State of Indiana Agency Users

Employer Reporting and Maintenance

User Manual

Table of Contents

Introduction to the ERM Application for Agency Users

Due to recent Indiana State legislation, all employers who report contributions to one of the INPRS Funds must report these contributions electronically. The Employer Reporting and Maintenance (ERM) application was developed to serve as the tool for reporting these contributions to INPRS and to help make employers' interactions with INPRS less complex and more efficient.

For state agencies that report to the Auditor of State the new ERM application will require each agency to review any warnings or errors that occur relating to the wage and contribution transactions submitted on their behalf by the Auditor of State. After reviewing the warnings or errors in ERM the agency should submit their resolution to the Auditor of State.

The main sections of the ERM application are:

- Home
- Manage Submission Unit
- Users
- My Profile
- Reporting

This User Manual introduces you to the agency user functions available in the ERM application.

Glossary of Important ERM Terms

The following are some important terms you need to know in order to carry out employer management duties in the ERM application.

ADJUSTMENT – A correction to a submitted wage and contribution transaction. This can be a positive or negative adjustment and can affect any wage or contribution field.

AGENCY USER – This is an individual, employed by one of the agencies who report wages and contributions to the Auditor of State, with the proper security role(s) to perform certain functions in the ERM application.

AGENCY USER SECURITY ROLES - When adding Agency Users, administrators must assign a security role to each. This security role determines the amount of access a User has in the ERM application, which dictates the activities a User can complete. Here is a list and description of those roles:

- *Agency Code W&C Viewer* – This Agency User can view any wage and contribution transactions that are sent to the exception queue. This person can also view the agency user reports.
- *Agency Code Contact User* – This Agency User can add, modify or delete agency contacts as well as create and modify agency users.

COVERED POSITION – An employment position designated by Indiana Code or the employer/Submission Unit as required to participate in an INPRS Fund. For a member to be enrolled in an INPRS Fund, he or she must work in a covered position.

EFFECTIVE DATE – This is the date that an addition/change takes effect in the ERM application. Several fields within ERM are controlled by effective dates. For example, an Employer User adds a new address for a Submission Unit account and types the effective date of April 1, 2011. INPRS will not use the new address for any correspondence until that effective date.

EMPLOYER – In ERM, the relationship between an employer and a Submission Unit is like a parent-child relationship. The employer is the parent, and the Submission Unit is the child. Each parent (employer) can have multiple children (Submission Units), but each child (Submission Unit) can only have one parent (employer).

ERM – The acronym stands for Employer Reporting and Maintenance. This application is used to enroll members and maintain member information, plus submit member wage and contribution data.

EXCEPTION QUEUE – If a transaction entered into the ERM application – either via online entry or bulk upload – contains errors or is waiting on more information, it will be placed in the

Exception Queue. Additional action must be taken on such a transaction before it is accepted by ERM and becomes effective. Some examples of why a transaction is put in the Exception Queue are:

- Member's birth date is after the member's hire date.
- SSN/Pension ID/Last Name combination on a transaction within a bulk upload does not match any SSN/Pension ID/Last Name combination in the ERM application.
- Statewide Baseline Examination results are needed ('77 Fund only).
- Wages and contributions are submitted for a member not enrolled in the Submission Unit being reported.

FUND – A retirement plan in which a Submission Unit participates. Funds, all under the INPRS umbrella, are:

- 1977 Police Officers' and Firefighters' Pension and Disability Fund (also known as '77 Fund) ('77)
- Indiana State Teachers' Retirement Fund (TRF)
- Judges' Retirement System (also known as Judges' Fund or 1977 and 1985 Judges' Retirement System) (JU)
- Legislators' Retirement System (LE)
- Prosecuting Attorneys' Retirement Fund (PA)
- Public Employees' Retirement Fund (PERF)
- State Excise Police, Gaming Agent, Gaming Control Officer and Conservation Enforcement Officers' Retirement Plan (CE)

INPRS – The acronym stands for the Indiana Public Retirement System.

INTEREST – When contributions are not reported at the time the member receives payment for wages, any interest a member lost because of this late reporting is due to him or her. Interest is also due to the Fund for this late reporting. The calculation of interest in ERM is based on the payroll date. This should be the date the member was actually paid the wages.

LAST CHECK DATE – This is the last payroll date an employee is included on once he or she has completely separated from employment. It is a required field if Last Day in Pay is reported. An employee's Last Check Date should occur on or after his or her Last Day in Pay. This date will be used to signal whether all wage and contribution information for a member requesting a retirement or Annuity Savings Account (ASA) distribution has been received or is in progress.

LAST DAY IN COVERED POSITION – The date a member's creditable pension service, and the associated contributions, stop. This date should be reported when an employee moves from a participating or covered position to a non-covered position but remains employed with the employer in some capacity. *Note: A retirement and/or ASA distribution cannot be processed until the employee has completely separated from employment and a Last Day in Pay has been reported.*

LAST DAY IN PAY – The last day an employee accrued or earned a wage (i.e. termination date) as a covered or Non-covered employee. This date should be reported once an employee has completely separated from employment. *Note: A retirement and/or ASA distribution cannot be processed until the employee has completely separated from employment and a Last Day in Pay has been reported.*

LIFE EVENT – In the ERM application, life events are a way to denote a member being placed on leave, returning from leave, moving from a covered position to a non-covered position or terminating employment, for example. Life events are:

- Adoption Leave (PERF and TRF only)
- Advanced Study (TRF only)
- Approved Educational Travel (TRF only)
- Covered to Non-covered Position
- Disability Leave
- Family Medical Leave Act (FMLA) (family member; all Funds except TRF)
- Family Medical Leave Act (FMLA) (Member)
- Maternity Leave
- Medical Leave (Member)
- Medical Leave (Nonmember)
- Military Leave
- Return From Leave
- Return From Military Leave
- Sick Leave
- Teacher Exchange (TRF only)
- Terminate Employment
- Work Experience (TRF only)
- Workman's Comp
- None of the Above (Paid Leave)
- None of the Above (Unpaid Leave)

Valid Life Events – PERF	***Valid Field Values for File Upload***
Covered to Non-covered Position	CNC
LOA-Adoption Leave	LADP
LOA-Disability Leave	LDIS
LOA-FMLA (Member)	LFMA
LOA-FMLA (other family member)	LFMB
LOA-Maternity Leave	LMAT
LOA-Medical Leave (member)	LMDA
LOA-Medical Leave (non-member)	LMDB
LOA-Military Leave	LUSA
LOA-Sick Leave	LSCK
LOA-Workman’s Comp	LWCB
LOA-None of the Above (Paid Leave)	LPLA
LOA-None of the Above (Unpaid Leave)	LUPD
Return from Leave	RFL
Return from Military Leave	RFML
Terminate Employment	TE

Valid Life Events – TRF	*Valid Field Values for File Upload*
Covered to Non-covered Position	CNC
LOA-Adoption leave	LADP
LOA-Advanced study	LAST
LOA-Approved Educational Travel	LTRV
LOA-Disability Leave	LDIS
LOA-FMLA (Member)	LFMA
LOA-Maternity Leave	LMAT
LOA-Medical Leave (member)	LMDA
LOA-Medical Leave (non-member)	LMDB
LOA-Military Leave	LUSA
LOA-Sick Leave	LSCK
LOA-Teacher Exchange	LTCH
LOA-Work Experience	LEXP
LOA-Workman's Comp	LWCB
LOA-None of the Above (Paid Leave)	LPLA
LOA-None of the Above (Unpaid Leave)	LUPD
Return from Leave	RFL
Return from Military Leave	RFML
Terminate Employment	TE

Valid Life Events – JU Fund	*Valid Field Values for File Upload*
Covered to Non-covered Position	CNC
LOA-Disability Leave	LDIS
LOA-FMLA (Member)	LFMA
LOA-FMLA (other family member)	LFMB
LOA-Maternity Leave	LMAT
LOA-Medical Leave (member)	LMDA
LOA-Medical Leave (non-member)	LMDB
LOA-Military Leave	LUSA
LOA-Sick Leave	LSCK
LOA-Workman's Comp	LWCB
LOA-None of the Above (Paid Leave)	LPLA
LOA-None of the Above (Unpaid Leave)	LUPD
Return from Leave	RFL
Return from Military Leave	RFML
Terminate Employment	TE

MEMBER – An individual who participates in any INPRS Fund.

