

GETTING STARTED

Employers must be set up as participants of the fund before they can use PERF Online for Employers. See [Admission to the Fund](#) the *Employer Handbook* section online on the PERF website for additional information.

When the setup process is complete, PERF will contact the employer with the User Login ID and Password to use for access. Once the login ID and password are received, the employer can begin using PERF Online.

1.1. How to Access PERF Online for Employers

PERF Online for Employers is accessible from the **PERF Home** page (<http://www.perf.in.gov>) several ways:

- 1** Click the Employer Login graphic:



OR

- 2** Click the Employer Login link under the **Online Services** menu:



OR

- 3** Click the drop down arrow under the **PERF Home** menu to the side to display a submenu:



Click the **Employers** submenu to display another submenu:



Click Login.



Figure 1: PERF Home page

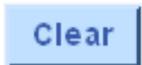
1.1.1. Logging into PERF Online

The **PERF Online Employer Login** page appears. The employer enters their User Login ID and Password where indicated. **Both entries are required.**

This page has the following buttons:



Press this button after entering your **User Login ID** and **Password**.



Press this button to clear all previous entries from the **User Login ID** and **Password** fields.



Figure 2: PERF Online Login screen

NOTE: Throughout PERF Online for Employers, **required** entries are indicated with an asterisk (*). If no entries are made, an **Error** page will appear indicating the missing information.

Page LINKS include:

- ✓ [Login Help](#)
This link has help concerning logging in to PERF Online, see section 1.3. *Login Help* on page 4.
- ✓ [Forgot Password?](#)
If you cannot remember your password, see section 1.3.1. *Forgot Password?* on page 4.

The **PERF Online Employer Disclaimer** page appears (see Figure 4).

The employer should read the disclaimer and click the acknowledgement checkbox as shown in Figure 3 below:

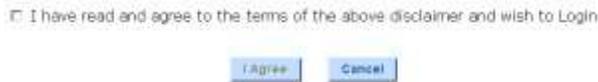


Figure 3: Acknowledgement checkbox



Click this button after reading the disclaimer and agreeing to it. The screen will change to the Welcome Screen (see section 1.2. *Welcome to PERF Online for Employers* on page 3)



Click this button to cancel the login and return to the Login page (see *Chapter 1 – GETTING STARTED* on page 1).



Figure 4: PERF Online Employer Disclaimer

1.2. Welcome to PERF Online for Employers

NOTE: Information in this handbook is based on an employer participating in the main PERF fund. All functionality shown in this handbook is **NOT** offered for employers who participate in one of the non-public employee funds (the 77 Police and Fire Fund is one of the non-PERF funds).

The **PERF Online Employer Welcome** page (see Figure 5) also known as the **Home** page displays when an employer logs in to PERF Online for Employers.

This page features the following sections:

Callout	Description
A	The last date and time PERF Online was accessed by the employer currently logged on.
B	Links to: <ul style="list-style-type: none"> ✓ Contact Us - Contact PERF ✓ Home - PERF Online Employer Welcome (Home) page ✓ Log out - exits PERF Online Additional details on these links can be found in section 1.2.1 <i>PERF Online Links</i> of the <i>PERF Online for Employers Handbook</i> .
C	Employer Account Management Tools Tools to help an employer manage both his/her account and administer specific functions of a member's account associated with the organization. More information is available in Chapter 4 of the <i>PERF Online for Employers Handbook</i> .
D	Link to register for training sessions. For details, see Chapter 3 of the <i>PERF Online for Employers Handbook</i> .

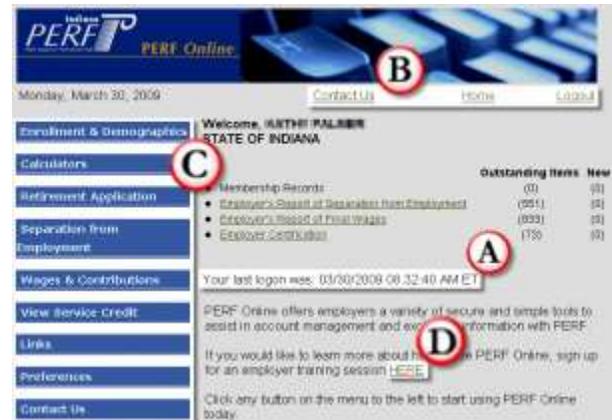


Figure 5: PERF Online Employer Welcome page

IMPORTANT:

The first time you log into PERF Online, change your password and set up your preferences. See section 1.5.1. *Change Password* on page 9 for more information.

