

# Member Enrollment – Employer User QRG

## Member Enrollment – Employer User

Use the *Member Enrollment – Employer User Quick Reference Guide (QRG)* to aid in enrolling members into PERF, TRF, the JU Fund or the '77 Fund in the Employer Reporting and Maintenance (ERM) application.

### **Enrolling a Member in the PERF, TRF or the JU Fund**

An Employer User with the appropriate security role can enroll members in PERF, TRF or the JU Fund using the ERM application.

#### **To enroll a member in PERF, TRF or the JU Fund:**

1. Access the ERM application. Choose “Member” from the left-hand side Navigation Menu.
2. Choose “Enroll Member” from the drop-down menu.
3. Select the member’s Submission Unit from the grid on the *Select Submission Unit* screen.
4. Enter, then verify, the member’s Social Security Number (SSN) using the *Enter SSN* screen (Figure 1). Click the **Next** button.

**NOTE:** If the member’s SSN already exists in the application, there are different pop-up boxes that appear depending upon the member’s status in the ERM application. For more information about these pop-up boxes, please see the *Verify Member Social Security Number* section of the *Member Management User Manual – Employer User*.

5. Enter the member’s position using the *Select Position* screen. The information required on this screen varies based upon the Fund into which the new member is enrolling.
6. Use the *Create New Member* screen (Figure 2) to provide member demographic information. Click the **Next** button. The *Verify Member Enrollment* screen appears.
7. Confirm all information displayed on the *Verify Member Enrollment* screen is correct and click the **Submit** button.
8. Once the enrollment process is complete, the *Confirm Member Enrollment* screen appears. This screen displays the Pension ID assigned to the member by the ERM application.

**NOTE:** If the enrollment transaction contains an error, a message appears on the *Confirm Member Enrollment* screen stating that the transaction was placed in the Exception Queue. This error must be fixed before the transaction can be accepted. For more information, please see the *Exception Queue* section of the *Member Management User Manual – Employer User*.

#### Member Enrollment Topics Covered:

- Enrolling a Member in PERF, TRF or the JU Fund
- Enrolling a Member in the '77 Fund



Figure 1: Enter SSN Screen

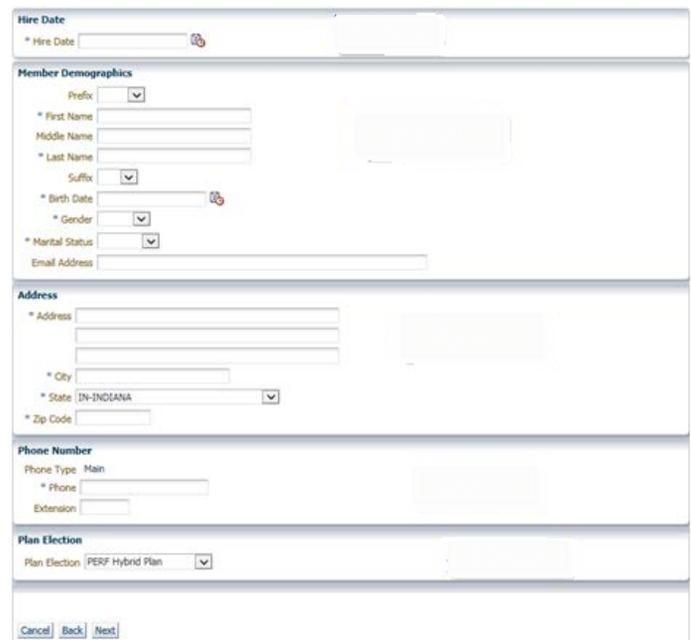


Figure 2: Create New Member Screen

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## Enrolling a Member in the '77 Fund

The enrollment process for the '77 Fund is similar to the PERF, TRF and JU Fund enrollment process with some minor differences.

### To enroll a member in the '77 Fund:

1. Access the ERM application. Choose “Member” from the left-hand side Navigation Menu.
2. Choose “Enroll Member” from the drop-down menu.
3. Select the member’s Submission Unit from the grid on the *Select Submission Unit* screen.
4. Enter, then verify, the enrolling member’s SSN using the *Enter SSN* screen (Figure 1).

**NOTE:** If the member’s SSN already exists in the application, there are different pop-up boxes that appear depending upon the member’s status in the ERM application. For more information about these pop-up boxes, please see the Verify Member Social Security Number section of the *Member Management User Manual – Employer User*.

Figure 3: Create New Member Screen

5. Use the *Create New Member* screen (Figure 3) to provide member demographic information. Click the **Next** button. The *Verify Member Enrollment* screen appears.
6. Confirm all information displayed on the *Verify Member Enrollment* screen is correct and click the **Submit** button.
7. A screen message will appear, stating that '77 Fund enrollments are sent to the Member Enrollment Exception Queue in “Pending” status until results of the Statewide Baseline Examination are received. Once INPRS receives the results, INPRS Staff will contact you to complete the enrollment.

Enrollment Type	Upload Date	PID	SSN	Last Name	Error(s)	Phy. Date	Action
Member Enrollment Online	9/28/2011	00098463C	***-**-6669 77		Physical incomplete	9/30/2011	Enter Hire Date

Figure 4: Member Enrollment Exception Queue

8. Once you receive notification from INPRS, either by phone or email, that the member has passed the Statewide Baseline Examination, access the Member Enrollment Exception Queue (Figure 4) from the Home Dashboard.
9. Find the member’s enrollment transaction, click the *Enter Hire Date* hyperlink in the “Action” column, and enter the member’s hire date.
10. Once the enrollment process is complete, the *Confirm Member Enrollment* screen appears. This screen displays the Pension ID assigned to the member by the ERM application.