PAY PERIOD END DATE – The ending date of the period that the wage being reported was accrued or earned.

PAY PERIOD START DATE – The starting date of the period that the wage being reported was accrued or earned.

PAYROLL DATE – The date that payroll information is considered final and disbursed to the employee (the check or direct deposit date).

SETTLEMENT ADJUSTMENT – An additional payment (or series of payments) made to a member as resolution of a legal suit, union grievance or a contract settled retroactively after the fiscal year is completed. INPRS Staff must review the adjustment and corresponding documentation, then approve the settlement adjustent in ERM before payment can be made and the adjustment posted.

SUBMISSION UNIT – This is a participating unit associated with an employer. Each Submission Unit is a specific employer division participating in a single Fund -- CE, JU, LE, PA, PERF, TRF or '77. If an employer participates in multiple Funds, multiple Submission Units will be associated with the same employer.

It is also possible for two Submission Units with the same name to be listed twice under an employer if the employer participates in multiple Funds. For example, Indianapolis Public Schools (IPS) participates in TRF for teachers and in PERF for its other staff. That means IPS would be listed twice under the same employer – once for TRF and once for PERF.

Most activity in the ERM application takes place at the Submission Unit level.

TRANSACTIONS THAT FAILED VALIDATION WITH ERRORS – Indicates a transaction contains information that is incorrect, based on business validations and/or Fund rules. The transaction will be sent to the Exception Queue awaiting corrections to the incorrect information. Transactions with errors cannot be submitted for payment until they are corrected. For more information and to find common solutions, check the *Wage and Contribution Exception Queue Troubleshooting – Employer User QRG* (Quick Reference Guide) or the Appendix in the *Wage and Contribution User Manual – Employer*. For example: Error code A-10 for PERF/TRF says "mandatory contributions do not total 3% of reported wages." The solution is to correct the mandatory pre- or post-tax amount or correct the wages amount. See also **TRANSACTIONS THAT FAILED VALIDATION WITH WARNINGS**.

TRANSACTIONS THAT FAILED VALIDATION WITH WARNINGS – Indicates a transaction that seems unusual to ERM based on information previously submitted for this member. However, the information is not necessarily incorrect (compare with **TRANSACTIONS THAT FAILED VALIDATION WITH ERRORS**); the warning is a flag for the employer to examine the transaction's accuracy. For example: Warning code L-55 states that wages for this period exceed previous period wages by more than 15%. However, this may be a correct entry for a pay period that includes over-time payment. Warnings will not prevent a transaction from being processed for payment; a TRANSACTION THAT FAILED VALIDATION WITH ERRORS will. Note: Once you select Process for Payment, all Transactions That Failed Validation with Warnings will also be included in the payment.

Employer Numbers and Submission Unit IDs

Prior to ERM, employers submitted data to INPRS using an employer number. If employers submitted payments to more than one Fund, they had more than one employer number. In the ERM application, employers are assigned a new, unique Employer Number; the numbers previously assigned as employer numbers are called Submission Unit IDs.

Let's look at an example:

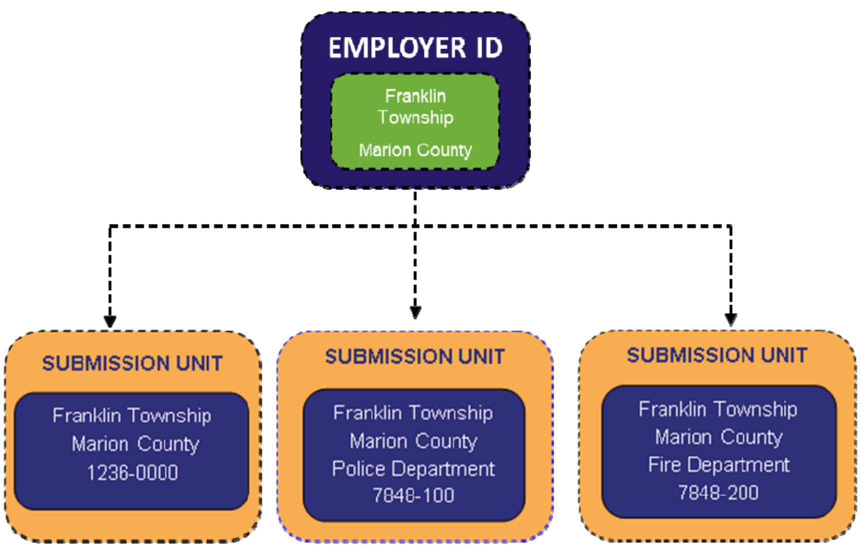
Prior to ERM, Franklin Township has three employer numbers: one for PERF, one for the '77 Fund for police and one for the '77 Fund for firefighters, as shown in Figure 1.

Figure 1: Employer Numbers (Prior to ERM)

Under the new system, Franklin Township becomes the employer and is assigned a new, different employer number. The old employer numbers become Submission Unit IDs, with one for PERF, one for the '77 Fund for police and one for the '77 Fund for firefighters.

Submission Unit IDs are linked with the new employer number in the ERM application, as shown in Figure 2.

Figure 2: Submission Unit IDs



For most transactions, including enrollment of new members and submitting wage and contribution data, use the Submission Unit ID.

ERM Application Navigation

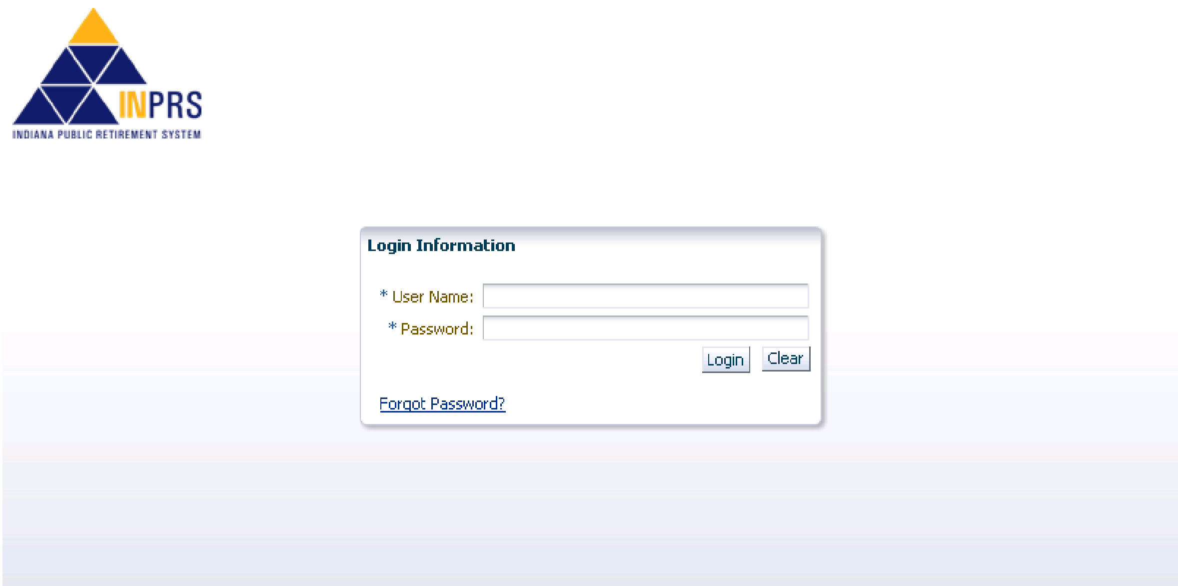
To view and manage agency accounts to which you have access, you must log into the ERM application.

