
Pension Relief

November 20, 2009



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Pension Relief Upgrades

- Changes made to the pension relief submission process in order to remedy problems experienced last year
- Enhancements of the pension relief submission process using PERF Online to create a more user-friendly experience



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Key Benefits

- Less time consuming process
 - Information can be pre-populated
- Additional information insures full evaluation of departments
- Receive Pension Relief money quickly and safely when you sign up for Electronic Funds Transfer (EFT)
- Secure log-in provides safe data transfer
- Modifications of process for enhanced usability

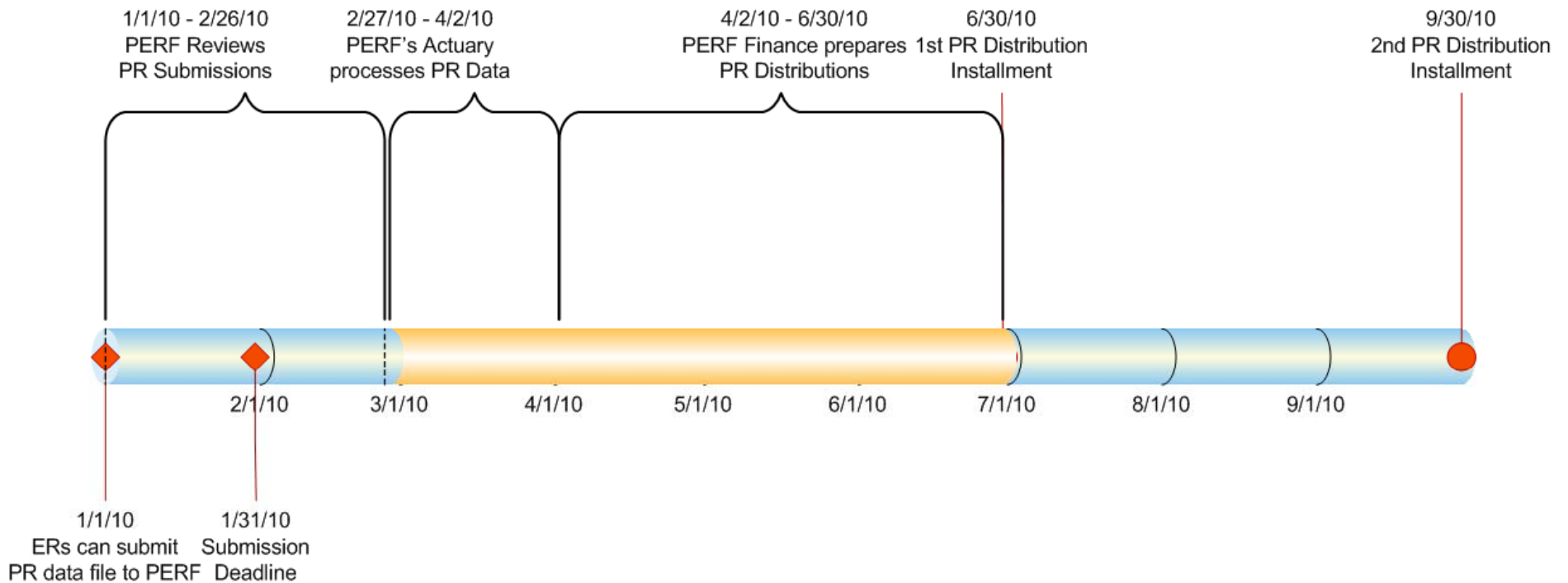


Public Employees' Retirement Fund

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Important Dates:	
December 4, 2009	Receive letter requesting reports be completed and submitted on PERF Online
December 14, 2009	Pension Relief Link on PERF Online made available for upload of this year's reports
January 1, 2009	Submit Pension Relief records through Pension Relief Link on PERF Online
February 1, 2010	All reports are due to PERF via PERF Online
February 2-March 2, 2010	PERF reviews Pension Relief submissions, and notifies employers of submission and approves or revokes the PR submission
March 3-April 2, 2010	PERF's Actuary processes Pension Relief data
April 2-June 29, 2010	PERF Finance prepares Pension Relief payments
June 30 and September 30, 2010	Receive Pension Relief distribution via EFT to your financial institution

