

TRF Employer Interactive: Member Enrollment Instructions

Member Enrollment is an online feature for employers to enroll TRF-qualified employees (members) into the Indiana State Teachers' Retirement Fund (TRF) when employees do not have an assigned TRF number. This feature is used when the *Quarterly Wage and Contribution Report* (P31) is due and the employer does not have an enrollment form on record for the employee. The following new member enrollment forms are available on the *Forms* page of the TRF Web site at www.in.gov/trf.

- *Enrollment Form for New Members* (State Form 37680) also available at <http://www.in.gov/icpr/webfile/formsdiv/37680.pdf>
- *Enrollment for New Members Employed by a Charter School* (State Form 53269) also available at <http://www.in.gov/icpr/webfile/formsdiv/53269.pdf>

The following requirements are outlined on the Member Enrollment page (Figure 4):

- TRF member enrollment should be submitted to the Indiana State Teachers' Retirement Fund within five days of the teacher's date of employment.
- Every effort should be made to ensure that the Fund receives an official *Enrollment Form for New Members* and a certified birth certificate.

Login Instructions

These are the instructions for the TRF Employer Interactive Web site. Access the TRF *Home* page at 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.*

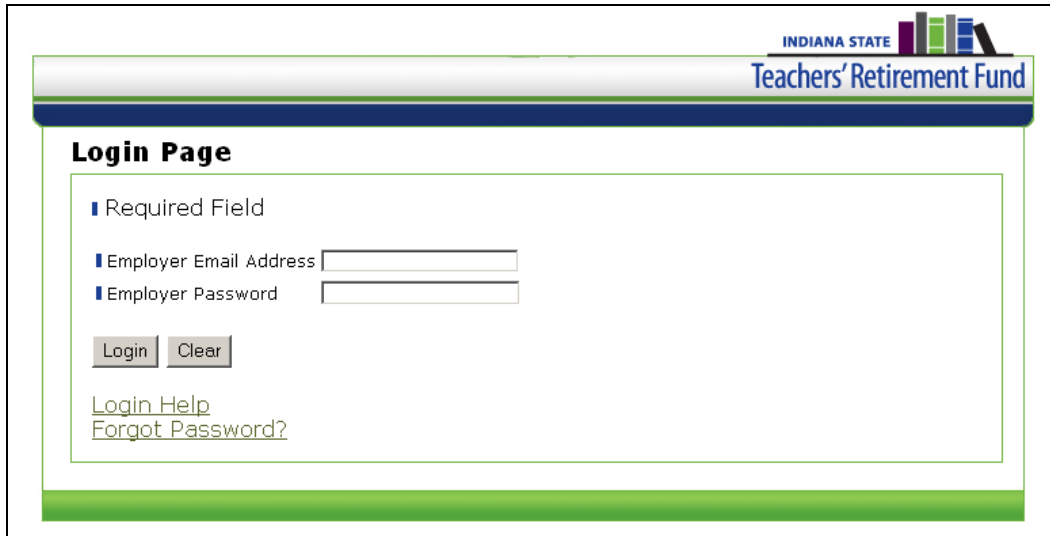


Figure 2 – Login Page

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.

<ul style="list-style-type: none"> 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 	<h3>Employer Information</h3> <p>Welcome <i>Your school corporation</i></p> <p>Welcome to the TRF Interactive Employer Website. Please use the links to the left of this window to navigate throughout this site.</p> <p>Notice: Beginning January 1, 2009, the employer contribution rate will drop to 7%. The current rate of 7.25% is effective through December 31, 2008.</p> <p>Did you know you can host retirement sessions at your school? The following opportunities are available:</p> <ul style="list-style-type: none"> * Pre-Retirement Seminars - open to all teachers who would like to learn more about their Teachers' Retirement Fund retirement benefit. * One-on-one retirement sessions - open to teachers who are within two years of retirement. <p>If you are interested in having a TRF representative visit your school, please send an email to appointments@trf.in.gov.</p> <p>Please note that it is important that you DO NOT share your username or password. Your username is your email address and all system generated notifications will be sent to this email address. Additional users must request and be assigned their own username and password.</p>
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Figure 3 – Employer Information Page

Select the **Member Enrollment** option in the navigation menu and the *Member Enrollment* page displays (Figure 4).

Member Enrollment

On the *Member Enrollment* page (Figures 4 and 5), enter the member information in the fields provided. Fields marked with an asterisk (*) are required.

Member Enrollment

Enrollment Form for New Members

TRF member enrollment should be submitted to the Indiana State Teachers' Retirement Fund within five (5) days of the teachers' date of employment. You must complete all items on this form where the field is marked required (*). Every effort should be made to ensure that the Fund receives an official "Enrollment Form for New Members" and a certified birth certificate.

