Indiana Public Retirement System (INPRS)

Employer Reporting and Management (ERM) Employer Management User Manual - Employer

Indiana Public Retirement System (INPRS)
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INPRS
INDIANA PUBLIC RETIREMENT SYSTEM

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1 Introduction to Employer Management for Employer Users

NOTE: To ensure that both employers and INPRS staff perform functions in ERM consistently and efficiently, the ERM manuals have been written for Employer and Staff. The Employer versions are available from the Employer Reporting & Maintenance page of the INPRS website. (IC 5-10.2-2-12.5)

Employer Users are Indiana Public Retirement System (INPRS) participants with access to manage their employer accounts in the Employer Reporting and Maintenance (ERM) application. Based on an individual's security role in the ERM application, Employer Users can conduct the following employer management functions:

- Modify employer information
- Modify Submission Unit information
- Add new Employer Users to ERM

Employer Users also have view-only access to the following information:

- Employer account details
- Employer Fund assignments
- Submission Unit account details
- Submission Unit contribution type details
- Submission Unit wage and contribution submission information

This User Manual introduces you to all the features and screens associated with employer management functions in the ERM application, as well as how to enter, modify and view employer management data in ERM.

For instructions on how to log into the ERM application, reference the *ERM Overview User Manual – Employer*.

NOTE: Effective 12/31/2009, employers are to submit contributions, records, and reports electronically in a uniform format through a secure connection over the Internet. Set up of employer, users, wage and contribution submissions and instructions on completing tasks are included in the manuals and QRGs available on the ERM – Manuals page and the ERM – Quick Reference Guides page of the INPRS website.

2 ERM Glossary

Refer to the *ERM Glossary* document for a complete list and definitions.

NOTE: In other documents the various funds, systems, and plans may be abbreviated as follows:

- 1977 Fund, 77 Fund, PF77 – 1977 Police Officers’ and Firefighters’ Pension and Disability Fund
- CE, C&E, CAEP, EG&C - Excise, Gaming, and Conservation Officers’ Retirement Plan
- JU, JRS, JUDG – Judges’ Retirement System
- PA, PARF – Prosecuting Attorneys’ Retirement Fund
- LE, LE DC, LE DB, LRS – Legislators’ Retirement System (Defined Contribution or Defined Benefit)

No matter how they are abbreviated, the abbreviations refer to these named funds, systems, and plans and often are referred to as “fund, “plan”, or “system”.

3 Employer Numbers and Submission IDs

In the ERM application, employers are assigned a unique Employer Number. Most transactions, including updating member records and submitting wage and contribution data, are completed using the Submission Unit ID. In the event payments are submitted to more than one Fund, there would be more than one submission unit ID but only one Employer Number. These numbers are generated by the ERM application. Any questions should be directed to INPRS.

4 ERM Navigation Menu

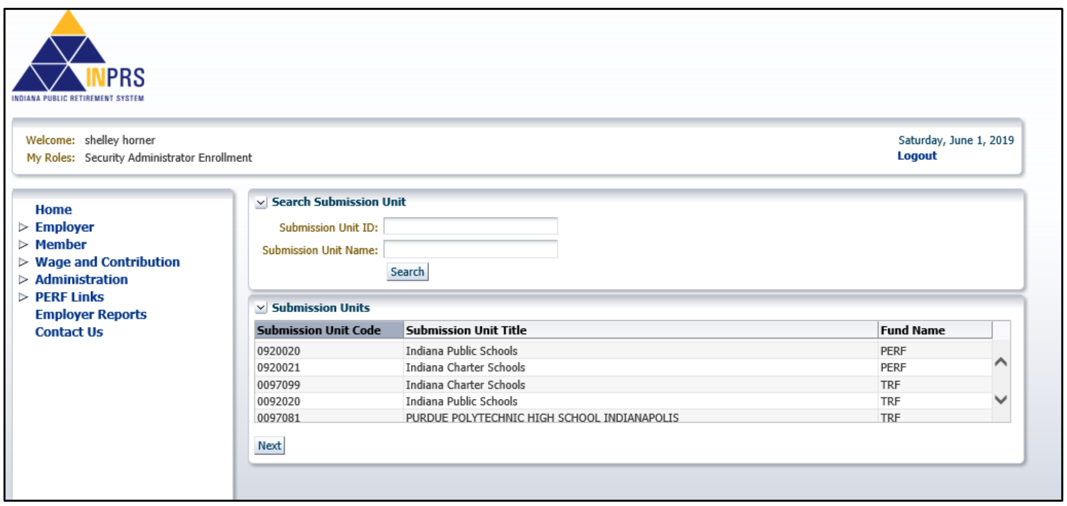
The *Navigation Menu* is to the left of the ERM *Home* page, as shown in Figure 1.

The selections in the *Navigation Menu* are:

- Home
- Employer
- Member
- Wage and Contribution
- Administration
- PERF Links
- Employer Reports
- Contact Us

Several selections have drop-down menus. The options available to Employer Users vary by security role. Options that are grayed out mean an Employer User does not have access.

Figure 1: ERM Home Page

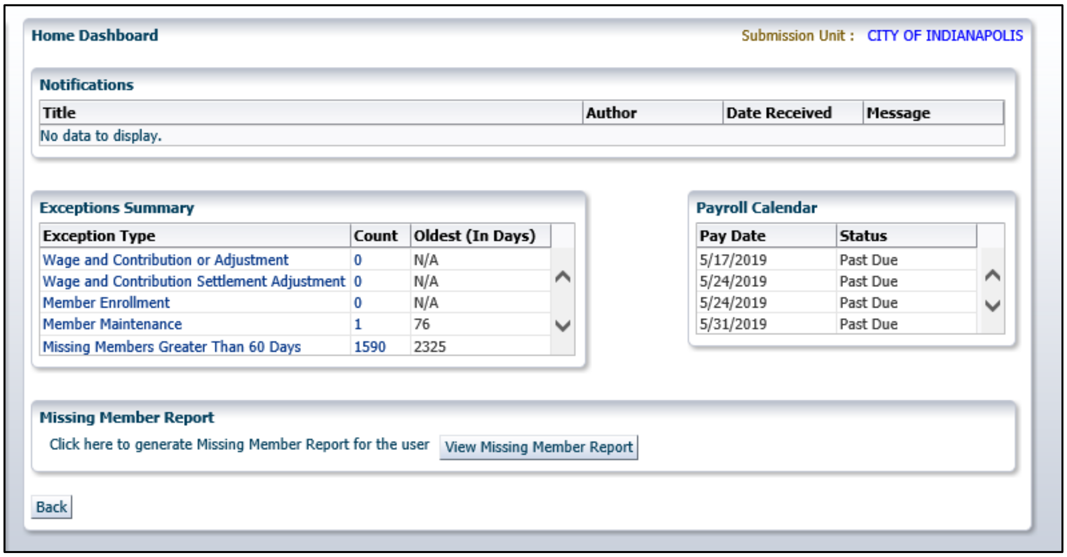


4.1 Access the Home Dashboard

To access the *HomeDashboard*:

1. Select a Submission Unit from the grid on the ERM *Home* page.
2. Click **Next**. The *Home Dashboard* for the selected Submission Unit opens, as shown in Figure 2.

Figure 2: Home Dashboard on the ERM Home Page



The *Home Dashboard* has these sections for the selected Submission Unit:

- Notifications
- Exceptions Summary
- Payroll Calendar
- Missing Member Report
- Payroll Calendar

> **NOTE:** For more information about the Home Dashboard, see the *ERM Overview Manual - Employer*.

4.2 Access and View Employer Account Options

Click the ▷ to the left of *Employer* in the *Navigation Menu*. A drop-down menu displays with all member management options, as shown in Figure 3. Actions associated with each option are described in Table 1.

Figure 3: Member Management Options Menu

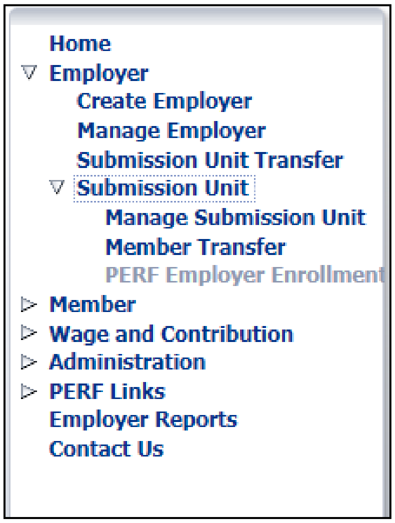


Table 1: Actions Available for Employer Account Options Menu

Menu Option	Action
Create Employer	Create a new employer account in the ERM application (INPRS Staff User-only).
Manage Employer	Update information in an existing employer account. Add new Submission Units to an existing employer account (INPRS Staff User-only).
Submission Unit Transfer	Transfer a Submission Unit between two employer accounts (INPRS Staff User-only).
Submission Unit	The Submission Unit option has an additional drop-down menu that allows you to complete the following activities: • Manage Submission Unit: Update information for an existing Submission Unit. • Member Transfer: Move a member between two Submission Units (INPRS Staff User-only).

5 New Employer

This process is undertaken by the INPRS Employer Advocate (EA) Team. If you have questions, contact INPRS.

6 Manage an Employer

NOTE: Throughout this section all required fields marked with an asterisk (*) must be completed before the record can be processed.

NOTE: Several subsections in this section are titled View. These are areas that the employer can view, but cannot make changes. If you have questions about these actions, contact INPRS.

Employer Users can add, delete, modify or view information in employer accounts, including:

- Account Details (view-only)
- Contact information
- Address and phone number
- Funds (view-only)
- Groups (view-only)
- Submission Unit information (view only)

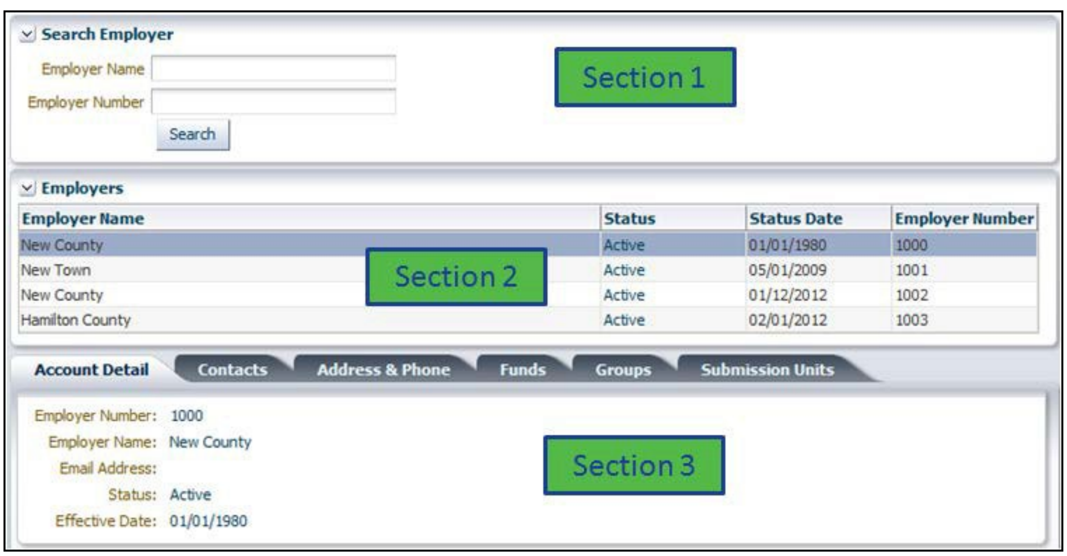
The specific employer information that an Employer User can access and update depends upon his or her security role.

6.1 Locate an Employer Account

To locate an existing employer account, choose **Manage Employer** from the drop-down menu below **Employer** in the *Navigation Menu*.

This takes you to the *Manage Employer* screen shown in Figure 4.

Figure 4: Manage Employer Screen



The *Manage Employer* screen contains three sections for searching and managing information in employer accounts.

- **Section 1** contains search fields that allow you to locate employer account information using either the employer name or ID number.

NOTE: This section is mostly used by INPRS Staff Users. The employer account that your security role allows you to view is auto-populated in Section 2 of the screen.

- **Section 2** of the *Manage Employer* screen contains a grid that is automatically populated with the employer account(s) that you have permission to view.
- **Section 3** displays several tabs that contain demographic data for the employer account.

