WAGE SUBMISSION AND VERIFICATION GUIDE

THE PURPOSE OF THIS GUIDE IS TO:

- Help employers who have previously submitted wages for their employees enrolled in MERS DC verify if the wages that will be used to calculate the Snapshot Reports are correct
- Help employers who have **not** previously submitted wages for their employees enrolled in MERS DC quickly and easily provide that information to MERS

USE THIS GUIDE IF:

- Your municipality is enrolled in the MERS Defined Contribution Plan
  AND:
- You've previously submitted wages for your employees enrolled in DC
  OR
- You've never submitted wages for your employees enrolled in DC

THE VALUE OF THE SNAPSHOT REPORT

In 2016, MERS launched the Snapshot retirement readiness report to employees enrolled in the MERS Defined Contribution Plan as a tool to help them prepare for retirement. By providing retirement readiness education and customized tools, we are helping employees recognize the importance of planning now to reach their financial goals in retirement.

And as an employer – we know it's also important for you as research shows that employees who feel prepared for retirement are happier and more productive.

The Snapshot Report combines all of an employee's MERS plans as well as projected Social Security income into one comprehensive report and lets them know if they are on track to receive 80% (the industry recommended standard) of their final salary in retirement. If they are not on track, they will receive customized suggestions to help them get on the right path to retirement readiness.

SIMPLIFYING THE PROCESS TO SUBMIT WAGES

We are only able to provide reports to those DC employees with wages on file with MERS. And we understand that for some employers, there are barriers to providing wages including lack of time and administrative resources and the inability to use the MERS upload template to report wages.

We have simplified the process to both provide this information and verify that the information we currently have on file is correct. Please use the following guide to ensure that MERS has the correct information needed to provide accurate Snapshot Reports to your employees this year.

HOW IT WORKS:

MERS has provided **all DC employers**, regardless of whether wages have previously been submitted, with a file in your Employer Portal. This file is pre-populated with the following information for your employees **who were enrolled in the MERS Defined Contribution for the entire previous calendar year**:

- Social Security Number
- Name
- Employee Type
- Status
- Birth Date
- Hire Date
- Termination Date
- Rehire Date
- Previous Year's Gross Compensation (if previously provided, otherwise this column will be empty)

If you've previously submitted wages for your employees, we are asking that you please review the data we have and either make changes if there are inaccuracies or acknowledge that the data is accurate. If you've not previously reported wages, we are asking that you add them to the spreadsheet and resubmit the file to MERS. The following steps will walk you through the process to verify the information provided, edit or add gross wages to the report, and acknowledge that the information is correct.

QUICKLINKS:

Locating and Opening the Wage Report in Your Employer Portal

Instructions to Add or Edit DC Wages and Resubmit Your File to MERS

Acknowledging Your Employee Data

LOCATING AND OPENING THE WAGE REPORT IN YOUR EMPLOYER PORTAL

1. **Log in to the Employer Portal**

2. **Select "Plan Gateway"**

Edit Security Question(s) | Reset Password | Log Out

Select Application   **Plan Gateway**

3. *Enter your Defined Contribution Plan ID in the "Plan ID" box and click on "Go".* ***Note that if you have multiple DC plans, you can enter any of your plan IDs. The report you receive will contain information for all your divisions.***
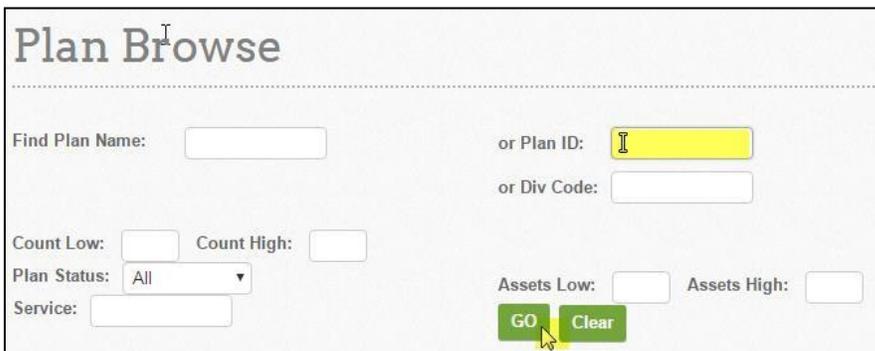
Plan Browse

Find Plan Name: [   ]   or Plan ID: [   ]

                           or Div Code: [   ]

Count Low: [   ]   Count High: [   ]

Plan Status: [All ▾]

Service: [   ]   Assets Low: [   ]   Assets High: [   ]

GO **Clear**

4. **Click on the correct Green Plan ID link**

☰ Search Results

Scroll table side to side to view all data.

