

# TRF Employer Interactive: Employer Demographics Instructions

Employer Demographics offers employers (school corporations) the ability to maintain the school corporation and TRF Employer Interactive contact information. Only the Superintendent and one System Administrator are allowed to make these changes, but all changes may be made and implemented online.

## Login Instructions

These are the instructions for the TRF Employer Interactive Web site. Access the TRF *Home* page at [www.in.gov/trf](http://www.in.gov/trf).

On the right side of the TRF Web site *Home* page, in the *Online Services* section, click the **Employer Secure Login** link (Figure 1). The *Login Page* displays (Figure 2).

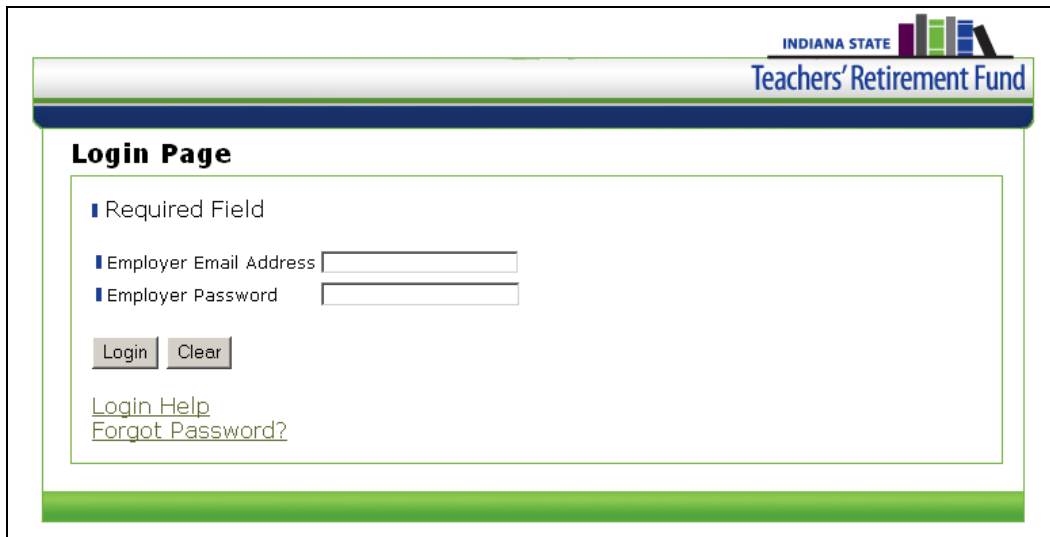
*Note: Consider bookmarking the Login Page for quicker access in the future.*



**Figure 1 – Indiana State Teachers' Retirement Fund Home Page**

On the *Login Page*, enter your **Employer Email Address** (user name) and **Employer Password**. Your **Employer Email Address** is your full e-mail address. Initially, your **Employer Password** is also your e-mail address up to 20 characters. The Employer Password is case-sensitive and has been created with all lowercase letters. For the Employer Password, if your e-mail address is longer than 20 characters, enter the first 20 characters and click the **Login** button. The *Employer Information* page displays (Figure 3).

*The **Employer Password** field is limited to 20 characters and does not accept more than 20 characters.*



