

VOL. 3 | MARCH 2020

IN THE ERIC LOOP

Monthly updates for ERIC users.

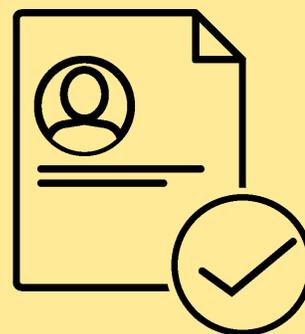


Well, hello again, employers.

Hello from the Montana Public Employee Retirement Administration (MPERA). This newsletter and those that will follow are intended to fill you in on the ongoing updates to ERIC, as well as to share some news about our agency and some tips and tricks to help you report payroll more efficiently.



TIPS AND TRICKS:



Always fill out all of the demographic data for everyone you enroll. The more information we have, the better. Questions about demographic data? Call us:

844-304-5452
406-444-3994

IMPORTANT INFORMATION REGARDING an **Immediate** Change to the State's 457(b) SALARY DEFERRAL Process

The State's contracted provider, Empower Retirement, announced the temporary closing of their Helena office due to the COVID-19 virus. In order to ensure that employees can continue to enroll in the 457(b) plan, add changes or stop deferrals, we have changed our deferral form requesting employees mail or fax their Salary Deferral Forms directly to MPERA. Empower will no longer forward the paper copy of the deferral form to your office. Instead we are asking you to utilize the 457 SDA file available in ERIC to update your payroll software. Here are the instructions to download the report:

- In ERIC, go to your navigation panel on the left of your home screen
- Open up 457 SDA File
- You will see the SDA forms that have been loaded and dates
- Download the file as *PDF or *CSV file
- If you don't see it right away, check the lower part of your screen, it may be "minimized"
- Use the information in this report to update your payroll software for changes and additions to your payroll software

The screenshot displays the ERIC system interface. On the left is a navigation panel with categories: Alerts & Messages, Messages, Employer Reporting, and Financial Information. The '457 SDA File' option is highlighted in yellow. The main content area shows a 'Home' screen with links for Alerts & Messages, Employer Reporting, Employee Data, and Payments. Below this is a '457 SDA File Maintenance' screen with a table of SDA forms. The table has columns for Upload Date, SDA Source, Title, and download options (Download - CSV File and Download - PDF File). The first row shows an SDA Form uploaded on 1/29/2020 with a title containing a timestamp and file name. The download buttons for this row are highlighted in yellow.

Upload Date	SDA Source	Title	Download - CSV File	Download - PDF File
1/29/2020	SDA Form	2020-01-29-08-35-13_MTPERA457_..._SDAForm_timestamp_012920_083513.csv	Download	Download

IMPORTANT INFORMATION REGARDING an **Immediate** Change to the State's 457(b) SALARY DEFERRAL Process (Cont.)

If you open it as a PDF it may be minimized within your screen. See example below:

The screenshot shows the PERIS ERIC system interface. The main content area is titled "457 SDA File Maintenance" and displays a table with the following data:

Upload Date	SDA Source
1/29/2020	SDA Form 2020-01-29-08-35-13_MTMPERA457_6

A blue circle highlights a PDF file icon and its name "2020-01-29-08-35-1....pdf" in the taskbar at the bottom of the browser window.

***PDF File Format-** "Portable Document Format" is a file format that has captured all elements of a printed document as an electronic image that you can view in Adobe and/or Adobe Acrobat and is "read only" format

***CSV File Format-** is open with Excel and the data can be viewed in a spreadsheet form in which you can use excel formulas or cross reference with other Excel documents or upload directly to your payroll system.

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What is the Deal with Working Retirees?

Retirees have the option to return to work on a limited basis. They may continue their benefit and not be required to make contributions. The employer, however, must make contributions on the retiree's behalf. This provision applies to the following MPERA-administered systems: PERS, SRS, MPORS, HPORS, FURS and GWPORS.