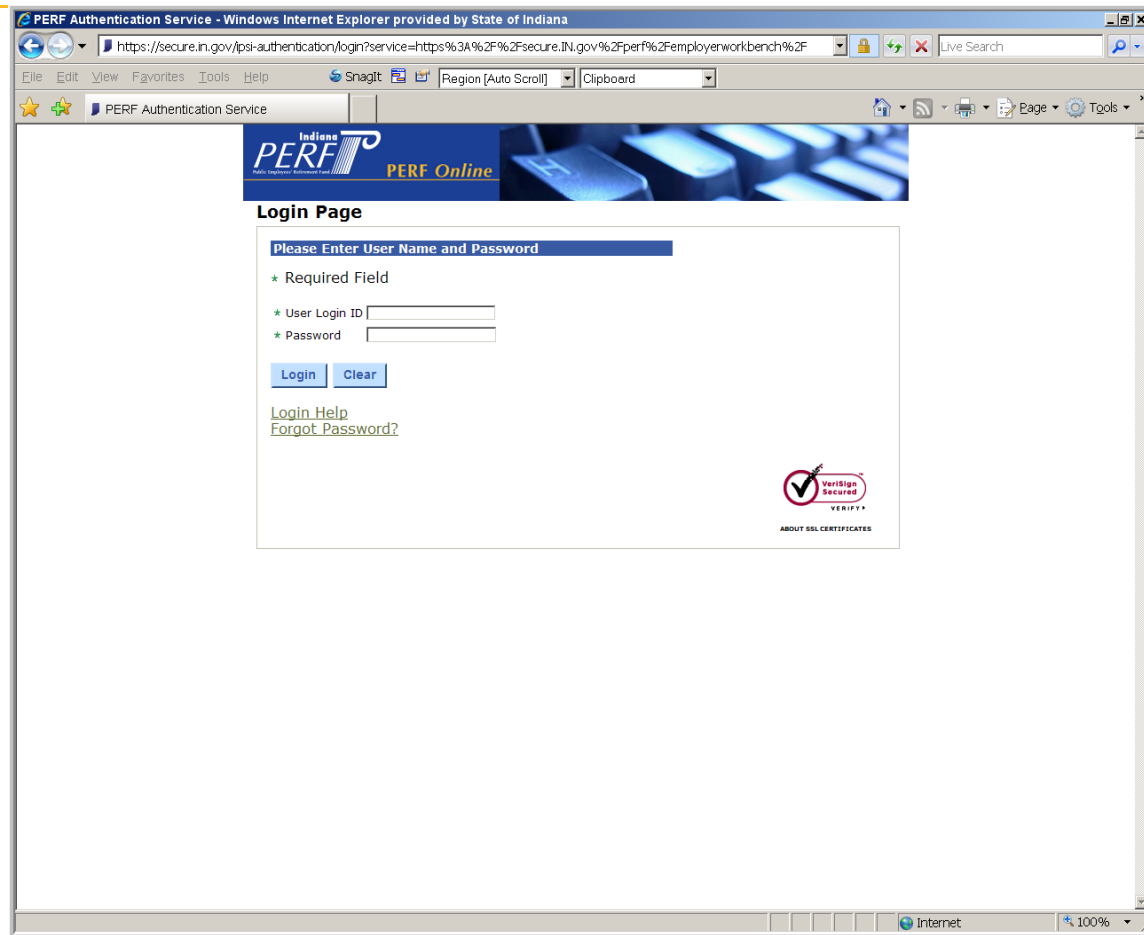
Why February 1 Deadline?



Step 1: Logging into PERF Online

The screenshot displays the Indiana Public Employees' Retirement Fund (PERF) website. At the top, there is a navigation bar with the IN.gov logo, a search bar, and various service categories like Agriculture & Environment, Business & Employment, etc. A banner for Governor Mitch Daniels is visible in the top right. The main content area features a large image of a police and firefighter's emergency lights with a 'go to fund' button. On the left, a sidebar menu includes 'Member Login' and 'Employer Login', with a red arrow pointing to the 'Employer Login' button. Below the menu, there are sections for retirement advice, a download for the 'PERF Retirement Application', and '1099R Information'. The right sidebar contains 'Online Services' (Member Login, Employer Login, Forms), 'Top FAQs', and a 'BRIDGE TO RETIREMENT' banner. A footer at the bottom provides contact information and a phone number: 1-888-526-1687.

Step 2: Employer Login



The screenshot shows a web browser window titled "PERF Authentication Service - Windows Internet Explorer provided by State of Indiana". The address bar contains the URL: <https://secure.in.gov/psi-authentication/login?service=https%3A%2F%2Fsecure.IN.gov%2Fperf%2Femploywork/bench%2F>. The page features the "Indiana PERF Online" logo at the top left. Below the logo, the text "Login Page" is displayed. A blue bar contains the instruction "Please Enter User Name and Password". Underneath, a "Required Field" section lists two input fields: "User Login ID" and "Password". Below these fields are "Login" and "Clear" buttons. At the bottom left of the form area, there are links for "Login Help" and "Forgot Password?". A VeriSign "Verified Secure" logo is located at the bottom right of the form area.