6.1.1 Search for a Specific Employer Account

To search for an employer by name

1. Enter the name of the employer in the **Employer Name** field.
2. Click **Search**.

To search for an employer by ID number

1. Enter the employer's ID number in the **Employer Number** field.
2. Click **Search**.

6.1.2 Select an Employer Account

All employer records that you have permission to view displays in the scrollable grid found in Section 2 of the *Manage Employer* screen, shown in Figure 4. To select an employer using the scrollable grid:

1. Click the employer name in the grid.
2. Once you select an employer record to view, the tabs in Section 3 populate with the chosen employer's demographic data. The tabs found in this section are:
   - Account Detail
   - Contacts
   - Address & Phone
   - Funds
   - Groups
   - Submission Units

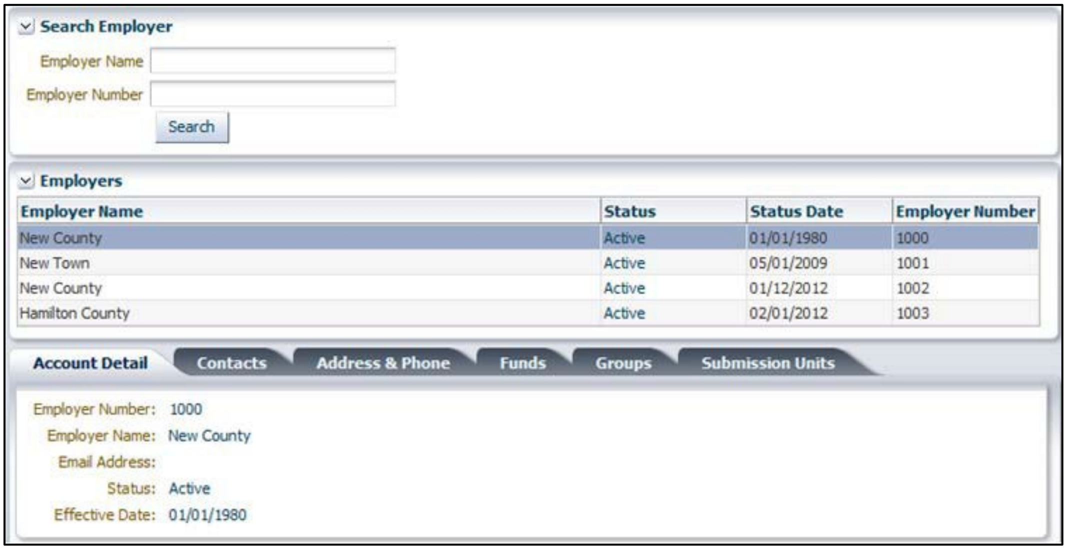
6.2 View Account Detail Information

The **Account Detail** tab, shown in Figure 5, displays employer account details, including:

- Employer Number
- Employer Name

- Email Address
- Status
- Effective Date

Figure 5: Account Detail Tab, Manage Employer Screen

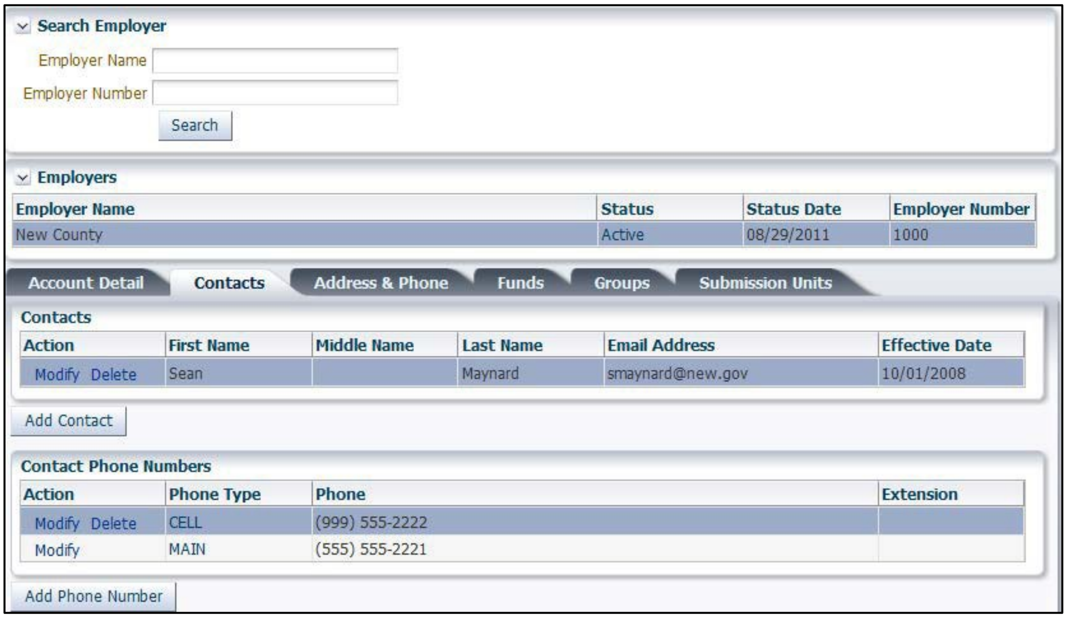


NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Account Detail** tab.

6.3 Manage an Employer Contact

To manage employer contact information, choose the **Contacts** tab. This displays a table containing all contacts for the employer account, as shown in Figure 6.

Figure 6: Contacts Tab, Manage Employer Screen

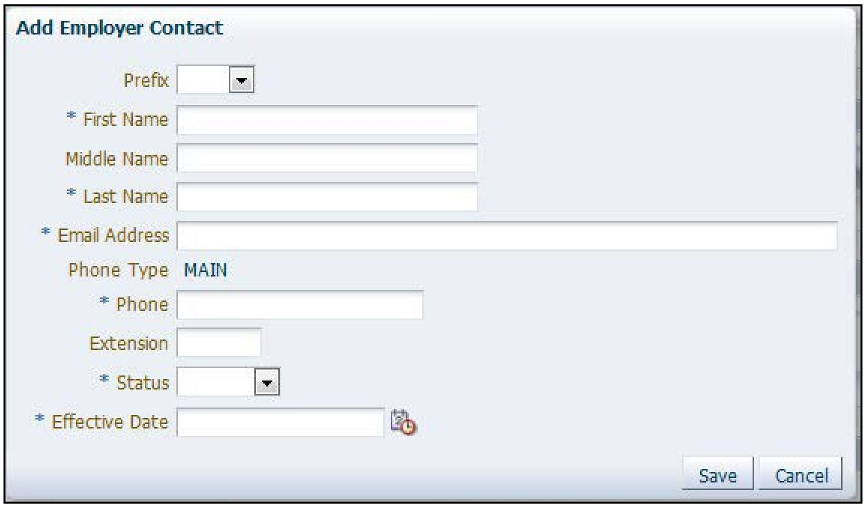


6.3.1 Add an Employer Contact

To add an employer contact

1. Click **Add Contact** under the *Contacts* table. This opens an *Add Employer Contact* Dialog Box, as shown in Figure 7. The Dialog Box contains the following fields:
    - Prefix
    - First Name
    - Middle Name
    - Last Name
    - Email Address
    - Phone Type
    - Phone
    - Extension
    - Status
    - Effective Date

Figure 7: Add Employer Contact, Manage Employer Screen



2. Click the arrow to the right of the **Prefix** field to access a drop-down menu of prefix choices. This field is not required.
3. Enter the first name of the employer contact in the **First Name** field.
4. Enter the middle name of the employer contact, if applicable, in the **Middle Name** field. This field is not required.
5. Enter the last name of the employer contact in the **Last Name** field.
6. Enter the contact's email address in the **Email Address** field.
7. Enter the contact's 10-digit phone number in the Phone field. The required format is shown in a pop-up bubble when you click the **Phone** field.
8. Enter the contact's telephone extension number (if applicable) in the **Extension** field. This field is not required.
9. Click the arrow next to the **Status** field to access a drop-down menu of the following status choices:
    - Active
    - Inactive
10. Choose **Active**.
11. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
12. Click **Save**.

6.3.2 Modify an Employer Contact

To modify an employer contact

1. Click the **Modify** link in the **Action** column of the *Contacts* table. A *Modify Employer Contact* Dialog Box opens, as shown in Figure 8. The Dialog Box contains the following modifiable fields:
    - Prefix

- First Name
- Middle Name
- Last Name
- Email Address
- Status
- Effective Date

Figure 8: Modify Employer Contact, Manage Employer Screen

2. Click the field(s) you want to modify.
3. Enter the updated employer contact information.
4. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click **Save**.

6.3.3 Delete an Employer Contact

To delete an employer contact

1. Click the **Delete** link in the **Action** column on the appropriate line of the *Contacts* table. A confirmation box opens.
2. Click **OK** to delete the contact.

6.3.4 Add an Employer Contact Phone Number

To add a phone number to a contact’s account

1. Choose a contact from the **Contacts** table.
2. Click **Add Phone Number**. This opens the *Add Phone Number* dialog box shown in Figure 9. The dialog box contains the following fields:
    - Phone Type
    - Phone

- Extension

Figure 9: Add Contact Phone Number, Manage Employer Screen

1. Click the arrow to the right of the **Phone Type** field to access a drop-down menu containing the following options:
   - Main
   - Fax
   - Cell

Every contact must have at least one phone number identified as **Main**. For all additional contact phone numbers, choose the correct phone type option.

2. Enter the phone number for the Submission Unit in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
3. If a particular extension is required. Enter this number in the Extension field. This field is not required.
4. Click **Save**.

6.3.5 Modify an Employer Contact Phone Number

To modify a contact's phone number

1. Choose a contact from the *Contacts* table. The phone numbers for the contact display in the *Contact Phone Numbers* table.
2. Click the **Modify** link in the **Action** column of the *Contact Phone Numbers* table at the bottom of the screen. This opens the *Modify Phone Number* dialog box shown in Figure 10. The dialog box contains the following fields:
   - Phone Type
   - Phone
   - Extension

Figure 10: Modify Contact Phone Number, Manage Employer Screen

3. Place your cursor in the field(s) you want to modify.
4. Enter the updated employer phone information.
5. Click **Save**.

6.3.6 Delete an Employer Contact Phone Number

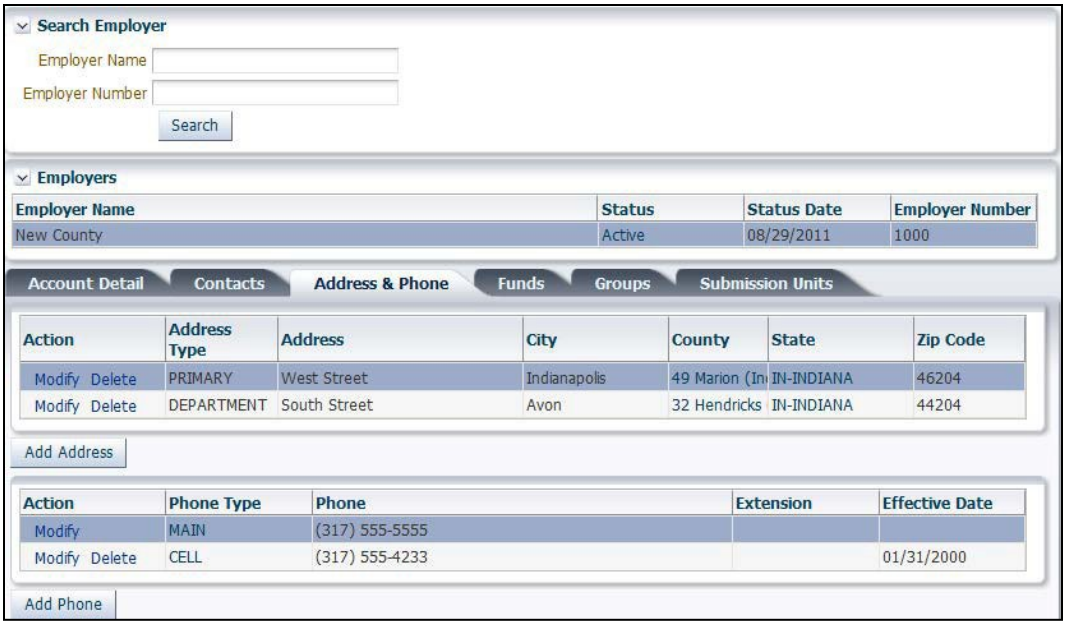
To delete a contact phone number from a contact's account

1. Choose a contact from the *Contacts* table. The phone numbers for that contact display in the *Contact Phone Numbers* table.
2. Click the **Delete** link in the **Action** column on the appropriate line of the *Contact Phone Numbers* table. A confirmation box opens.
3. Click **OK** to delete the phone number.

6.4 Manage Employer Addresses and Phone Numbers

To manage an employer's address or phone number, choose the **Address & Phone** tab. This displays two tables, as shown in Figure 11. One table contains employer address information, and the other contains employer phone number information.

Figure 11: Address & Phone Tab, Manage Employer Screen



6.4.1 Add an Employer Address

To add an employer address

1. Click **Add Address** below the *Address* table on the screen. The *Add/Modify Address* dialog box opens, as shown in Figure 12. The dialog box contains the following fields:
   - Address Type
   - Address
   - City
   - County
   - State
   - Zip Code
   - Organizational Email
   - Effective Date

Figure 12: Add/Modify Address, Manage Employer Screen

2. Click the arrow next to the **Address Type** field to access a drop-down menu of these address types:
   - Primary
   - Department
3. Choose the appropriate address type.
4. Enter the employer’s street address in the **Address** fields.
5. Enter the city name in the **City** field.
6. Click the arrow next to the **County** field to access a drop-down menu of Indiana counties. Click the correct county to populate the field. This field is only required if the employer’s address is in Indiana.
7. The **State** field defaults to Indiana but can be changed. Click the arrow next to the **State** field to access a drop-down menu of states. Click the correct state, and the **State** field will automatically update.
8. Enter the five-digit **Zip Code** in the **Zip Code** field. The required format is shown in a pop-up bubble when you click the **Zip Code** field.
9. Enter the employer’s email address in the **Organizational Email** field. This field is not required.
10. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
11. Click **Save**.

6.4.2 Modify an Employer Address

To modify an employer address

1. Click the **Modify** link in the **Action** column of the *Address* table. The *Add/Modify Address* Dialog Box shown in Figure 12 opens.
2. Place your cursor in the field(s) you want to modify.
3. Enter the updated employer address information.

4. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click **Save**.

6.4.3 Delete an Employer Address

To delete an employer address

1. Click the **Delete** link in the **Action** column on the appropriate line of the *Address* table. A confirmation box opens.
2. Click **OK** to delete the address.

6.4.4 Add an Employer Phone Number

To add an employer phone number

1. Choose an employer address from the *Address* table.
2. Click **Add Phone**. This opens the *Add Phone Number* dialog box shown in Figure 13.
3. The dialog box contains the following fields:
    - Phone Type
    - Phone
    - Extension
    - Effective Date

Figure 13: Add Phone Number, Manage Employer Screen

4. Click the arrow to the right of the **Phone Type** field to access a drop-down menu containing the following options:
    - Main
    - Fax
    - Cell

Every employer must have at least one phone number identified as **Main**. For all additional contact phone numbers, choose the correct phone type option.

5. Enter the phone number for the employer in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
6. If a particular extension is required, enter this number in the **Extension** field. This field is not required.
7. Enter the date the phone number becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
8. Click **Save**.

6.4.5 Modify an Employer Phone Number

To modify an employer phone number

1. Choose an employer address from the *Address* table. All the phone numbers associated with that employer address display in the *Phone Table*.
2. Click the **Modify** link in the **Action** column of the *Phone* table at the bottom of the screen. This opens the *Modify Phone Number* dialog box shown in Figure 14. The dialog box contains the following fields:
    - Phone Type
    - Phone
    - Extension
    - Effective Date

Figure 14: Modify Phone Number, Manage Employer Screen

3. Place your cursor in the field(s) you want to modify.
4. Enter the updated employer phone information.
5. Enter the date the phone number becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
6. Click **Save**.

6.4.6 Delete an Employer Phone Number

To delete an employer phone number

1. Choose an employer address from the *Address* table. All the phone numbers associated with that employer address display in the *Phone* table.