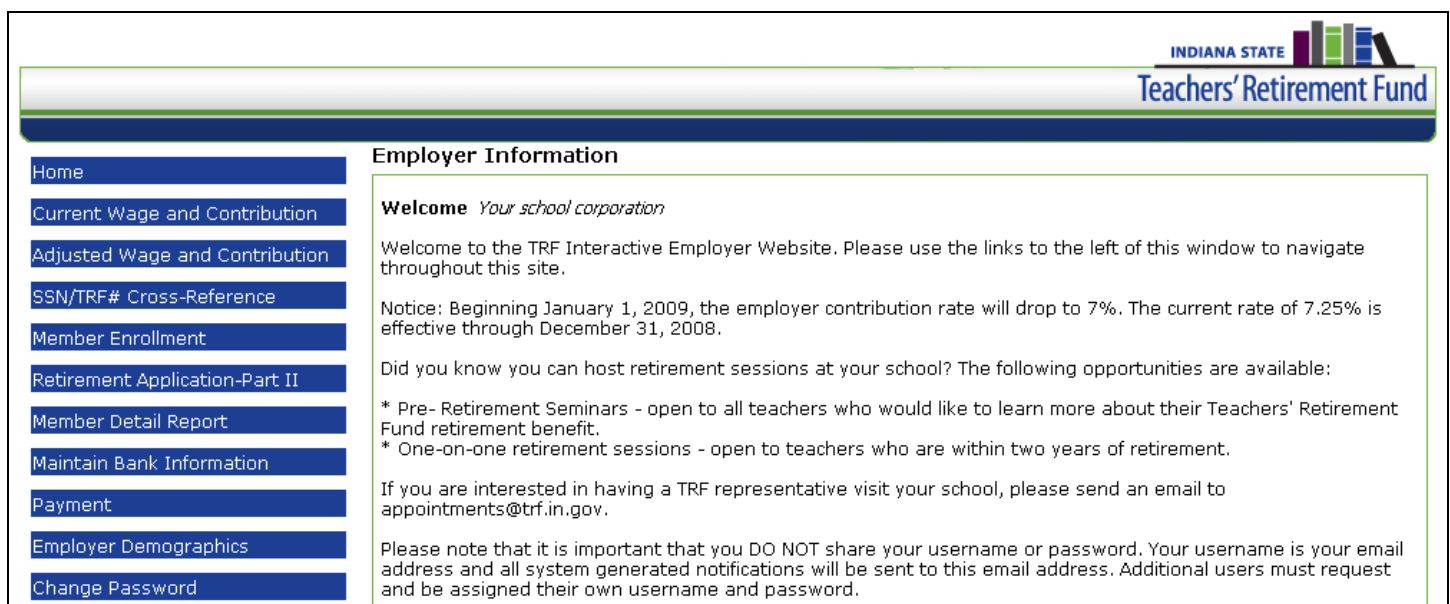
**Figure 2 – Login Page**

The first time you log in, you are required to change your password. For information on password restrictions, click the **Login Help** link.

Once you log in and change your password, your *Employer Information* page (Figure 3) displays. On the *Employer Information* page, all of your designated access rights, including Current Wage and Contribution, are listed on the navigation menu in the left frame on the page.

On the *Employer Information* page (Figure 3), in the navigation frame, there may be links to **SSN/TRF# Cross Reference, Payment, Change Password**, and other options. You may access only those features for which you have requested and been granted access. Other options may not appear on your navigation menu.

The *Employer Information* page (Figure 3) is your personal employer page. Once you successfully log in to the TRF Employer Interactive Web site, you and anyone with security access are able to access this page for your school corporation. Persons without security access cannot view this page.



**Figure 3 – Employer Information Page**


Select the **Employer Demographics** option and the *Employer Demographics* page displays (Figure 4).

## Employer Demographics

On the *Employer Demographics* page (Figure 4), the school corporation information and the current contact list displays.

*Only the Superintendent and one additional Security Administrator can modify user accounts and employer account information. The Security Administrator has limited access to modify the Superintendent's information.*

*The instructions in this document pertain to the Superintendent and the Security Administrator.*



- Home
- Current Wage and Contribution
- Adjusted Wage and Contribution
- SSN/TRF# Cross-Reference
- Member Enrollment
- Retirement Application-Part II
- Member Detail Report
- Maintain Bank Information
- Payment
- Employer Demographics
- Change Password
- TRF Home Page
- Contact TRF
- Forms
- Logout

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### Employer Demographics

Instructions:

- The superintendent's contact information can be modified by the superintendent only but cannot be deleted. You must contact TRF to add or delete the superintendent's contact information.
- The security administrator can modify user accounts but cannot modify or delete the superintendent's contact information. Only the superintendent can delete the security administrator as a contact or reassign a new security administrator.
- Click on the Update Employer Information link to update any employer information.
- Click on the contact name to edit or delete existing contact information.
- Email addresses for existing contacts cannot be modified if the email address is incorrect. In the case of an incorrect email address, the existing contact must be deleted and then added again with the correct email address.
- Click on the Add New Contact link to add a new contact.

