

## PENSION RELIEF

The Pension Relief Fund (IC 5-10.3-11) was established to help cities and towns with the financial burdens associated with the police and fire 1925, 1937, and 1953 retirement systems (collectively known as the "Old Plans").

### 1.1. Overview of how a Pension Relief submission is processed

The process of submitting data for pension relief begins when you submit and save your Pension Relief (PR) data in the Pension Relief section of PERF Online. This link will be made available starting **Dec 14, 2009**, although the information will not be submitted to PERF until **Jan 1, 2010**.

Data saved on PERF Online does not mean it has been submitted to PERF. On Jan 1, a new link will be available to upload the data file to PERF. Once your PR data is submitted to PERF, you will receive an e-mail notification that the submission was successful. You have until **Feb 1, 2010** to enter and submit PR data on PERF Online. You are ineligible to receive a distribution if you do not supply the complete information (IC5-10.3-11-4).

PERF reviews all PR data submissions and either approves or sends them back for additional information. If a submission is sent back, you are notified that the submission has errors and that it must be corrected and resubmitted before the submission can be approved. Once all the submissions are approved, a PERF Online notifies you by e-mail that the PR Data is approved.

Once all information has been received and approved, it is sent to PERF's actuary who calculates estimates to be paid to each local unit. You will receive a e-mail/letter indicating your PR distribution amount of your first payment. Before the second payment is due to go out, you will receive another e-mail/letter indicating your PR distribution amount of your second payment. The calculated PR totals are distributed using EFT in two installments: the first on **Jun 30, 2010** and the second on **Sept 30, 2010**.

For a list of Frequently Asked Questions, go to the Pension Relief Information section on the PERF website (<http://www.in.gov/perf>), select **My Plan → Police Officers and Firefighters** from the menu on the left, and scroll down to the last section, **Pension Relief Information**. There is a link for Frequently Asked Questions.

#### Important Dates:

- **Dec 14, 2009:**  
Availability of link on PERF Online to begin entering Pension Relief data.
- **Jan 1, 2010:**  
Date after which Pension Relief data can be submitted for processing to PERF.
- **Feb 1, 2010:**  
Last day to submit Pension Relief data to PERF. You are ineligible to receive a distribution if you do not supply the complete information (IC5-10.3-11-4).
- **Feb 26, 2010:**  
Reviewing of PR Data complete.
- **Mar 1, 2010 – Apr 1, 2010:**  
PERF's Actuary Processes PR Data.
- **Apr 2, 2010 – Jun 29, 2010:**  
PERF Finance prepares PR Distributions.
- **Jun 30, 2010:**  
First installment of Pension Relief distribution paid out.
- **Sept 30, 2010:**  
Second and last installment of Pension Relief distribution paid out.

## 1.2. Upload Pension Relief Data File

If you are an employer that has access to the Pension Relief Fund, an additional **Upload Pension Relief File** menu will appear on the PERF Online page.



Figure 1: PERF Online menus with Upload Pension Relief File option and with no Upload Pension Relief File option

Employers with Pension Relief and can use this tool to do the following

- Upload pension relief data.  
This link is **only available** after Dec 14 to start saving PR submission data. From Jan 1 until Jan 31, you can submit your PR data to PERF. This link disappears after the data has been submitted.
- Upload their active member data file.  
The upload is performed annually and this link is **always available** to the employer.

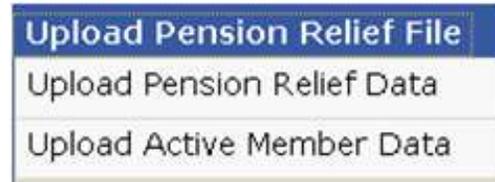


Figure 2: Upload Pension Relief File menu

[Upload Pension Relief File](#)

Click this button from the **PERF Online Employer Welcome** page to display the menu in Figure 2 and make a selection.

### 1.3. Upload Pension Relief Data

The **Upload Pension Relief File** page (see Figure 3) appears after clicking on the Upload Pension Relief Data menu selection.

The pension relief data file must be in a specific format in order to be submitted. A template is provided (see the Page LINKS box below).

See section 1.3.1. Uploading the Pension Relief Data on page 4 for instructions on how to upload the pension relief file.

