



# RETIREE HEALTH FUNDING VEHICLE (RHFV) GUIDE

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# MAKE CONTRIBUTIONS

This section is intended to support data submission for making RHFV contributions. While some of the named fields may appear to reflect participant-level information, they are being used specifically to capture plan-level data for reporting purposes.

To ensure clarity and consistency, this section provides detailed instructions on how each field should be completed within this context. It outlines what information should be entered in each field and how it aligns with RHFV reporting.

1. Under **Plan Summary** in the left navigation, select **Payroll** and **Enter payroll**.
2. In STEP 1: Enter Your Payroll Information,
  - a. Enter the **Payroll Date** (the date of your contribution).
  - b. Select **P6 A A** for the **Division**.
  - c. Enter the **Expected Contribution Total**.

Dashboard

- PartnerLink
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    - Payroll Overview
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Video help (6)

### Recent Payrolls

Payroll date	Amount	Event ID	Submission date	Cash effective date	Status
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Review additional details on recent payroll submissions [here](#)

### Process employee updates and submit contributions online

**STEP 1: Enter Your Payroll Information** \*Required

Hover over this icon when you need additional information.

Payroll Date:  mm/dd/yyyy

Division:

Expected Contribution Total:

Continue

STEP 2: Select Your Money Sources

STEP 3: Update Your Employee and Contribution Information

STEP 4: Process and Confirm Your Contributions

- In STEP 2: Select Your Money Sources, check the box for the money source you want to process (**Employer – Unallocated Investment**).

STEP 1: Enter Your Payroll Information

**STEP 2: Select Your Money Sources**

Payroll Date: 05/04/2026  
 Division: P 8 A A  
 Expected Contribution Total: \$ 100000.00

Select the Money Source(s) You Want To Process

Select	Money Source	Description	Copy From Previous Remit	Last Contribution Date
<input checked="" type="checkbox"/>	UI01	Employer - Unallocated Investment Only		04/16/2026

Show/Copy Amounts From Previous Contribution(s) Continue Back

STEP 3: Update Your Employee and Contribution Information

STEP 4: Process and Confirm Your Contributions

- In STEP 3: Update Your Employee Contribution, enter the contribution amount. The total contributions on this page should equal the number previously entered for the expected contribution total.

Each RHFV plan has an assigned SSN, used for payroll reporting. If you need an SSN but don't know it, you can locate it under **Plan Summary** in the left navigation by selecting **Participants** and **Search employee**. Select the only employee listed and view the SSN towards the top of the screen.

STEP 1: Enter Your Payroll Information

STEP 2: Select Your Money Sources

**STEP 3: Update Your Employee and Contribution Information**

Use the form below to update contribution amounts and employee information, including adding newly hired employees, before clicking on the Submit button to proceed to STEP 4 - Process and Confirm Your Contributions.

Payroll Date: 05/04/2026  
 Division: P 8 A A  
 Expected Contribution Total: \$ 100000.00

Note: Any employees deleted from step 3, including employees with errors or warnings, will be included again the next time you start a new contribution and will display the same error/warning if it was not cleared previously. There is no need to delete any employee records from step 3 if they do not have a contribution amount for this payroll.

Errors must be corrected before continuing to Step 4 - Process and Confirm Your Contributions

Warnings will not prevent you from continuing to Step 4 - Process and Confirm Your Contributions, we do encourage your review in case updates are needed.

The employee account has been terminated, no updates allowed at this time. If you need to make a contribution for this employee, include them here and you will be prompted to reactivate them in Step 4. Once they have been reactivated, you will be able to edit their account.

Add New Column Export Search Add/Change Money Sources

Delete	Alert	SSN	Last Name	First Name	Middle Name	Suffix	Employer - Unallocated Investment	Birth Date	Hire Date	Term Date	Resign Date	Address 1	Address
		000600431					\$ 100000.00	01/01/1960	01/01/1980			1134 Municipal Way	

Totals across pages: \$100000.00

Money Source Total \$: 100000.00 Expected Contribution Total: \$ 100000.00

Show All Entries First Previous 1 Next Last Show 1 to 1 of 1 entries

Enter contribution amount to continue Save And Continue To Contribution Processing Back

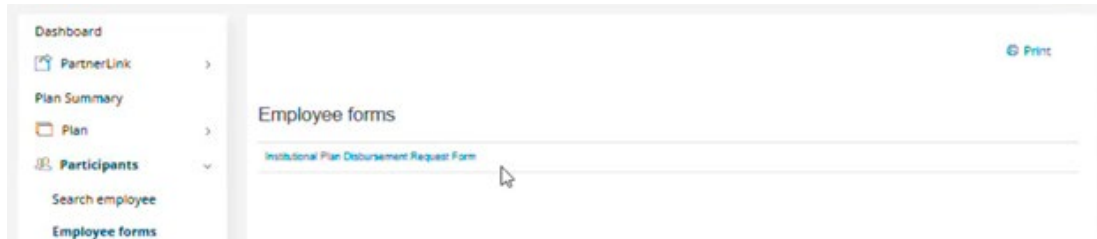
STEP 4: Process and Confirm Your Contributions

- In STEP 4: Process and Confirm Your Contributions, review the information and select **Continue** to finalize your contribution.