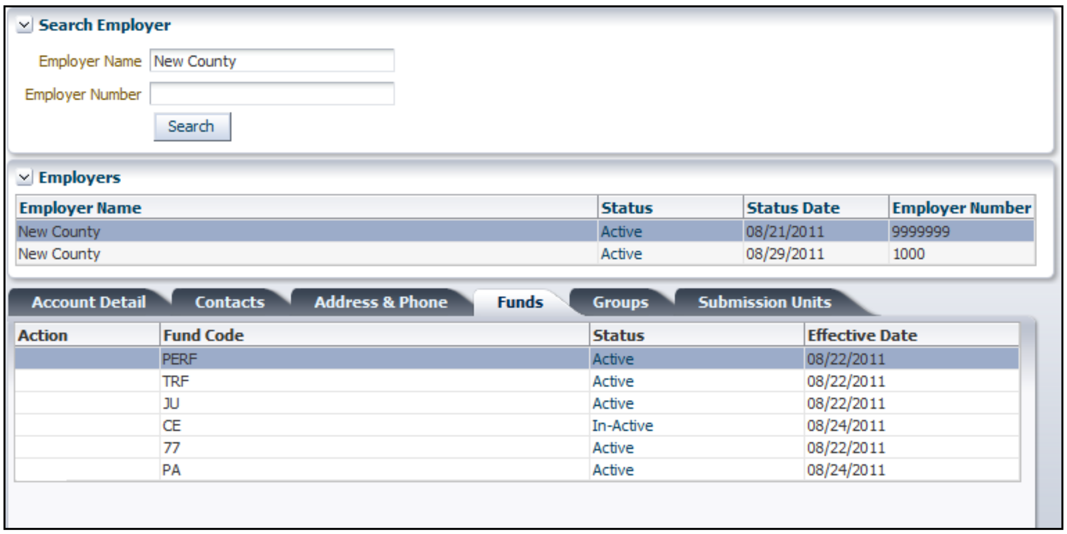
2. Click the **Delete** link in the **Action** column on the appropriate line of the *Phone* table. A confirmation box opens.
3. Click **OK** to delete the phone number.

6.5 View Employer Funds

The **Funds** tab, shown in Figure 15, displays employer Fund details, including:

- Fund Code
- Status
- Effective Date

Figure 15: Funds Tab, Manage Employer Screen



> **NOTE:** Employer Users have view-only access to the information contained in the fields associated with the **Funds** tab.

6.6 View Employer Groups

The **Groups** tab, shown in Figure 16, displays groups associated with the employer account. For more information about the use of Groups within the ERM application, refer to the *ERM Glossary*.

Figure 16: Groups Tab, Manage Employer Screen

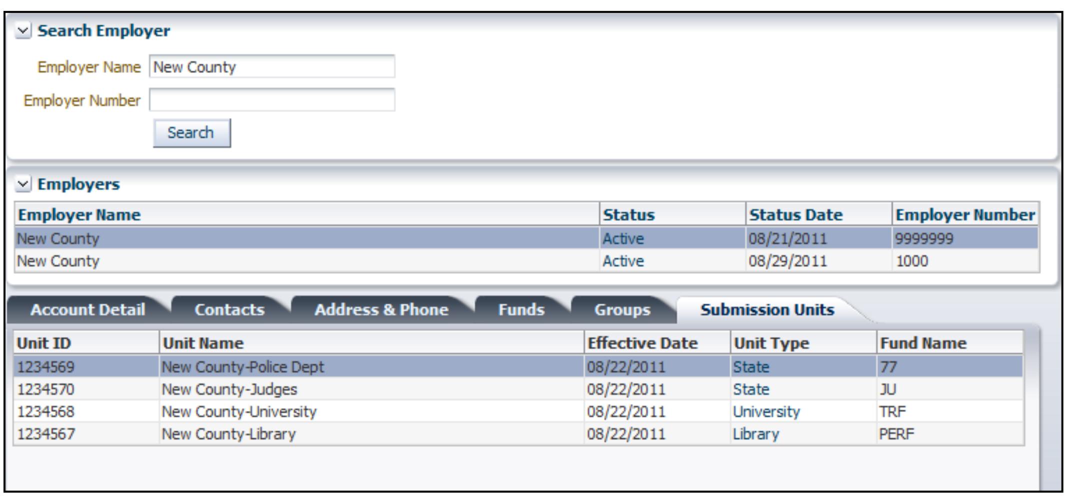
NOTE:	Employer Users have view-only access to the information contained in the fields associated with the **Groups** tab.

6.7 View Submission Unit Information for Employer Accounts

The **Submission Units** tab, shown in Figure 17, displays details about the Submission Units associated with an employer account, including:

- Submission Unit ID
- Submission Unit Name
- Effective Date
- Submission Unit Type
- Fund Name

Figure 17: Submission Units Tab, Manage Employer Screen



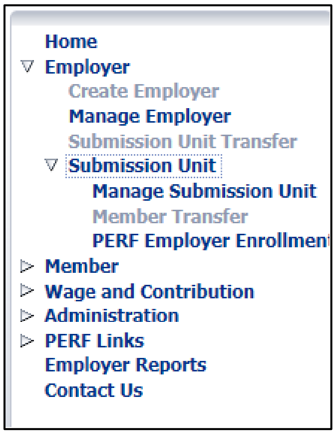
NOTE:	Employer Users have view-only access to the information contained in the fields associated with the **Submission Units** tab.

7 Manage a Submission Unit

NOTE: Throughout this section all required fields marked with an asterisk (*) must be completed before the record can be processed.

To manage a Submission Unit that already exists in the ERM application, click the arrow to the left of *Submission Unit* in the *Navigation Menu*. This opens a drop-down menu of all possible actions that you can perform on a Submission Unit account, as shown in Figure 18.

Figure 18: Submission Unit Option, Navigation Menu



The selections in the Submission Unit drop down menu:

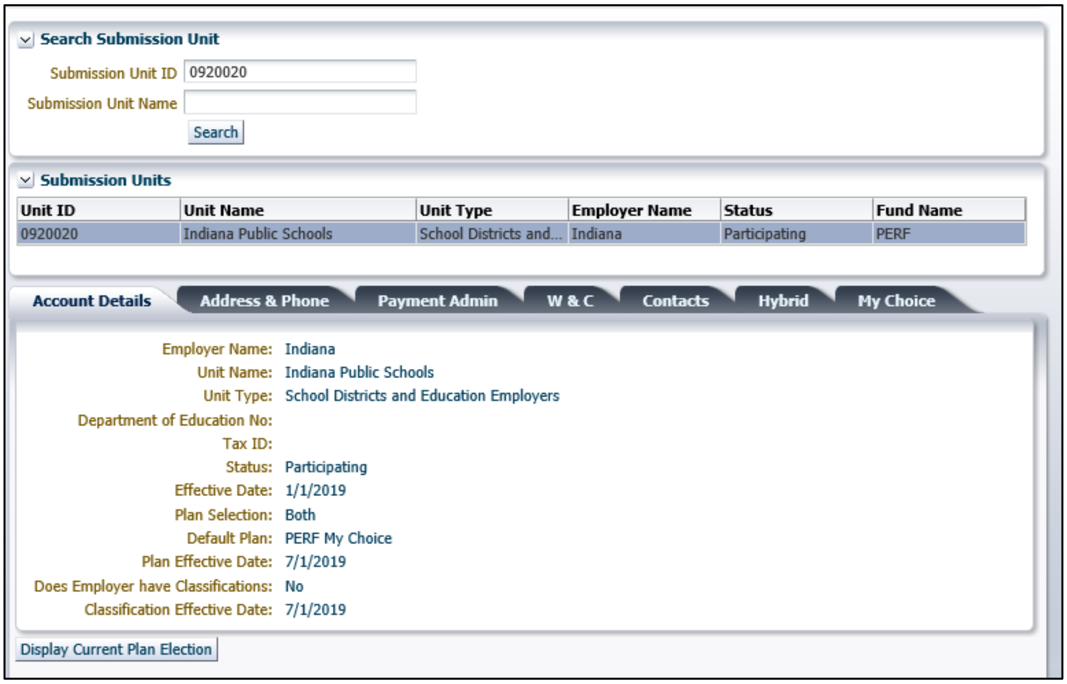
- Manage Submission Unit
- Member Transfer
- PERF Employer Enrollment Resolution

Choose **Manage Submission Unit** to access the *Manage Submission Unit* screen. The *Member Transfer* option will be grayed out for Employer Users, as it is an INPRS Staff User-only function. The **PERF Employer Enrollment Resolution** option will only be available to PERF Employers.

7.1 Locate a Submission Unit Account

The *Manage Submission Unit* screen, shown in Figure 19, contains three sections for locating and managing information about Submission Units entered in the ERM application.

Figure 19: Manage Submission Unit



Search Submission Unit section contains search fields that allow you to locate Submission Unit account information using either the Submission Unit ID number or name.

> **NOTE:** This section is mostly used by INPRS Staff Users. The Submission Unit accounts that your security role allows you to view are auto-populated in Section 2 of the screen.

- The *Submission Units* section contains a scrollable grid that is automatically populated with a list of the Submission Units you have permission to view and/or modify. Depending on fund affiliation, this section may also contain the link to the My Choice Open Enrollment.
- **T**he bottom section displays tabs for **Account Details, Address & Phone**, **Payment Admin**, **W & C**, **Contacts**, **Hybrid**, and **My Choice**. PERF or TRF Submission Units will see one or two tabs (Hybrid and/or My Choice) depending on plan election. All other funds will see the **Contribution Type Details** tab. Additional fields will show for PERF submission units on the **Hybrid** or **My Choice** tabs, as applicable.

7.1.1 Search for a Specific Submission Unit Account

To search for a Submission Unit by ID number

1. Enter the Submission Unit ID number in the **Submission Unit ID** field.
2. Click **Search**.

To search for a Submission Unit by name

1. Enter the name of the Submission Unit in the **Submission Unit Name** field.
2. Click **Search**.

7.1.2 Select a Submission Unit Account

All Submission Unit records that you have permission to view display in the scrollable grid in the *Submission Units* section. To select a Submission Unit from the scrollable grid:

1. Scroll through the grid until the record for the Submission Unit you want to update is visible.
2. Click the line associated with the Submission Unit record you want to view.

Once you have selected a Submission Unit to modify, the tabs below the scrollable grid will populate with the chosen Submission Unit's data.

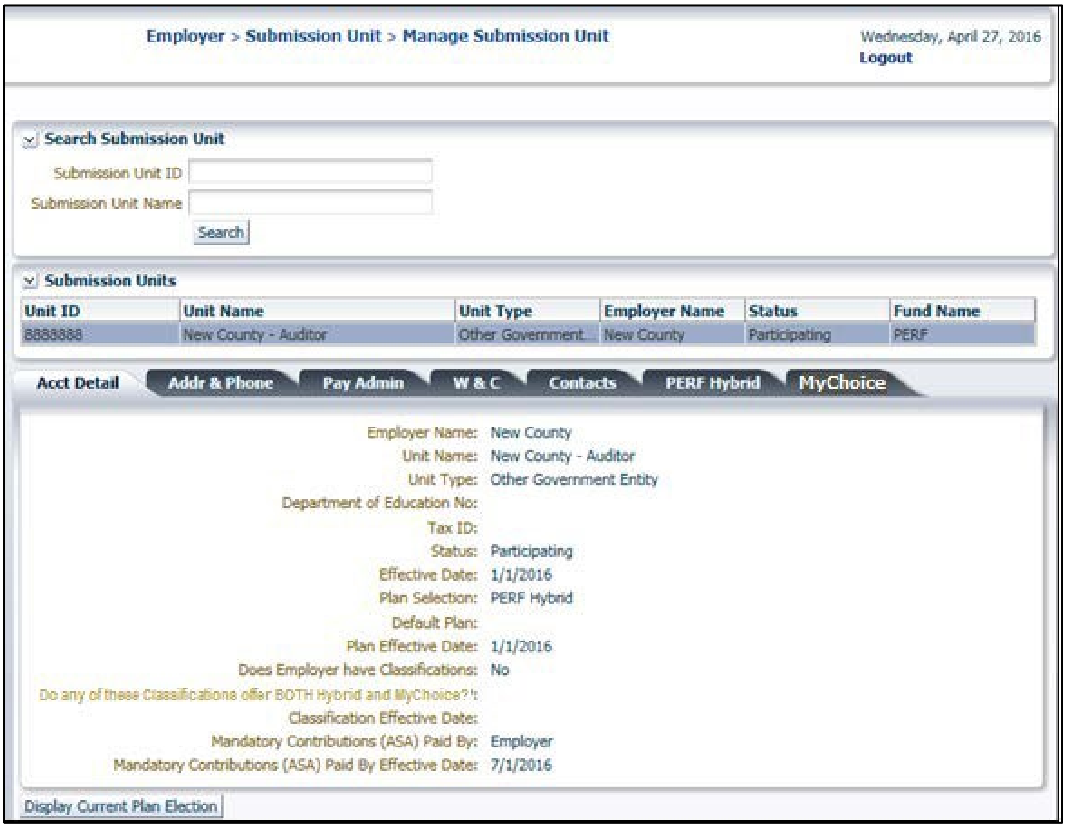
> **NOTE:** For Employer Users who only have access to one Submission Unit account, the grid in Section 2 and the tabs in the bottom section display only the information for that Submission Unit.

7.1.3 Manage Account Details Information

The **Account Details** tab on the *Manage Submission Unit* screen, as shown in Figure 20, displays Submission Unit account information, including:

- Employer Name
- Unit Name
- Unit Type
- Department of Education No.
- Tax ID
- Status
- Effective Date
- Plan Selection
- Default Plan
- Plan Effective Date
- Does Employer have Classifications (PERF Only)
- Classification Effective Date (PERF Only)

Figure 20: Account Details Tab, Manage Submission Unit



The **Account Details** tab contains the **Display Current Plan Election** button

> **NOTE:** Employer Users have view-only access to the information contained in the fields associated with the **Account Details** tab.

7.2 Manage Submission Unit Address or Phone Number Information

To manage Submission Unit address or phone number information, choose the **Address & Phone** tab. This displays two tables, as shown in Figure 21. One has Submission Unit address information, and one has Submission Unit phone number information.