Logging into the ERM Application

To log into the ERM application for the first time:

1. Access the INPRS ERM application. The *Login Information* screen appears (Figure 3).

Figure 3: ERM *Login Information* Screen



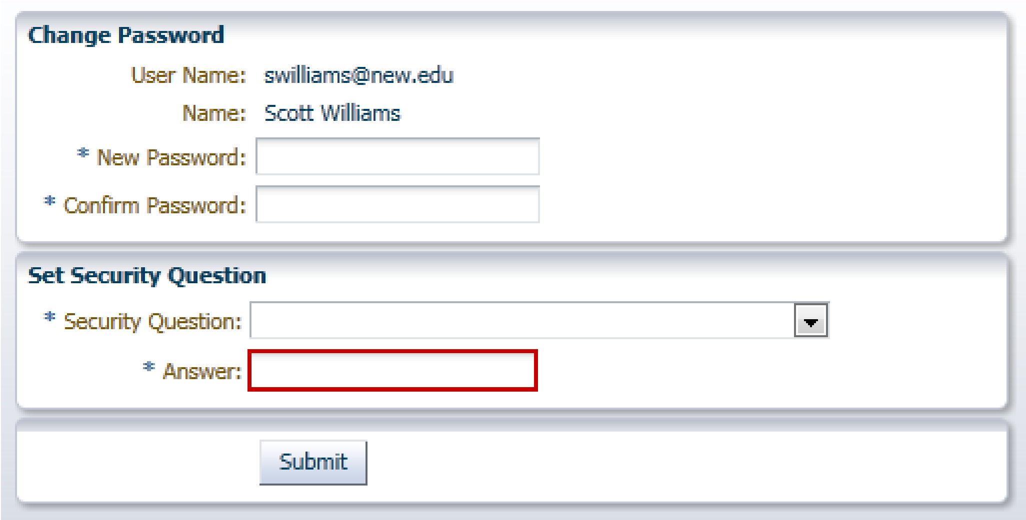
2. Enter your user name into the **User Name** field.
   - Your User Name must be the email address you use for work-related activities or the one you use for contact with INPRS. This must be a unique email address. You cannot use the same email address that someone else uses to log into the ERM application.
   - If you cannot remember your User Name, you must contact INPRS.
3. Enter the temporary password that was sent to you via email in the **Password** field.
4. Click the **Login** button to submit the information. If needed, click the **Clear** button to clear the fields.
5. After clicking the **Login** button, the *Change Password* screen appears (Figure 4). Here you must enter a new password for your User Name and provide an answer for the Security Question you select.
   - The new password must meet the following criteria:
     - Password cannot be the same as the User Name.

- Minimum password length is 8 characters.
- Maximum password length is 50 characters.
- The password must contain three of the following attributes:
  1. Uppercase letters
  2. Lowercase letters
  3. Numeric characters
  4. Spaces
  5. Special characters
- The password cannot be the same as one of the past 24 passwords for the account.

- Please keep in mind:
  - The password will expire every 90 days, and a new one must be created.
  - Passwords are case sensitive.
  - If you forget your password, you must answer the security question you selected. After answering the question correctly, a new temporary password will be sent to your email address.
  - After logging in unsuccessfully five times, your account will become locked, and you must contact your system administrator to re-gain access to the ERM application.
  - Duplicate logins are not allowed. For example, you may not have two sessions active with the same login information.
  - After 30 minutes of inactivity, the session will expire, and you will be automatically logged out.

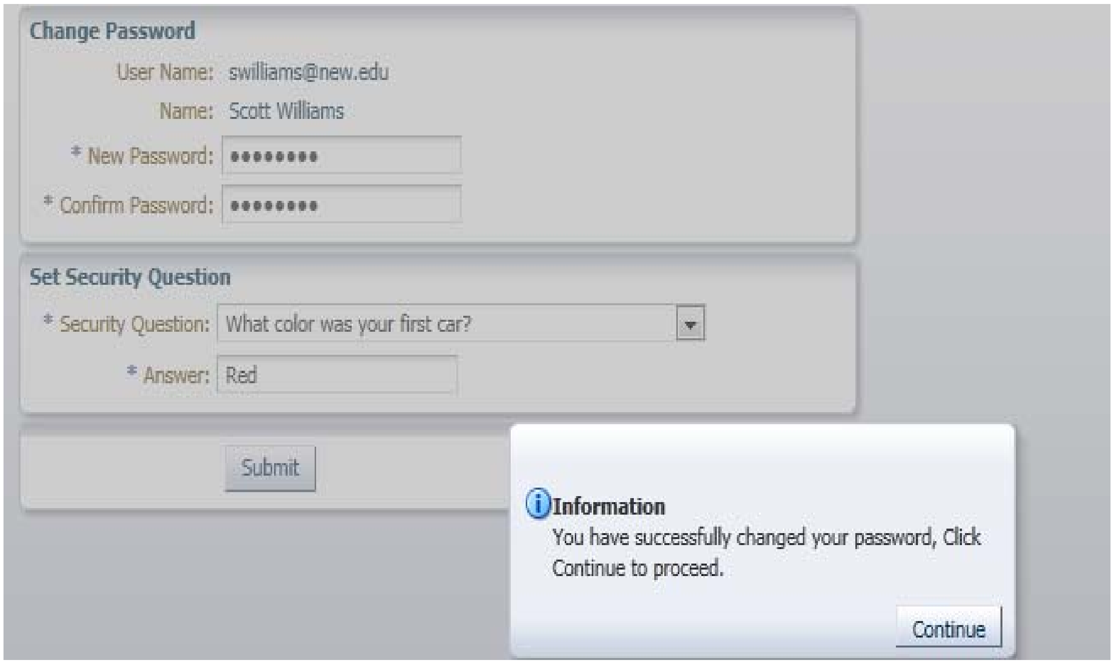
NOTE: If you are automatically logged out due to inactivity, you will lose any information that you have entered but have not saved.

Figure 4: *Change Password* Screen



6. Once you have entered the required information, click the **Submit** button. A confirmation pop-up box will appear (Figure 5). Click the **Continue** button to access the ERM *Home* page.

Figure 5: Confirmation Pop-Up Box



ERM Navigation Menu

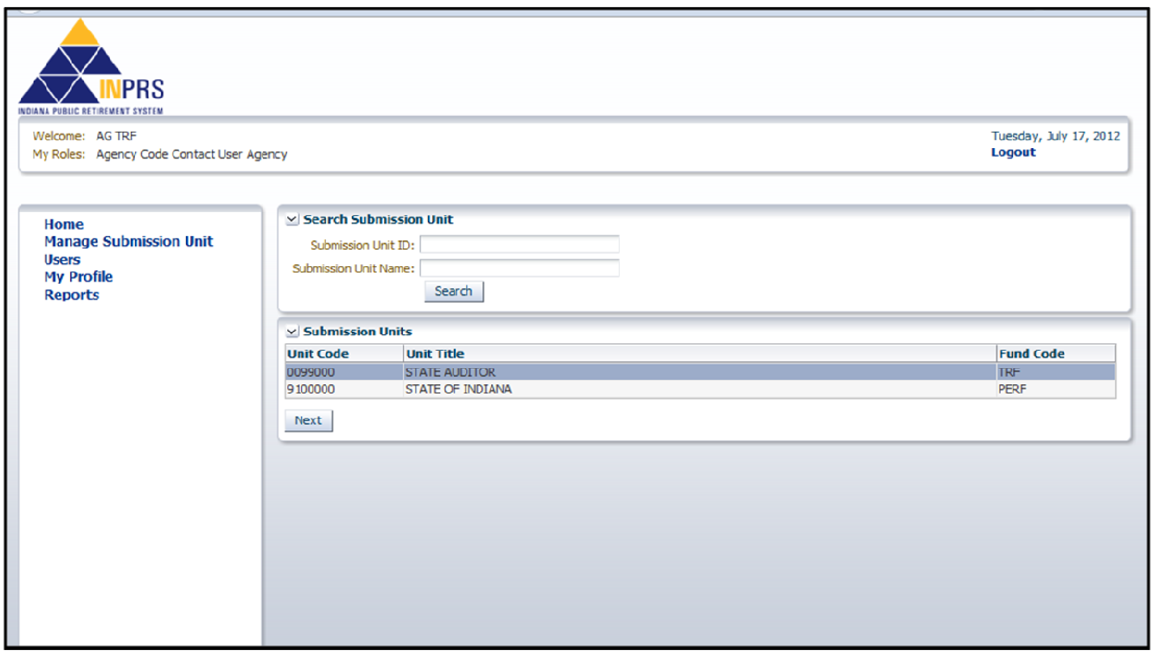
The Navigation Menu is on the left side of the ERM *Home* page, as shown in Figure 6.

The selections in the Navigation Menu are:

- Home
- Manage Submission Unit
- Users
- My Profile
- Employer Reports

The options available to Agency Users vary by security role. Any options that Agency Users cannot access will appear grayed out in the Navigation Menu.

