



## Exhibit E – Listing of COPERS Forms, Letters and Reports

### COPERS LEGACY FORMS

Listed in this table is a comprehensive inventory of COPERS existing legacy forms. Some of these forms may be maintained outside of the system and/or COPERS; however they will also need to be generated by the new, PAS system and thus are included here for scoping purposes.

#	Form Name
1	03 Change of Address
2	04 A-4P State Tax
3	05 W-4P Fed Tax
4	06 A-4P & W-4P w/Cover
5	07 Direct Deposit Form
6	08 Direct Deposit (Split)
7	Beneficiary Contact Letter
8	Beneficiary Designation-Active
9	Beneficiary Designation-Ret
10	Buyback Application Refund
11	Change Option Agreement
12	DAC App - Initial Request
13	Death Final Check
14	Death Survivor Letter
15	Deferred Counseling-Appt Forms
16	Deferred Counseling-No Appt
17	DRO Checklist
18	Form 38-923 In
19	Income Verification-Active/Ina
20	Income Verification-Deferred
21	Income Verification-Retiree
22	Refund Application - Vested
23	Refund Application Non-Vested
24	Ret Pkt-Individual
25	Ret-App/PC Memo
26	Ret-App/PC Memo Disability
27	Ret-New Ret Ltr
28	Ret-New Ret Ltr Recalc
29	Ret-Request Duplicate Warrant
30	Service Record Change Form
31	SPC Appl JS/FTTemp



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#	Form Name
32	SPC Appl Military Purchase
33	SPC Appl Other Public Plans
34	SPC Fee Receipt
35	SPC Ltr to Govt Entity
36	SPC Payment Receipt
37	SPC Payoff Statement
38	SPC Request Payment Plan
39	SPC Resend Ltr to Entity
40	SPC Rollover-Nationwide
41	SPC Rollover-Other Entity
42	Subpoena
43	Transfer In Application

### COPERS LEGACY LETTERS

Listed in this table is a comprehensive inventory of COPERS existing legacy letters / correspondence. These items will need to be generated by the new, PAS system and thus are included here for scoping purposes. Offerors and COPERS may be able to combine / consolidate various correspondences where appropriate as long as there is mutual agreement.

#	Letter / Correspondence Name
1	01 Cover Sheet
2	02 Cover Sheet 2
3	06 A-4P & W-4P w/Cover
4	Beneficiary Contact Letter
5	Beneficiary Designation Reject
6	Buyback Board Memo
7	Buyback Is Scheduled
8	Buyback Was Approved
9	DAC App - Initial Request
10	DAC Application Received
11	DAC Application Withdrawal
12	DAC APS Request
13	DAC Ltr-Approval
14	DAC Ltr-Benefits 1 Cont (APS)
15	DAC Ltr-Benefits 2 Cont
16	DAC Ltr-Benefits 3 Cont & Exmt
17	DAC Ltr-Denial



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#	Letter / Correspondence Name
18	DAC Ltr-No Show
19	DAC Ltr-Possible Denial
20	DAC Meeting Notice
21	DAC PCD Form
22	Death Final Check
23	Death Survivor Letter
24	Deferred Counseling-Appt Forms
25	Deferred Counseling-No Appt
26	Deferred Retirement Reminder
27	DRO Compliance Letter
28	DRO Non-Compliance Letter
29	EBA Letter - Tax changes
30	Form 38-923 In
31	Outstanding Warrant Single
32	Outstanding Warrants Multiple
33	Refund Application Non-Vested
34	Refund Rejection letter
35	Ret Pkt-Individual
36	Ret-10 Year Certain Term
37	Retirement Checklist
38	Revised Payroll Clerk Memo
39	SPC Appl JS/FTTemp
40	SPC Appl Military Purchase
41	SPC Appl Other Public Plans
42	SPC Contract Expiration Letter
43	SPC Denial of FTimeTemp request
44	SPC Instate Ltr to Mem
45	SPC Is Scheduled Full TimeTemp
46	SPC Is Scheduled Job Share
47	SPC Ltr to Govt Entity
48	SPC No Fee Pd
49	SPC Pre-tax paymnt missed ltr.
50	SPC Rejection Letter
51	SPC Resend Ltr to Entity
52	SPC Was Apprvd Full Time Temp
53	SPC Was Apprvd Job Share
54	SPC Was Apprvd Other Public
55	Transfer In (B) Request Letter



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<b>#</b>	<b>Letter / Correspondence Name</b>
56	Transfer In (C) Cost Letter
57	Transfer In (D) Confirm Letter
58	Transfer In Approval
59	Transfer Out (A) Request Letter
60	Vested Termination Letter

**COPERS LEGACY REPORTS**

Listed in this table is a comprehensive inventory of COPERS existing legacy reports. These items will need to be generated by the new, PAS system and thus are included here for scoping purposes. Offerors and COPERS may be able to combine / consolidate various reports or possibly eliminate reports if the same information can be presented and viewed online or via ad-hoc query capabilities as long as there is mutual agreement.

<b>#</b>	<b>Report Name</b>
1	Active Members by Tiers and Units
2	All Retirements - PRR at time Retirement
3	All DEPT - Eligible with 5 yrs
4	City All - Count Monthly Eligible to Retire
5	COPERS All - Count Eligible to Retire by Benefit Code
6	COPERS All - Count Eligible to Retire by Job Classification
7	DEPT - Count Eligible to Retire by Dept
8	DEPT - Count Eligible to Retire by Division
9	Dept - Eligible with 5 yrs
10	COPERS Emails
11	Retiree Addresses with Benefit Effective Date
12	Member Age/Service Report
13	Life to Date Contribution and Interest
14	Members w/out Dep or Nom Beneficiaries
15	Nominated DRO Listing
16	Service Purchase Deduction Listing
17	Interest Posting Detail Report
18	Interest Posting Summary Report
19	Actuary Export Summary Report
20	Interest Posting What If Report
21	SPC Payment Schedule Report
22	Receipt of SPC Payment
23	Disability Status Report
24	Disability Agenda Report



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#	Report Name
25	Refunds of Accumulated Contributions
26	Leave W/O Pay /Industrial Leave
27	Notice of Deadline for COPERS SPC
28	Contribution Balance Report
29	Death Notification Report
30	DAC New Apps Fiscal Year End
31	DAC Re-Exams Fiscal Year End
32	COPERS File Maintenance
33	Service Purchase Contract Tracking
34	Transfer Out Tracking Report
35	Benefit Estimation Generation Tracking
36	DRO's Reviewed Tracking Report
37	SPC's Expiring with no Payments
38	Transmittal Exception Report
39	Transmittal Batch Detail Listing
40	Service Purchase Impending Payoff
41	Transmittal Batch Summary Listing
42	Transmittal Member Change Listing
43	Benefit Payroll Check Register
44	Bank Memorandum - Transfers Out
45	Bank Memorandum - New Retirees/Survivors
46	PEP Increase Verification Report
47	13th Check Supp Verification Report
48	Disability Reexam Report
49	New Payees Report
50	Refund Export Report
51	Task History Report
52	Correspondence History Report
53	Seminar Attendance Report
54	Audit Trial Path History