The following buttons are on this page:

|                  |                                                                                                                                                             |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Browse...        | Click this button to open the Select File window (see Figure 4).                                                                                            |
| Upload File      | Click this button after selecting the file to upload and to begin the upload process.                                                                       |
| Cancel Upload    | Click this button to cancel the upload process, exit the <b>Upload Pension Relief File</b> page and return to the <b>PERF Online Employer Welcome</b> page. |
| Previous Data    | Click this button to view the pension relief data that was submitted the year before. See section 1.3.3. Previous Pension Relief Data Records on page 7.    |
| Records in Queue | Click this button to view records that were Saved as Incomplete. See section 1.3.4. Pension Relief Data File Queued Records <i>on page 8.</i>               |

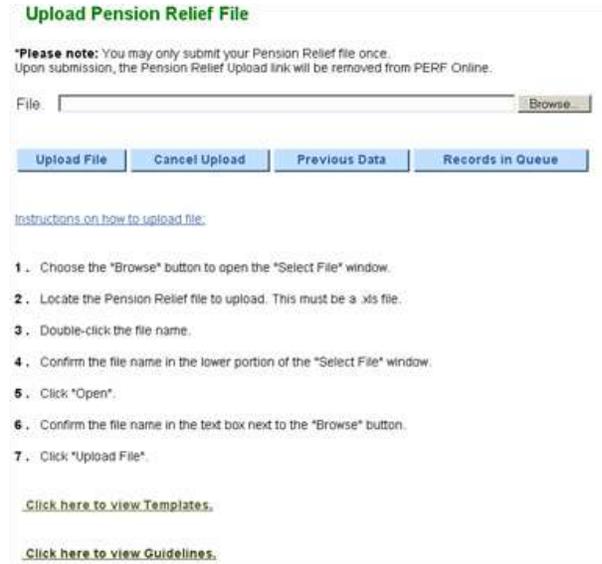


Figure 3: Upload Pension Relief File page



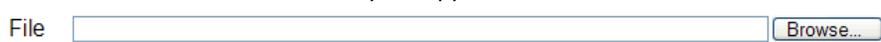
Figure 4: Select File window

Page LINKS include:

- ✓ [Click here to view Templates](#)  
Provides a template for the format of the pension relief file that will be submitted to PERF.
- ✓ [Click here to view Guidelines](#)  
This link is under development.

### 1.3.1. Uploading the Pension Relief Data

Follow the procedure below to correctly upload the Pension Relief File to PERF Online.

| Step | Action                                                                                                                                                                                                                        |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | <p> Click this button to open the Choose File window:</p>  |
| 2    | Navigate to the Pension Relief Data file to upload. This <b>MUST</b> be an Excel file.                                                                                                                                        |
| 3    | <p> Click once to select it.</p>                                                                                                           |
| 4    | <p>Confirm that the desired file appears in the <b>File name</b> field.</p>                                                               |
| 5    | <p> Click this button.</p>                                                                                                                 |
| 6    | <p>Confirm that the file name and its path appear in the <b>File</b> field.</p>                                                           |
| 7    | <p> Click this button to upload the file.</p>                                                                                              |

### 1.3.2. Fixing a revoked Pension Relief data file

Once the PR data is submitted, you will receive an automatic notification from PERF Online that your PR data was successfully received.

If there are any errors in the PR data file submitted, the file is **revoked** and you will receive an automatic email from [questions@perf.in.gov](mailto:questions@perf.in.gov) with text similar to Figure 5.

Log back into PERF Online (See section 2.1.1. Logging into PERF Online in Chapter 2 of the *PERF Online for Employers Handbook*, navigate to the Pension Relief section and review the data file.

Your pension relief information has been received; however, errors have been found.

Please log in to PERF Online, review and correct all errors, and resubmit your pension relief information. 'The errors have been documented in the comments section under the 'Records in Queue' link'.

If you have questions, please contact our call center toll-free at 888-526-1687 or locally at 233-4162, or email your questions to [questions@perf.in.gov](mailto:questions@perf.in.gov).

Warm regards,

PERF

Figure 5: Sample email notification of errors in PR data

Fields that must be corrected before submission will be outlined in red.

Fields that do not match PERF records but can be submitted will be outlined in orange.

All date and Social Security numbers fields will be automatically formatted as the numbers are entered. Use the drop-down arrow ( ▼ ) to choose a value for the **Payee Type** field.