Figure 6: ERM *Home* Page

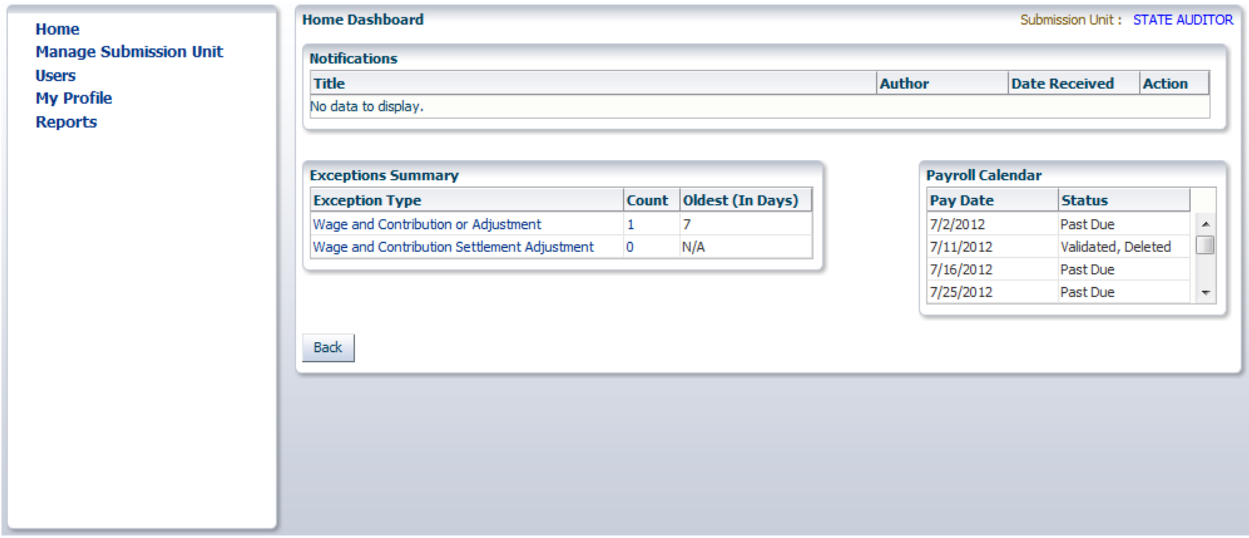


Accessing the Home Dashboard

To access the Home Dashboard for a Submission Unit:

1. Select a Submission Unit from the grid on the *Home* page.
2. Click the **Next** button. The Home Dashboard for the selected Submission Unit opens, as shown in Figure 7.

Figure 7: Home Dashboard on the ERM *Home* Page



The Home Dashboard contains the following sections for the selected Submission Unit:

- Notifications
- Exceptions Summary
- Payroll Calendar

Notifications

The Notifications section lists any active notifications that have been sent to the selected Submission Unit. The columns include:

- Title
- Author
- Date Received
- Action

Payroll Calendar

The Payroll Calendar displays payroll submissions for a Submission Unit in a table format with the following columns:

- Payroll Date (MM/DD/YYYY)
- Status

The Payroll Calendar is updated with the previous five and next five payroll submissions.

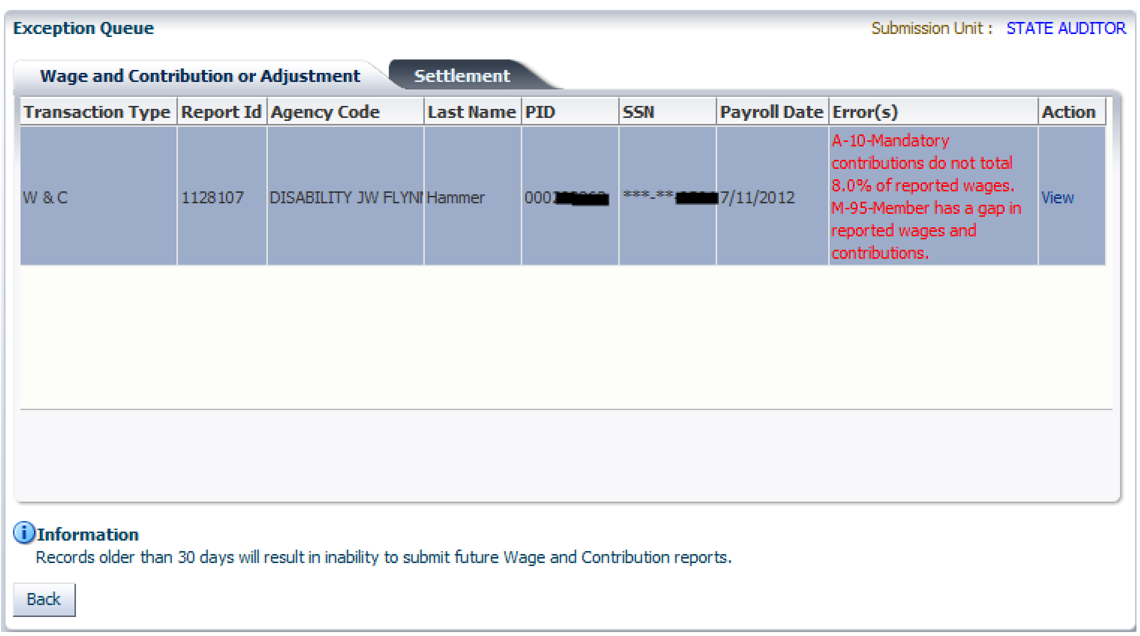
Exceptions Summary

The Exceptions Summary lists:

- Exception Type
- Count
- Oldest Record Age (In Days)

To view an Exception Queue, click a hyperlink in the “Exception Type” column of the Exception Summary section (Figure 7). The *Exception Queue* screen appears (Figure 8).

Figure 8: Exception Queue

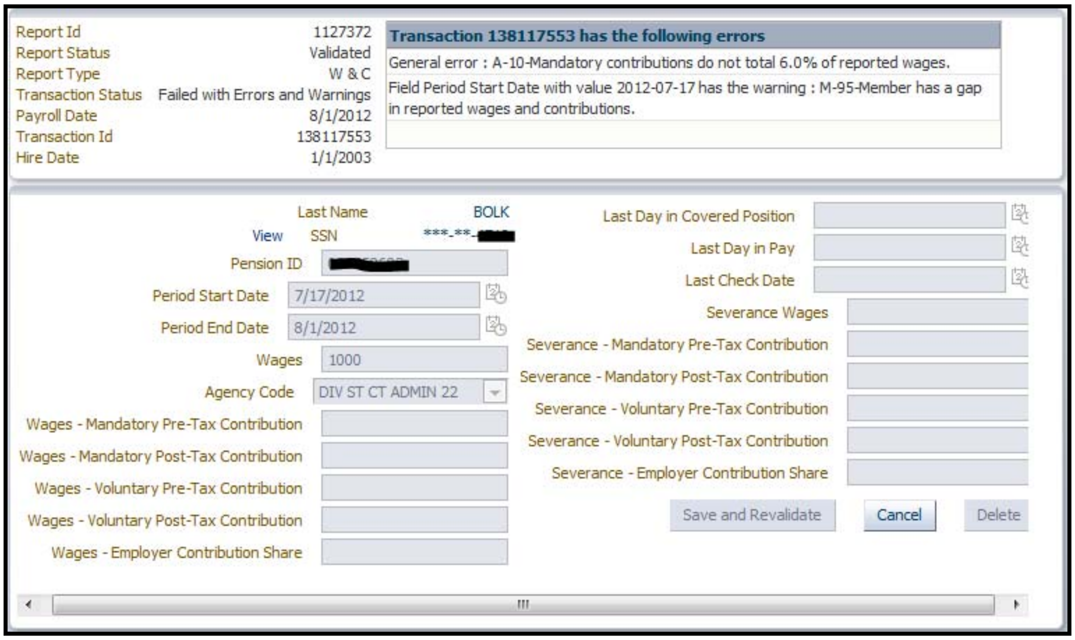


The *Exception Queue* screen displays tabs for two Exception Queues: Wage and Contribution or Adjustment and Settlement. It automatically defaults to the Exception Queue tab for the hyperlink chosen in the Exceptions Summary section on the Home Dashboard.

To view the exceptions:

1. Click the *View* hyperlink in the “Action” column of the table to open a summary screen for the chosen transaction. The Transaction Summary screen displays (Figure 9). The error(s) or warning(s) that caused the transaction to appear in the Exception Queue are listed in the upper right of the summary screen.