<b>Unit Number:</b> <i>TRF Unit Number</i>	<b>Unit Name:</b> <i>Your school corporation</i>
<b>Address:</b> 150 W. Market St Indianapolis, IN 46204	<b>Phone:</b>
	<b>Fax:</b>

Update Employer Information

Add New Contact

Name	Phone	Ext	Fax	Email	Contact Type(s)
<a href="#">Mary Jones</a>	(317) 226-4054			not.caseymj@ips.k12.in.us	C, D, F, G, H, I, J
<a href="#">Donna Doe</a>				not.dinorcid@ips.k12.in.us	E, F, G, H, I
<a href="#">Eugene Doe</a>	(317) 444-4444			not.whiteeg@ips.k12.in.us	E

**Legend**

- A. Superintendent
- B. Treasurer
- C. Part II Contact
- D. P31 Contact
- E. Authorized Agent
- F. New Member Enrollment Contact
- G. Submit Part II Contact
- H. TRF# Cross Reference Contact
- I. Submit P31 Contact
- J. Pay P31 Contact
- K. Security Administrator

**Figure 4 – Employer Demographics Page**

Indiana State Teachers' Retirement Fund  
150 West Market Street, Suite 300  
Indianapolis, Indiana 46204-2809

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TR09063-TRF ER-Employer Demographics Instructions.doc  
Revised: May 2009  
Version: 2.0

On the *Employer Demographics* page (Figure 4), you may select to **Update Employer Information**, **Add New Contact**, or update any of the existing contacts by clicking on the contact's name.

*You must always have a registered contact for the **Superintendent, Treasurer, Part II Contact, and P31 Contact**. If any of these contacts must be removed, the new contact must be added or an existing contact updated to include the Contact Type prior to removing the existing contact.*

## Update Employer Information

On the *Employer Demographics* page (Figure 4), click the **Update Employer Information** link and the *Update Employer Information* page displays (Figure 5).

The current information for your school corporation displays. Make changes as needed and then click **Save Changes**. The *Confirm Employer Information* page (Figure 6) displays.

On the *Confirm Employer Information* page, click **Confirm Changes** and the *Success* page displays (Figure 7). Select one of the menu options in the navigation menu to move from the *Success* page.

Whenever employer or contact information is changed, an e-mail is generated to the contact whose information was changed. See the *Modified Contact Information Confirmation* e-mail (Figure 8).

If more changes need to be made, click the **Make More Changes** button to return to the *Update Employer Information* page.

To discard changes, click **Cancel** to return to the *Employer Information* page (Figure 2) or click **Reset** to return the *Update Employer Information* page to the original information.

The screenshot shows the 'Update Employer Information' page. At the top right is the logo for the Indiana State Teachers' Retirement Fund. On the left is a vertical navigation menu with blue buttons for: Home, Current Wage and Contribution, Adjusted Wage and Contribution, SSN/TRF# Cross-Reference, Member Enrollment, Retirement Application-Part II, Member Detail Report, Maintain Bank Information, Payment, Employer Demographics, Change Password, TRF Home Page, Contact TRF, Forms, and Logout. The main content area is titled 'Update Employer Information' and contains the following text: 'Complete the employer information in the fields provided. Select the **Save Changes** button to save your data.' Below this is a legend: '\* Required Field'. The form fields are: 'Unit Number: TRF Unit Number' (text input), 'Unit Name: Your school corporation' (text input), '\* Address Line 1' (text input with '150 W. Market St'), 'Address Line 2' (text input), 'Address Line 3' (text input), '\* City' (text input with 'Indianapolis'), '\* State' (dropdown menu with 'INDIANA'), '\* Zip' (text input with '46204' and a hyphen separator), '\* Phone' (text input), and 'Fax' (text input). At the bottom right of the form are three buttons: 'Save Changes', 'Reset', and 'Cancel'.