For Year: 2018 Department: BATESVILLE-POLICE DEPT Employer Number: 7706100

| Select All               | Member SSN | Member First Name | Member Last Name | Member Date of Birth (MM-DD-YYYY) | Member Date of Hire (MM-DD-YYYY) | Last Day in Pay Status (MM-DD-YYYY) | Member Retiree Date (MM-DD-YYYY) |
|--------------------------|------------|-------------------|------------------|-----------------------------------|----------------------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | 000000000  | John              | Deaton           | 01/01/1950                        | 01/01/2010                       |                                     |                                  |
| <input type="checkbox"/> | 000000000  | Ray               | Wain             | 01/01/1950                        | 01/01/2010                       |                                     |                                  |

Title of Authorized Agent  
  
 Last Name of Authorized Agent  
  
 First Name of Authorized Agent

Registration to use PERF Online does not automatically authorize the user to sign PERF documentation or approve electronic submissions of any kind. Only a person properly authorized by the employer's governing board may sign PERF documents or electronic submissions of any kind. If you have questions about who is authorized or how to become authorized please contact PERF at 1-888-526-1687 and ask to speak with an Employer Liaison Specialist.

Errors highlighted in red need to be corrected before submission.  
Errors highlighted in orange do not match our records but are acceptable.

If you wish to Save records using Save in Queue then please select **"Select All"** and click **"Save as Incomplete"**. Please note that only all records can be saved in Queue.  
If you wish to Authorize records then please select **"Select All"** and click **"Save Changes"** to submit records to PERF. Please note that only all records can be authorized and sent to PERF; partial submissions are not valid.

Select and delete unwanted records in order to **Save Changes** or **Save as Incomplete**.  
Disability Relief includes Disability Relief and Disability Relief (Line of Duty) Survivor/Beneficiary Relief includes Beneficiary (Spouse), Beneficiary (Child), Beneficiary (Disabled Child), Beneficiary (Dependant Parent).

Figure 6: Records in Queue listing

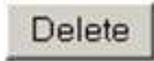
**NOTE:**

If you have already defined the title, first name and last name of an authorized agent in the Preferences section of PERF Online (see section 2.5.2 Authorized Agent Information in Chapter 2 of the *PERF Online for Employers Handbook*), that information will automatically appear in the **Title of Authorized Agent**, **Last Name of Authorized Agent**, and **First Name of Authorized Agent** fields.

The following buttons are available on this page:



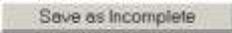
Clicking this button after viewing or maintaining pension relief data file records in the queue and return to the Upload Pension Relief File page.



Clicking this button to delete a pension relief data file record from the queue after selecting the record to delete (by checking the checkbox in the **Select All** column). The record will be deleted immediately.



Click this button to add a row for entry of a new pension relief data file record in the queue.



Click this button after selecting all records to save as incomplete and to save partially completed pension relief data file records in the queue.

### 1.3.3. Previous Pension Relief Data Records

The pension relief data file records for the prior year's submission will appear (see Figure 7). The year this information was submitted is shown in the **For Year** field.

The pension relief data file for the prior year can be used to create the pension relief data file for the current year by following the steps below:

1. Click the drop down arrow in the **For Year** field and choose the current year.
2. Select **all** previous pension relief data records by clicking the check box in the **Select All** column heading.

A checkmark appears in the selection box for all the records under the first column indicating that the pension relief data record has been selected. **All records must be selected.**

3. Click the **Save as incomplete** button and the entries will be **saved** in the **queue**.

**NOTE:** If you have already defined the title, first name and last name of an authorized agent in the Preferences section of PERF Online (see section 2.5.2 Authorized Agent Information in Chapter 2 of the *PERF Online for Employers Handbook*), that information will automatically appear in the **Title of Authorized Agent**, **Last Name of Authorized Agent**, and **First Name of Authorized Agent** fields.

See the next section for information on accessing and editing the pension relief data file records in the queue.

For Year: 2007 Department: BATESVILLE-POLICE DEPT Employer Number: 7706100

| Select All               | Member SSN  | Member First Name | Member Last Name | Member Date of Birth (MM-DD-YYYY) | Member Date of Hire (MM-DD-YYYY) | Last Day in Pay Status (MM-DD-YYYY) | Member Retirement Date (MM-DD-YYYY) |
|--------------------------|-------------|-------------------|------------------|-----------------------------------|----------------------------------|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> | 000-09-3325 | Dan               | Wheldon          | 10-06-1946                        | 04-01-1969                       | 04-01-1992                          | 04-01-1992                          |
| <input type="checkbox"/> | 000-24-8926 | Alex              | Lloyd            | 03-21-1936                        | 01-01-1968                       | 04-15-1979                          | 04-15-1979                          |
| <input type="checkbox"/> | 000-36-1369 | Marco             | Andeth           | 07-05-1924                        | 01-01-1962                       | 04-01-1978                          | 04-01-1978                          |
| <input type="checkbox"/> | 000-36-1365 | Marco             | Andeth           | 07-05-1924                        | 01-01-1962                       | 04-01-1978                          | 04-01-1978                          |

