Certification Form

- Name, SSN, DOB
- Employee Termination Date
- Last Day in Pay Status
- Submission Date

Member/Benefit Recipient Data Update Form

- Name Changes
- Address Changes
- Effective Date

MainePERS PUBLIC EMPLOYEES RETIREMENT SYSTEM

P.O. Box 349
Augusta, ME 04332-0349
Telephone: (207) 512-3100
Toll-free: 1-800-451-9800
Fax: (207) 512-3101
Maine Relay: 711

EMPLOYER PRELIMINARY BENEFIT CERTIFICATION FORM

The Maine Public Employees Retirement System (MainePERS) is processing a retirement benefit for one of your former employees. Because we do not currently have all of the information required to finalize their benefit amount, we would like to begin paying them on a preliminary basis. To do so, we need the following information.

Complete the form as soon as possible after your former employee's termination date. Thank you.

Employee Information

Employee Name: Prefix First MI Last Suffix

Social Security Number:

Date of Birth:

Employee Termination Date:

Last Day in Pay Status:

(Last date member worked or used their own sick or vacation time. Does not include sick bank time.)

Employer Location Code:

Employer Location Name:

Certification of Workers' Compensation Benefits and/or Sick Bank/Donated Time

I certify that, at termination, the above named employee: does does not receive Workers' Compensation benefits. has has not received Sick Leave Bank/Donated Time.

Certifying Signature

The above information is true and correct to the best of my knowledge.

Signature of Employer's Certifying Official: Date:

Print or Type Name and Title of Certifying Official:

Form #CL-0055 Rev. 02/16

MainePERS PUBLIC EMPLOYEES RETIREMENT SYSTEM

P.O. Box 349
Augusta, ME 04332-0349
Telephone: (207) 512-3100
Toll-free: 1-800-451-9800
Fax: (207) 512-3101
Maine Relay: 711

MEMBER/ BENEFIT RECIPIENT DATA UPDATE

Former Member/ Benefit Recipient Name: (Prefix) (First) (MI) (Last) (Suffix)

Social Security Number: Date of Birth:

Home E-mail Address:

Home Telephone Number: Daytime Telephone Number:

Name Change/ Correction

New Name: (Prefix) (First) (MI) (Last) (Suffix)

Address Change/ Correction

New Mailing Address: (Address Line 1)
 (Address Line 2)
 (City/Town) (State) (ZIP)

Effective Date of Change:

To be signed by either the Member/Benefit Recipient or the Employer. Only ONE signature is required.

(Signature of Member/Benefit Recipient) (Date) Member/Benefit Recipient Name (please print)

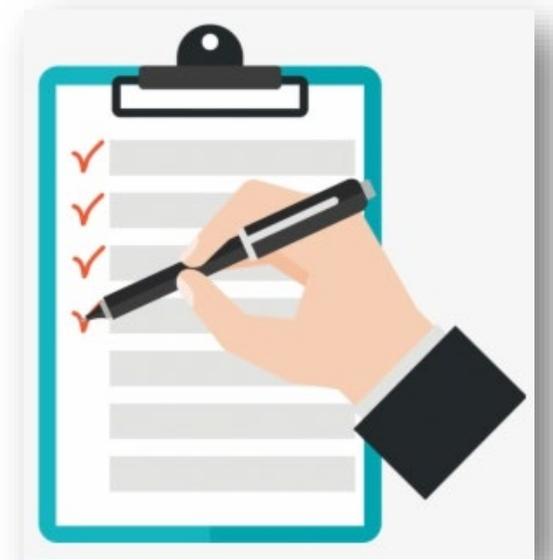
(Signature of Employer) (Date) Employer Certifying Official (please print)

(Employer Location Code) (Employer Phone Number)

Form #MM-0022 Rev. 01/16

Training Agenda

- ~~1. Employer Reporting Unit and
MainePERS Background~~
- ~~2. Accessing Employer Self-Service (ESS)~~
- ~~3. Understanding Eligibility and Enrollment~~
- ~~4. Navigating Employer Self-Service Part 1~~
- ~~5. Navigating Employer Self-Service Part 2~~
- 6. Survivor Services and Group Life
Insurance (GLI)**
7. Additional MainePERS Contacts