Figure 9: Transaction Summary Screen



2. Review the error(s) or warning(s).
3. If the transaction contains a warning, and the warning is acceptable, no further action is required. These transactions will be submitted for payment on the payroll date and will be removed from the exception queue at that time. If the warning is unacceptable, contact the Auditor of State to get the warning resolved before the payroll date.
4. If the transaction contains an error you must work with the Auditor of State to resolve the error.
5. Click the **Cancel** button to return to the Exception Queue summary.
6. When you are finished reviewing the Exception Queue summary, click the **Back** button to return to the ERM *Home* page.

NOTE: Any errors that remain in the exception queue seven calendar days after the payroll date will begin to accrue interest. If there are transactions that have remained in the Exception Queue for 30 days or more may result in pentalties and may prevent the Auditor of State from submitting reports for payment until you resolve these errors. It is very important to keep your Exception Queue clear and resolve errors in a timely manner.

Managing a Submission Unit

To view information for a Submission Unit click the Manage Submission Unit hyperlink in the Navigation Menu.

Locating a Submission Unit Account

The *Manage Submission Unit* screen, shown in Figure 10, contains two sections for locating and managing information about Submission Units in the ERM application.

Figure 10: Manage Submission Unit Screen

- Section 1 of the *Manage Submission Unit* screen contains a scrollable grid that is automatically populated with a list of the Submission Units you have permission to view.
- Section 2 displays several tabs that contain demographic data for the Submission Unit.

Selecting a Submission Unit Account

All Submission Unit records that you have permission to view appear in the scrollable grid in Section 2.

To select a Submission Unit from the scrollable grid click the line associated with the Submission Unit record you wish to view.

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

NOTE: For Agency Users who only have access to one Submission Unit account, the grid in Section 2 and the tabs in Section 3 display only the information for that Submission Unit.

Viewing Account Details Information

The Account Details tab on the *Manage Submission Unit* screen, as shown in Figure 11, displays Submission Unit account information, including:

- Employer Name
- Submission Unit Name
- Submission Unit Type
- Department of Education No.
- Tax ID
- Status
- Effective Date
- Agency Code Flag

Figure 11: Account Details Tab on the *Manage Submission Unit* Screen

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

Viewing Submission Unit Address or Phone Number Information

To view Submission Unit address or phone number information, choose the Address & Phone tab. This will display two tables, as shown in Figure 12. One has Submission Unit address information, and one has Submission Unit phone number information.

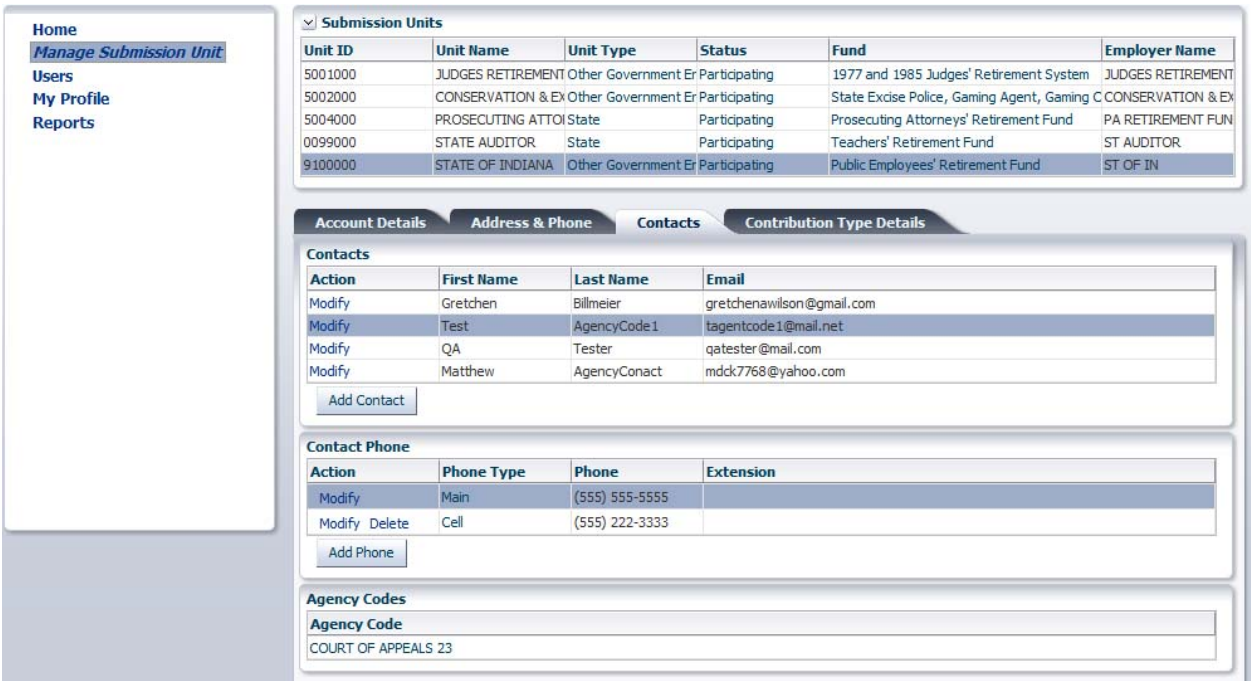
Figure 12: Address & Phone Tab on the *Manage Submission Unit* Screen

NOTE: Agency Users have view-only access to the information contained in the fields associated with the Address & Phone tab.

Managing 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 13.

Figure 13: Contacts Tab on the *Manage Submission Unit* Screen

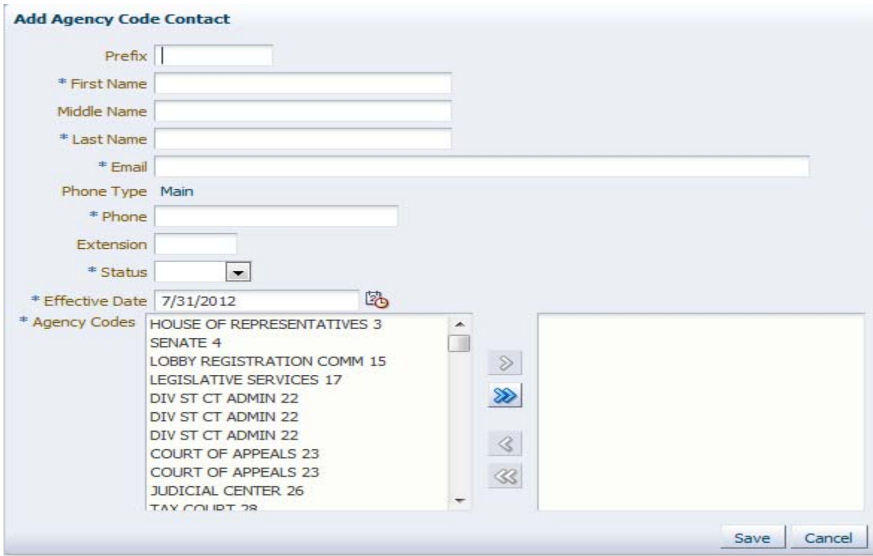


Adding an Agency Contact

To add a Submission Unit contact:

1. Click the **Add Contact** button below the Contacts table on the screen. The Add Agency Code Contact pop-up box opens, as shown in Figure 14.

Figure 14: Add Agency Contact Pop-Up Box on the *Manage Submission* Unit Screen



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. Type the first name of the Submission Unit contact in the **First Name** field.
4. Type the middle name of the Submission Unit contact, if applicable, in the **Middle Name** field. This field is not required.
5. Type the last name of the Submission Unit contact in the **Last Name** field.
6. Type the contact's email address in the **Email Address** field.
8. Type 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.
9. If a particular extension is required, type this number in the **Extension** field.
10. Click the arrow next to the **Status** field to access a drop-down menu of these status choices:
    - Active
    - Inactive

    Choose the "Active" status.
11. Type 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.