PlanID▲	Div Code▾	Plan▾	City▾
000015	111111	SAMPLE PLAN	Anytown

5. **Click on the "Retrieve Files" link located on the bottom left side of your screen under "Files and Reports.**

Files And Reports

Retrieve Files

Submit Files

Utilities

Plan Reports

7. Change File Type to "Wage Information"

Retrieve Files

File Type: All Documents ▼ File Status: All

Select One
All Documents
Beneficiary Designation Form
Distribution-Rollover Form
Employer Statements
Enrollment Form
HCSP Claim Documents
Incoming Rollover Form
Legal Documents (DRO, JOD)
Loan Application
Online Enrollment
Other
Payroll Reports
Plan Documents and Forms
Requested Reports
RHFV Distribution
Wage Information

File Type▼	Uploaded ▼	Time (CT)▼	Begi Date
Payroll Rep	04/12/2017	3:16 PM	04/1
Wage Information	04/05/2017	2:59 PM	04/0
Requested Reports	02/08/2017	7:00 AM	02/0
Requested Reports	01/26/2017	9:05 AM	01/2

8. Click Search.

Retrieve Files

File Type: Wage Information ▼ File Status: All ▼ Name Includes: [   ] **Search**

9. Find the file titled 2019 Wages and click on View.

File Type▼	Name▼	Uploaded ▼	Time (CT)▼	Begin Date ▼	End Date ▼	Status▼	Format ▼	View	Manage
Wage Information	2019 Wages	04/05/2017	2:59 PM	04/05/2017		Accepted	CSV	🔍	🔧

10. Open the file and verify that all information is accurate, including the previous year's gross compensation.

	A	B	C	D	E	F	G	H	I	J	K
1	Sample City Wage File										
2	WAGE CO	PLAN ID:	/000015/000017	PLAN:	Sample Plan						
3	Plan	Division Number	SSN	Name	Employee Type	Status	Birth Date	Hire Date	Termination Date	Rehire Date	Comp
4	15	111111	444-45-5555	Doe, Barbara A	Full Time	Active	1/3/1968	6/24/2002			66984.53
5	15	111111	123-45-6789	Smith, Jane	Full Time	Active	1/1/1975	2/2/2015			50000
6	15	111111	666-66-6601	Doe, Susan	Full Time	Terminated	12/11/1954	6/28/1999	4/29/2016		25313.28
7	17	111112	777-77-7773	Doe, Mark	Full Time	Active	2/25/1972	9/28/2015			66794.72
8	15	111112	666-66-6602	Doe, Jennifer C	Full Time	Active	2/20/1953	3/3/2003			73207.02
9	Plan	Division Number	SSN	Name	Employee Type	Status	Birth Date	Hire Date	Termination Date	Rehire Date	232299.6
10											
11											

Next steps:

a. Need to add or edit employee compensation? Click here for instructions on how to do so. **OR**
b. If everything looks accurate, there's just one more step – acknowledging that you've reviewed the data. Click here for instructions.

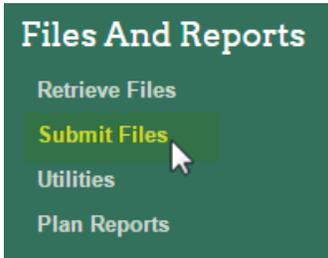1. **Save the file somewhere on your computer**
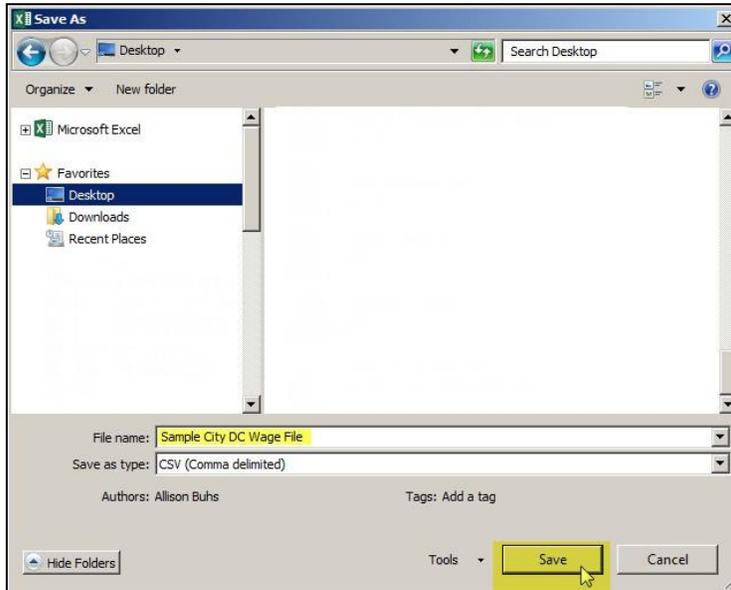
2. **Add or change the compensation (note that the definition of gross compensation is left to the employer's discretion)**