Member Information * - Required Field

* First Name	<input type="text"/>
Middle Name	<input type="text"/>
* Last Name	<input type="text"/>
* Social Security Number	<input type="text"/> (numeric characters only)
* Date of Birth	<input type="text"/> (in mm/dd/yyyy format)
* Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
* City	<input type="text"/>
* State	Select <input type="text"/>
* Zip	<input type="text"/> (numeric characters only)
* Date of Hire	<input type="text"/> (in mm/dd/yyyy format)
* Home Phone Number	<input type="text"/> (numeric characters only)
Other Phone Number	<input type="text"/> Extn <input type="text"/> (numeric characters only)
* Current Marital Status	Married <input type="text"/>
* Gender	Male <input type="text"/>

Figure 4 – Member Enrollment Page (Top)

Member Enrollment

Employment Status	
<input type="radio"/> Full Time	
* Email Address	<input type="text"/>
<input type="radio"/> Part Time	
* <input type="checkbox"/> Employee has at least an Associates Degree	
* <input type="checkbox"/> Employee has worked 60 days in 2 years or 120 days in 1 year	
* <input type="checkbox"/> Employee is licensed by the Department of Education (DOE)	
Email Address	<input type="text"/> (optional)

Employer Information	
Unit Name: <i>Your school corporation</i>	Unit Number: <i>TRF Unit Number</i>

Please click the Submit button only once, and do not hit refresh after clicking Submit. Otherwise, a duplicate enrollment may be processed.

Privacy Notice
Your Social Security Number is requested by this agency in accordance with the requirements of IRS Code 3405. Disclosure is mandatory and this form will not be processed without this information.

Figure 5 – Member Enrollment Page (Bottom)

After all information is entered click **Submit** to submit the member information. If the information is complete and does not conflict with information provided for an existing member, the *Success* page displays (Figure 6).

On the *Success* page, the TRF number displays. To move from the *Success* page, select any menu option in the navigation menu.

On the *Member Enrollment* page, the **Reset** button clears all entered information on the page.

Figure 6 – Member Enrollment Success Page

If the employee exists in the TRF database (already assigned a TRF number) and/or the data on file does not match the entered data, an *Error* message displays (Figure 7).

If the TRF number is the issue, use the **SSN/TRF# Cross-Reference** option on the navigation menu to find the member’s assigned TRF number by entering the member’s Social Security number.

Click the **Back** link on the *Error* page to return to the *Member Enrollment* page to correct the information.

trf@trf.in.gov or 1-888-286-3544 to resolve this issue.' Below the message is a **Back** link."/>

Figure 7 – Error Message

If the employee does not have a TRF number this might indicate that the employee is a beneficiary on another member’s account and some of the data entered does not match the

database. Contact TRF if you receive this error and are unable to retrieve the TRF number by using the **SSN/TRF# Cross-Reference** feature.

When a new TRF number is assigned an *Employee Registration Confirmation* e-mail (Figure 8) is sent to the member. The employer is not required to send an original enrollment form to TRF at this time.

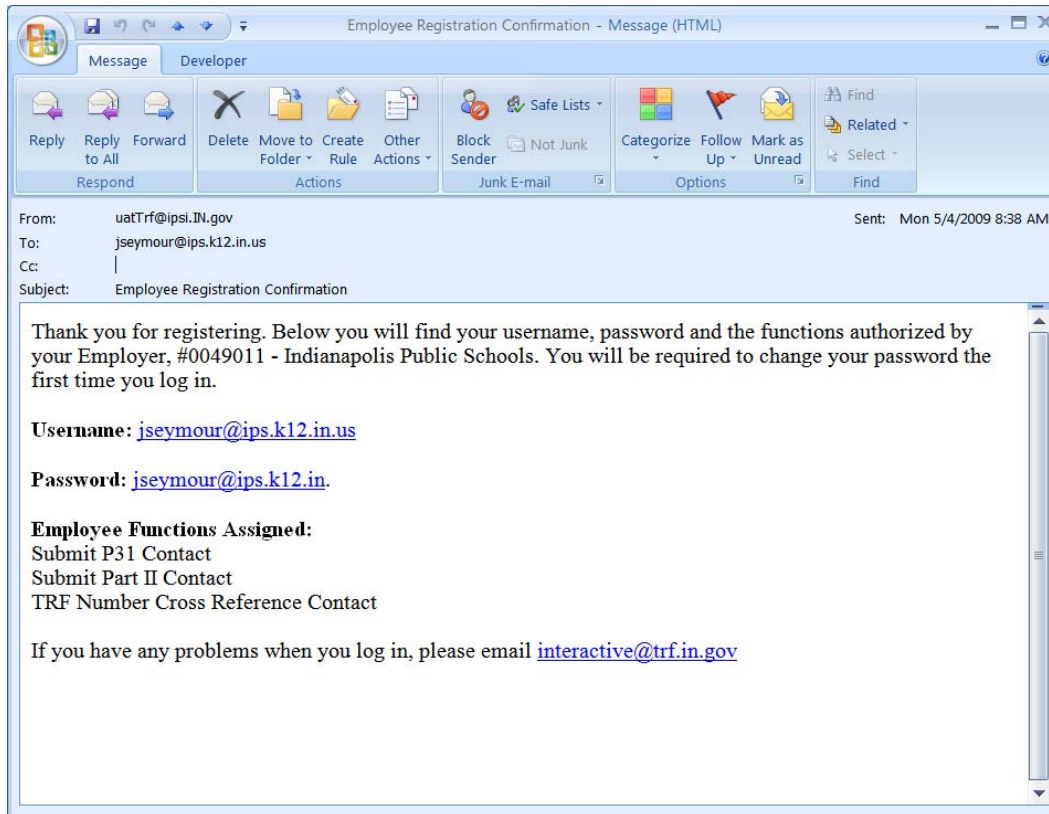


Figure 8 – Employee Registration Confirmation E-mail