Title of Authorized Agent  
 \*  
 Last Name of Authorized Agent  
 \*  
 First Name of Authorized Agent  
 \*

Back Delete Insert Rows Save as Incomplete Save Changes

Registration to use PERF Online does not automatically authorize the user to sign PERF documentation or approve electronic submissions of any kind. Only a person properly authorized by the employer's governing board may sign PERF documents or electronic submissions of any kind. If you have questions about who is authorized or how to become authorized please contact PERF at 1-888-526-1687 and ask to speak with an Employer Liaison Specialist.

Errors highlighted in red need to be corrected before submission.  
 Errors highlighted in orange do not match our records but are acceptable.

If you wish to Save records using Save in Queue then please select **"Select All"** and click **"Save as Incomplete"**. Please note that only all records can be saved in queue.  
 If you wish to Authorize records then please select **"Select All"** and click **"Save Changes"** to submit records to PERF. Please note that only all records can be authorized and sent to PERF partial submissions are not valid.

Select and delete unwanted records in order to **Save Changes** or **Save as Incomplete**.  
 Disability Retired includes Disability Retired and Disability Retired (Line of Duty) Survivor/Beneficiary Retired includes Beneficiary (Spouse), Beneficiary (Child), Beneficiary (Disabled Child), Beneficiary (Dependant Parent).

Figure 7: Selection of records for pension relief file

### 1.3.4. Pension Relief Data File Queued Records

Any pension records that were not processed completely and saved as incomplete are automatically stored as pending for later review.

If there are no records in the queue, an error pop-up window displays (see Figure 8).



Click this button to return to the **Upload Pension Relief File** page. See section 1.3. Upload Pension Relief Data on page 3.



Figure 8: No Pending Records

Records that are in the queue will be displayed on the **Pension Relief Data File Records Queue** page. All fields for the pension relief data file record are not shown because of the size of this page.

The list below will help the employer complete entries on this page:

- Use the scrollbar to move forward or backward to see and complete all the entries.
- Click the entry field under the appropriate column name to enter information.
- The tab key can be used to move to the next entry.
- Items marked with an asterisk next to the space for the entry, must be filled in.

For Year: 2017 Department: BATESVILLE-POLICE DEPT Employer Number: 7706100

| Select All               | Member ID# | Member First Name | Member Last Name | Member Date of Birth (MM-DD-YYYY) | Member Date of Hire (MM-DD-YYYY) | Last Day of Pay Status (MM-DD-YYYY) | Member Retiree Date (MM-DD-YYYY) |
|--------------------------|------------|-------------------|------------------|-----------------------------------|----------------------------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | 000093026  | Dia               | Shelton          | 07-02-1946                        | 04-01-1983                       | 04-01-1982                          | 04-01-1982                       |
| <input type="checkbox"/> | 000240920  | Alan              | Good             | 03-21-1936                        | 02-01-1968                       | 04-15-1975                          | 04-15-1975                       |
| <input type="checkbox"/> | 000361302  | Franc             | Jordan           | 07-25-1924                        | 07-01-1962                       | 04-01-1965                          | 04-01-1978                       |
| <input type="checkbox"/> | 000361300  | Franc             | Jordan           | 07-25-1924                        | 07-01-1962                       | 04-01-1978                          | 04-01-1978                       |

Figure 9: Pension Relief Data File Records Queue

### 1.3.4.1. Successful save of pending queued records

A pop-up window will appear (see Figure 10) providing a summary of all pension relief data file records that are to be saved as incomplete in the queue.

The employer can enter optional comments about the pension relief data file records to be saved as incomplete in the queue. These comments will only be seen by **internal staff at PERF**.

This window has the following buttons:

**Submit**

Click this button to **save changes** in the queue. A confirmation window appears (see Figure 11). Click this button to cancel saving changes and return to the **Upload Pension Relief File** page (see section 1.3. Upload Pension Relief Data *on page 3*).

**Cancel**

Page LINKS include:

- ✓ [Return Back to Upload Pension Relief File](#)  
This link returns to the **Upload Pension Relief File** page (see section 1.3. Upload Pension Relief Data *on page 3*).

