



## Employer Reporting and Management (ERM) Glossary

The following are some important terms to know in order to carry out duties in the Employer Reporting and Management (ERM) application.

**NOTE:** In other documents the various funds, systems, and plans may be abbreviated as follows:

- 1977 Fund, 77 Fund, PF77 – 1977 Police Officers’ and Firefighters’ Pension and Disability Fund
- CE, C&E, CAEP, EG&C - Excise, Gaming, and Conservation Officers’ Retirement Plan
- JU, JRS, JUDG – Judges’ Retirement System
- LE, LE DC, LE DB, LRS, LEGL – Legislators’ Retirement System (Defined Contribution or Defined Benefit)
- PA, PARF – Prosecuting Attorneys’ Retirement Fund
- PERF, PRF, PE, PMCH, PR2, PR3 – Public Employees’ Retirement Fund
- TRF, TRFF, TMCH, TR2 – Indiana State Teachers’ Retirement Fund

No matter how they are abbreviated, the abbreviations refer to these named funds, systems, and plans and often are referred to as “fund”, “plan”, or “system”.

All referenced codes are available online at the Indiana General Assembly website at [IGA | 2025 Indiana Code](#) or Indiana Administrative code at [Indiana Administrative Code – Title 35 Board of Trustees of the Indiana Public Retirement System](#). These sites include House Enrolled Acts/House Bills (HEA/HB), and Senate Enrolled Acts/Senate Bills (SEA/SB).

Term	Definition
<b>77/1977</b>	1977 Police Officers’ and Firefighters’ Pension and Disability Fund
<b>Accommodation</b>	An accommodation is a disqualifying condition that can be accommodated by the Local Unit.
<b>Adjustment</b>	A correction to a submitted wage and contribution transaction. This can be a positive or negative adjustment and can affect any wage or contribution field.
<b>Annuity Savings Account (ASA)</b>	Annuity Savings Account now known as Defined Contribution (DC) Account
<b>Benefit Management System (BMS)</b>	Benefit Management System
<b>Board</b>	INPRS Board of Trustees
<b>Bulk Uploads</b>	Bulk uploads allow a large amount of data to be submitted in one file upload. Data is entered into a single file, which is uploaded to the ERM application.
<b>C &amp; E/CE/EG&amp;C</b>	Formerly the State Excise Police, Gaming Agent, Gaming Control Officer, and Conservation Enforcement Officers’ Retirement Plan (also referred to as CE). See EG&C.