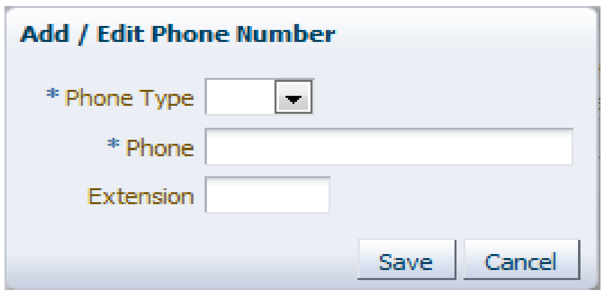
12. Choose the agencies for which this individual should be contacted if INPRS has any questions by using the shuttle window in the **Agency Codes** field.
    a. Choose one agency from the list found in the box on the left:
    b. Click the right-facing single arrow to move the chosen agency to the box on the right side of the screen.
    c. If an agency is added to the box on the right side of the screen by mistake, complete the following steps:
        i. In the box on the right side of the screen, highlight the appropriate agency from the list.
        ii. Click the left-facing single arrow to move the agency to the box on the left side of the screen.
13. Verify the entered information is correct and then click the **Save** button. All required fields, denoted with an asterisk (*), must be completed before saving.

Adding an Agency Contact Phone Number

To add an Agency contact phone number:

1. Choose an Agency contact from the Contacts table.
2. Click the **Add Phone Number** button. This opens the Add/Edit Phone Number pop-up box, as shown in Figure 15. The pop-up box contains the following fields:
    - Phone Type
    - Phone
    - Extension

Figure 15: Add / Edit Phone Number Pop-up Box on the *Manage Submission Unit* Screen



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

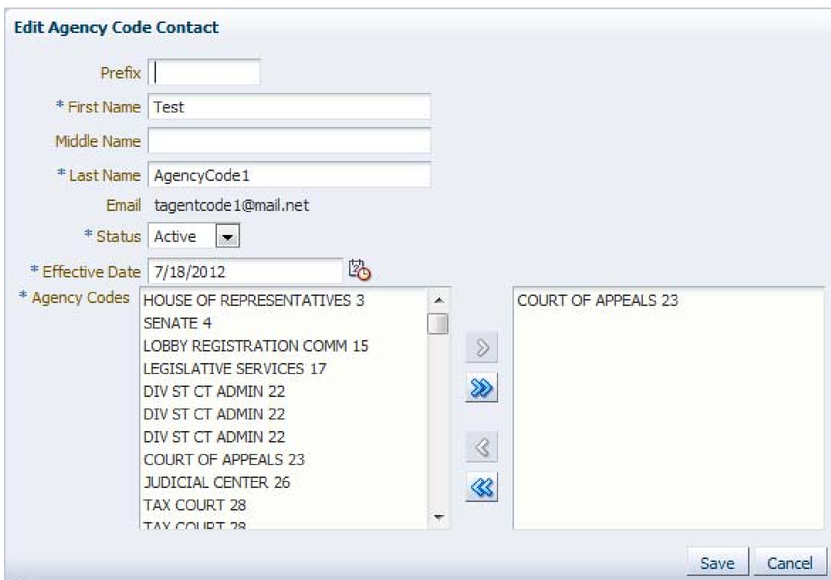
    Every contact must have at least one phone number identified as "Main." For all additional contact phone numbers, choose the correct phone type option from the drop-down menu.
4. Type the phone number for the contact in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
5. If a particular extension is required, type this number in the **Extension** field.
6. Click the **Save** button. All required fields, denoted with an asterisk (*), must be completed before saving.

Modifying an Agency Contact

To modify an Agency contact:

1. Click the *Modify* hyperlink in the "Action" column on the appropriate line of the Contacts table. The Edit Agency Code Contact pop-up box opens, as shown in Figure 16. The pop-up box contains the following modifiable fields:
    - Prefix
    - First Name
    - Middle Name
    - Last Name
    - Status
    - Effective Date
    - Agency Codes

Figure 16: Edit Agency Code Contact Pop-up Box on the *Manage Submission Unit* Screen



2. Click the field(s) you wish to modify.
3. Enter the updated Agency contact information.
4. Click the **Save** button. All required fields, denoted with an asterisk (*), must be populated before saving.

Modifying an Agency Contact Phone Number

To modify an Agency contact phone number:

1. Choose a contact from the Contacts table. All phone numbers associated with that contact will appear in the Contact Phone Numbers table.
2. Click the *Modify* hyperlink 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 pop-up box, as shown in Figure 15. This box contains the following fields:
    - Phone Type
    - Phone
    - Extension
3. Place your cursor in the field(s) you wish to modify.
4. Type the updated contact’s phone information.
5. Click the **Save** button. All required fields, denoted with an asterisk (*), must be populated before saving.

Deleting an Agency Contact Phone Number

Only Agency contact phone numbers designated as “Cell” or “Fax” can be deleted. To delete an Agency contact phone number:

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

Viewing 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.

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

PERF Contribution Type Details

For PERF, the Contribution Type Details tab displays the following fields, as shown in Figure 17:

- Employer Name
- Submission Unit Name
- Fund Code
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Employer Contribution
- Employer Contribution Effective Date
- Mandatory Contribution Paid By
- Mandatory Contribution Paid By Effective Date
- Voluntary Contribution (ASA Pre-tax)
- Voluntary Contribution (ASA Pre-tax) Effective Date
- All Positions Covered

Figure 17: *PERF Contribution Type Details* Screen

TRF Contribution Type Details

For TRF, the Contribution Type Details tab displays the following fields, as shown in Figure 18:

- Employer Name
- Submission Unit Name
- Fund Code
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Employer Contribution
- Employer Contribution Effective Date
- Mandatory Contribution Paid By
- Mandatory Contribution Paid By Effective Date
- Voluntary Contribution (ASA Pre-tax)
- Voluntary Contribution (ASA Pre-tax) Effective Date

Figure 18: *TRF Contribution Type Details* Screen

JU Fund Contribution Type Details

For the JU Fund, the Contribution Type Details tab contains two sections, as shown in Figure 19.

The *Fund Details* section displays the following information:

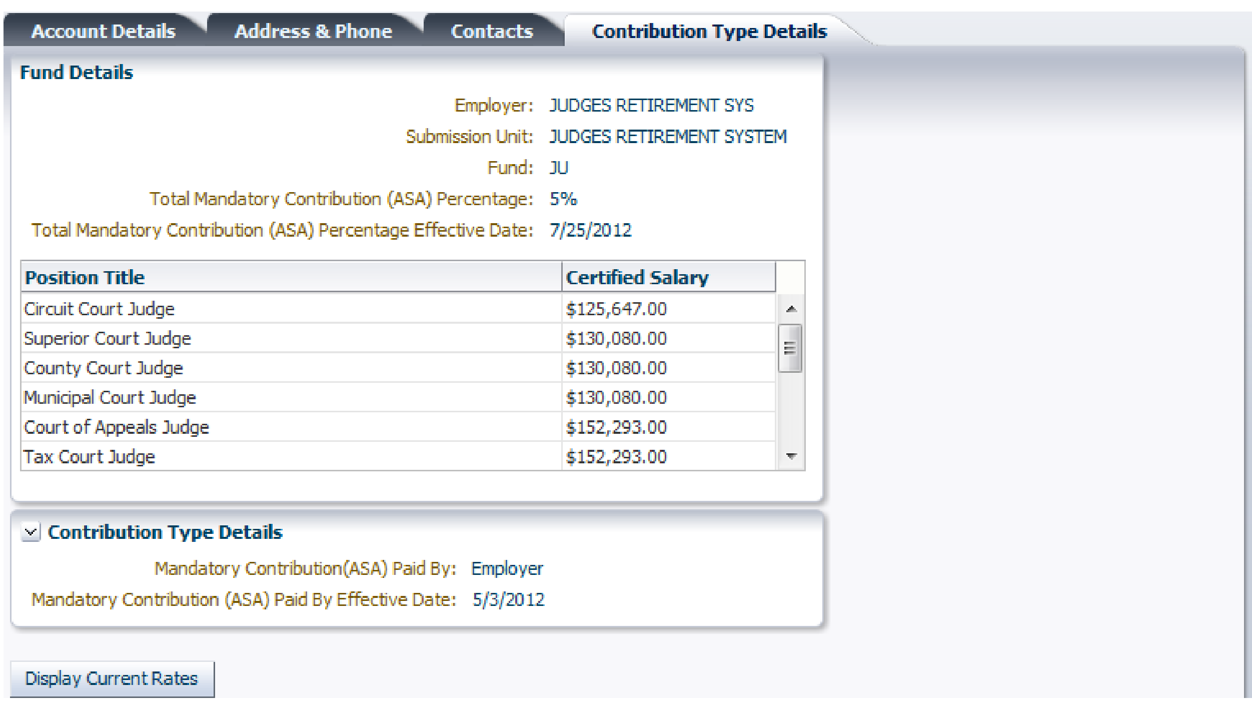
- Employer Name
- Submission Unit Name
- Fund Code
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date