Figure 21: Address & Phone Tab, Manage Submission Unit

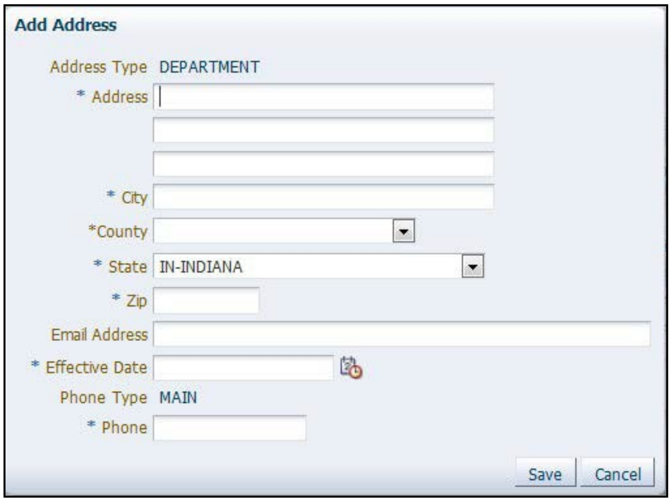
7.2.1 Add a Submission Unit Address

To add a Submission Unit address

1. Click **Add Address** below the *Address* table on the screen. An **Add Address** dialog box opens, as shown in Figure 22. The dialog box contains the following fields:

    - Address Type
    - Address
    - City
    - County
    - State
    - Zip
    - Submission Unit Email Address
    - Effective Date
    - Phone Type
    - Phone

Figure 22: Add Address, Manage Submission Unit



2. The **Address Type** will default to **Department** and cannot be changed.
3. Enter the street address of the Submission Unit in the **Address** fields.
4. Enter the city name in the **City** field.
5. Click the arrow next to the **County** field to access a drop-down menu of Indiana counties. Choose the correct county to populate the field. This field is only required if the Submission Unit's address is in Indiana.
6. The **State** field defaults to Indiana but can be changed. Click the arrow next to the field to access a drop-down menu of states. Choose the correct state, and the **State** field will automatically update.
7. Enter the 9-digit Zip Code (Zip + 4) in the **Zip** field. The required format is shown in a pop-up bubble when you click the **Zip** field.
8. Enter the Submission Unit's email address in the **Email Address** field. This field is notrequired.
9. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
10. Enter the phone number for the Submission Unit in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field. The phone type will default to *Main*; this cannot be changed.
11. Click **Save**.

7.2.2 Modify a Submission Unit Address

To modify a Submission Unit address

1. Click the **Modify** link in the **Action** column on the appropriate line of the *Address* table. A **Modify Address** Dialog Box opens, as shown in Figure 23. The Dialog Box contains the following modifiable fields:
    - Address
    - City

- County
- State
- Zip
- Submission Unit Email Address
- Effective Date

Figure 23: Modify Address, Manage Submission Unit

2. Click the field(s) you want to modify.
3. Enter the updated Submission Unit address information.
4. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click **Save**.

7.2.3 Add a Submission Unit Phone Number

To add a Submission Unit phone number

1. Choose a Submission Unit address from the *Address* table.
2. Click **Add Phone Number**. An **Add Phone Number** dialog box opens, as shown in Figure 24. The dialog box contains the following fields:
    - **Phone Type**
    - **Phone**
    - **Extension**
    - **Effective Date**

Figure 24: Add Phone Number, Manage Submission Unit

3. Click the arrow to the right of the **Phone Type** field to access a drop-down menu containing the following options:

    - Main
    - Fax
    - Cell

    The **Phone Type** field will default to **Main***.* Every Submission Unit must have at least one phone number identified as *Main.* For all additional contact phone numbers, choose the correct phone type option.

    Enter the phone number for the Submission Unit in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.

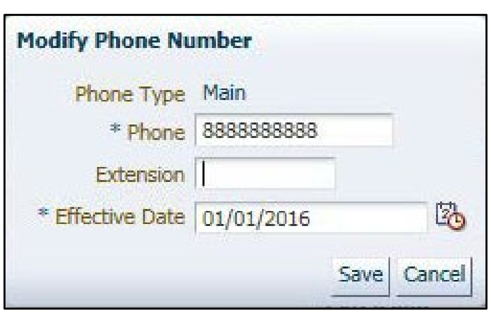
4. If a particular extension is required, enter this number in the **Extension** field.
5. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
6. Click **Save**.

7.2.4 Modify a Submission Unit Phone Number

To modify a Submission Unit phone number

1. Choose a Submission Unit address from the *Address* table. All the phone numbers associated with that Submission Unit display in the *Phone Number* table.
2. Click the **Modify** link in the **Action** column of the *Phone* table at the bottom of the screen. This opens the **Modify Phone Number** dialog box, as shown in Figure 25.

Figure 25: Modify Phone Number, Manage Submission Unit



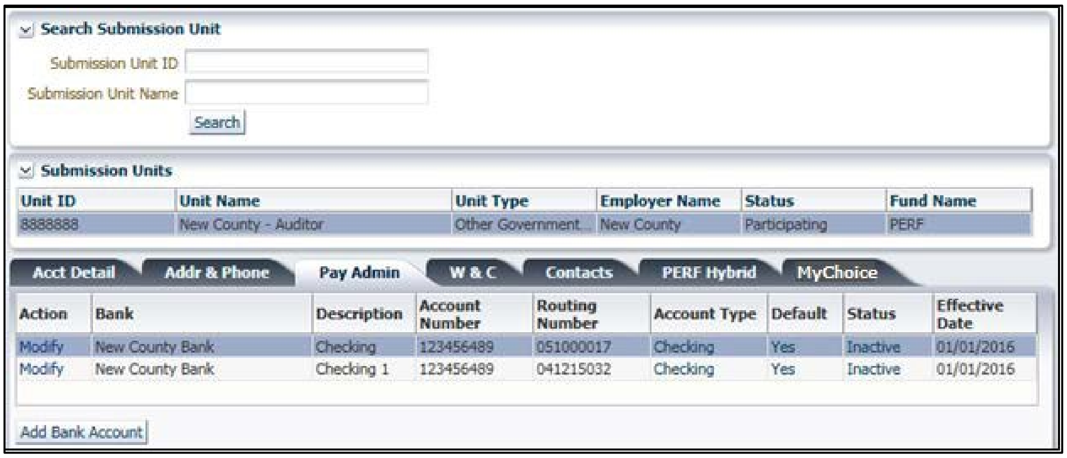
3. Place your cursor in the field you want to modify.

4. Enter the updated Submission Unit phone information.
5. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
6. Click te **Save**.

7.3 Manage Submission Unit Payment Administration

To manage Submission Unit payment administration information, choose the **Payment Admin** tab. This displays a table, where bank account information related to the Submission Unit is entered and stored as shown in Figure 26.

Figure 26: Payment Admin Tab, Manage Submission Unit

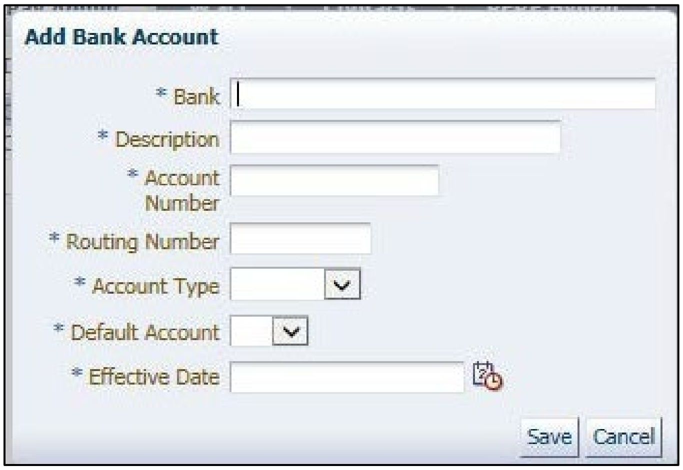


7.3.1 Add Bank Account to a Submission Unit Account

To add bank account

1. Click **Add Bank Account** below the *Bank* table. This opens an **Add Bank Account** dialog box, as shown in Figure 27. The dialog box contains the following fields:
    - Bank
    - Description
    - Account Number
    - Routing Number
    - Account Type
    - Default Account
    - Effective Date

Figure 27: Add Bank Account, Manage Submission Unit



2. Enter the name of the bank associated with the Submission Unit in the **Bank** field.
3. If applicable, enter a description in the **Description** field.
4. Enter the bank account number in the **Account Number** field.
5. Enter the routing number for the bank account in the **Routing Number** field.
6. Click the arrow next to the **Account Type** field to access a drop-down menu containing a list of bank account types. These bank account types are:
    - Savings
    - Checking
7. Click the appropriate enter to populate the field.
8. Click the arrow next to the **Default Account** field to access a drop-down menu containing **Yes** and **No**. Choose the appropriate answer.
    - Any time you must choose between multiple bank accounts, the *Default* account will automatically be selected.
    - When the *Default* account is automatically selected but is not to be used, you must manually select a different bank account from the drop-down menu.

NOTE: Only one bank account may be designated as the default bank account for a Submission Unit.

9. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
10. Click **Save**.

NOTE: ERM will automatically assign any newly created bank account a status of “Inactive.” Once the bank account is authenticated, ERM will update the status to “Active.” It may take up to 10 business days to authenticate the account. During that time, this bank account will not be available for contribution payments. If the bank account cannot be authenticated, an INPRS Staff member will contact you, via phone or email, and instruct you to change the status to “Invalid.”

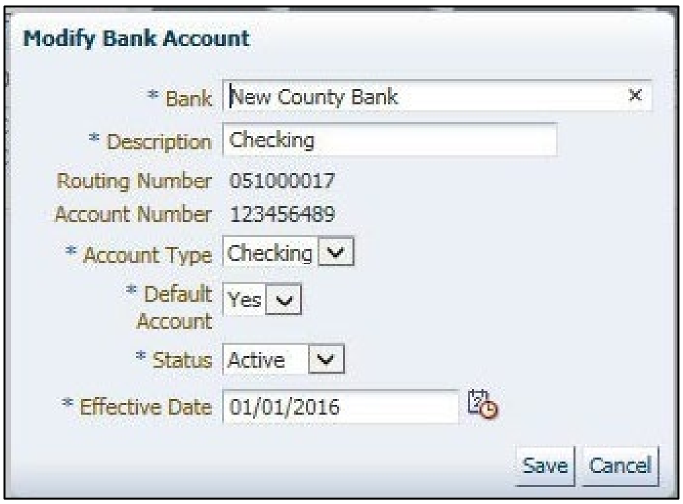
7.3.2 Modify Submission Unit Bank Account

To modify a Submission Unit's bank account

1. Click the **Modify** link found in the **Action** column on the appropriate line of the *Bank* table at the bottom of the screen. This opens the **Modify Bank Account** dialog box, as shown in Figure 28.

> **NOTE:** The **Routing Number** and **Account Number** cannot be changed. If the situation requires this change a new bank account will need to be added. See the *Add Bank Account to a Submission Unit Account* section of this manual for details.

Figure 28: Modify Bank Account, Manage Submission Unit



2. Click the field(s) you want to modify.
3. Enter the updated Submission Unit bank account information.
4. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click **Save**.

7.4 Manage Wage and Contribution (W&C) Submission Information

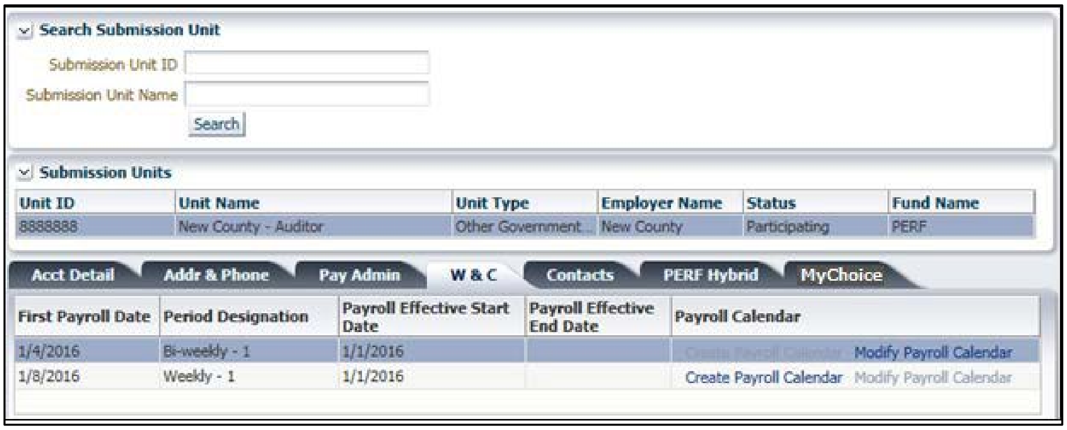
> **NOTE:** Effective 12/31/2009, employers are to submit contributions, records, and reports electronically in a uniform format through a secure connection over the Internet. Set up of employer, users, wage and contribution submissions and instructions on completing tasks are included in the manuals and QRGs available on the ERM – Manuals page and the ERM – Quick Reference Guides page of the INPRS website. The Staff versions are available from INPRS's document management system (PPM).

Choosing the **W&C** tab displays information about payroll data. As shown in Figure 29, the information includes:

- First payroll date associated with each payroll frequency
- Period designations (payroll frequencies)
- Payroll effective date for each payroll frequency/first payroll date combination

- Payroll Calendar

Figure 29: W&C Tab, Manage Submission Unit

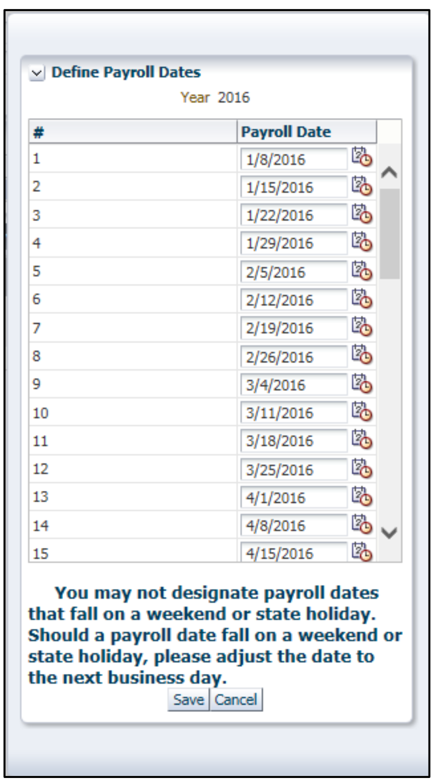


Employer Users save and confirm a payroll calendar to a Submission Unit account upon their initial login through the **W&C** tab on the *Manage Submission Unit* screen.