Term	Definition																						
<b>Contact Types</b>	<p>When creating or adding a Submission Unit contact, you must identify a contact type for that person. Here is a list and description of those types, along with any Fund they are associated with:</p> <table border="1" data-bbox="571 241 1422 1816"> <tr> <td data-bbox="571 241 990 535"><i>Authorized Agent</i></td> <td data-bbox="990 241 1422 535">This person, named by the Submission Unit's board, is the first line of contact for all Fund matters. The Authorized Agent may assign tasks and roles to others but is ultimately the responsible party and is authorized to accept pension liability. This contact type is required for all funds, except TRF, and may be modified only by INPRS Staff Users.</td> </tr> <tr> <td data-bbox="571 535 990 688"><i>Authorized Agent – Clerk-Treasurer</i></td> <td data-bbox="990 535 1422 688">This person, assigned by statute for a town or third-class city, is the Authorized Agent for all Fund matters and is authorized to accept pension liability.</td> </tr> <tr> <td data-bbox="571 688 990 787"><i>Authorized Agent – Controller</i></td> <td data-bbox="990 688 1422 787">This person has the role of an Authorized Agent and the titles and duties of a Controller.</td> </tr> <tr> <td data-bbox="571 787 990 886"><i>Authorized Agent – Trustee</i></td> <td data-bbox="990 787 1422 886">This person has the role of an Authorized Agent and the titles and duties of a Trustee.</td> </tr> <tr> <td data-bbox="571 886 990 987"><i>Chief</i></td> <td data-bbox="990 886 1422 987">This person is responsible for overall administrative duties for '77 Fund Submission Units.</td> </tr> <tr> <td data-bbox="571 987 990 1085"><i>Other Contact</i></td> <td data-bbox="990 987 1422 1085">This person is contacted only if a concern does not fall into another category.</td> </tr> <tr> <td data-bbox="571 1085 990 1239"><i>Pension Secretary</i></td> <td data-bbox="990 1085 1422 1239">This person is the liaison between members and their Submission Units. This person also helps members file for retirement or survivor benefits and understands statutes of the '77 Fund</td> </tr> <tr> <td data-bbox="571 1239 990 1312"><i>Personnel</i></td> <td data-bbox="990 1239 1422 1312">This person is the contact for new enrollment-related questions.</td> </tr> <tr> <td data-bbox="571 1312 990 1354"><i>Rate Letter</i></td> <td data-bbox="990 1312 1422 1354">This person receives the rate letters.</td> </tr> <tr> <td data-bbox="571 1354 990 1428"><i>Retirement</i></td> <td data-bbox="990 1354 1422 1428">This person is the contact for retirement-related questions.</td> </tr> <tr> <td data-bbox="571 1428 990 1816"><i>Superintendent</i></td> <td data-bbox="990 1428 1422 1816">This person is the head of a school corporation. Often, the Superintendent functions as the security agent for the corporation and assigns ERM security roles to other staff. Generally, the Superintendent is contacted only if all other listed contacts are not responding. This person is the Authorized Agent for a corporation, ultimately responsible for all Fund matters and authorized to accept pension liability. This contact type is required for TRF and may be modified only by INPRS Staff Users.</td> </tr> </table>	<i>Authorized Agent</i>	This person, named by the Submission Unit's board, is the first line of contact for all Fund matters. The Authorized Agent may assign tasks and roles to others but is ultimately the responsible party and is authorized to accept pension liability. This contact type is required for all funds, except TRF, and may be modified only by INPRS Staff Users.	<i>Authorized Agent – Clerk-Treasurer</i>	This person, assigned by statute for a town or third-class city, is the Authorized Agent for all Fund matters and is authorized to accept pension liability.	<i>Authorized Agent – Controller</i>	This person has the role of an Authorized Agent and the titles and duties of a Controller.	<i>Authorized Agent – Trustee</i>	This person has the role of an Authorized Agent and the titles and duties of a Trustee.	<i>Chief</i>	This person is responsible for overall administrative duties for '77 Fund Submission Units.	<i>Other Contact</i>	This person is contacted only if a concern does not fall into another category.	<i>Pension Secretary</i>	This person is the liaison between members and their Submission Units. This person also helps members file for retirement or survivor benefits and understands statutes of the '77 Fund	<i>Personnel</i>	This person is the contact for new enrollment-related questions.	<i>Rate Letter</i>	This person receives the rate letters.	<i>Retirement</i>	This person is the contact for retirement-related questions.	<i>Superintendent</i>	This person is the head of a school corporation. Often, the Superintendent functions as the security agent for the corporation and assigns ERM security roles to other staff. Generally, the Superintendent is contacted only if all other listed contacts are not responding. This person is the Authorized Agent for a corporation, ultimately responsible for all Fund matters and authorized to accept pension liability. This contact type is required for TRF and may be modified only by INPRS Staff Users.
<i>Authorized Agent</i>	This person, named by the Submission Unit's board, is the first line of contact for all Fund matters. The Authorized Agent may assign tasks and roles to others but is ultimately the responsible party and is authorized to accept pension liability. This contact type is required for all funds, except TRF, and may be modified only by INPRS Staff Users.																						
<i>Authorized Agent – Clerk-Treasurer</i>	This person, assigned by statute for a town or third-class city, is the Authorized Agent for all Fund matters and is authorized to accept pension liability.																						
<i>Authorized Agent – Controller</i>	This person has the role of an Authorized Agent and the titles and duties of a Controller.																						
<i>Authorized Agent – Trustee</i>	This person has the role of an Authorized Agent and the titles and duties of a Trustee.																						
<i>Chief</i>	This person is responsible for overall administrative duties for '77 Fund Submission Units.																						
<i>Other Contact</i>	This person is contacted only if a concern does not fall into another category.																						
<i>Pension Secretary</i>	This person is the liaison between members and their Submission Units. This person also helps members file for retirement or survivor benefits and understands statutes of the '77 Fund																						
<i>Personnel</i>	This person is the contact for new enrollment-related questions.																						
<i>Rate Letter</i>	This person receives the rate letters.																						
<i>Retirement</i>	This person is the contact for retirement-related questions.																						
<i>Superintendent</i>	This person is the head of a school corporation. Often, the Superintendent functions as the security agent for the corporation and assigns ERM security roles to other staff. Generally, the Superintendent is contacted only if all other listed contacts are not responding. This person is the Authorized Agent for a corporation, ultimately responsible for all Fund matters and authorized to accept pension liability. This contact type is required for TRF and may be modified only by INPRS Staff Users.																						