Below these fields is a table that displays a list of position titles applicable to the JU Fund 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
- Mandatory Contribution (ASA) Paid By Effective Date

Figure 19: *JU Fund Contribution Type Details* Screen



PA Fund Contribution Type Details

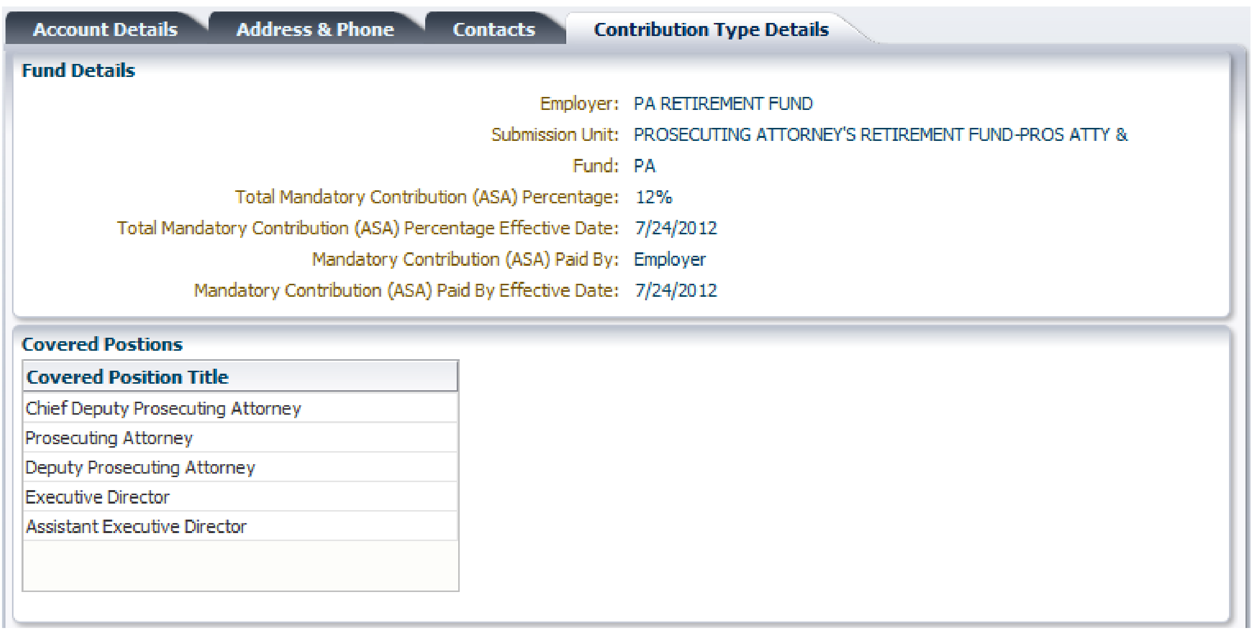
For the PA Fund, the Contribution Type Details tab contains two sections, as shown in Figure 20.

The *Fund Details* section displays the following information:

- Employer Name
- Submission Unit Name
- Fund Code
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Mandatory Contribution Paid By
- Mandatory Contribution Paid By Effective Date

Below these fields is a table that displays a list of position titles covered by the PA Fund.

Figure 20: *PA Fund Contribution Type Details* Screen

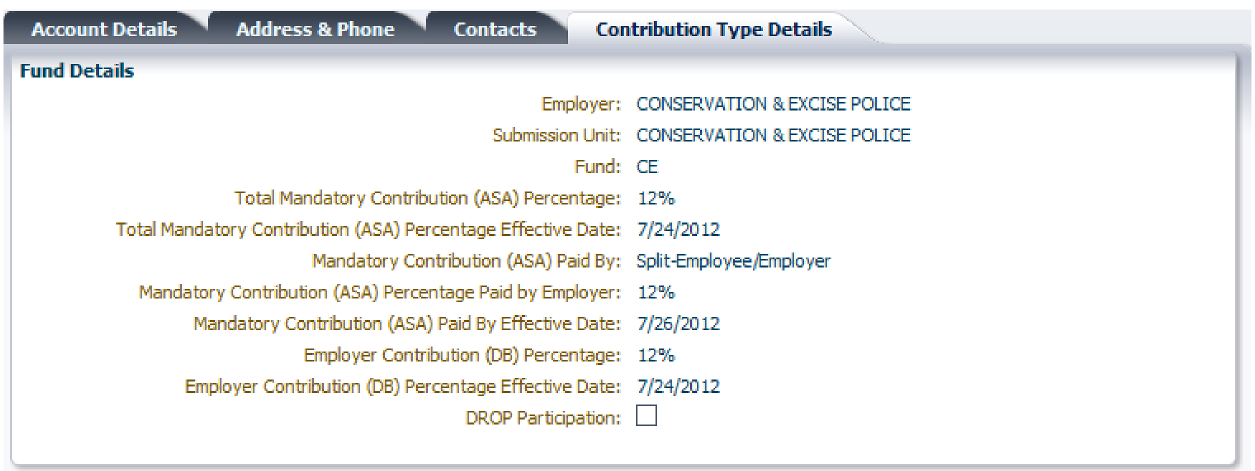


CE Fund Contribution Type Details

For the CE Fund, the Contribution Type Details tab contains one section, as shown in Figure 21. The *Fund Details* section displays the following information:

- Employer Name
- Submission Unit Name
- Fund Code
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Mandatory Contribution Paid By
- Mandatory Contribution Percentage Paid By Employer
- Mandatory Contribution Paid By Effective Date
- Employer Contribution Percentage
- Employer Contribution Percentage Effective Date
- DROP Participation

Figure 21: *CE Fund Contribution Type Details* Screen



Managing Agency Users

ERM Agency Code Contact Users can add new Agency Users in the ERM application. Before a new Agency User can be added and assigned a security role, he or she must be added as an Agency contact in the ERM application.

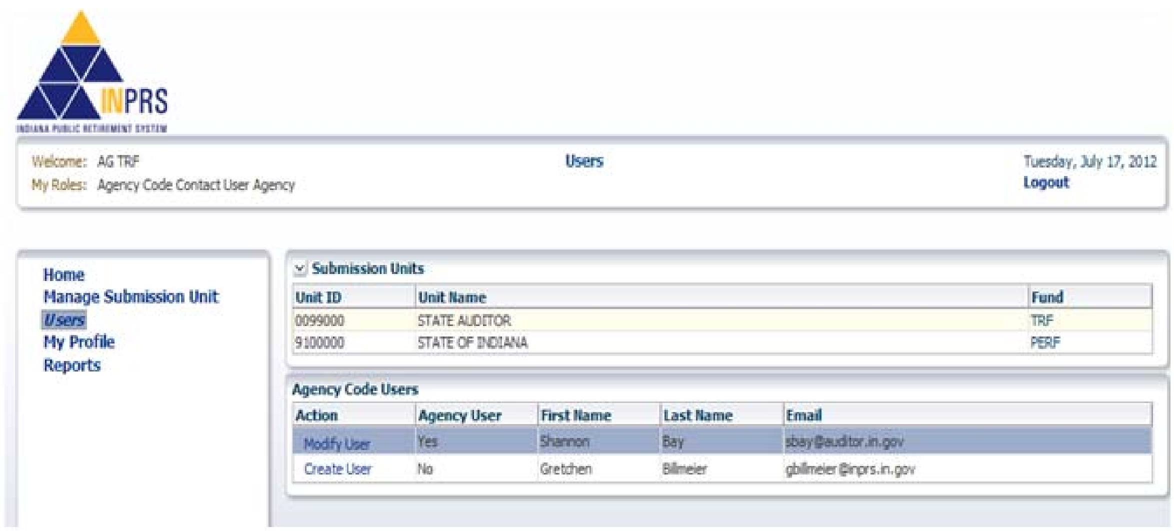
NOTE: For detailed information about how to add an Agency contact, see the Adding an Agency Contact section in this manual.

Adding a New Agency User

To add a new Agency User:

1. Choose “Users,” from the Navigation Menu and the *Agency Code User* screen will appear. The screen contains two sections, as shown in Figure 22.

Figure 22: Add Agency User on the *Agency Code User* Screen



- Section 1 displays only the Submission Unit(s) that you have permission to view.
- Section 2 contains a list of the contacts for the Submission Unit account.