Survivor Services and Group Life Insurance

MainePERS Employer Training

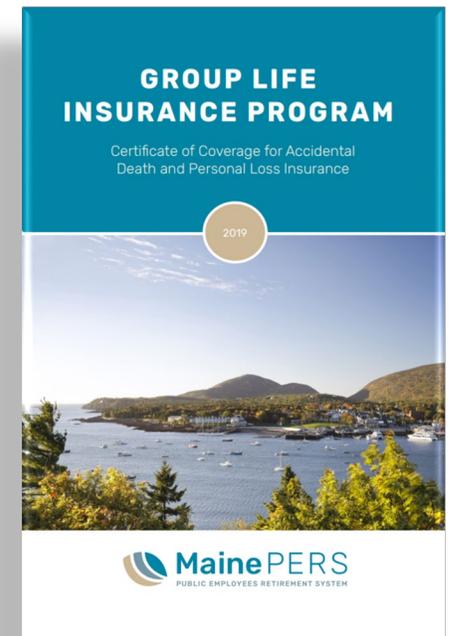
Survivor Services Unit – Survivor Benefits

- Pre-Retirement Death Benefits
 - [Defined Benefit Plan](#)
- Designating a Pre-Retirement Beneficiary
 - [‘Designation of Beneficiary Pre-Retirement Death Benefits’ \(CL-0722\)](#)
 - [‘Information Regarding Designation of Beneficiary Pre-Retirement Death Benefits’ \(CL-0722A\)](#)
 - [MainePERS Website: Forms & Resources > Employer Forms](#)
- Must be on file at MainePERS to be valid
 - [Electronic Signature Now Permitted](#)
 - [DocuSign](#)
 - [Can be faxed or scanned and emailed](#)
 - [Regular Mail](#)



Survivor Services Unit – Group Life Insurance

- Eligibility
 - Full-Time, Permanent Part-time
- Effective Coverage Date
 - 1st of the month following 30 days in an eligible position
 - Exception to rule: February 1st
 - Application should be dated the date the member signed the form
- Designation of GLI Beneficiary
 - Separate designation from Pre-Retirement Beneficiary
 - 'Designation of Beneficiary - Group Life Insurance'
 - MainePERS Website: Forms & Resources > Employer Forms
 - Must be on file at MainePERS to be valid
- Additional GLI Forms
 - Evidence of Insurability - DocuSign
- GLI Levels
 - Upload to ESS Annually, in April
 - Full Numbers (No decimal)
 - For example \$41,125 (41125) round up to \$42,000



Survivor Services Unit – Group Life Insurance

- **Monthly GLI Bill & Payment**
 - **‘Documents’ Tab**
 - 1st of each month for prior month
 - **Employees on LOA**
 - Potential Member Direct Billing
 - Unpaid Premiums
 - **Suspension/Cancellation of Policy**
 - **Printing Issues**
 - Contact MainePERS for assistance
 - **Due 15th of same month**
 - i.e. August 2020 bill due September 15, 2020
 - **Payment via EFT in ESS**
 - Same process as DB Work Report and Adjustment payments

 MainePERS <small>PUBLIC EMPLOYEES RETIREMENT SYSTEM</small>	Maine Public Employees Retirement System Group Life Premiums																								
	Employer Location Code: P0290 Invoice No.: GLI 2941490 Date Issued: 09/01/2020 Period Covered: 08/01/2020 - 08/31/2020																								
Maine Public Employees Retirement System P.O. Box 349 139 Capitol Street Augusta, ME 04332	Remit By: 09/15/2020																								
<table><tr><td>Previous Balance</td><td></td><td>\$ 0.00</td></tr><tr><td>Current Active Premiums</td><td></td><td></td></tr><tr><td></td><td>Basic</td><td>\$ 3,091.20</td></tr><tr><td></td><td>Supplemental</td><td>\$ 1,004.41</td></tr><tr><td></td><td>Dependent</td><td>\$ 107.70</td></tr><tr><td></td><td>Total Active Premiums</td><td>\$ 4,203.31</td></tr><tr><td>Current Retiree Premiums</td><td></td><td>\$ 1,476.23</td></tr><tr><td></td><td>Total Amount Due:</td><td>\$ 5,679.54</td></tr></table>		Previous Balance		\$ 0.00	Current Active Premiums				Basic	\$ 3,091.20		Supplemental	\$ 1,004.41		Dependent	\$ 107.70		Total Active Premiums	\$ 4,203.31	Current Retiree Premiums		\$ 1,476.23		Total Amount Due:	\$ 5,679.54
Previous Balance		\$ 0.00																							
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	Dependent	\$ 107.70																							
	Total Active Premiums	\$ 4,203.31																							
Current Retiree Premiums		\$ 1,476.23																							
	Total Amount Due:	\$ 5,679.54																							
<i>Questions concerning this Invoice should be addressed with Survivor Services by phone at 1-800-451-9800 or by email at survivorservices@mainepers.org</i>																									
<i>Please remit no later than 09/15/2020 to:</i>	MainePERS PO Box 349 Augusta, ME 04332-0349																								
Please write your Employer Location Code and Identifier on your check and enclose this page with your remittance.																									