Page LINKS include:

- ✓ [Membership Records](#)
- ✓ [Employer's Report of Separation from Employment](#)
- ✓ [Employer's Report of Final Wages](#)
- ✓ [Employer's Certification](#)

These links are used by departments within PERF to help administer/manage accounts.

1.2.1. Organization Drop down menu

If you are set up to administer more than one account (say the Police **AND** Fire Department or a non-77 fund and a 77 fund), a drop down menu will appear above the menu along the left side of the PERF Online home page.

This drop down menu is accessible from all the PERF Online pages at any time.

Select Organization:

0887000 ELKHART COUNTY ▼

Figure 6: Organization Drop Down Menu

1.3. Login Help

This section provides assistance regarding logging in to PERF Online for Employers.

The **Login Help** page (see Figure 7) offers guidance when a password is rejected:

- **You do not know the general password**
Contact PERF. If you or anyone in your organization does not have a general password, an Authorized Agent must contact at PERF at 888-526-1587 to obtain a general password. Any authorized person may use the general password to login and then register his/her individual Login ID and Password for later visits.
- **You and/or other in your organization have been using this site with a shared employer password but have not yet registered for an Individual User Login.**

You and/or others have been using a shared employer password but not individual passwords. Login using the shared password then go to the registration page. Follow the instructions to register for your Individual User Login ID and Password. The system will generate a password and send it to the work email address you provide. You may change the Password later using the method and rule below.

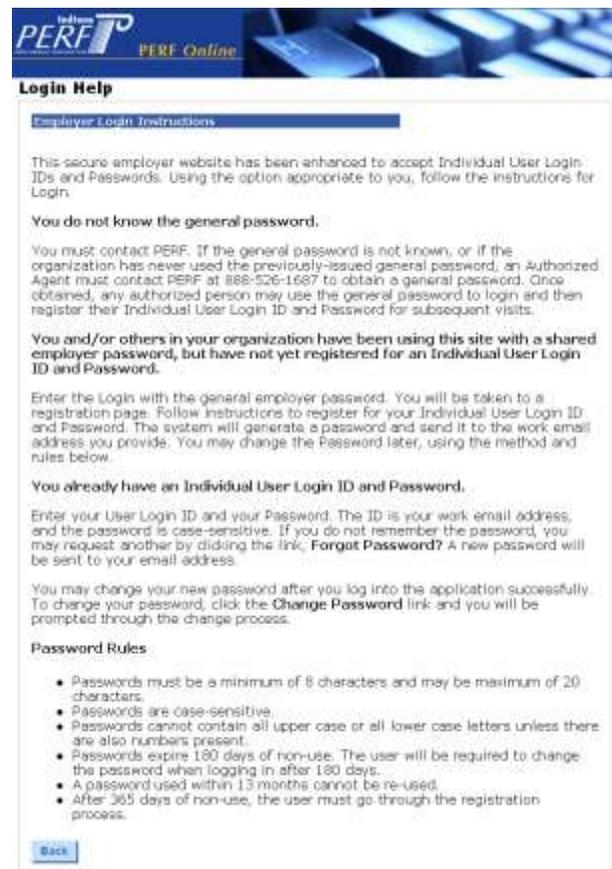


Figure 7: Login Help page

- **You already have an individual User Login ID and Password.**
Enter your User Login ID and your Password. The ID is your work email address and the password is case sensitive. If you do not remember the password, you may request another by clicking the **Forgot Password?** link (see section 1.3.1. *Forgot Password?* on page 5 for more information). A new password will be sent to your email address.

You may change your new password after you log into the application successfully. To change your password, click the **Change Password** link and follow the prompts.

- **Password Rules**

The following items should be kept in mind when generating a password:

- Passwords must be between eight and twenty characters.
- Passwords are case-sensitive
- Passwords cannot have all uppercase or all lowercase characters unless a number is also used.
- Passwords are only valid for 180 days. You must change the password after 180 days.
- Previous passwords used within the past 13 months cannot be re-used.
- If you do not use your password within 365 days, you must re-register.

This button is available on this page.

Back

Click this button to return to the **PERF Online Employer Login** page (see section 1.1.1. Logging into PERF Online on page 2).

1.3.1. Forgot Password?

The **Reset Password** page appears when an employer clicks the **Forgot Password?** link on the **PERF Online Employer Login** page. **An entry is required.**

On the **Reset Password** page (see Figure 8),

Submit

Click this button after entering your **User Login ID**.

A new password will be sent to the e-mail address PERF has on file. Use this new password to sign into PERF Online.

Figure 8: Reset Password page

1.4. Contacting PERF

The **e-mail PERF** page (see Figure 9) appears after clicking one of these links:

[Contact Us](#)

[Contact Us](#)

This page is an online form ensures the person contacting PERF is a PERF member. It is a step for answers to **specific account related questions or issues**.