To save and confirm a payroll calendar

1. Click the **Create Payroll Calendar** link in the **Payroll Calendar** column on the appropriate line of the table under the **W&C** tab. This opens the **Define Payroll Dates** dialog box, shown in Figure 30.

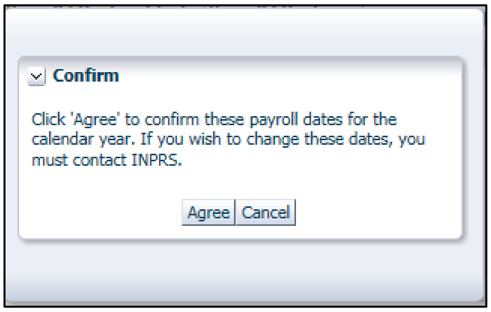
Figure 30: Define Payroll Dates, Manage Submission Unit



2. The applicable payroll dates will be entered by INPRS Staff into the **Payroll Date** fields in the Dialog Box. The number of required payroll dates varies depending upon the payroll frequency.

3. Click **Save** if the dates are correct. If the dates are incorrect, contact INPRS staff. A confirmation screen displays, as shown in Figure 31.
4. Confirm that the entered payroll dates are correct by selecting **Agree** in the dialog box. The Payroll Calendar is saved to the ERM application.

Figure 31: Confirm Payroll Calendar, Manage Submission Unit

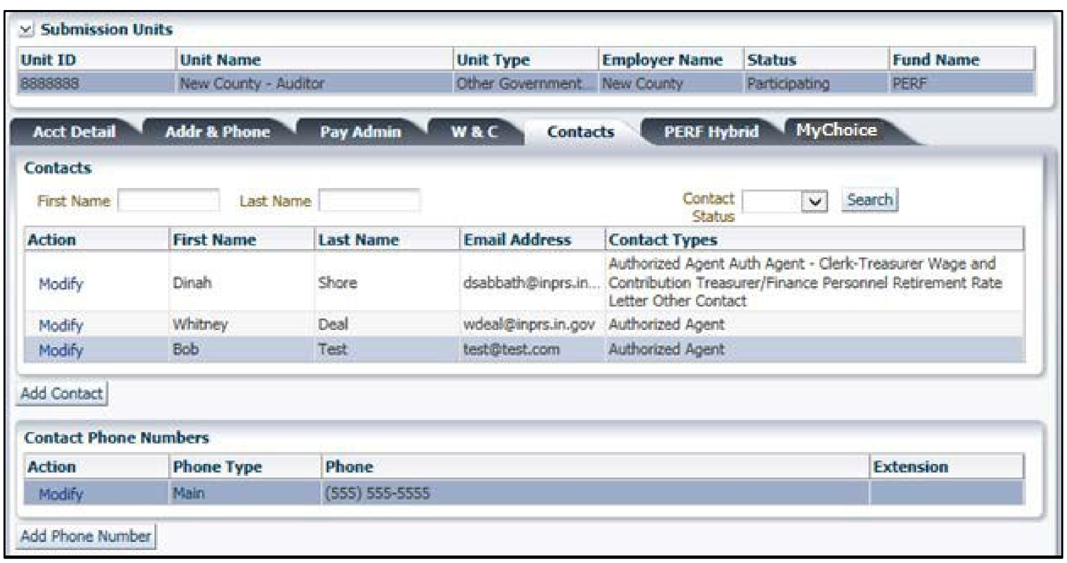


7.5 Manage Submission Unit Contact Information

To manage Submission Unit contact information, choose the **Contacts** tab. This displays a table containing all applicable contacts for the Submission Unit, as shown in Figure 32. To search for an existing contact use the **First Name**, **Last Name**, or **Contact Status** fields in the *Contacts* section of the screen.

> **NOTE:** Once you click **Agree** in the *Confirm* dialog box, you will not be able to make any changes to the payroll calendar through the ERM application. Should you need to update the payroll calendar for any reason, you must contact INPRS. You will not be able to submit wages and contributions to the ERM application until you have confirmed your payroll dates.

Figure 32: Contacts Tab, Manage Submission Unit

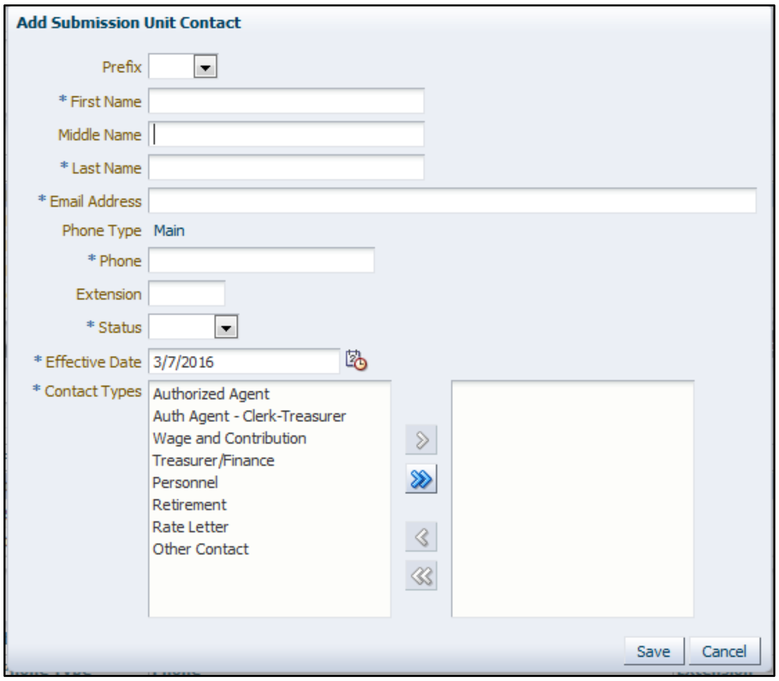


7.5.1 Add a Submission Unit Contact

To add a Submission Unit contact

1. Click **Add Contact** below the *Contacts* table on the screen. The *Add Submission Unit Contact* dialog box opens, as shown in Figure 33.

Figure 33: Add Submission Unit Contace, Manage Submission Unit



2. Click the arrow to the right of the **Prefix** field to access a drop-down menu of prefix choices. Click the applicable prefix to populate the field. This field is not required.
3. Enter the first name of the Submission Unit contact in the **First Name** field.
4. Enter the middle name of the Submission Unit contact, if applicable, in the **Middle Name** field. This field is not required.
5. Enter the last name of the Submission Unit contact in the **Last Name** field.
6. Enter the contact's email address in the **Email Address** field.
7. Enter the contact's 10-digit phone number in the **Phone** field**.** The required format is shown in a pop-up bubble when you click the **Phone** field. The phone type will default to **Main**; this cannot be changed.
8. If a particular extension is required, enter this number in the **Extension** field.
9. Click the arrow next to the **Status** field to access a drop-down menu of these status choices:
   - Active
   - Inactive
10. Choose the **Active** status.
11. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.

12. Choose the contact type, using the shuttle window in the **Contact Type** field. The contact types listed will depend on the fund.
    a. Choose the appropriate contact type(s) from this list, found in the box on the left:
        - Authorized Agent
        - Authorized Agent-Clerk Treasurer
        - Authorized Agent-Trustee(77 Fund Only)
        - Authorized Agent-Controller (77 Fund Only)
        - Chief (77 Fund Only)
        - Superintendent (TRF Only)
        - Pension Secretary
        - Personnel
        - Rate Letter
        - Retirement
        - Treasurer/Finance
        - Wage and Contribution
        - Other Contact
13. Click the right single arrow to move the chosen contact type to the box on the right side of the screen.
    a. If a contact type is added to the box on the right side of the screen by mistake, complete the following steps:
    b. In the box on the right side of the screen, highlight the appropriate contact type from the list.
        1) Click the left single arrow to move the contact type to the box on the left side of the screen.
        2) Verify the entered information is correct and then click **Save**.

NOTE: For the definition of each contact type, see the *ERM Glossary* document .

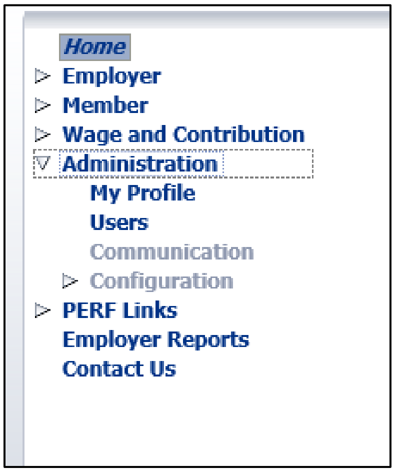
7.5.2 Add an Existing Submission Unit Contact

Each Submission Unit contact must have an email address that is unique in the ERM application. If you attempt to add a contact and you get a message stating that the contact cannot be added because the contact's email address already exists, you must add the contact through the "Administration" section of the ERM application.

To add a Submission Unit contact in the *Administration* section

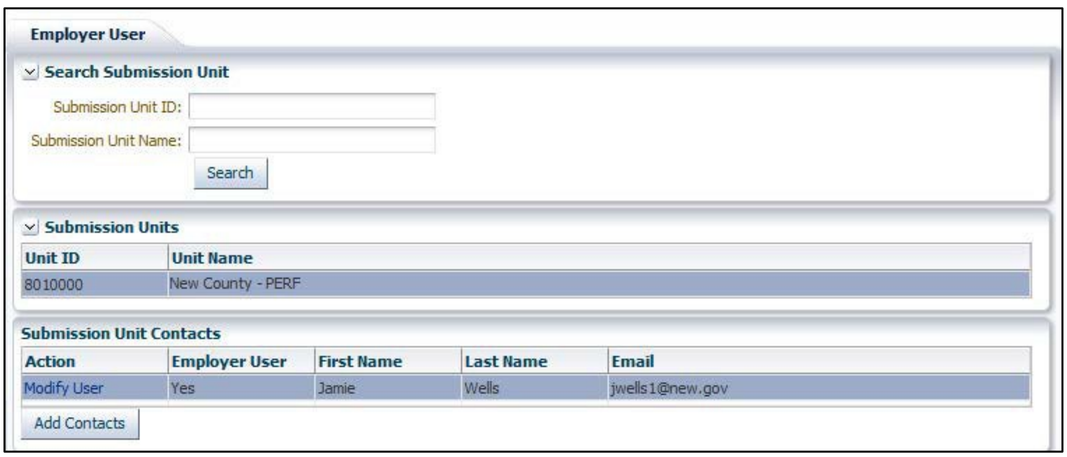
1. Access the *Administration* section of the ERM application as shown in Figure 34.

Figure 34: Administration Options, Navigation Menu



2. Click **Users**, and the *Employer User* screen displays, as shown in Figure 35.

Figure 35: Employer User



3. Select the Submission Unit for the contact to be added and click **Add Contacts**. This opens the **Email Search** dialog box, as shown in Figure 36.

Figure 36: Email Search, Employer User

4. When the shuttle window displays, enter the email address for the contact into the **Email** field and click **Search**. If the email address is found, it displays in the *Available Contacts* list on the left side of the shuttle window.

5. Click the right facing single arrow to move the email address to the *Selected Contacts* list on the right side of the screen. Click **Save** to add the contact to the Submission Unit.

6. Once the contact is added, return to the *Manage Submission Unit* screen to modify the contact, if necessary.

7.5.3 Add a Submission Unit Contact Phone Number

To add a Submission Unit contact phone number

1. Choose a Submission Unit contact from the *Contacts* table.
2. Click **Add Phone Number**. This opens the **Add/Edit Phone Number** dialog box, as shown in Figure 37. The dialog box contains the following fields:
   - Phone Type
   - Phone
   - Extension

Figure 37: Add/Edit Phone Number, Manage Submission Unit

3. Click the arrow to the right of the **Phone Type** field to access a drop-down menu of thefollowing options:

- Main
- Cell
- Fax

4. Every contact must have at least one phone number identified as *Main.* For all additional contact phone numbers, choose the correct phone type option from the drop-down menu.
5. Enter the phone number for the contact in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
6. If a particular extension is required, enter this number in the **Extension** field.
7. Click **Save**.

7.5.4 Modify a Submission Unit Contact

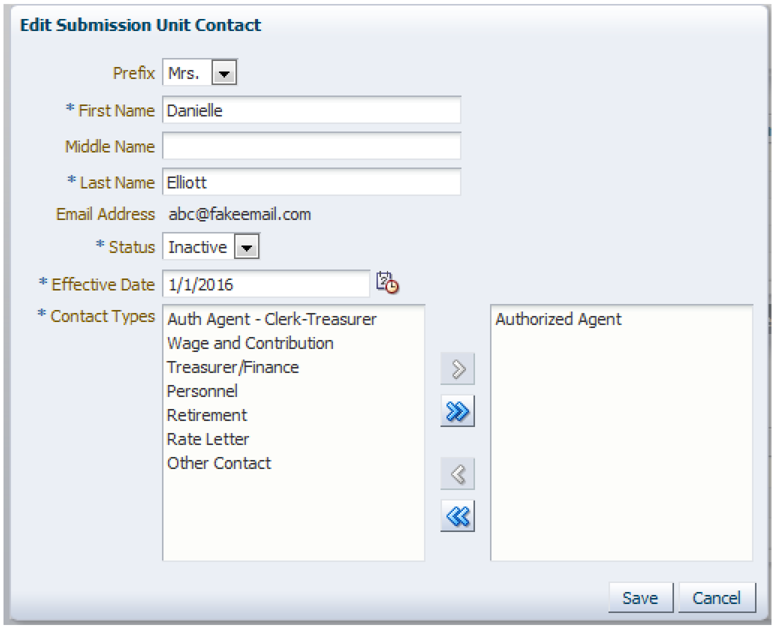
To modify a Submission Unit contact

1. Click the **Modify** link in the **Action** column on the appropriate line of the *Submission Unit Contacts* table. The *Edit Submission Unit Contact* dialog box opens, as shown in Figure 38. The dialog box contains the following modifiable fields:

    - Prefix
    - First Name
    - Middle Name
    - Last Name
    - Status
    - Effective Date
    - Contact Type Id

NOTE: Contact Types *Superintendent* for TRF and *Authorized Agent* for PERF can only be modified by an INPRS Staff User.