Survivor Services Unit – Group Life Insurance

- Adjustments

- Second page of GLI Bill

- Submit more than one if necessary

- Reasons

- Terminations
 - Bill for entire month
 - Leaves of Absence (LOA)
 - Beginning and Ending
 - Other
 - Overpayment of Dependent Premium

- Information Needed

- Affected Employee Name
 - Reason for Adjustment
 - Adjustment Amount

- Amount Enclosed

- Total Due + Adjustments

Please enclose this page with your remittance

Identifier: GLI 2941490
Employer Location Code : Maine Public Employees Retirement System Total Amount Due: \$ 5,679.54

Adjustments

Employee Name	Reason for Adjustment	Adjustment Amount
Example: John Smith Jane Smith	Added dependent coverage Canceled dependent coverage	\$10 -\$10

Amount Enclosed: _____
*Amount Enclosed should equal Total Amount Due + Adjustments

Run Date/Time: 09/01/2020 04:03 PM GLI Invoice Printed by: Page 2 of 12

Survivor Services & Group Life Insurance Unit

Business Unit Phone: (207) 512-3244

Business Unit Email: Survivor.Services@mainepers.org

- **Business Unit Leader**

- Stacey Beckim

- **Account Associate**

- Nicole Cote

- **Account Representative**

- George Boff

- **Account Representative**

- Elle Jones

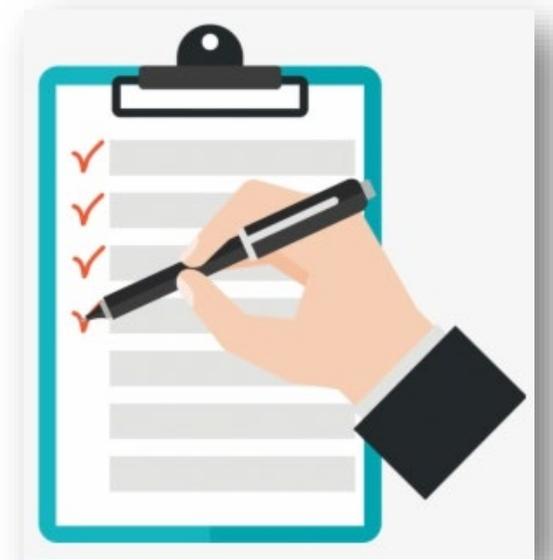
- **Account Representative**

- Ashleigh Keller



Training Agenda

- ~~1. Employer Reporting Unit and
MainePERS Background~~
- ~~2. Accessing Employer Self-Service (ESS)~~
- ~~3. Understanding Eligibility and Enrollment~~
- ~~4. Navigating Employer Self-Service Part 1~~
- ~~5. Navigating Employer Self-Service Part 2~~
- ~~6. Survivor Services and Group Life
Insurance (GLI)~~
- 7. Additional MainePERS Contacts**



MainePERS Employer Training

Questions?
Comments?

Thank you for
attending!