Sample City Wage File										
WAGE CO	PLAN ID:	/000015/000017	PLAN:	Sample Plan						
Plan	Division Number	SSN	Name	Employee Type	Status	Birth Date	Hire Date	Termination Date	Rehire Date	Comp
15	111111	444-45-5555	Doe, Barbara A	Full Time	Active	1/3/1968	6/24/2002			$50,000
15	111111	123-45-6789	Smith, Jane	Full Time	Active	1/1/1975	2/2/2015			
15	111111	666-66-6601	Doe, Susan	Full Time	Terminated	12/11/1954	6/28/1999	4/29/2016		
17	111112	777-77-7773	Doe, Mark	Full Time	Active	2/25/1972	9/28/2015			
15	111112	666-66-6602	Doe, Jennifer C	Full Time	Active	2/20/1953	3/3/2003			
Plan	Division Number	SSN	Name	Employee Type	Status	Birth Date	Hire Date	Termination Date	Rehire Date	

3. **Save any changes to the file**
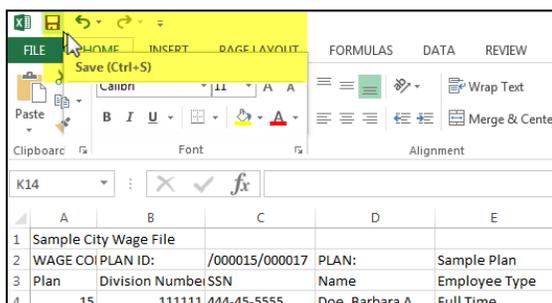
4. **Log back in to the ER Portal and follow the previous steps you used to access your DC plan (refer to previous section for detailed steps). Once in your plan, click on "Submit Files" (bottom left hand side of your screen under Files and Reports)**

Files And Reports

Retrieve Files

Submit Files

Utilities

Plan Reports

5. **Select "Wage Information" from the File Type drop down**

Submit Files

Select file type :

Short description of what you are submitting :

Your information covers the period between :

Location of the information you are submitting :

Select One

Select One
Beneficiary Designation Form
Distribution-Rollover Form
Employer Statements
Enrollment Form
HCSP Claim Documents
Incoming Rollover Form
Legal Documents (DRO, JOD)
Loan Application
Online Enrollment
Other
Payroll Reports
Plan Documents and Forms
Requested Reports
RHFV Distribution
Wage Information

Information on Submitting Files

Please do not submit anything under the below File Types:

4. *Type "[Previous Year] Wages" in the description box and then click on "Browse". **For example, in 2020, you would enter "2019 Wages" in the description box.***

Submit Files

Select file type :

Wage Information

Short description of what you are submitting :

2019 Wages

Your information covers the period between :

To

Location of the information you are submitting :