Figure 38: Edit Submission Unit Contact, Manage Submission Unit



2. Click the field(s) you want to modify.
3. Enter the updated Submission Unit contact information.
4. Click **Save**.

7.5.5 Modify a Submission Unit Contact Phone Number

To modify a Submission Unit contact phone number

1. Choose a contact from the *Contacts* table. All phone numbers associated with that contact displays in the *Contact Phone Numbers* table.
2. Click the **Modify** link in the **Action** column on the appropriate line of the *Phone* table at the bottom of the screen. This opens the *Add/Edit Phone Number* dialog box, as shown in Figure 37.
3. This box contains the following fields:
    - Phone Type
    - Phone
    - Extension
4. Place your cursor in the field(s) you want to modify.
5. Enter the updated contact's phone information.
6. Click **Save**.

7.5.6 Delete a Submission Unit Contact Phone Number

Only Submission Unit contact phone numbers designated as *Cell* or *Fax* can be deleted. To delete a Submission Unit contact phone number:

1. Choose a contact from the *Contacts* table. All phone numbers associated with that contact displays in the *Contact Phone Numbers* table.
2. Click the **Delete** link in the **Action** column of the *Phone* table at the bottom of thescreen. A confirmation box will open.
3. Cick **OK** to delete the phone number.

7.6 View Submission Unit Contribution Type Details

The **Contribution Type Details** tab displays details about the Fund associated with a Submission Unit account and the types of contributions made to that Fund. The information for each Fund type is different. The name and number of tabs viewable may be different depending on Fund affiliation.

> **NOTE:** Employer Users have view-only access to the information contained in the fields associated with the **Contribution Type Details** tab of the *Modify Submission Unit* screen.

> **NOTE:** PERF and TRF no longer have a separate **Contribution Type Details** tab. The information from that tab is now part of the **Hybrid** or **My Choice** tabs for PERF and TRF. For all other Funds, the **Contribution Type Details** tab is available.

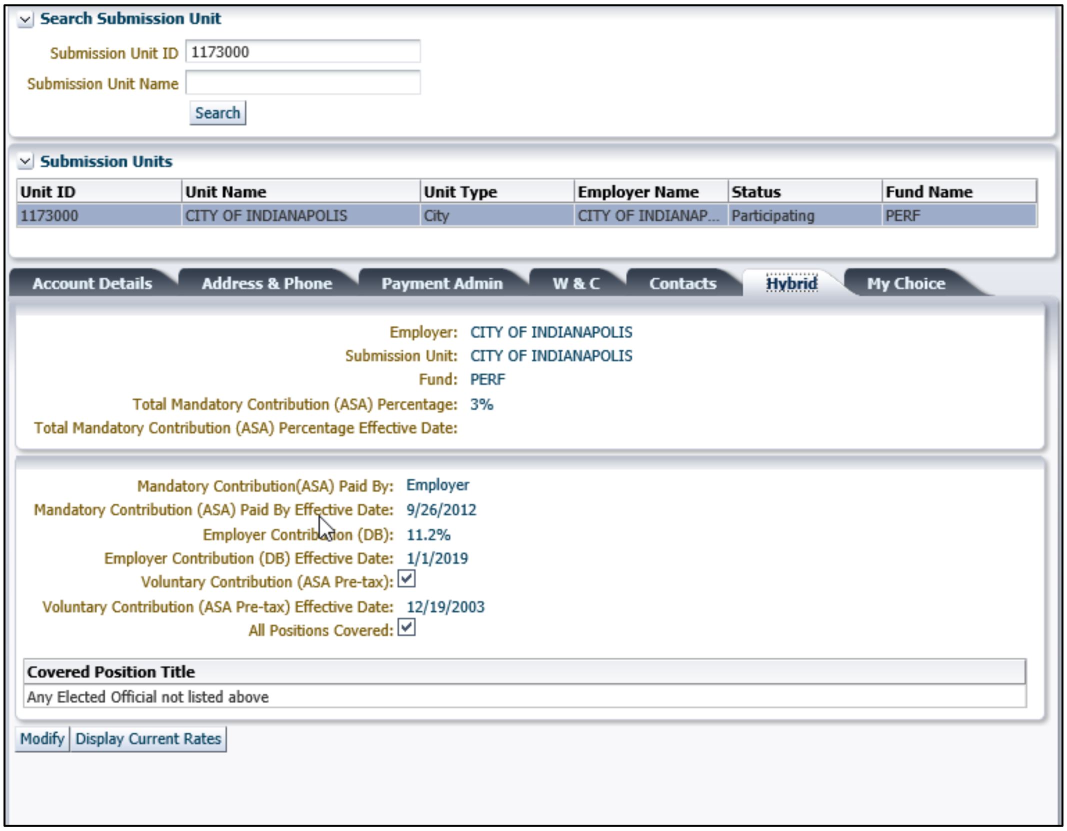
7.6.1 Hybrid

For PERF or TRF, the **Hybrid** tab displays contribution type details with the following fields, as shown in Figure 39:

- Employer
- Submission Unit
- Fund
- Total Mandatory Contribution (ASA) Percentage
- Total Mandatory Contribution (ASA) Percentage Effective Date
- Employer Contribution (DB)
- Employer Contribution (DB) Effective Date
- Voluntary Contribution (ASA Pre-tax) *
- Voluntary Contribution (ASA Pre-tax) Effective Date *
- All Positions Covered

* **Effective 1/01/2018** Voluntary Pre-Tax Contributions are no longer an option for new participation by members or employers. Participation cannot be changed or added as of 1/01/2018. Employers and members already enrolled in the Voluntary Pre-Tax Contributions prior to 1/01/2018 must remain in the plan as is. The election for participation in this plan is irrevocable for both the member and the employer.

Figure 39: Hybrid Tab



7.6.2 My Choice

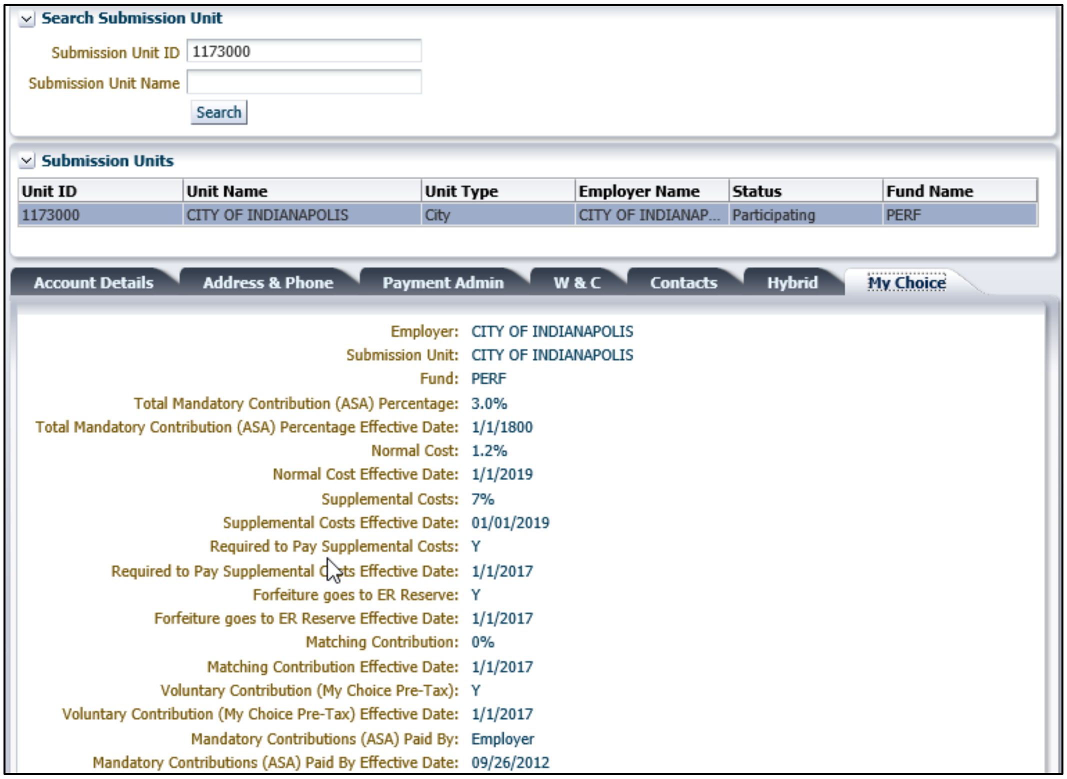
For PERF or TRF the **My Choice** tab, the contribution details are displayed in the following fields, as shown in Figure 40:

- Employer
- Submission Unit
- Fund
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Normal Cost
- Normal Cost Effective Date
- Supplemental Cost
- Supplemental Cost Effective Date
- Required to Pay Supplemental Cost
    - YES: Forfeiture goes to ER Reserve
- Effective Date
- Voluntary Contribution (ASA Pre-tax) *

- Voluntary Contribution (ASA Pre-tax) Effective Date *

* **Effective 1/01/2018** Voluntary Pre-Tax Contributions are no longer an option for new participation by members or employers. Participation cannot be changed or added as of 1/01/2018. Employers and members already enrolled in the Voluntary Pre-Tax Contributions prior to 1/01/2018 must remain in the plan as is. The election for participation in this plan is irrevocable for both the member and the employer.

Figure 40: My Choice Tab



7.6.3 TRF Contribution Type Details

This information is no longer on a separate tab for PERF and TRF, but rather, featured on the appropriate **My Choice** or **Hybrid** tab, as applicable, as shown in Figures 39 and 40:

- Employer
- Submission Unit
- Fund Employer Contribution
- Employer Contribution Effective Date
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Mandatory Contribution (ASA) Paid By

7.6.4 1977 Fund Contribution Type Details

For the 1977 Fund, the **Contribution Type Details** tab displays the following fields, as shown in Figure 41:

- Employer
- Submission Unit
- Fund
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Employer Contribution (DB)
- Employer Contribution Effective Date (DB)
- DROP Participation

Below these fields is a second set of information detailing additional details associated with the Certified First Class Salary. Below the table is the *Contribution Type Details* section of the screen, which contains the following fields:

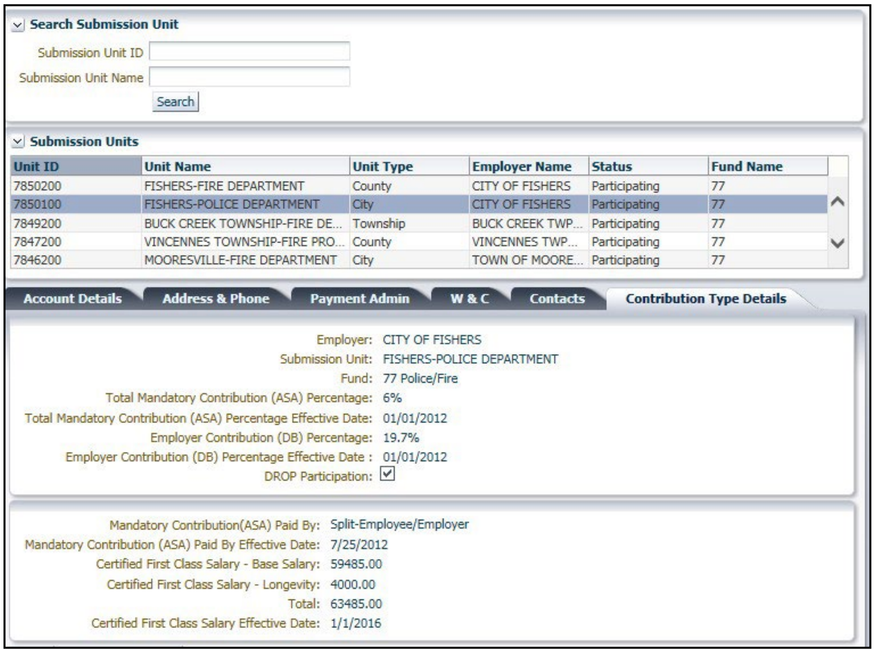
- Mandatory Contribution (ASA) Paid By

> **NOTE:** If the **Mandatory Contribution (ASA)** is *Split-Employee/Employer*, this field will also show: *Mandatory Contribution (ASA) Paid by Employer*.

- Certified First Class Salary (Base Salary and Longevity)

> **NOTE:** The first-class salary is defined by State law as the "salary of a first class patrolman or first class firefighter" means the highest nonpromoted salary of a patrolman or firefighter plus all longevity increases, if provided by the employer, for:
> (1) service of not more than twenty (20) years; or
> (2) service of more than twenty (20) years but no more than twenty-five (25) years if provided as a result of the meet and confer process under IC 36-8-22;
> but does not include remuneration or allowances for fringe benefits, incentive pay, holiday pay, insurance, clothing, automobiles, firearms, education, overtime, or compensatory time off. (IC 36-8-8-6.5, Sections 6.5 and 7 and IC 36-8-1-11)
>
> Upon retirement, benefits are based on the first-class salary effective for the member's employer in the year service ends. This first-class salary varies by employer and is certified annually to the 1977 Fund by the employer's governing board. Each fund member who qualifies for a retirement benefit payment under IC 8-8-10(c) of this chapter is entitled to receive a monthly benefit equal to fifty percent (50%) of the monthly salary of a first class patrolman or firefighter in the year the member ended the member's active service. (IC 8-8-11(c)

Figure 41: 1977 Fund Contribution Type Details Tab



7.6.5 JU/JRS System Contribution Type Details

For the JU Fund, the **Contribution Type Details** tab contains two sections, as shown in Figure 42. The *Fund Details* section displays the following information:

- Employer
- Submission Unit
- Fund
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date

Below these fields is a table that displays a list of position titles applicable to the JU System and their associated certified salaries.