Step 3: Pension Relief File

Monday, October 26, 2009 [Contact Us](#) [Home](#) [Logout](#)

Select Organization:
7766100 LAFAYETTE-POLICE DEPT

Welcome, MEGAN PAPPENFUSS
LAFAYETTE-POLICE DEPT

Enrollment & Demographics

Calculators

Separation from Employment

Wages & Contributions

Links

Upload Pension Relief File

Upload Pension Relief Data

Upload Active Member Data

Preferences

Contact Us

Outstanding Items **New**

- Employer's Report of Separation from Employment (0) (0)
- Employer's Report of Final Wages (0) (0)
- Employer Certification (0) (0)

Your last logon was: 10/26/2009 11:20:39 AM ET

PERF Online offers employers a variety of secure and simple tools to assist in account management and exchange information with PERF.

If you would like information on how to use PERF Online, please call 888-526-1687.

Click any button on the menu to the left to start using PERF Online today.

ABOUT SSL CERTIFICATES

Step 4: Choose File Option

The screenshot shows a web browser window displaying the Indiana PERF Online interface. The page title is "Upload Pension Relief File". The user is logged in as "7786100 LAFAYETTE-POLICE DEPT". The page includes a navigation menu with "Contact Us", "Home", and "Logout". A sidebar on the left contains various menu items such as "Enrollment & Demographics", "Calculators", "Separation from Employment", "Wages & Contributions", "Links", "Upload Pension Relief File", "Preferences", and "Contact Us". The main content area features a "Please note" section, a "File" input field with a "Browse..." button, and a row of buttons: "Cancel Upload", "Previous Data", "Records in Queue", and "Upload File". A red arrow points to the "Records in Queue" button. Below the buttons, there are instructions on how to upload a file, consisting of seven numbered steps. At the bottom of the page, there are links for "Click here to view Templates." and "Click here to view Guidelines."

Step 5a: Previous Data Option

- If you have NO new retirees, you need only change two pieces of information for all members:
 1. Monthly payout amount
 2. Annual payout amount
- For any new retirees, all member, payee, and DROP fields must be completed.

Step 5b: Previous Data Option

Monday, October 26, 2009 [Contact Us](#) [Home](#) [Logout](#)

Select Organization:
 7766100 LAFAYETTE-POLICE DEPT

For Year : 2009 Department : LAFAYETTE-POLICE DEPT Employer Number : 7766100

select	Member SSN	Member First Name	Member Last Name	Member Date of Birth (MM-DD-YYYY)	Member Date of Hire (MM-DD-YYYY)	Last Day in Pay Status (MM-DD-YYYY)	Member Retirement Date (MM-DD-YYYY)	Member Date of Death (MM-DD-YYYY)	Death Benefit Paid	To P
<input type="checkbox"/>										
<input type="checkbox"/>										
<input type="checkbox"/>										

Upload Pension Relief File
 Upload Pension Relief Data
 Upload Active Member Data

Preferences

Contact Us

ABOUT SSL CERTIFICATES

Title of Authorized Agent
 * Last Name of Authorized Agent
 * First Name of Authorized Agent

Back Delete InsertRows Save as Incomplete Save Changes

Registration to use PERF Online does not automatically authorize the user to sign PERF documentation or approve electronic submissions of any kind. Only a person properly authorized by the employer's governing board may sign PERF documents or electronic submissions of any kind. If you have questions about who is authorized or how to become authorized please contact PERF at 1-888-526-1687 and ask to speak with an Employer Liaison Specialist.

Errors highlighted in red need to be corrected before submission
 Errors highlighted in orange do not match our records but are acceptable.

Step 8: Submit File

The screenshot shows a web browser window displaying the Indiana PERF Online Employer Workbench. The address bar shows the URL: <https://test.secure.in.gov/perfdemo/employerworkbench/StMgrServlet?EntryPointName=emprworkbenchsummary#>. The page header includes the date "Friday, December 12, 2008" and navigation links for "Contact Us", "Home", and "Logout".

The main content area is divided into a left sidebar and a main panel. The sidebar contains several menu items: "Enrollment & Demographics", "Calculators", "Separation from Employment", "Wages & Contributions", "Links", "Upload Pension Relief File", "Preferences", and "Contact Us". The "Upload Pension Relief File" menu item is expanded, showing sub-options: "Upload Pension Relief Data" and "Upload Active Member Data".