**Figure 5 – Update Employer Information Page**

INDIANA STATE  
Teachers' Retirement Fund

**Confirm Employer Information**

Select **Confirm Changes** to update the database with the below changes. Select **Make More Changes** to edit or view employer information.

<b>Unit Number:</b> 0049011	<b>Unit Name:</b> Indianapolis Public Schools
<b>Address Line 1</b>	150 W. Market St
<b>Address Line 2</b>	
<b>Address Line 3</b>	
<b>City</b>	Indianapolis
<b>State</b>	IN
<b>Zip</b>	46204
<b>Phone</b>	(317) 555-1212
<b>Fax</b>	

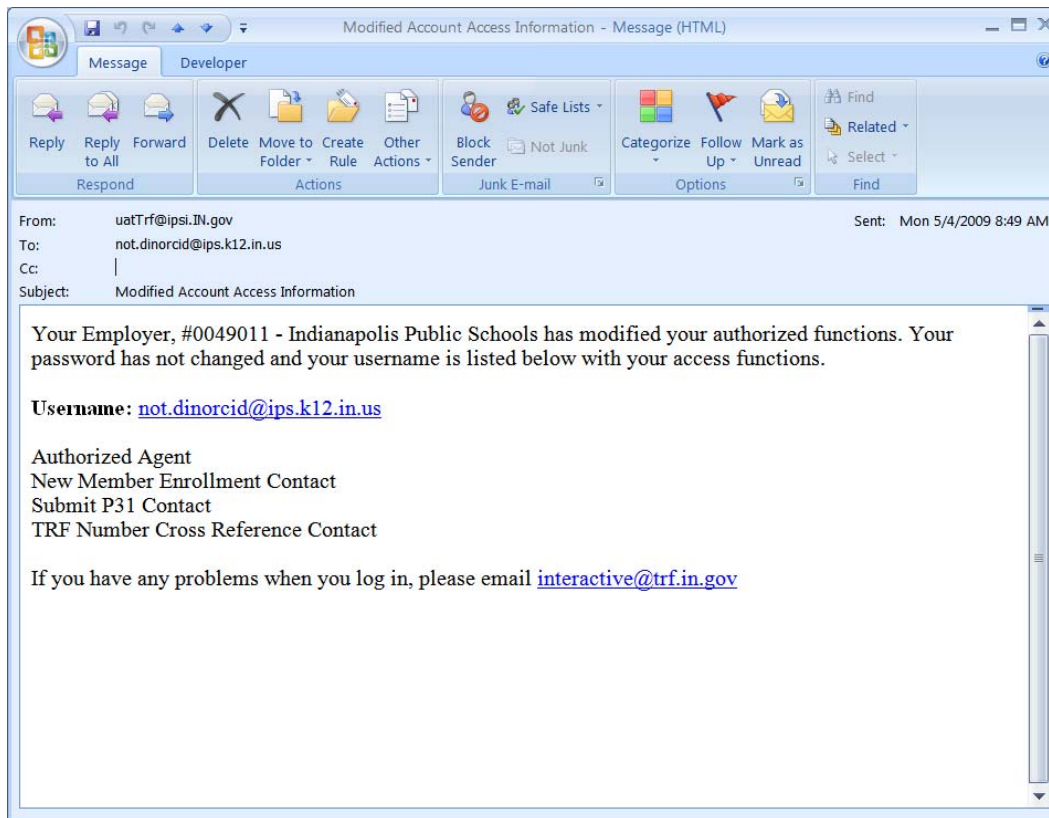
**Figure 6 – Confirm Employer Information Page**

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**Update Employer Information**

Your changes have been successfully saved to the database.

**Figure 7 – Update Employer Information, Success Page**



**Figure 8 – Modified Account Access Information E-mail**

### Add New Contact

On the *Employer Demographics* page (Figure 4), click the **Add New Contact** link. The *Enter New Contact* page displays (Figure 8).

