



## Back-To-School Checklist – 2024

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*Use this checklist as a reminder of back-to-school reporting and new employee preparation tasks.*

### Preparing for employees new to MPSERS:

- For employees who are new to MPSERS, provide the link to the [Choosing Your Retirement Plan - New Public School Employees](#) video. You can also provide the [Retirement Plan Election Guide](#) and [Retirement Plan Decision Guide](#). You may either email your new employees links to these materials ([use this template](#)) or print the guides from the links.

NOTE: New members must make their retirement election through miAccount. The election will not be available until the DTL1 and DTL4 records have posted creating a MPSERS account. Do not submit the DTL1 record until wages are ready to be reported.

- Voya Financial offers in-person onsite presentations and [live webinars](#) for active employees and new hires entitled to the Defined Contribution and Pension Plus 2 election. Sessions include New Employee Orientation, 401(k) & 457 Plans Overview, and more. The New Employee Orientation is also available as an [on-demand webinar](#). Contact Voya at 517-284-4422 for more information or to schedule a presentation at your location for your employees.

### Reporting for employees new to your reporting unit:

- Before reporting new employees, request proof of Social Security numbers to verify they are correct. This helps prevent reporting incorrect information to ORS and Voya and eliminates wasted time in entering adjustments for corrections. **IMPORTANT: Always contact ORS with any SSN issues or corrections before taking any action.**
- Use the Member Benefit Plan link on the Employer Reporting website to determine whether the employee is (1) new to the retirement system, (2) a current MPSERS member who is new to your reporting unit, or (3) a MPSERS retiree (if a retirement effective date is displayed). See [RIM 7.06.01](#).
  - 1) **New to the retirement system:** Provide member the [Retirement Plan Election Guide](#) and [Retirement Plan Decision Guide](#) and refer them to [Michigan.gov/ORSmiAccount](#) and [PickMiPlan.org](#) to make a retirement election. See [RIM 7.06.00](#) and [RIM 7.06.02](#).
  - 2) **Current MPSERS member who is new to your reporting unit:** Report member based on the benefit plan shown on the Member Benefit Plans link.
  - 3) **MPSERS retiree:** see [RIM Chapter 9](#) and [Reporting Retirees](#) on the Employer Information website.

### Other reporting reminders:

- For members who were reported with the summer spread wage code (08), switch to regular wage code (01).
- For DTL2 records, verify wages that are considered reportable compensation. See [RIM 4.01](#).
- DTL4 records are required for all employees. Report total gross earnings (for both active employees and retirees). This includes cash in lieu of benefits, bonuses payments, or any other form of compensation reported on a W-2. See [RIM 4.01](#).

### Tax-Deferred Payment (TDP) Agreements and Addendums:

- Ask new employees who are existing MPSERS members whether they had a TDP agreement with their previous employer, and if so, process their [TDP Agreement Addendum \(R0625C\)](#) promptly. See [RIM 10.03](#).