A confirmation window displays (see Figure 11) to verify that the changes to the pension relief data file records have been **saved in queue**.

Page LINKS include:

- ✓ [Back to Home](#)  
This link returns to the **PERF Online Employer Welcome** page (See section 2.2 Welcome to PERF Online for Employers in Chapter 2 of the *PERF Online for Employers Handbook*).

Total number of members : 3  
 Total number of Payees : 3  
 Total Annual Benefit : \$ 62,909.00  
 Total Death Benefit : \$ .00  
 Total Benefit Paid before Death : \$ .00  
 Total DROP Amount : \$ .00  
 Grand Total : \$ 62,909.00

Comments :

[Return Back to Upload Pension Relief File](#)

**Submit** **Cancel**

Figure 10: Pop-up window of incomplete pension relief data file records

Your Pension Relief file has been successfully saved in queue.  
 Please use the "Records in Queue" link to access your records prior to submission

[Back to Home](#)

Figure 11: Confirmation windows of records saved in the queue

### 1.3.4.2. Unsuccessful save of pending queued records

If the save was **unsuccessful**, an error page (see Figure 12) will indicate the corrections needed. The errors shown will be different depending on the records in the file.

Fields requiring changes appear as highlighted in red. These fields must be fixed before the file can be submitted to PERF. See *Figure 7: Selection of records for pension relief file on page 7* as an example. Use the scroll bar to see more fields. After correcting the fields, enter the **Title of Authorized Agent, Last Name of Authorized Agent, and First Name of Authorized Agent** to continue with the resubmission.

#### ERROR

- Error Page: Please hit the back link at the bottom of the screen to correct all errors.
- Invalid Death Benefit Amount Paid: If Date of Death is earlier than 07/01/2008 the death benefit cannot be greater than \$9,000.00. If Date of Death is after 07/01/2008 the death benefit cannot be greater than \$12,000.00. If member Date of Death is earlier than the year of PR data submission Death Benefit Paid must be zero. ( 1 )
- Invalid Total Death Benefit Paid Before Death: Total Benefits Paid before Death is mandatory if Date of Death is the year of PR data submission. If member Date of Death is prior to the year of PR data submission Total Benefits Paid before Death should be zero. ( 1 )
- Invalid Death Benefit Amount Paid: Total Benefits Paid before Death is mandatory if the payee Date of Death is the same year as the year of PR data submission. If the payee SSN and member SSN are the same Total Benefits Paid before Death should be blank on the payee side. ( 1 )
- Invalid Total Percentage: Member benefit cannot be less than 50% or greater than 74%. ( 1 )

[Back](#)

Figure 12: Unsuccessful save of pending records

|                    |                                                                                                                                                             |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Page LINKS include | ✓ <a href="#">Back</a>                                                                                                                                      |
|                    | ✓ Click to return to the <b>Pension Relief Data File Records Queue</b> page (see section 1.3.4. Pension Relief Data File Queued Records <i>on page 8</i> ). |

### 1.3.4.3. Submission of pending queued records to PERF

If there are no errors, a confirmation page verifies that the pension relief file data records were **saved** (See Figure 14).

The employer can enter optional comments about the pension relief data file records that were saved and are ready for submission. These comments will only be seen by **staff at PERF**.

This window has the following buttons:

**Submit**

Click this button to **save changes** in the queue. A confirmation window appears (see Figure 14).

**Cancel**

Click this button to cancel saving and return to the **Upload Pension Relief File** page (see section 1.3. Upload Pension Relief Data *on page 3*).

Page LINKS include:

- ✓ [Return Back to Upload Pension Relief File](#)  
This link returns to the **Upload Pension Relief File** page (see section 1.3. Upload Pension Relief Data *on page 3*) where **the saved records have not yet been submitted**.

Total number of members : 1  
 Total number of Payees : 1  
 Total Annual Benefit : \$ 25,528.00  
 Total Death Benefit : \$ 8,175.00  
 Total Benefit Paid before Death : \$ .00  
 Total DROP Amount : \$ .00  
 Grand Total : \$ 33,703.00

**Comments :**

[Return Back to Upload Pension Relief File](#)

**Submit**

**Cancel**

Figure 13: Confirmation of saved pending queued records

### 1.3.5. Confirmation of successful submission to PERF

A confirmation window displays (see Figure 14) to verify that the changes to the pension relief data file records have been **submitted to PERF** and the Pension Relief Upload link has been **removed**. This link will reappear when the time comes for next year's pension relief data file to be submitted. A contact number is also provided for questions.