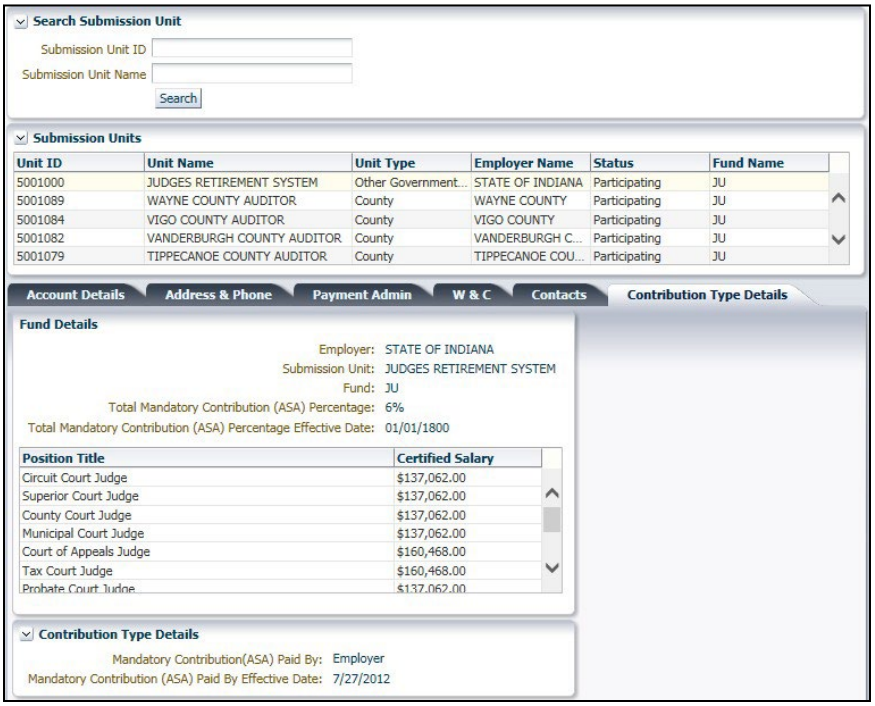
Below the table is the *Contribution Type Details* section of the screen, which contains the following fields:

- Mandatory Contribution (ASA) Paid By

> **NOTE:** If the **Mandatory Contribution (ASA)** is *Split-Employee/Employer*, this field will also show: *Mandatory Contribution (ASA) Paid by Employer*.

- Mandatory Contribution (ASA) Paid By Effective Date

Figure 42: JU System Contribution Type Details Tab



7.7 PERF Employer Enrollment Resolution

The *PERF Employer Enrollment Resolution* section allows for a submission unit to make changes to the plans offered by the unit. Submission units can elect to offer the PERF Hybrid, PERF My Choice, and/or a combination of the plans. This link is available to users with the Wage and Contribution Administrator security role.

7.7.1 Select a Submission Unit Account

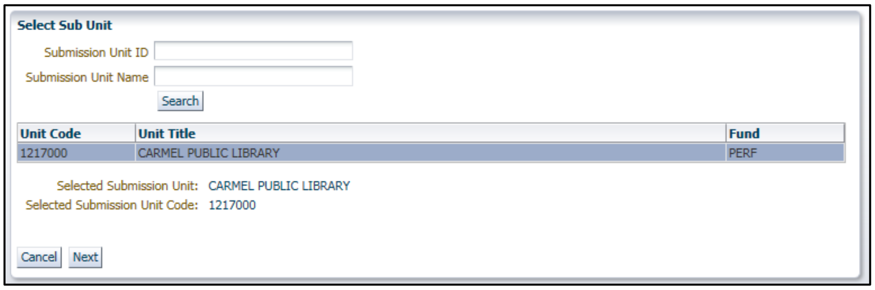
All Submission Unit records that you have permission to view display in the scrollable grid in the *Submission Unit* section. To select a Submission Unit from the scrollable grid:

1. Scroll through the grid until the record for the Submission Unit you want to update is visible.
2. Click the line associated with the Submission Unit record you want to view.
3. Once you have selected a Submission Unit to modify, the tabs below the scrollable grid will populate with the chosen Submission Unit's data.

> **NOTE:** For Employer Users who only have access to one Submission Unit account, the grid in *Submission Units* section and the tabs in Section 3 display only the information for that Submission Unit.

4. Click **Next** as shown in the *Select Sub Unit* screen on Figure 43.

Figure 43: Select Sub Unit



Select Sub Unit

Submission Unit ID

Submission Unit Name

Search

Unit Code	Unit Title	Fund
1217000	CARMEL PUBLIC LIBRARY	PERF

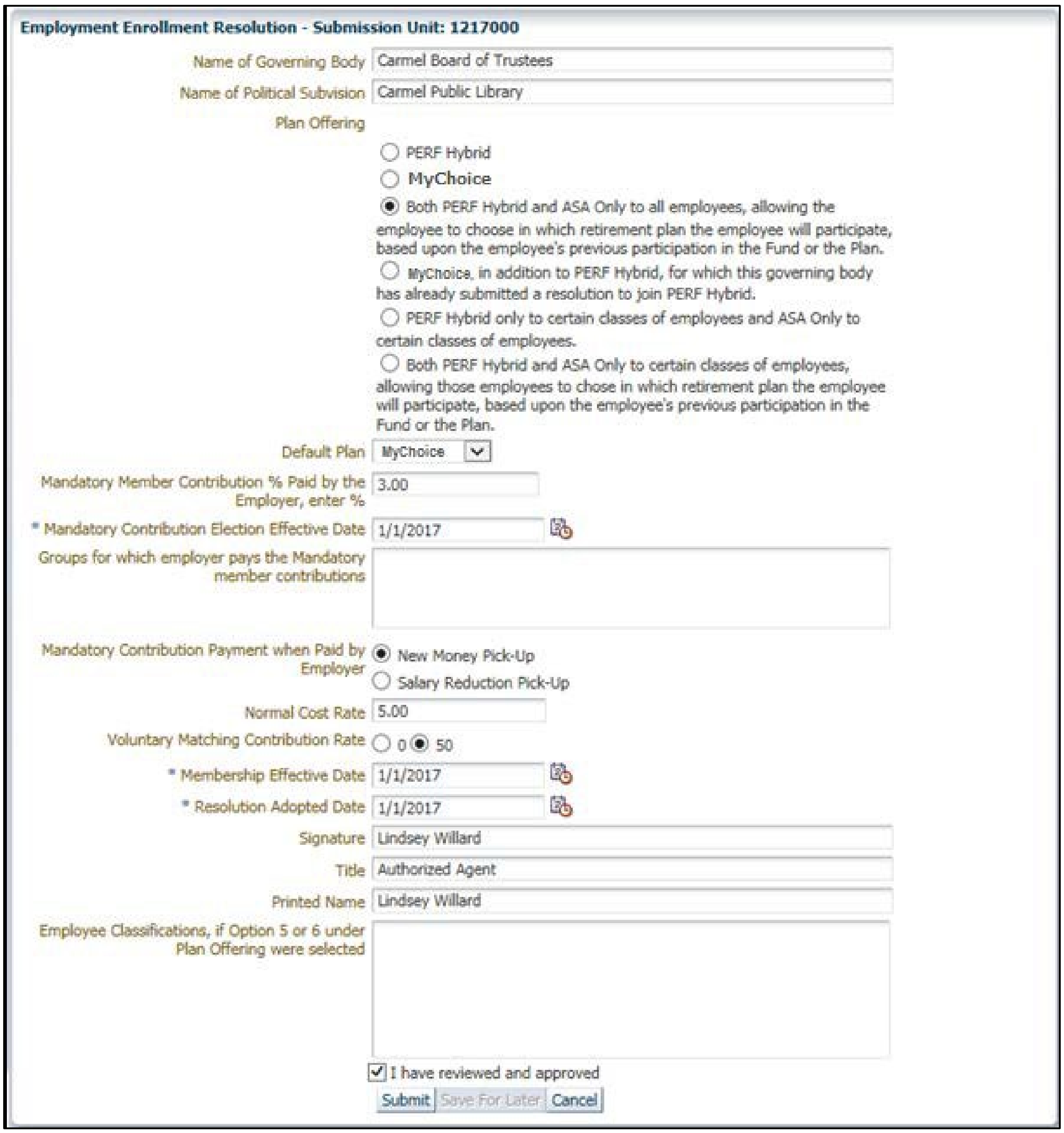
Selected Submission Unit: CARMEL PUBLIC LIBRARY

Selected Submission Unit Code: 1217000

Cancel Next

5. The *PERF Employer* i *Resolution* screen displays as shown in Figure 44.

Figure 44: PERF Employer Enrollment Resolution



Employment Enrollment Resolution - Submission Unit: 1217000

Name of Governing Body: Carmel Board of Trustees

Name of Political Subvision: Carmel Public Library

Plan Offering:

- PERF Hybrid
- MyChoice
- (selected) Both PERF Hybrid and ASA Only to all employees, allowing the employee to choose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.
- MyChoice, in addition to PERF Hybrid, for which this governing body has already submitted a resolution to join PERF Hybrid.
- PERF Hybrid only to certain classes of employees and ASA Only to certain classes of employees.
- Both PERF Hybrid and ASA Only to certain classes of employees, allowing those employees to chose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.

Default Plan: MyChoice

Mandatory Member Contribution % Paid by the Employer, enter %: 3.00

* Mandatory Contribution Election Effective Date: 1/1/2017

Groups for which employer pays the Mandatory member contributions:

Mandatory Contribution Payment when Paid by Employer: (selected) New Money Pick-Up / Salary Reduction Pick-Up

Normal Cost Rate: 5.00

Voluntary Matching Contribution Rate: 0 / (selected) 50

* Membership Effective Date: 1/1/2017

* Resolution Adopted Date: 1/1/2017

Signature: Lindsey Willard

Title: Authorized Agent

Printed Name: Lindsey Willard

Employee Classifications, if Option 5 or 6 under Plan Offering were selected:

☑ I have reviewed and approved

Submit Save For Later Cancel

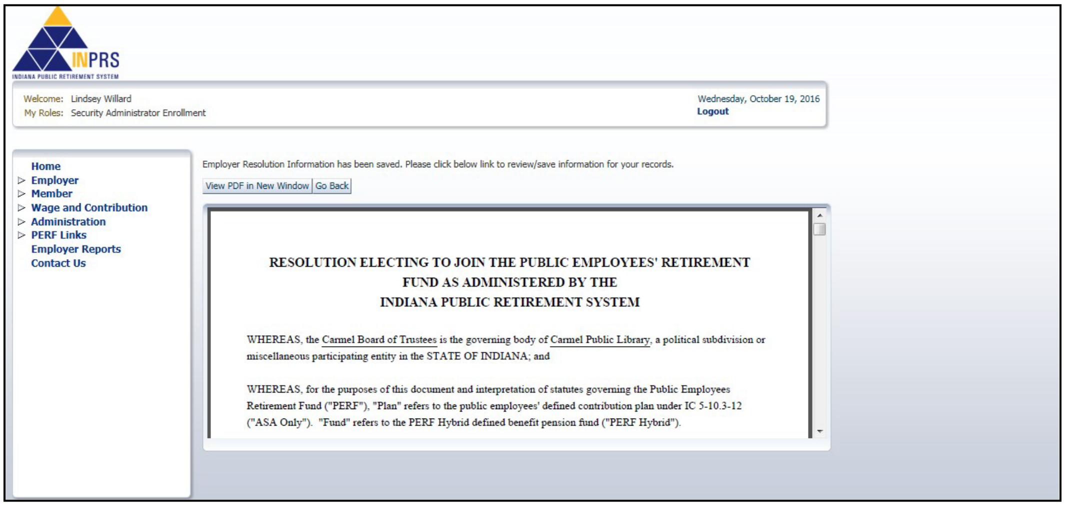
The following fields should be completed in order to submit an employer resolution:

1. Name of Governing Body
2. Name of Political Subdivision
3. Plan Offering
   a. Select one option:
      1) Hybrid
         a) Select this option if you want to only offer the Hybrid fund.
      2) My Choice
         a) Select this option if you want to only offer the My Choice Retirement Savings Plan.
      3) Both Hybrid and My Choice to all employees, allowing the employee to choose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.
         a) Select this option if you want to offer both plans and the option for the member to choose which fund they are a part of, based on previous participation.
      4) My Choice, in addition to Hybrid, for which this governing body has already submitted a resolution to join Hybrid.
         a) Select this option if you want to maintain your current Hybrid coverage for existing employees and enroll new hires into the My Choice.
      5) Hybrid only to certain classes of employees and My Choice to certain classes of employees.
         a) Select this option if you want to offer Hybrid to groups of employees and My Choice to other groups of employees.
      6) Both Hybrid and My Choice to certain classes of employees, allowing those employees to choose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.
         a) Select this option if you want to offer both Hybrid and My Choice to certain groups of employees.
4. Default Plan
   a. The retirement fund, either My Choice or Hybrid, into which a member will be automatically enrolled if the submission unit offers both options and the member fails to make an election within 60 days of their hire date. Select one option:
      1) My Choice Retirement Savings Plan
      2) Hybrid
5. Mandatory Member Contribution % Paid by the Employer
   a. Enter the percentage, between 0% and 3%, that is being paid by the employer. Any amount less than 3% will be paid by the member.
6. Mandatory Contribution Election Effective Date

7. Groups for which employer pays the Mandatory member contributions
    a. Submission Units may elect to split the pickup of contributions by groups of employees. Enter the groups, if applicable. Submission Units can elect to pick up contributions for Exempt employees but not for Non-Exempt employees for example.
8. Mandatory Contribution Payment when paid by Employer
    a. Select New Money Pick-Up or Salary Reduction Pick-Up
        1) **New Money Pick-Up** means: Contributions designated as employee contributions for state law purposes, are being paid by the employer in addition to regular compensation as a supplemental contribution that is separate and distinct from the employees' current or future compensation, and in lieu of contributions by the employees. These contributions are made on a pre-tax basis and are paid by the employer on behalf of the employee.
        2) **Salary Reduction Pick-Up** means: Contributions designated as employee contributions for state law purposes, are being paid by the employer via a reduction in salary. These contributions are made on a pre-tax basis but are paid by the employee through a payroll deduction.
9. Normal Cost Rate
    a. A percentage calculated by INPRS' actuary and approved by the INPRS Board that would be equivalent to funding the pension in the PERF Hybrid fund. This rate is subject to change January 1 of each year. The submission unit can select the employer contribution rate for members participating in the My Choice Retirement Savings Plan. The contribution rate may not be higher than the normal cost of fund participation. The rate as of July 1, 2016 can be anywhere between 0 and 5.8%. As of January 1, 2017, the maximum normal cost percentage will be 4.1%.
10. Voluntary Matching Contribution Rate
    a. Contributions made by the submission unit based on the member's voluntary contributions. The matching contributions must be either 0% or 50% of the voluntary contributions made by the member.
11. Membership Effective Date
12. Resolution Adopted Date
    a. This is the date the submission unit's governing body passed the resolution to join the My Choice Retirement Savings Plan.
13. Signature
14. Title
15. Printed Name
16. Employee Classifications – If Option 5 or 6 under Plan Offering were selected
17. Check the box *I have reviewed and approved* to confirm your entries.
18. Click **Submit** to submit your elections.