Browse

Submit

5. Attach the updated file that you saved to your computer
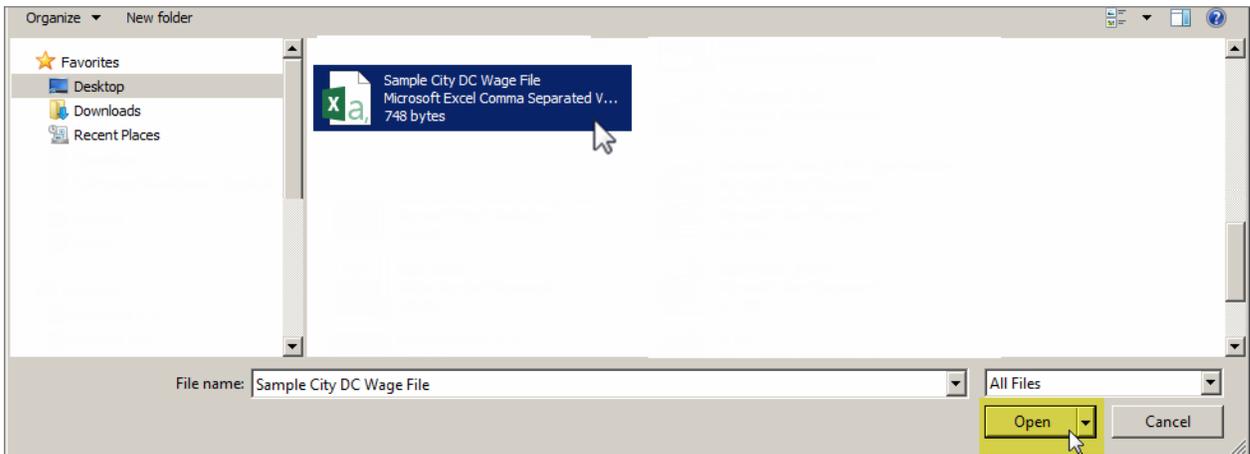
6. Click on Submit

Submit Files

Select file type :   Wage Information

Short description of what you are submitting :   2019 Wages

Your information covers the period between :   [ ] To [ ]

Location of the information you are submitting :   Browse   Sample City DC Wage File.cs

Submit

Congratulations! You've successfully uploaded your updated file.

Upload Successful

Plan	SAMPLE PLAN
Type of Report	Wage Information
Subject	2019 Wages
File name	Sample_City_DC_Wage_File.csv
Confirm Number	2020-04-14 09:15:30.900.B3983221
Message	Thank you

Now you have one last step – acknowledging that the data you've submitting is accurate to the best of your knowledge. Click here for instructions.

ACKNOWLEDGING YOUR EMPLOYEE DATA

The final step to the wage submission process is acknowledging that the information you've reviewed or provided to MERS is accurate to the best of our knowledge. This also helps us to know which municipalities have reviewed there data and which have not.

To acknowledge your data, follow these steps:

1. Once in the ER Portal, enter your plan ID, then click "Go":

2. Click on the correct Green Plan ID link

3. Click on "Manage Alert Settings" on the top right side of your screen
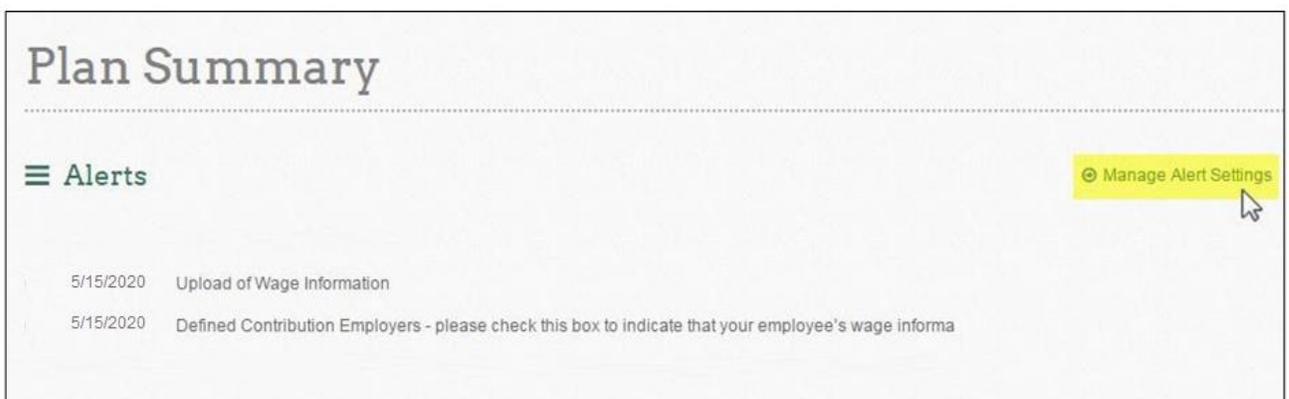
4. **Scroll over and check the box for the alert that states** *"Defined Contribution Employers – please check this box to indicate that your employee's wage information in the Wage Collection file is accurate to the best of your knowledge".*

5. **Click "Acknowledge Selected Alerts"**

Congratulations, you've completed the steps necessary to provide your defined contribution employees with Snapshot Reports this year!