Your Pension Relief file has been successfully submitted.

The Pension Relief Upload link will now be removed from PERF Online. PERF will contact you once your file has been reviewed.

If you have any further questions, feel free to contact PERF at [questions@perf.in.gov](mailto:questions@perf.in.gov) or 888-526-1687.

[Back to Home](#)

Figure 14: Confirmation windows of records saved in the queue

Page LINKS include: ✓ [Back to Home](#)  
 This link returns to the **PERF Online Employer Welcome** page (See section 2.2 Welcome to PERF Online for Employers in Chapter 2 of the *PERF Online for Employers Handbook*).

### 1.3.6. Pension Relief Template

Clicking on the **Click here to view templates** link from the **Upload Pension Relief File** page (see Figure 3 on page 3), opens a new window which has a table showing the acceptable fields, field length and formats for the pension relief file.

**NOTE:** Pension Relief data can be only be uploaded and submitted to PERF in an Excel file. Text files are not allowed.

**NOTE:** The first line of the Microsoft Excel file should contain the column headers.

Click on the **Sample Excel File** link to view the sample file. To save a copy to use as a template, right-click on the link and select "Save Target As..."

Table 1: Formatting Fields for Pension Relief Excel File on page 12 shows the formatting which is acceptable in the Excel file.

Page LINKS include: ✓ [Sample Excel File](#)  
 This link will download a sample Excel file correctly set up to handle the data. See section 1.3.6.1. Sample Pension Relief Excel File on page 14 for more information.



Figure 15: Pension Relief Template

Table 1: Formatting Fields for Pension Relief Excel File

| Field Name    | Field Length           | Field Format                         |
|---------------|------------------------|--------------------------------------|
| SSN           | Nine or 11 characters  | XXXXXXXXXX<br>XXX-XX-XXXX            |
| First Name    | 20 characters maximum  | Letters or spaces only               |
| Last Name     | 20 characters maximum  | Letters or spaces only               |
| Date of Birth | Eight or 10 characters | mm/dd/yyyy<br>mm-dd-yyyy<br>mmdyyyyy |
| Date of Hire  | Eight or 10 characters | mm/dd/yyyy                           |

**Table 1: Formatting Fields for Pension Relief Excel File**

| Field Name                       | Field Length             | Field Format                                                                                         |
|----------------------------------|--------------------------|------------------------------------------------------------------------------------------------------|
|                                  |                          | mm-dd-yyyy<br>mmdyyyy                                                                                |
| Last Day in Pay Status           | Eight or 10 characters   | mm/dd/yyyy<br>mm-dd-yyyy<br>mmdyyyy                                                                  |
| Retirement Date                  | Eight or 10 characters   | mm/dd/yyyy<br>mm-dd-yyyy<br>mmdyyyy                                                                  |
| Date of Death                    | Eight or 10 characters   | mm/dd/yyyy<br>mm-dd-yyyy<br>mmdyyyy                                                                  |
| Death Benefit Paid               | Eight characters maximum | numbers only                                                                                         |
| Total Benefits Paid Before Death | Eight characters maximum | numbers only                                                                                         |
| Payee Type                       | Drop down menu           | Dropdown Options are:<br>"Regular Retired"<br>"Disability Retired"<br>"Survivor/Beneficiary Retired" |
| Date Child Benefit Stopped       | Eight or 10 characters   | mm/dd/yyyy<br>mm-dd-yyyy<br>mmdyyyy                                                                  |
| Member Benefit                   | 10 characters maximum    | numbers only                                                                                         |
| Annual Benefit                   | 10 characters maximum    | numbers only                                                                                         |
| Monthly Payment Amount           | Eight characters maximum | numbers only                                                                                         |
| DROP Entry Date                  | Eight or 10 characters   | mm/dd/yyyy<br>mm-dd-yyyy<br>mmdyyyy                                                                  |
| Salary Used to Calculate DROP    | 10 characters            | numbers only                                                                                         |
| Annual DROP Lump Sum             | 10 characters            | numbers only                                                                                         |
| Grand Total Paid                 | 10 characters            | numbers only                                                                                         |

### 1.3.6.1. Sample Pension Relief Excel File

A pre-formatted Microsoft Excel template file is available which can be used to enter the active member directly into the correct format.

See section 1.3.6.2. Saving the Excel File below to save a copy to use as a template.