The Resolution is saved and the screen reflects a completed resolution as shown in Figure 45.

Figure 45: PERF Employer Enrollment Resolution Confirmation



To make corrections:

- Click **Go Back**

To print and save the Resolution:

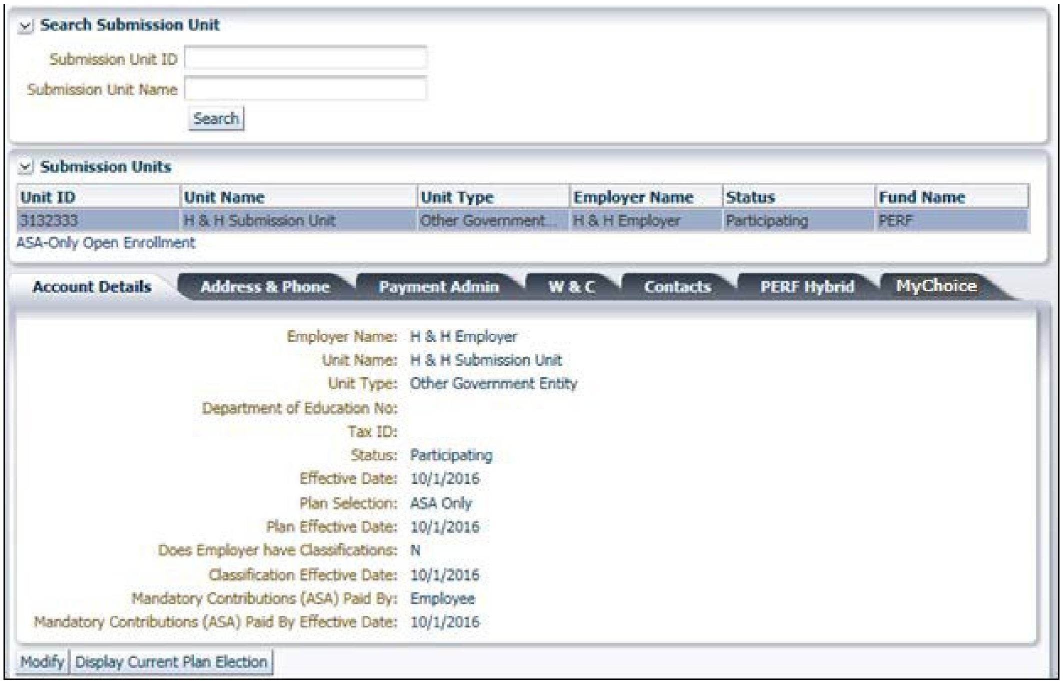
- Click **View PDF in New Window**

7.8 PERF My Choice Retirement Savings Plan Employer Open Enrollment

Open Enrollment is available to PERF employers who have elected to offer the My Choice Retirement Savings Plan. Each year, elections for coverage can be made but nothing is required if no changes are needed.

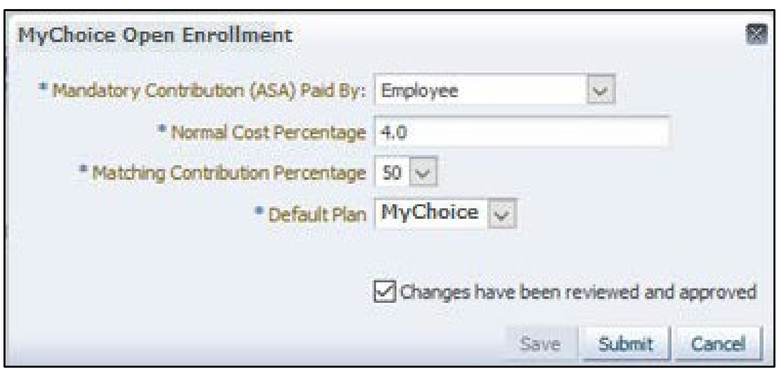
To make changes to the elections for the following year, click the **My Choice Open Enrollment** link on the *Manage Submission Unit* screen as shown in Figure 46.

Figure 46: Manage Submission Unit



1. Click the **My Choice Open Enrollment** link in the Submission Unit grid. The *My Choice Open Enrollment* dialog box displays, as shown in Figure 47.

Figure 47: My Choice Open Enrollment



Choose who pays the mandatory member contributions by selecting:

- Employee
- Employer
- Split-by Position
- Split-Employee/Employer

1. Enter the **Normal Cost Percentage** to contribute between 0 and the maximum.
    - The normal cost is a percentage calculated by INPRS' actuary and approved by the INPRS Board that would be equivalent to funding the pension in the PERF Hybrid fund. The submission unit can

select the employer contribution rate for members participating in the My Choice Retirement Savings Plan. As of January 1, 2019, the maximum normal cost percentage is 4.2%.

2. Make a selection for **Matching Contribution Percentage** of either 0% or 50%
   - Matching contributions must be either 0% or 50% of the voluntary contributions made by the member. Matching contributions will default to 0% if the submission unit does not elect to match 50% of voluntary member contributions.
3. If an employer offers a choice between the PERF Hybrid and, they can also change the default plan if no choice is made by the member.
   - Select either PERF Hybrid or My Choice as the default.
4. Select the Changes have been reviewed and approved box.
5. Click **Submit** once all entries have been completed.
   - The changes will be effective January 1 of the following year.

8 Manage Employer Users

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

ERM security administrators can add new Employer Users in the ERM application. Before a new Employer User can be added and assigned a security role, he or she must be added as a Submission Unit contact in the ERM application.

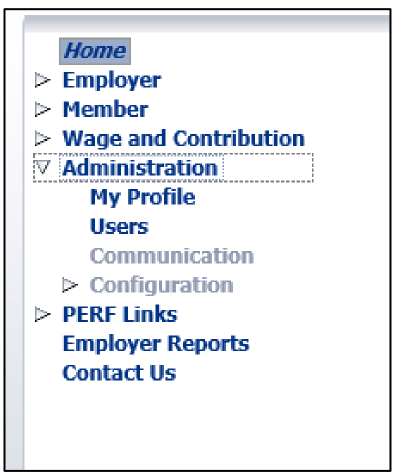
NOTE: For detailed information about how to add a Submission Unit contact, see the *Adding a Submission Unit Contact* in this manual.

8.1 Add a New Employer User

To access the Administration options for adding a new Employer User:

1. Click the arrow to the right of *Administration* in the *Navigation Menu*. This opens thedrop-down menu, shown in Figure 48. This menu shows all possible administrative actions that are available on a Submission Unit account. Any screens that Employer Users cannot access displays grayed out in the Navigation Menu.

Figure 48: Administration Options, Navigation Menu

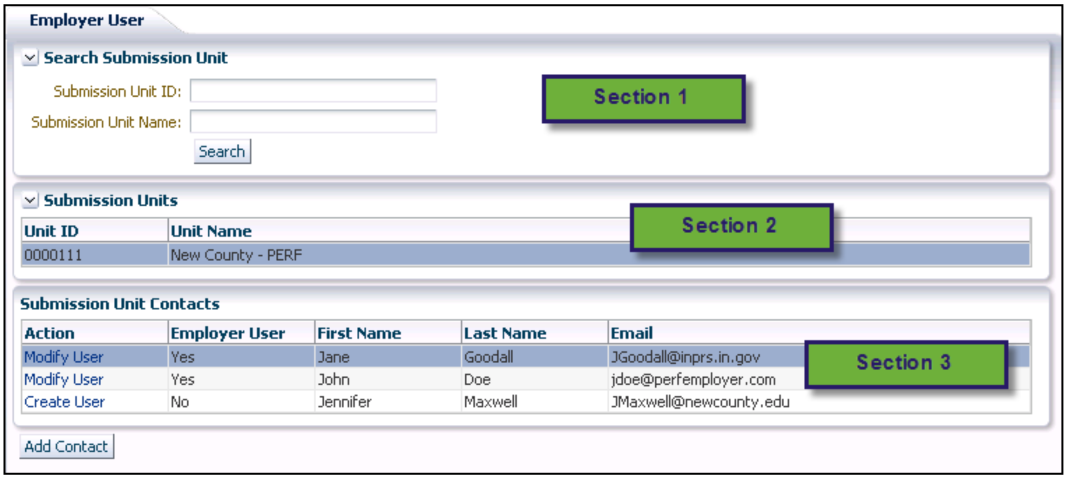


The options in the drop-down menu are:

- My Profile
- Users
- Communication
- Configuration

1. Choose **Users**, and the *Search Submission Unit* screen displays. The screen contains three sections, as shown in Figure 49.

Figure 49: Add Employer User, Search Submission Unit



- *Search Submission Unit* section contains search fields that allow you to locate the Submission Unit account for the new contact, using either the Submission Unit ID number or name.

NOTE: This section is mostly used by INPRS Staff Users.

- *Submission Unit* section displays only the Submission Unit(s) that match the search criteria provided and that you have permission to view.
- *Submission Unit Contacts* section contains a list of the contacts for the Submission Unit account.

8.1.1 Identifying the Submission Unit

To search for a Submission Unit by ID number:

1. Enter the Submission Unit ID number in the **Submission Unit ID** field.
2. Click **Search**.

To search for a Submission Unit by name:

1. Enter the name of the Submission Unit in the **Submission Unit Name** field.
2. Click **Search**.

To select a Submission Unit from the scrollable grid:

1. Scroll through the grid until the record for the Submission Unit to which you want to add a user is visible.
2. Click the line associated with that Submission Unit record.

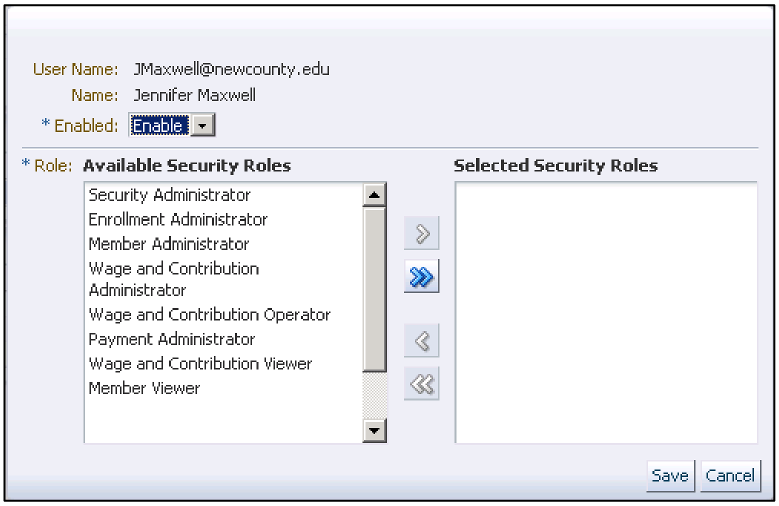
8.1.2 Identifying an Employer Contact as an Employer User

To assign a new Employer User role to an employer contact:

1. Locate the contact you want to identify as an Employer User in the *Submission Unit Contacts* table.

2. Click the **Create User** link next to the contact's name. The *Create Employer User* dialog BOX displays, as shown in Figure 50.

Figure 50: Create Employer User



3. Choose **Enable** from the drop-down menu in the **Enabled** field.
4. Select one or more security roles from the *Available Security Roles* window on the left side of the dialog box. For details about each role, refer to the *ERM Glossary*.
5. Click the right single arrow to move the selected security role(s) to the right side of the shuttle window.
6. When you have assigned all applicable security roles, click **Save**. The value in the **Employer User** column of the table for the selected contact changes from **No** to **Yes**.

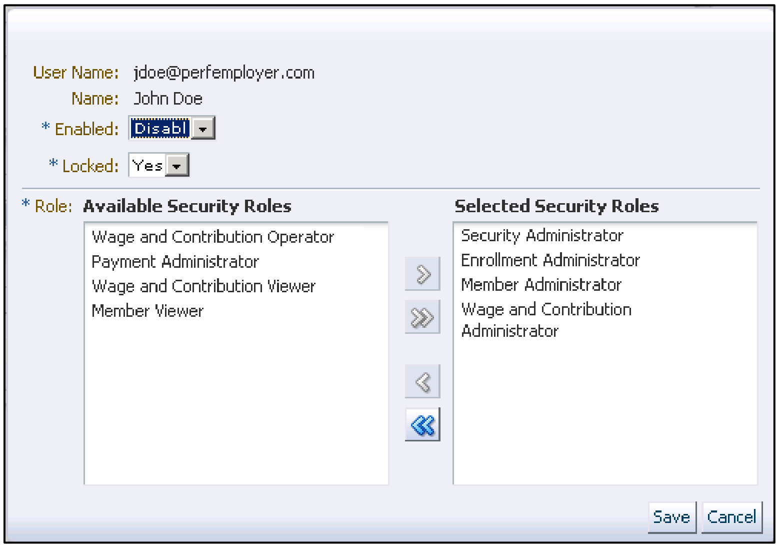
NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

8.2 Modifying an Employer User

To modify an Employer User

1. Choose a Submission Unit from the list. The contacts for the Submission Unit then populate in the *Submission Unit Contacts* section of the screen.
2. Click the **Modify** link next to the user you need to modify in the *Search Submission Unit* screen associated with the *Users* option in the *Navigation Menu*. This opens the *Modify Employer User* dialog box, shown in Figure 51.

Figure 51: Modify Employer User



3. To disable an Employer User, choose **Disable** from the drop-down menu in the **Enabled** field. The chosen user will no longer be able to access the application.
4. To give an Employer User access to the ERM application, choose **Enable** from the drop-down menu in the **Enabled** field.
5. To lock an Employer User out of the application, choose **Yes** from the drop-down menu in the **Locked** field.
6. To unlock an Employer User account, choose **No** from the drop-down menu in the **Locked** field.
7. To add security roles for an Employer User, select one or more security roles from the *Available Security Roles* window to the left of the dialog box.
8. Click the right single arrow to move the selected security role(s) to the right of the shuttle window.
9. To remove security roles for an Employer User, select one or more security roles from the Selected Security Roles window to the right of the shuttle window in the *Modify Employer User* dialog box.
10. Click the left single arrow to move the selected security role(s) to the left of the shuttle window.
11. Click **Save** to save the changes for the Employer User in the ERM application.

NOTE: If a Submission Unit contact designated as an Employer User leaves your organization, disable his or her Employer User account and change the contact status to **Inactive**.