On the *Enter New Contact* page, enter the new contact's information. The items featuring an asterisk (\*) are required.

When entry of contact information is complete, click **Save** to add the new contact to the list featured on the *Employer Demographics* page. The *Confirm Contact Information* page displays (Figure 10).

On the *Confirm Contact Information* page, click **Confirm Changes** to save the information. The *Success* page displays (Figure 11). Click any menu option in the navigation menu to move to another page.

On the *Confirm Contact Information* page, click **Make More Changes** to return to the *Enter New Contact* page for this new contact.

If the new contact is not to be added, click **Cancel** to return to the *Employer Information* page (Figure 2). Click **Reset** to empty the fields on this page.

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### Enter New Contact

Complete the employee contact data in the fields provided. Select the **Save** button to save your data.

\* Required Field

*First Name	<input type="text"/>
Middle Name	<input type="text"/>
*Last Name	<input type="text"/>
*Phone	<input type="text"/>
Ext	<input type="text"/>
Fax	<input type="text"/>
*Email	<input type="text"/>

*Contact Type		
Available		Selected
<ul style="list-style-type: none"> <li>Authorized Agent</li> <li>New Member Enrollment Contact</li> <li>P31 Contact</li> <li>Part II Contact</li> <li>Pay P31 Contact</li> <li>Security Administrator</li> <li>Submit P31 Contact</li> <li>Submit Part II Contact</li> <li>Superintendent</li> <li>Treasurer</li> <li>TRF Number Cross Reference Contact</li> </ul>	<input type="button" value="Select -&gt;"/> <input type="button" value="Remove &lt;-"/>	<input type="text"/>

Figure 9 – Enter New Contact Page

- Home
- Current Wage and Contribution
- Adjusted Wage and Contribution
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### Confirm Contact Information

Select **Confirm Changes** to update the database with the below changes. Select **Make More Changes** to edit or view contact information.

<b>First Name</b>	Jane
<b>Middle Name</b>	
<b>Last Name</b>	Seymour
<b>Phone</b>	(317) 555-3434
<b>Ext</b>	
<b>Fax</b>	
<b>Email</b>	jseymour@ips.k12.in.us
<b>Contact Type</b>	<input type="checkbox"/> Submit P31 Contact <input type="checkbox"/> Submit Part II Contact <input type="checkbox"/> TRF Number Cross Reference Contact

Confirm Changes

Make More Changes

Figure 10 – Confirm Contact Information Page

- Home
- Current Wage and Contribution
- Adjusted Wage and Contribution
- SSN/TRF# Cross-Reference
- Member Enrollment
- Retirement Application-Part II
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### Enter New Contact

Your new contact information has been successfully saved to the database.

Figure 11 – Enter New Contact, Success Page

## Edit Existing Contact

On the *Employer Demographics* page (Figure 4), contact information may be updated by clicking on the contact name. The *Edit Existing Contact* page displays (Figure 12).

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### Edit Existing Contact

Complete the employee contact data in the fields provided. Select the **Save Changes** button to save your data.

NOTE: You cannot add new users on this page. To add a new user, please use the Add New Contact link on the Employer Demographics page.

\* Required Field

\* First Name:

Middle Name:

\* Last Name:

\* Phone:

Ext:

Fax:

\* Email:

Available		Selected
<ul style="list-style-type: none"> <li>Authorized Agent</li> <li>New Member Enrollment Contact</li> <li>P31 Contact</li> <li>Part II Contact</li> <li>Pay P31 Contact</li> <li>Security Administrator</li> <li>Submit P31 Contact</li> <li>Submit Part II Contact</li> <li>Superintendent</li> <li>Treasurer</li> <li>TRF Number Cross Reference Contact</li> </ul>	<input type="button" value="Select -&gt;"/>  <input type="button" value="Remove &lt;"/>	<ul style="list-style-type: none"> <li>New Member Enrollment Contact</li> <li>P31 Contact</li> <li>Part II Contact</li> <li>Pay P31 Contact</li> <li>Submit P31 Contact</li> <li>Submit Part II Contact</li> <li>TRF Number Cross Reference Contact</li> </ul>

**Figure 12 – Edit Existing Contact Page**

On the Edit Existing Contact page, existing information may be updated by making changes to existing information on the page.