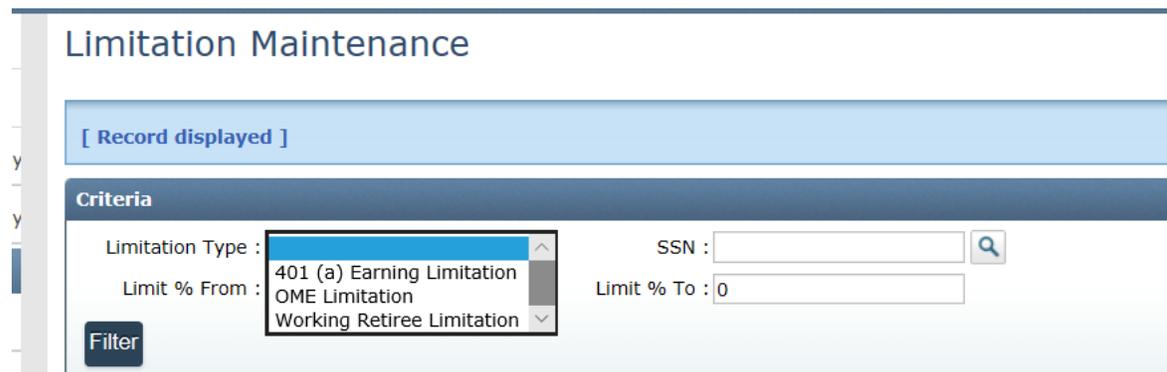
Working retirees are limited to the number of hours they work in a calendar year. If the retiree exceeds that limit, their benefit will be reduced. Hours are monitored by MPERA by calendar year based on your pay date. When a retiree comes within 80% of the hour limitation, you and the member will receive communication from MPERA. In ERIC, there's a handy feature that can help you monitor hours worked for a working retiree. On your ERIC homepage, go to the menu on the far left side. Under the "Organizational Banner", Click the section that reads "Limitation Maintenance". Then choose "Working Retiree Limitation" from the drop down next to limitation Type. Clicking the "Filter" button will run the search. You may also filter the search by SSN or retirement system. The hours and earnings will update after each payroll that is reported.

If you have questions or need clarification, MPERA staff is ready to help!

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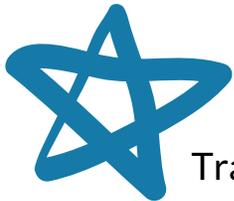
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Changes Coming in ERIC

APRIL 8 RELEASES

Mark your calendars! A new payroll schedule update is coming in April. You will be able to go out to a pre-populated schedule you can modify before you validate and finalize. This will add flexibility to your process. For example, if you normally add a payroll in June to pay out employee time, this new process will allow you to set up the payroll date, instead of having MPERA create a special payroll for you.



Training, including live and recorded webinars will be coming soon. You will receive a notification of that schedule.

Meet Our New Customer Service Supervisor

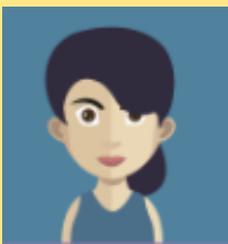


Doug Hays

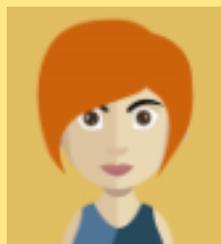
406-444-2996

Doug has 15 years of customer service management experience. He is an outdoor enthusiast who enjoys all outdoor related activities in his free time, to include fishing, hunting, hiking, biking, cross country skiing, snow shoeing and golfing.

Meet Our Payroll Reporting Customer Service Staff



Diana Stitt, 406-444-9171, has been with MPERA the longest, with 18 years under her belt. Diana has a green thumb and cares for quite a few plants at her workstation. When not at her desk, she is hard at work on her family's ranch.



Cathy Grose, 406-444-1860, is the newest member of the team, with a little over 5 years at MPERA. When not brightening up the office, Cathy is busy as a volunteer firefighter and with her grandchildren and the family ranch.



Roberta Scow, 406-444-5452, known as Berta to many of you, has been with MPERA for 15 years. She is also a plant lady, and when not at work she loves to garden, ski, golf and just get outside.