Employer Contact Management Guide

In contact management, you will find a list of your employer contacts and their preferences for conducting business with MERS.

ACCESS YOUR CONTACT LIST

The Primary Contact and the Contact Management Admin have access to review and make changes to the employer contacts and their preferences.

1. Log into the MERS Employer Portal.
2. Under Resources in the left navigation, select **Manage Employer Contacts**.
3. For each contact, click the drop down arrows to view more information.

ADD A NEW CONTACT

While only one person can be listed for each of the required roles (primary, finance, and HR), you can now create as many general contacts as you'd like, with customized preferences for what each contact **Has Access To**, **Responds To Questions About**, and **Receives Communication For**.

1. Click the green **Add New Contact** button and enter the person's name and contact information.
2. Select the applicable MERS Role(s) to continue. Based on the role(s) selected, the system updates the preferences. Required items are checked and disabled. You may change the preferences of the remaining items to further meet the contact's needs.

   Note: For contacts gaining access to a system, please allow up to two business days for them to receive their temporary password with login instructions.
3. Click the green **Save** button. Then, you will be redirected to the main page.

MAKE CHANGES TO AN EXISTING CONTACT

1. Find the contact you wish to update and click the green **Edit** button.
2. Make the necessary changes.

   Note: For contacts gaining access to a system, please allow up to two business days for them to receive their temporary password with login instructions.
3. Click the green **Save** button. Then, you will be redirected to the main page.

DELETE A CONTACT

1. Find the contact you wish to delete and click the green **Edit** button.
2. Click the red **Delete** button.
3. A message will appear that says "*If you delete this contact, you will no longer have the ability to view this contact. Are you sure you wish to continue?*" Click the green **Yes** button. Then, you will be redirected to the main page.

REPLACE A CONTACT

When a person is assigned to a required MERS role type, they cannot be deleted unless that role is assigned to another contact. To reassign the required roles, add the required role to a new or existing contact.

1. Either click the green **Add New Contact** button OR a green **Edit** button on an existing contact.
2. Select the required role you would like to replace.
3. When you click the **Replace** button, the role(s) you have selected will be saved under this contact and removed form the existing contact(s). Click the red **Replace** button. Then, you will be redirected to the main page.

REQUEST A COPY OF YOUR CONTACT LIST

1. Fill out the Employer Contact List Request form with your municipality name and the requesters name, position title, email, and phone number.
2. MERS will email the Customer Contact report to the requester. This report is for information purposes only. Any changes needed must be made in Contact Management.

HAVE A QUESTION?

Please contact MERS Service Center at 800.767.6377.

MERS Roles	
Primary	The main point of contact for plan administration and communication from MERS. This is the only person with the authority to make changes to employer contact information unless a Contact Management Admin role is assigned to a second person.
Finance	The main point of contact for financial information related to your MERS benefits.
Human Resources	The main point of contact for employee relations and education needs related to your MERS benefits.
General Contact	Additional contacts that coordinate with or receive communications from MERS.
Contact Management Admin	The person with the authority to make changes to employer contact information.
Highest Board	The highest-ranked member on a municipality's governing body.
Highest Administrator	The highest-ranked administrator for a municipality.
Authorized Signer	A person who can sign official documents for the municipality. This role is tied to a job title(s) defined by the municipality's governing body. If you do not see an authorized signer or wish to make changes regarding this role type, please contact MERS.

Based on the role(s) selected, certain items may be required. Those required items are shown with a green block ■ in the tables below.

Has Access To		Primary	Finance	HR
Contact Management Tool	Contact may view and update a list of employer contacts and their preferences for conducting business with MERS.	■		
Admin Portal (Defined Benefit)	Contact may view defined benefit plan statements and reports.	■	■	■
Reporting Portal (Defined Benefit)	Contact may report wages, service time, and contributions to MERS for active employees and rehired retirees for the defined benefit plan.		■	
Manage Employees (Defined Benefit)	Contact may add new hires or search existing employees to view and edit their information for the defined benefit plan.			■
ePayment (Defined Benefit)	Contact may view and pay invoices, apply existing credits and view paid invoices/credits applied for the defined benefit plan.		■	
TrueComp TLC Basic (Defined Benefit)	Contact may run projections, compare data with peer groups, review historical data and analyze pension plan liabilities with this self-service actuarial tool.	■	■	
Admin Portal (Participant Directed)	Contact may view participant account information.	■	■	■
Reporting Portal (Participant Directed)	Contact may report wages, service time, and contributions to MERS for participant directed accounts.		■	

Responds To Questions About		Primary	Finance	HR
Financial Information	MERS staff may contact this individual with questions regarding financial items, such as invoices, statements, and annual valuations.		■	
Plan or Benefit Changes	MERS staff may contact this individual to discuss changes to MERS plan or benefits.			■
Employee Information	MERS staff may contact this individual to discuss information regarding a current or past employee, such as wages, benefits, and service.			■
Account Check-In	MERS staff may contact this individual to discuss satisfaction with MERS plans and services and additional needs.	■		
New Product Opportunities	MERS staff may contact this individual to discuss new MERS products.	■		

Receives Communication For		Primary	Finance	HR
Invoices	A monthly email that alerts when it's time to make a payment.		■	
Late Payment or Reporting Notices	An email that states your payment or reporting is past due and must be submitted as soon as possible.		■	
CEO News	An email from MERS CEO, which can include board meeting updates, plan document changes and other reminders.	■	■	■
Municipal Matters	An email from MERS Regional Manager, which can include plan and provision updates, administrative changes, participant education and other reminders.	■	■	■
Report Alerts (AAV, GASB, Census, Statements)	An annual email that announces when the valuations and reports are available to view in the employer portal.		■	
Statement Alerts (Participant Directed)	A quarterly email that announces when the statements are available to view in the employer portal.		■	
Statement Alerts (Employer Directed)	A quarterly email that announces when the statements are available to view in the employer portal for RHFV or ISP.		■	
Forfeiture Notices and Reminders	An email that alerts when non-vested employer contributions of a participant's account are given up and explains how the money can be used. If no action is taken, a follow up letter may be sent via mail.		■	
Year-End Financial Reminders	An annual email that announces new contribution limits and other financial and reporting reminders.		■	
MERS Investment Menu Updates	An email that alerts when investments change, which may include adding new funds, removing funds, portfolio changes, default fund changes and more.			■
Annual Conference	A mailed invitation to MERS Annual Conferences where delegates vote for MERS Retirement Board members. The conferences offers a wide-range of educational sessions and networking opportunities.	■		
Participant Education & Resources	Most commonly an email that describes how to engage employees so they can make the most of their benefits and informs what resources are available. May include occasional mailings to spark further engagement.			■