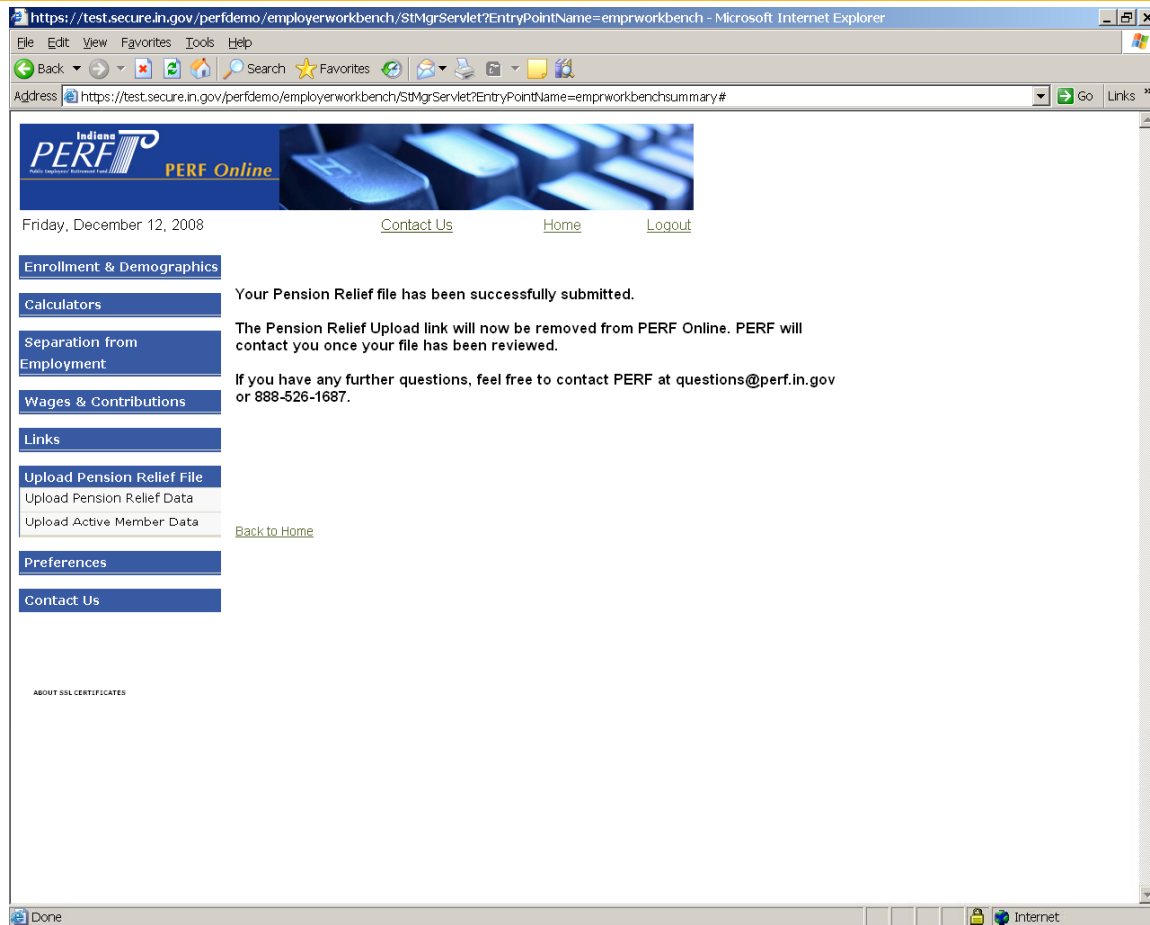
The main panel displays summary statistics:

- Total number of members : 13
- Total number of Payees : 13
- Total Annual Benefit : \$.00
- Total Death Benefit : \$.00
- Total Benefit Paid before Death : \$.00
- Total DROP Amount : \$.00
- Grand Total : \$.00

Below the statistics is a "Comments :" section with a text input field. At the bottom of the main panel, there is a link: "Return Back to Upload Pension Relief File".

At the bottom of the page, there are two buttons: "Submit" and "Cancel".

Step 9: Successfully Submitted



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If PERF does NOT receive your Pension Relief data....

- By law, PERF is required to make equal pension relief distributions by June 30 and September 30.
- PERF **will not use old data** to calculate this year's pension relief distribution.
- If pension relief data is not submitted on time, you may not receive your pension relief distribution.

Pension Relief Help

- Pension Relief informational flyer
- Frequently asked questions (FAQs) and additional Pension Relief information available on PERF website:
<http://www.in.gov/perf/>>My Plan>>Police Officers and Fire Fighters>>Pension Relief Information>
- Field Services Representatives available for house calls with advanced notice
- If you think you'll need PERF Online login help, see our Field Services representative before you leave
- PERF Online access & future questions

Contact PERF @ 888-526-1687 or locally at 233-4162



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