The following items can be entered (**required entries are in bold**):

- **First Name**
- **Last Name**
- **Last four digits of your Social Security number**
- **Date of Birth (MM/YYYY)** – Enter the two-digit month followed by the four digit year.
- **Your Complete e-mail Address**
- **Retype Complete e-mail Address**
- **Street Address**
- **City**
- **State**
- **Zip**
- **Phone Number** – Enter the area code in the first entry box.
- **Fax Number** – Enter the area code in the first entry box.

Public Employees' Retirement Fund **Indiana PERF**

[PERF](#) > [Contact Us](#) > e-mail PERF

e-mail PERF

To send a general, non-account related comment or question, please go to [Contact Us](#) and click on the general e-mail link. You will not receive specific account information using this form.

The form below will allow us to positively identify you as a member in order to provide specific benefit information. This information is requested for security purposes.

NOTE: Fields marked with * are required.

*First Name:

*Last Name:

*Last Four Digits of your Social Security Number:

*Date of Birth (MM/YYYY):

*Your Complete e-mail Address :
(Example: username@domain.com)

*Retype Complete e-mail Address:

*Street Address:

*City: *State: *Zip:

*Phone Number: () -

Fax Number: () -

What is the Subject of Your e-mail?
Select One

*How May We Help You?

Figure 9: e-mail PERF page

- What is the Subject of Your e-mail? – Click the drop down arrow to display the available pre-defined choices (see Figure 10). Use the arrow keys to view all selections and choose one.

Figure 10: What is the Subject of Your e-mail? List selections

- **How May We Help You?** – Enter the specifics of your questions, issues or other comments.

Submit

Click this button after entering the requested information.

NOTE: Any required items that were omitted will return an error page indicating that the missing information must be filled in and the e-mail resubmitted.

Page LINKS include:

✓ [Contact Us](#)

This link opens a different more general Contact Us window that is used for non-specific account and benefit questions. See section 1.4.1. PERF General Inquiries Contact Page on page 8 for more information.

A confirmation page (see Figure 11) appears indicating the e-mail was successfully submitted and an expected response timeframe.

[PERF > Thank You](#)

Contact Us

Your email has been successfully submitted. Thank You!

We will respond to your request within 48 hours.

Please feel free to contact our Customer Service Department at 1-888-526-1687 should you need immediate assistance. Our office hours are 8:00 AM - 5:00 PM, Monday through Friday.

Thanks again for your inquiry!

Public Employees' Retirement Fund Customer Service

Figure 11: E-Mail Confirmation page

1.4.1. PERF General Inquiries Contact Page

This **Contact Us** page (see Figure 12: General Contact Us page for PERF) is used for **general, non-account related** comments or questions. There are sections on this page containing specific information for:

- Retirement Medical Benefits Account Plan – phone numbers and information
- e-mail Us – Links to general questions or comments and to information about a particular account or member information.
- Media Contact
- PERF Offices
- Mailing Address
- Phone Number
- Fax Numbers
- Driving Directions

Page LINKS include:

- ✓ [State Budget Agency's Web site](#)
Opens a window for the State Budget Agency site.
- ✓ [General questions or comments unrelated to a specific account](#)
Opens a window allowing the member to send an e-mail message.
- ✓ [Information about a particular account or member information](#)
Opens a different Contact Us window that is described as the first option in this appendix.
- ✓ [Driving Directions to PERF](#)
Opens a MAPQUEST window containing how to navigate to the PERF office.

Figure 12: General Contact Us page for PERF

1.5. Preferences

This feature allows you to change your password and also verify or change your preference options.

When you initially log in to PERF, you should change your password. Use **View or Change Preferences** to verify or change your preference options. After that, you can determine when to use the Preferences tool.



Figure 13: Preferences menu

The two options available are:

- Change Password – See section 1.5.1. Change Password on page 9.
- View or Change Preferences – See section 1.5.2. View or Change Preferences.

1.5.1. Change Password

You must change your password immediately.

To change a password, select **Change Password** under **Preferences** from the **Employer Account Management Tools** section.

The Change Password page will appear.

Complete the following items (**all entries are required**):

- **Old Password**
- **New Password**
- **Confirm Password**

As a reminder, password rules are provided.

Save Changes

Click this button after all requested information has been entered and your **password** will be changed.