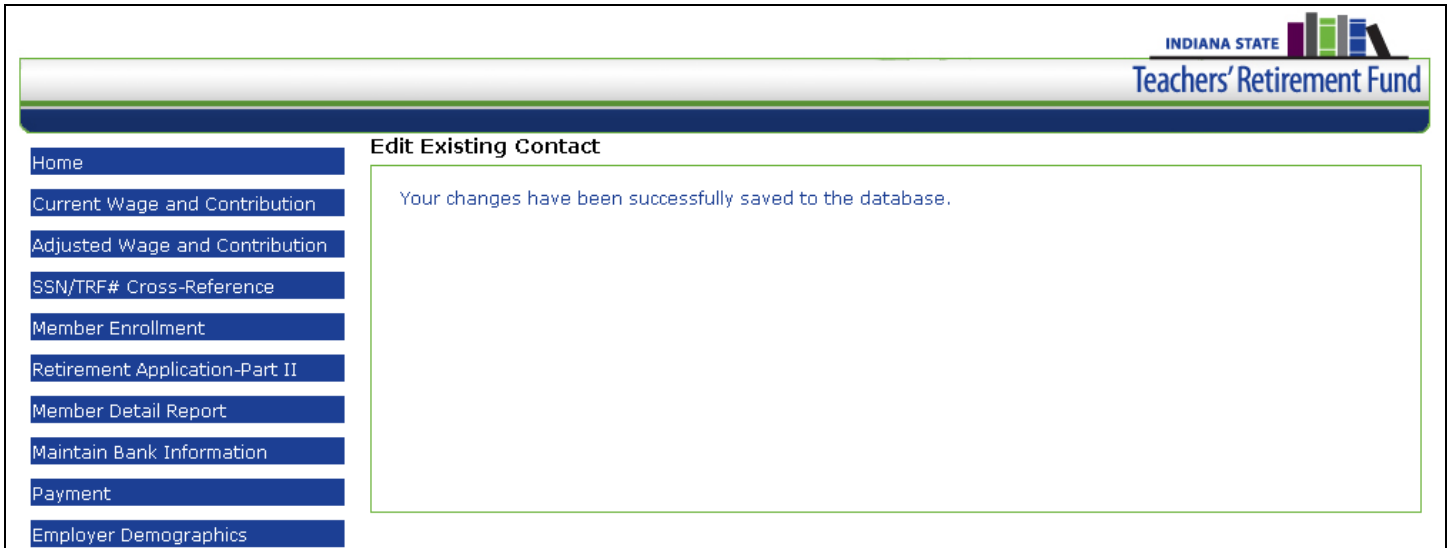
Contact Type designations assign permissions for contacts to perform activities within TRF Employer Interactive. The various permissions are selected from the Available column and added to the Selected column using the **Select** button, or removed from the Selected column, using the **Remove** button.

If the changes are not to be kept, click **Cancel** to return to the *Employer Information* page (Figure 2) or **Reset** to remove the changes and display the original information.

When finished with changes on the *Edit Existing Contact* page, click **Save Changes**. The *Confirm Contact Information* page displays (Figure 10).

On the *Confirm Contact Information* page, click **Confirm Changes** if the changes are to be written to the database. The *Success* page displays (Figure 12).

If more changes need to be made, click the **Make More Changes** button to return to the *Edit Existing Contact* page.



**Figure 13 – Edit Existing Contact, Success Page**

### **Delete Contact**

On the *Edit Existing Contact* page (Figure 12) there is a **Delete Contact** button which allows a contact to be completely removed. Click the **Delete Contact** button and the *Delete Contact Dialog Box* (Figure 14) displays. If the contact is to be deleted, select **Yes**. Otherwise, select **No** and return to the *Edit Existing Contact* page.



**Figure 14 – Delete Contact Dialog Box**