

ERM Adding Contact and User QRG - Employer

This quick reference guide (QRG) provides instructions for adding Contacts and Users in the Employer Reporting and Maintenance (ERM) application.

Complete, detailed instructions for managing contact and user information is available from the [Employer Reporting Maintenance \(ERM\) Employer Management User Manual](#) available from the INPRS website.

ERM Adding Contact and User Topics

- Manage Submission Unit Contact Information
- Modify Existing Submission Unit Contact
- Add New Submission Unit Contact
- Adding an Existing Submission Unit Contact
- Manage Employer Users

Manage Submission Unit Contact Information

To manage Submission Unit contact information do the following:

1. Click **Employer**
2. Click **Manage Submission Unit**. Your unit populates (Figure 1).
3. Click the **Contact** tab.
4. Click the dropdown next to **Contact Status** and select **Active**
5. Click **Search** to see your *Active Contacts*.

Figure 1: Submission Units, Contact tab

The screenshot displays the ERM application interface. On the left is a navigation menu with options like Home, Employer, Create Employer, Manage Employer, Submission Unit Transfer, Submission Unit, Manage Submission Unit, Member Transfer, Member, Wage and Contribution, Administration, PERF Links, Employer Reports, and Contact Us. The main area shows a table for Submission Units with columns for Unit ID, Unit Name, Unit Type, Employer Name, Status, and Fund Name. Below this is a 'Contacts' section with a search bar and a table of contacts. The contacts table has columns for Action, First Name, Last Name, Email Address, and Contact Types. There are also sections for 'Add Contact' and 'Contact Phone Numbers'.

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
000000	New County - Auditor	Other Government	New County	Participating	PERF

Action	First Name	Last Name	Email Address	Contact Types
Modify	Dinah	Shore	dsabbath@inprs.in	Authorized Agent Auth Agent - Clerk-Treasurer Wage and Contribution Treasurers/Finance Personnel Retirement Rate Letter Other Contact
Modify	Whitney	Deal	wdeal@inprs.in.gov	Authorized Agent
Modify	Bob	Test	test@test.com	Authorized Agent

Modify Existing Submission Unit Contact

To modify an existing submission unit contact, click **Modify** next to the name of the contact you want to select. You can update the contact status or contact types for that individual.

Add a New Submission Unit Contact

To add a new submission unit contact, click **Add Contact** to populate the pop-up screen (Figure 2).

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Figure 2: Add Submission Unit Contact

Add Submission Unit Contact

Prefix

* First Name

Middle Name

* Last Name

* Email Address

Phone Type: Main

* Phone

Extension

* Status

* Effective Date: 3/7/2016

* Contact Types

- Authorized Agent
- Auth Agent - Clerk-Treasurer
- Wage and Contribution
- Treasurer/Finance
- Personnel
- Retirement
- Rate Letter
- Other Contact

Save Cancel

Adding an Existing Submission Unit Contact

Each Submission Unit contact must have an email address that is unique in the ERM application. If you attempt to add a contact and receive a message stating that the contact cannot be added because the contact's email address already exists, you must add the contact through the *Administration* section of the ERM application.

After going to *Administration*, click **Users** for the *Employer User* screen to display (Figure 3).

Select **Add Contacts** to search for the email address of your existing contact to apply any user roles, but also permission to be an active contact for more than one submission unit.

Figure 3: Employer User tab

Employer User

Search Submission Unit

Submission Unit ID:

Submission Unit Name:

Search

Submission Units

Unit ID	Unit Name
8010000	New County - PERF

Submission Unit Contacts

Action	Employer User	First Name	Last Name	Email
Modify User	Yes	Jamie	Wells	jwells1@new.gov

Add Contacts

Manage Employer Users

ERM security administrators can add new Employer Users in the ERM application. Before a new Employer User can be added and assigned a security role, the user must be added as a Submission Unit contact in the ERM application. To access options for adding new user, click the **Users** tab (Figure 4).

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Figure 4: Employer User,

The screenshot displays the 'Employer User' interface. On the left is a navigation menu with options: Home, Employer, Member, Wage and Contribution, Administration (expanded), My Profile, Users, Communication, Configuration, PERF Links, Employer Reports, and Contact Us. The main content area is titled 'Employer User' and contains three sections:

- Section 1:** 'Search Submission Unit' with input fields for 'Submission Unit ID' and 'Submission Unit Name', and a 'Search' button.
- Section 2:** 'Submission Units' table with columns 'Unit ID' and 'Unit Name'. One entry is shown: Unit ID 0000111, Unit Name New County - PERF.
- Section 3:** 'Submission Unit Contacts' table with columns 'Action', 'Employer User', 'First Name', 'Last Name', and 'Email'. Three rows are shown: 'Modify User' for Jane Goodall (jgoodall@inprs.in.gov), 'Modify User' for John Doe (jdoe@perfemployer.com), and 'Create User' for Jennifer Maxwell (jmaxwell@newcounty.edu).

An 'Add Contact' button is located at the bottom left of the interface.

Section 1 allows you to *Search Submission Unit* for the unit to make updates if it has not prepopulated in **Section 2**.

Section 3 select create user to grant user roles to a **new contact** and enable their account. Select **Modify User** for an existing contact to make any updates or disable their access to ERM for your unit.

For more detailed instructions refer to the [Employer Reporting Maintenance \(ERM\) Employer Management User Manual](#) available from the INPRS website. Refer to the [Manage Submission Unit Contact Information](#) section for updating and adding contact information, along with [Manage Employer Users](#) section for setting up particular security roles to a current contact.