

January 12, 2023

Dear Superintendent <Last_Name> ,

I am reaching out to you with a list of your employees (see attached) who will be mailed a final, one-time RetirementPlus (R+) election form by the end of this week.

This special R+ election is the result of the recently passed Chapter 134 of the Acts of 2022, which applies only to members who transferred into the MTRS from one of the other 103 MA public pension systems before 7/1/2022 (e.g., a teacher aide who became a teacher), and failed to make their R+ election during their original election period. As a result of this legislation, the MTRS members who receive our mailing will have one last opportunity to **participate in** or **opt-out** of R+.

As you can see in the attached sample election form, the eligible members can make their election online, or by returning their printed election form in the postage-paid envelope to our processing vendor, *YesElections*. **Elections must be submitted by 6/30/2023.**

Please share this list with your HR and Payroll staff, and ask them to:

- reach out to these employees to make sure they act on their election before 6/30/2023;
- provide an email address for the employees who do not have one and return the spreadsheet to us using our [secure online form](#);
- if anyone on the list is no longer working in your school district, update their Events in MyTRS and reach out to your assigned Employer Service Representative for assistance; and
- attend one of our **R+ Election Employer Training** webinars.*

PLEASE NOTE: Even if an employee on this list is currently contributing at 11%, they are **not enrolled in R+** because they never made their required R+ election. Thus, **it is critical that your staff tell these members that they must complete and submit their election forms no matter what their current contribution rate is.** If they don't respond, they will not have another chance to participate in R+ and will not be eligible for the enhanced R+ benefits. Even if their intention is not to participate in R+, they must still respond and opt-out.

Once we receive your employees' R+ elections, we will inform you of their correct MTRS contribution rate. After we confirm that you are withholding the correct rate, we will either:

- issue a refund if the member opts-out of R+ and has contributed at 11%, OR
- send the member an invoice, with installment options, if the member elects to participate in R+ but has not contributed at 11% (they are required to make up the difference between 11% and any lower rate), OR
- simply send the member a confirmation if they elect to participate in R+ and have already made the required 11% contributions.

More information about R+ benefits, contribution rates, and potential invoice/refund amounts can be found at the MTRS [R+ Resource Center](#).

***The R+ Election Employer Training webinars for school district HR and Payroll staff will be held on Wednesday, February 1st, at 9:00 AM, and repeated on Tuesday, February 7th at 9:00 AM. Registration is now open via the [RetirementPlus employer training registration form](#).**

We very much appreciate your assistance with this process!