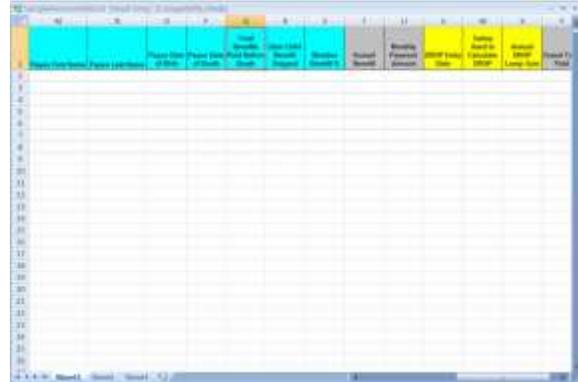
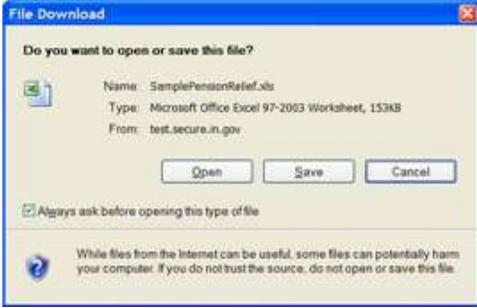


Figure 16: Pension Relief Sample Microsoft Excel file

### 1.3.6.2. Saving the Excel File

To save a copy to use as a template,

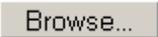
| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | <p><a href="#">Sample Excel File</a> Click on the <a href="#">Sample Excel File</a> link.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|      | <p> Or right-click on the link and select <b>Save Target As...</b> from the menu that appears. See Step 4 below.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 2.   | <p>A new window will appear prompting you to either download or save the file.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 3.   | <p>Click one of the buttons below:</p> <div style="display: flex; flex-direction: column; gap: 10px;"> <div style="border: 1px solid gray; padding: 2px 10px; display: inline-block;">Open</div> <div style="border: 1px solid gray; padding: 2px 10px; display: inline-block;">Save</div> <div style="border: 1px solid gray; padding: 2px 10px; display: inline-block;">Cancel</div> </div> <ul style="list-style-type: none"> <li>• Click this button to open the template in Microsoft Excel.<br/><b>Note:</b> Microsoft Excel or a program that can read an .XLS file must be installed on your PC to read this file.</li> <li>• Click this button to save the template to your PC. See Step 4 below.</li> <li>• Click this button to cancel the download.</li> </ul> |

| Step | Action                                                                                                                                                                                                                                                                                                                  |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4.   | <p>A Save As window appears:</p>  <p>Navigate to the location you want to save the Excel file.</p> <p>Click this button to save the Excel file.</p>  |

## 1.4. Upload Active Member Data

The **Upload Active Member Data** page appears (see Figure 17) after clicking on the Upload Active Menu Data menu selection. It is noted that this upload is for **Pension Relief Active Members** only.

The file to be uploaded must be in a specific format. There is a template provided; see the Page LINK box.

|                                                                                     |                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Click this button to open the Select File window (see Figure 4 on page 3).                                                                                                                                                                                                       |
|  | Click this button after following the instructions on the page and selecting the file to upload to begin the upload process.                                                                                                                                                     |
|  | Click this button to cancel the upload process; exit the <b>Upload Active Member Data</b> page and return to the <b>PERF Online Employer Welcome</b> page (See section 2.2 Welcome to PERF Online for Employers in Chapter 2 of the <i>PERF Online for Employers Handbook</i> ). |

Follow the procedure on the screen which is also in section 1.4.1. Uploading the Active Member File on page 16.

**Upload Active Member Data**

\* Please note: This upload is for Pension Relief Active Members only. To upload Wages & Contribution files, please use the "Wages & Contributions" link to the left.

File:

[Instructions on how to upload file:](#)

1. Choose the "Browse" button to open the "Select File" window.
2. Locate the Pension Relief file to upload. This must be a .xls file.
3. Double-click the file name.
4. Confirm the file name in the lower portion of the "Select File" window.
5. Click "Open".
6. Confirm the file name in the text box next to the "Browse" button.
7. Click "Upload File".

PERF Online accepts the Pension Relief Active Member file in Excel (.xls) format. Click on the link below to view the sample file. To save a copy to use as a template, right click on the link and select "Save Target AS".

[Click here to view Template:](#)

Figure 17: Upload Active Member Data page

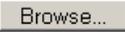
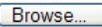
Page LINKS  
include:

✓ [Click here to view Template](#)

This link opens up a Microsoft Excel template for the format of the active member file that will be uploaded. See section 1.4.2. Active Member Template.