Additional MainePERS Contacts

MainePERS Employer Training

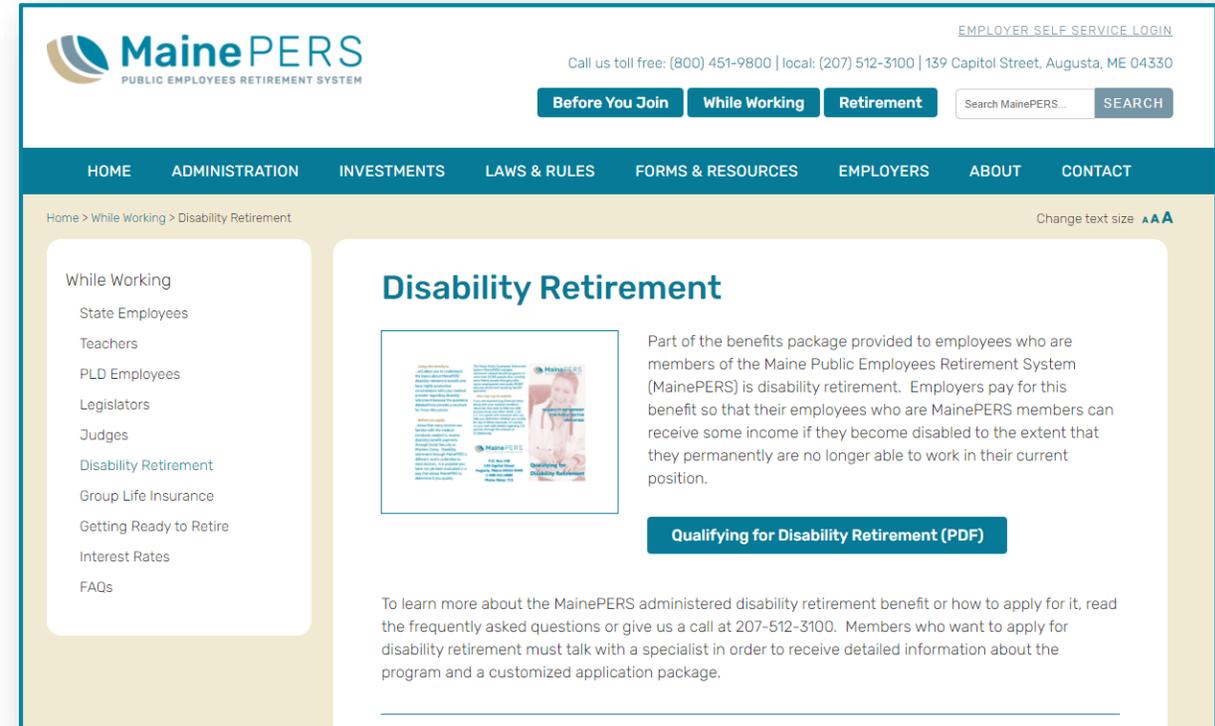
Employer Auditing Program

Employer Auditing Team Members

- **Accounting Manager**
 - Jennifer Lidback
 - (207) 512-3322
 - Jennifer.lidback@mainepers.org
- **Employer Reporting Assistance Specialist**
 - NA
- **Payroll Compliance Auditor**
 - Donna Audette
 - (207) 512-3380
 - Donna.audette@mainepers.org

Disability Unit

- Disability Retirement
 - Employee Questions?
 - Refer to Disability Unit
- Website Resources
 - MainePERS Website: Home > While Working> Disability Retirement
 - Disability FAQ's
 - Disability Forms
 - In order to apply, contact MainePERS Disability Specialist
- Disability Unit Contact Information
 - Phone: (207) 512-3170
 - Email: disability@mainepers.org



The screenshot displays the MainePERS website interface. At the top left is the MainePERS logo with the tagline 'PUBLIC EMPLOYEES RETIREMENT SYSTEM'. To the right, contact information is provided: 'Call us toll free: (800) 451-9800 | local: (207) 512-3100 | 139 Capitol Street, Augusta, ME 04330'. Below this is a navigation bar with buttons for 'Before You Join', 'While Working', and 'Retirement', along with a search bar. A secondary navigation bar lists menu items: HOME, ADMINISTRATION, INVESTMENTS, LAWS & RULES, FORMS & RESOURCES, EMPLOYERS, ABOUT, and CONTACT. The main content area shows the breadcrumb 'Home > While Working > Disability Retirement' and a 'Change text size' option. A left sidebar lists categories under 'While Working', including State Employees, Teachers, PLD Employees, Legislators, Judges, Disability Retirement, Group Life Insurance, Getting Ready to Retire, Interest Rates, and FAQs. The main content area features the heading 'Disability Retirement' and a brief description: 'Part of the benefits package provided to employees who are members of the Maine Public Employees Retirement System (MainePERS) is disability retirement. Employers pay for this benefit so that their employees who are MainePERS members can receive some income if they become disabled to the extent that they permanently are no longer able to work in their current position.' Below this is a prominent blue button labeled 'Qualifying for Disability Retirement (PDF)'. At the bottom, a paragraph states: 'To learn more about the MainePERS administered disability retirement benefit or how to apply for it, read the frequently asked questions or give us a call at 207-512-3100. Members who want to apply for disability retirement must talk with a specialist in order to receive detailed information about the program and a customized application package.'

Retirement Services Unit

Business Unit Phone: (207) 512-3158

Business Unit Email: Retirement.Services@mainepers.org



- **Participating Local District (PLD) Unit**

- PLD@mainepers.org
- **David Jones, Business Unit Leader**
 - Phone: (207) 512-3151
 - Email: David.Jones@mainepers.org
- **Deanna Doyle, PLD Plan Administrator**
 - Phone: (207) 512-3131
 - Email: Deanna.Doyle@mainepers.org

- **Teacher Unit**

- Teacher@mainepers.org
- **Alex Rand, Business Unit Leader**
 - Phone: (207) 512-3163
 - Email: Alex.Rand@mainepers.org

- **State Unit**

- State@mainepers.org
- **Steven Smith, Business Unit Leader**
 - Phone: (207) 512-3353
 - Email: Steven.Smith@mainepers.org

Social Security and MainePERS

- Social Security Benefits and MainePERS Benefits
 - [MainePERS Website: Home > Forms & Resources > Forms > Member Forms](#)
- Windfall Elimination Provision
 - [MainePERS Website: Home > Before You Join > Windfall Elimination Provisions and Government Pension Offset](#)
- MainePERS Contact
 - [Quinn Collins, System Representative](#)
 - Phone: (207) 512-3266
 - Email: quinn.collins@mainepers.org