Identifying the Submission Unit

To select a Submission Unit from the scrollable grid:

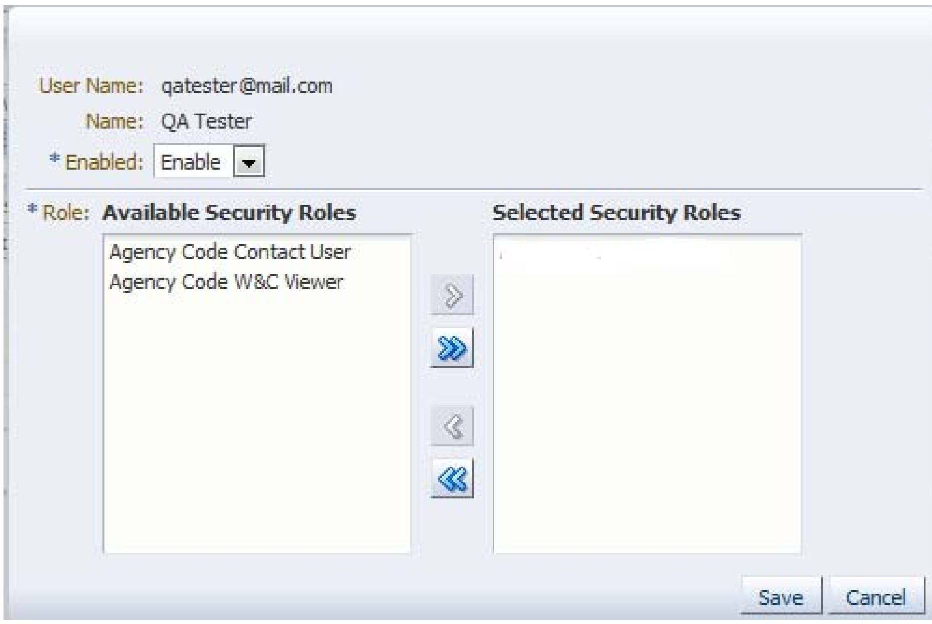
1. Scroll through the grid until the record for the Submission Unit to which you wish to add a user is visible.
2. Click the line associated with that Submission Unit record.

Identifying an Agency Contact as an Agency User

To assign a new Agency User role to an Agency contact:

1. Locate the contact you wish to identify as an Agency User in the Agency Code Users table.
2. Click the *Create Use*r hyperlink next to the contact's name. The Create Agency User pop-up box appears, as shown in Figure 23.

Figure 23: Create Agency User Pop-up Box



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 pop-up box. For details about each role, see the Glossary of Important Terms in this manual.
5. Click the right-facing single arrow to move the selected security role(s) to the right sideof the shuttle window.
6. When you have assigned all applicable security roles, click the **Save** button. All required fields, denoted with an asterisk (*), must be completed before saving. The value in the Agency User column of the table for the selected contact changes from "No" to "Yes."

Modifying an Agency User

To modify an Agency User:

1. Choose a Submission Unit from the list. The contacts for the Submission Unit then populate in the Agency Code User section of the screen.
2. Click the *Modify* hyperlink next to the user you need to modify in the Action column of the Agency Code User section of the screen. This opens the Edit Agency User pop-up box, shown in Figure 24.

Figure 24: Modify Agency User Pop-up Box

3. To disable an Agency 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 Agency User access to the ERM application, choose "Enable" from the drop-down menu in the **Enabled** field.
5. To add security roles for an Agency User, select one or more security roles from the Available Security Roles window on the left side of the pop-up box.
6. Click the right-facing single arrow to move the selected security role(s) to the right side of the shuttle window.
7. To remove security roles for an Agency User, select one or more security roles from the Selected Security Roles window on the right side of the shuttle window in the Edit Agency User pop-up box.
8. Click the left-facing single arrow to move the selected security role(s) to the left side of the shuttle window.
9. Click the **Save** button to save the changes for the Agency User in the ERM application. All required fields, denoted with an asterisk (*), must be completed before saving.

NOTE: If an Agency contact designated as an Agency User leaves your organization, disable his or her Agency User account and change the contact status to "Inactive."

My Profile

Accessing My Profile

To access my profile:

1. Access the ERM application. Choose the *My Profile* hyperlink in the left-hand side Navigation Menu to access the *Change Password* screen (Figure 25).
2. To change your password:
    a. Type your current password in the **Current Password** field.
    b. Type your new password in the **New Password** field.
    c. Type your new password again in the **Confirm New Password** field.

Figure 25: Change Password Screen

- The new password must meet the following criteria:
    - o Password cannot be the same as the User Name.
    - o Minimum password length is 8 characters.
    - o Maximum password length is 50 characters.
    - o The password must contain three of the following attributes:
        1. Uppercase letters
        2. Lowercase letters
        3. Numeric characters
        4. Spaces
        5. Special characters
    - o The password cannot be the same as one of the past 24 passwords for the account.
- Please keep in mind:
    - o The password will expire every 90 days, and a new one must be created.
    - o Passwords are case sensitive.

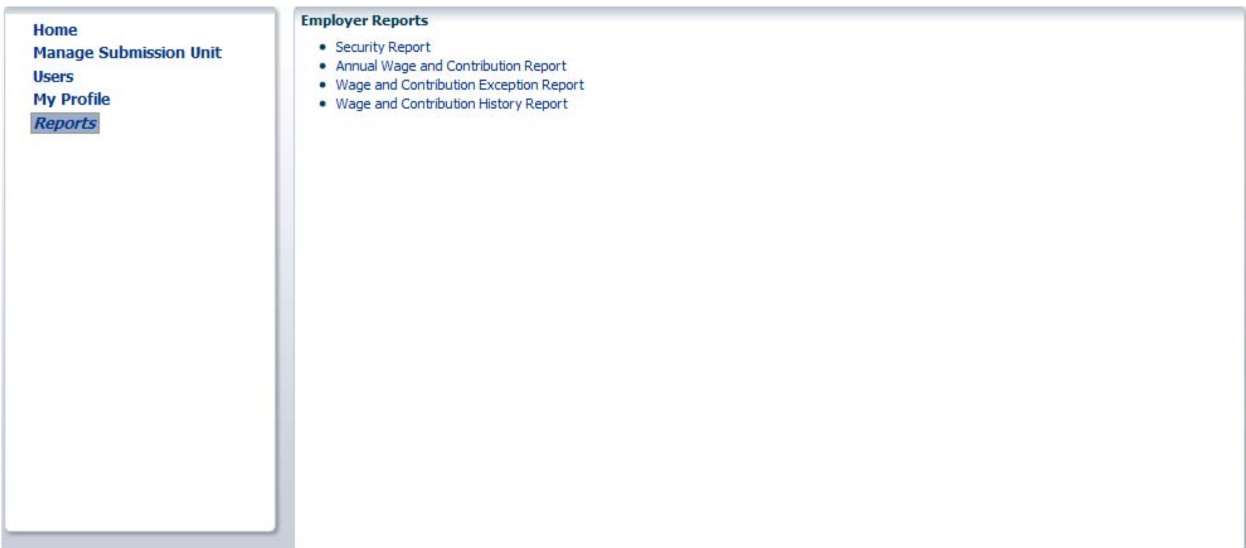
Agency Reporting

Accessing Agency Reports

To access Agency reports:

3. Access the ERM application. Choose the *Reports* hyperlink in the left-hand side Navigation Menu to access the *Agency Reports* screen.
4. Choose the report you want to view from the list on the screen (Figure 26). Reports can be customized to return specific data based on the parameters entered. Each report contains a high-level summary of the report contents and a detailed report. Reports can be printed or displayed as PDFs.

Figure 26: Agency Reports Screen



The reports are:

- Annual Wage and Contributions Report – Use this report to generate the year-to-date total contributions by Agency or by member.
- Wage and Contributions History Report – Use this report to access a history of wage and contribution report submissions. This report displays wage and contribution transactions (regular and adjustments) submitted in ERM for a specific Agency during a date range or for a specific member.
- Wage and Contributions Exception Report – Use this report to inform and enable the process of resolving wage and contribution exceptions when cross-departmental research is required. This report includes information which identifies the member, Agency, Submission Unit, exception description, exception field(s), payroll date, and due date.
- Security Report – Use this report to generate a list of active ERM Agency User information, including names, email addresses, and security roles/access.