# SUBMIT A DISTRIBUTION REQUEST

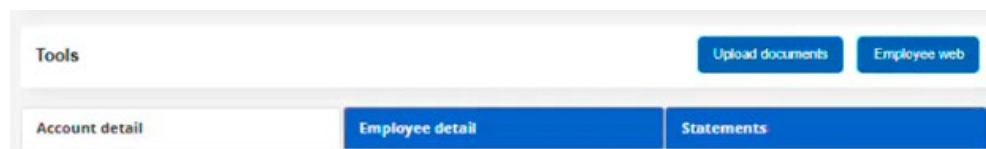
Locate the form

1. Under **Plan Summary** in the left navigation, select **Participants** and **Employee forms**.
2. Select and complete the **Institutional Plan Disbursement Request form**.



Upload the form

1. Under **Plan Summary** in the left navigation, select **Participants** and **Search employee**.
2. Select the only employee listed.
3. In the **Tools** section, select the **Upload documents** button.



4. Select **Transaction documentation** for the **Document Type**.
5. Select the file to upload or drag and drop it.
6. Click the **Upload** button.

A screenshot of the 'DOCUMENTS' upload form. At the top left, there is a link 'Return to employee overview'. The form has a 'DOCUMENTS' section with a dropdown menu for 'DOCUMENT TYPE' (currently set to 'Select') and a 'DOCUMENTS' list area. The list area includes a '10MB max file size View supported file types' note and a 'Tips for managing file size' link. Below this is a text box with instructions: 'For accurate processing, please be sure to include all relevant pages in a clear, legible format.' and a 'Tips for photographing documents' link. The upload area contains a blue button 'Select file to upload' and a text box 'Or drag and drop here'. At the bottom, there is an 'OPTIONAL COMMENTS' text area with a character count '0/250' and an 'Upload' button.



## TRANSFER RHFV FUNDS TO HCSP

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For employers who use their Retiree Health Funding Vehicle to pay the employer contributions to their Health Care Savings Program, please send an email to **MERSServiceTeam@empower.com** with the subject line **“URGENT: RHFV to HCSP Transfer – 66XXXXX-01”** and mark the email as high importance / urgent. Include the following information in the body of the email:

- Please transfer \$X,XXX.XX
- From plan number 66XXXXX-01
- To plan number 63XXXXX-01
- Deposit into forfeiture, ER01

You'll receive an email confirmation within 3 business days. Please note that this transfers funds into your HCSP forfeiture account, which can then be used to fund an HCSP payroll. However, RHFV funds cannot be transferred directly to a specific HCSP payroll entry.

If your municipality has ACH (pull done by Empower), the email needs to be sent in advance of reporting for HCSP, otherwise the pull will include full amount reported.

If your municipality pays using wire, it is recommended to also include the wiring details associated with the request to appropriately process.

# VIEW RHFV QUARTERLY REPORT

1. Under Plan Summary in the left navigation, select **Reports** and **Standard Reports**.
2. Select the **Most Frequently Used** tab and select **Plan Balance** and **Transaction Summary**.
3. Modify the parameters as noted below:
  - a. Change **Ignore divisions** to **Yes**.
  - b. Enter the **Begin date** (first day of the quarter).
  - c. Enter the **End date** (last day of the quarter).
  - d. Click the **Submit** button.

4. You will receive a notification when the report is available as it will take a few minutes to generate.
5. Once you receive the notification via email, go to **Reports** and **Standard Reports**.
6. Click on **View** under the status column of your report, which will open the report in a new browser tab which you can then save to your local network.

<input type="checkbox"/> Select	Date	Plan #	Category	Report name	Request #	Status	File Sharing
<input type="checkbox"/>	05/05/2026	6619081-01	Assets and Investments	Plan Balance and Transaction Summary <span style="color: red; font-weight: bold;">New</span>	638403133	<span style="border: 1px solid red; padding: 2px;">View</span>	Unavailable <span style="font-size: small;">?</span>



1134 Municipal Way • Lansing, MI 48917 | 800.767.6377 | [mersofmich.com](http://mersofmich.com)

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