### 1.4.1. Uploading the Active Member File

Follow the procedure below to correctly upload the Active Member File to PERF Online.

| Step | Action                                                                              |                                                                                                                                                                                                                                                             |
|------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    |    | Click this button to open the Choose File window:<br>                                                                                                                    |
| 2    |                                                                                     | Navigate to the Pension Relief file to upload. This <b>MUST</b> be an Excel file.                                                                                                                                                                           |
| 3    |  | Double-click the file to select it or<br>Click once to select it.                                                                                                                                                                                           |
| 4    |                                                                                     | Confirm that the desired file appears in the <b>File name</b> field.<br>                                                                                                |
| 5    |  | Click this button.                                                                                                                                                                                                                                          |
| 6    |                                                                                     | Confirm that the file name and its path appear in the <b>File</b> field.<br>File   |
| 7    |  | Click this button to upload the file.                                                                                                                                                                                                                       |

## 1.4.2. Active Member Template

A pre-formatted Microsoft Excel template file that can be used to enter the active member directly into the correct format.

See section 1.4.2.1. Saving the Excel File below to save a copy to use as a template.

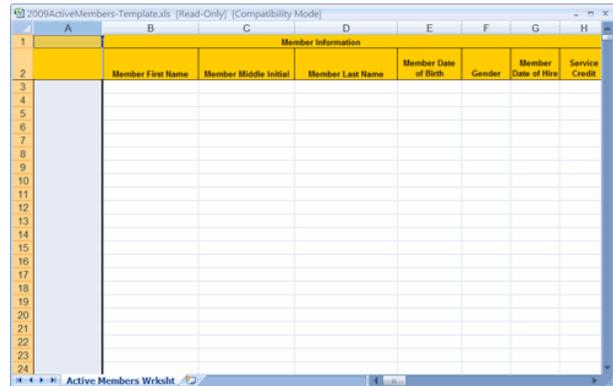
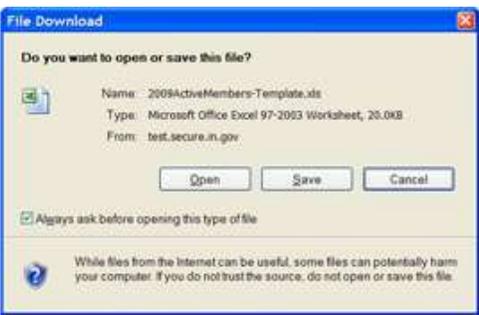
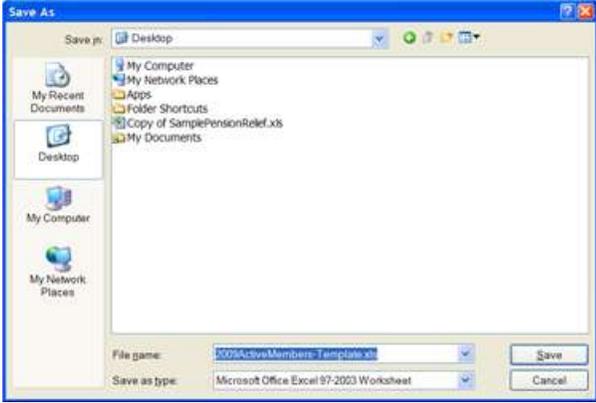


Figure 18: Active Member template

### 1.4.2.1. Saving the Excel File

To save a copy to use as a template,

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | <p> Click on the <b><u>Click here to view Template</u></b> link.</p> <p>Or right-click on the link and select <b>Save Target As...</b> from the menu that appears. See Step 4 below.</p>                                                                                                                                                                                                                              |
| 2.   | <p>A new window will appear prompting you to either download or save the file.</p>                                                                                                                                                                                                                                                                                                                                  |
| 3.   | <p>Click one of the buttons below:</p> <ul style="list-style-type: none"> <li>• Click this button to open the template in Microsoft Excel.<br/><b>Note:</b> Microsoft Excel or a program that can read an .XLS file must be installed on your PC to read this file.</li> <li>• Click this button to save the template to your PC. See Step 4 below.</li> <li>• Click this button to cancel the download.</li> </ul>  |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                       |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4.   | <p data-bbox="537 237 834 268">A Save As window appears:</p>  <p data-bbox="537 688 1138 720">Navigate to the location you want to save the Excel file.</p> <p data-bbox="537 737 946 768">Click this button to save the Excel file.</p>  |