 A screenshot of the 'Change Password' web page. At the top, the title 'Change Password' is in green. Below it, a message states: 'New password must be a minimum of 8 characters and may be maximum of 20 characters. Passwords are case-sensitive.' Underneath, it says 'You may use:' followed by a bulleted list of password rules: 'Any combination of upper and lower case', 'Any combination of upper case and numbers', 'Any combination of lower case and numbers', and 'All numbers'. Below the list are four input fields: 'User Login ID' (pre-filled with 'kapalmer@perf.in.gov'), 'Old Password', 'New Password' (with '(minimum 8 characters)' to its right), and 'Confirm Password'. At the bottom of the form is a blue 'Save Changes' button.

Figure 14: Change Password page

1.5.2. View or Change Preferences

The **Employer Preferences** page (see Figure 15) shows all the organizations you administer.

The registered user is listed along with the e-mail address to which notifications will be sent.

Reference information which may be changed includes:

- **Selecting the Default Organization** — If multiple organizations appear, select the radio button for the default fund for login. This will be the organization that will be logged into by default whenever you log into PERF Online.
- **E-mail Confirmation** — Checking this box will send email confirmations for Separation from Employment, Final Wages and Service Certification reports. Clearing the checkbox will **NOT** send these reports by e-mail.
- **Agent Information** — See section 1.5.3. Authorized Agent Information on page 10.

Figure 15: Employer Preferences page

The following buttons are available on this page:

Save Changes

Click this button when finished with the entries and to **save** your preferences.

Cancel

Click this button **without saving** changes and to return to the **PERF Online Employer Welcome** page (see section 1.2. Welcome to PERF Online for Employers on page 3)

1.5.3. Authorized Agent Information

An authorized agent is a person who has been authorized by you to accept electronic documentation from PERF and to answer inquiries for information from PERF. You must specify an authorized agent on this page.

Entries made for the following items (all entries are required) will automatically be entered in the Authorized Agent fields (see Table 1).

Figure 16: Agent Information fields

Table 1: Agent Information fields

Agent Information Field	Used in	Section
Title of Authorized Agent - The title of the person authorized by you.	Bulk Upload of Membership Records, Manual Entry	5.3.1 of the <i>PERF Online for Employers Handbook</i>
First Name of Authorized Agent - The first name of the person authorized by you.	Bulk Report of Separation from Employment, Manual Entry Bulk Report of Separation from Employment, View Pending Records	8.2.1 of the <i>PERF Online for Employers Handbook</i>
Last Name of Authorized Agent - The last name of the person authorized by you.	Employer Certification, Employer Certification of Creditable Services and Authorized Leave	8.4.2. of the <i>PERF Online for Employers Handbook</i>

1.6. Search for a member

Selecting Employer Account Management Tools displays the **Member Search** page. The following tools use the **Member Search** page:

- Enrollment and Demographics
 - ✓ View or Change Menu Address
 - ✓ Membership Records & Enrollment
- Calculators – All choices
- Retirement Application
- Separation from Employment – All choices
- View Service Credit

To search for a member record, enter information for one or more of the following items (**Required fields are bolded**):

- **SSn (Social Security number)**
- **Last Name**
- **First Name**

Member Search

STATE OF INDIANA

Enter complete SSN or last 4 digits of SSN and/or name for the member that you would like to search for. Next, select Submit.

* Required Field

SSN (numeric characters only)

*

Last Name

*

First Name

*

Privacy Notice
All Social Security Numbers are requested by this agency in accordance with the requirements of the Internal Revenue Code. Disclosure is mandatory and this form will not be processed without this information.

Requested by PERF
Records Completed in Last 90 Days

Figure 17: Member search page

This page has the following button:



Click this button to submit the entered information.

Page LINKS include: ✓ [Requested by PERF](#)
 ✓ [Records Completed in Last 90 Days](#)

Both of these links are used internally by PERF to help administer and manage accounts and only appear when applicable.

Results matching the search criteria entered for the member record search are displayed on the **Member Search** page (see [Figure 18](#)).

Click the linked Social Security number (ex. [###-##-8894](#)) for the appropriate employee record.

8 records found.

SSN	Employee Name: First, Middle Initial, Last
###-##-8894	AMANDA J STRETTON
###-##-8894	ED E CARPENTER
###-##-8894	ED A CARPENTER
###-##-8894	ED F CARPENTER
###-##-8894	JENNIFER A TUMMINELLI
###-##-8894	MARTY P ROTH
###-##-8894	MARTY A ROTH
###-##-8894	MARTY L ROTH

Figure 18: Member Search results

If more records meet the search criteria than can be displayed online, an error window displays.

Page LINKS include: ✓ [Back](#)

Click this link to return to the **Member Search** page to perform another search using more specific criteria.



Figure 19: Error in Search – Too Many Records