Member Modification and Exception Queue – Employer User QRG

Modifying a Member Account

Use the *Member Modification and Exception Queue – Employer User Quick Reference Guide (QRG)* to aid in modifying member information in the ERM application.

Member Modification and Exception Queue Topics Covered:

→ Modifying a Member Account
→ Managing the Exception Queue

To locate a member account:

1. Access the ERM application. Choose “Member” from the left-hand side Navigation Menu, then choose “Modify Member” from the drop-down menu.
2. Use the fields in the Search Member section of the *Modify Member* screen (Figure 1) to search for a member account.
3. Click the **Search** button. Results appear in the bottom three sections of the screen (Figure 2).

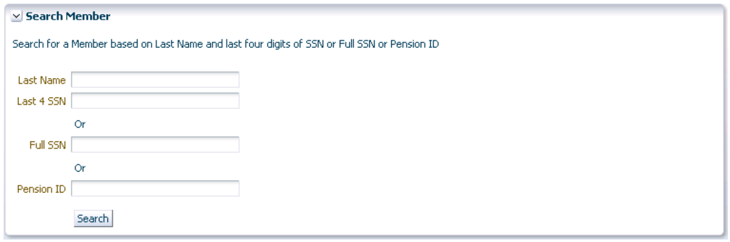

Figure 1: Search Fields on the *Modify Member* Screen

To modify a member account:

1. To modify a member’s first, middle or last name, gender or marital status:
   a. Click the **Modify** button in Section 1 of the *Modify Member* screen (Figure 2).
   b. Type the updated data into the field or select the correct option from the drop-down menu. All required fields, denoted with an asterisk (*), must be populated before saving.
   c. Click the **Save** button.
2. Section 2 contains a grid listing all Submission Units associated with the member. Depending upon which Submission Unit is selected in Section 2, the information displayed in the tabs will change.

NOTE: Member Submission Unit information is view-only and cannot be modified. Only Submission Units that you have access to view appear in the grid.

3. To modify member Fund information (PERF and TRF only):
   a. Choose the Member Fund – PERF (or TRF) tab in Section 3.
   b. Click the **Modify** button.
   c. Place your cursor in the field you wish to modify and type the updated information into the field, or choose the correct option from the drop-down menu. All required fields, denoted with an asterisk (*), must be populated before saving.
   d. Click the **Save** button.

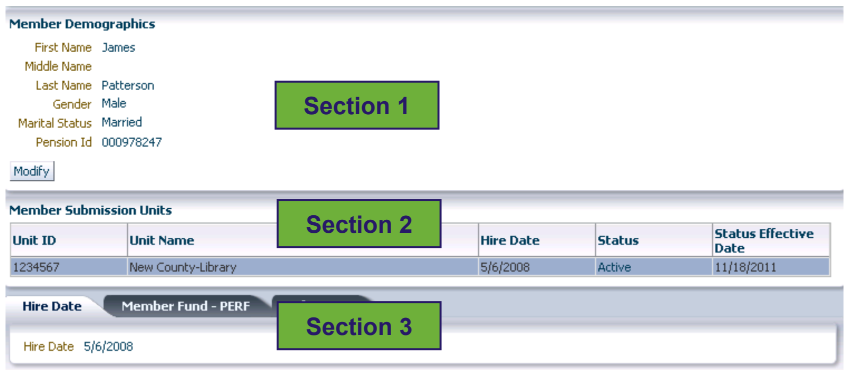

Figure 2: Member Demographics Section of the *Modify Member* Screen

4. To modify member Life Events (including member terminations):
   a. Choose the Life Events tab in Section 3 and click the **Add Life Event** button.
   b. Click the arrow to the right of the **Life Event** field.
   c. Choose the appropriate Life Event from the drop-down menu.
   d. Complete any additional fields that appear on the screen once the Life Event is selected. All required fields, denoted with an asterisk (*), must be completed before saving.
   e. Click the **Save** button.

NOTE: Employer Users cannot modify a member’s hire date. If this information needs to be modified, please contact INPRS.

Member Modification and Exception Queue – Employer User QRG

Managing the Exception Queue

For any member transaction that contains errors and fails validation, and for all ‘77 Fund enrollments, the transaction is placed into the Exception Queue. You must resolve the exception before the transaction is accepted by the ERM application and becomes effective. If the exception is not resolved, then wage and contribution amounts submitted for this member will also be placed in the Wage and Contribution Exception Queue and will not be accepted by the ERM application.

To access the Exception Queue:

1. Select the appropriate Submission Unit from the grid on the ERM *Home* page.
2. Click the **Next** button to access the Home Dashboard.
3. Click the applicable hyperlink in the “Exception Type” column in the Exceptions Summary section. The Exception Queue tab for the chosen hyperlink will automatically open (Figure 3).

To resolve a member maintenance or enrollment exception from the Exception Queue:

1. Click the *Resolve* hyperlink in the “Action” column of the table to open a summary screen for the chosen transaction. A description of the error(s) that caused the transaction to be placed in the Exception Queue appears in the upper right of the summary screen.
2. Locate the data field that contains the error.
3. Enter the data required to resolve the error(s) into the appropriate field(s).
4. Once you’ve provided the information necessary to resolve the error, click the **Save and Revalidate** button to resubmit the transaction for validation. If you would like to remove a transaction because it was entered erroneously, click the **Delete** button.
5. If you don’t have the information required to resolve the exception, click the **Back** button to return to the ERM *Home* page.

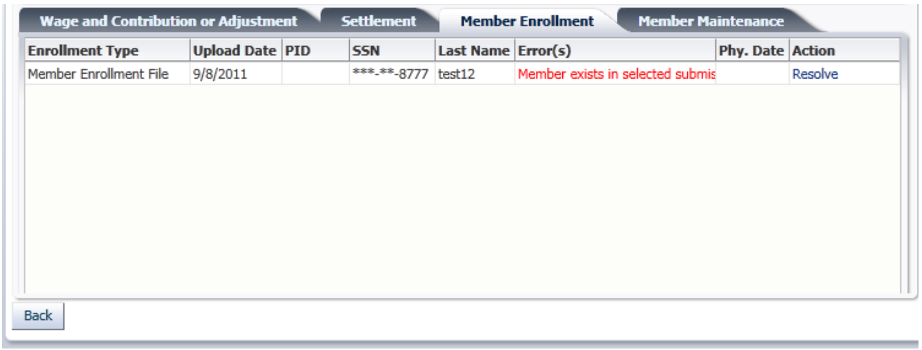

Figure 3: ***Member Enrollment Exception Queue***

To complete a ‘77 Fund enrollment:

Before an enrollment into the ‘77 Fund is complete, the member must pass the Statewide Baseline Examination. Once you receive notification, either by phone or email from INPRS, that results have been received, you will need to enter the member’s hire date to complete the member’s enrollment into the ‘77 Fund.

To complete the enrollment:

1. Click the member’s enrollment transaction hyperlink in the “Exception Type” column in the Exceptions Summary section on the Home Dashboard.
2. Click the *Enter Hire Date* hyperlink in the “Action” column of the table next to the transaction you wish to modify.
3. Enter the member’s hire date into the **Hire Date** field.
4. Click the **Save and Revalidate** button to submit the transaction for validation.

NOTE: If transactions have been in the Exception Queue for 30 days or more, you will not be able to submit reports for payment until the errors are resolved.

INPRS
INDIANA PUBLIC RETIREMENT SYSTEM