Term	Definition	
	<i>Treasurer/Finance</i>	This person is responsible for ensuring that funds are available for wages and contributions.
	<i>Wage and Contribution</i>	This person is responsible for submitting wages and contributions for a Submission Unit and is contacted if there are any issues with those submissions.
<b>Covered Position</b>	An employment position designated by Indiana Code or the employer/Submission Unit as required to participate in an INPRS Fund. For a member to be enrolled in an INPRS Fund, he or she must work in a covered position.	
<b>Defined Benefit (DB)</b>	This pension benefit is funded by the employer. These funds are invested and pay for the lifetime monthly benefit the member receives once they are eligible for retirement benefits. This benefit comes at no direct cost to the member. These contributions belong to the employer until the member becomes eligible for a retirement benefit. If the member leaves a PERF or TRF-covered service before they are eligible for a pension benefit, these funds remain in the employer's account. This benefit is not available to PERF ASA Only (My Choice) plan members.	
<b>Defined Contribution (DC)</b>	Defined contribution (DC) account, formerly known as an Annuity Savings Account (ASA), is the account where the member and/or the employer make contributions of at least 3 percent of the member's wages. For PERF and TRF Hybrid Plan members, this is in addition to the standard monthly benefit paid for by the employer. Members participating in the My Choice: Retirement Savings Plan (formerly ASA Only Plan) have only a DC account with different employer and member contribution rates.	
<b>Employer Advocate (EA)</b>	Employer Advocates (EA) are part of the Employer Advocate (EA)Team (formerly the EPPA team). They need to be well-versed in Fund administration and understand how and when to use ERM.	
<b>Employer Advocate (EA) Team</b>	This is the INPRS department which handles employer pension plan administration. This was formerly the Employer Pension Plan Administration (EPPA).	
<b>Effective Date</b>	This is the date that an addition/change takes effect in the ERM application. Several fields within ERM are controlled by effective dates. For example, an Employer User adds a new address for a Submission Unit account and types the effective date of April 1, 2011. INPRS does not use the new address for any correspondence until that effective date.	
<b>EG&amp;C/C &amp; E/CE</b>	Excise, Gaming and Conservation Officers' Retirement Plan, formerly the State Excise Police, Gaming Agent, Gaming Control Officer, and Conservation Enforcement Officers' Retirement Plan (C & E)	
<b>Employee Lost Annual Interest:</b>	This is the rate charged on the late member contributions and is paid to the member's annuity savings account.	
<b>Employer</b>	In ERM, the relationship between an employer and a Submission Unit is like a parent-child relationship. The employer is the parent, and the Submission Unit is the child. Each parent (employer) can have multiple children (Submission Units), but each child (Submission Unit) can only have one parent (employer).	
<b>Employer Advocate (EA)</b>	Formerly the Customer Service Representative (CSR)	
<b>Employer Advocate (EA) Team</b>	Formerly the Employer Pension Plans Administration (EPPA)	
<b>Employer User</b>	This is an individual, employed by an organization that participates in one of the INPRS retirement plans, with the proper security role(s) to perform certain functions in the ERM application.	

Term	Definition
<b>Employer User Security Role</b>	When adding Employer Users, administrators must assign a security role to each. This security role determines the amount of access a User has in the ERM application, which dictates the activities a User can complete. Some security roles give limited access, while others let Users complete nearly every activity. Here is a list and description of those roles:
<i>Add and Modify ACH</i>	This Employer User has permission to add and make modifications to banking information in ERM.
<i>Enrollment Administrator</i>	This Employer User can enroll members into the Submission Unit and resolve all member enrollments sent to the Exception Queue. This person can also view member reports.
<i>Life Event Administrator</i>	This Employer User can modify/delete all life events for a member.
<i>Member Administrator</i>	This Employer User can manage member accounts, update member information and resolve member management transactions sent to the Exception Queue. This person can also view member reports.
<i>Member Viewer</i>	This Employer User has view-only access to member data, including member reports.
<i>Payment Administrator</i>	This Employer User can view the payment administration screen and authorize payment on wage and contribution entries.
<i>PERF Pension Relief Administrator</i>	This Employer User can access pension relief functions from ERM and upload pension relief data to the INPRS Web.
<i>PERF Retirement Administrator</i>	This Employer User may access INPRS Web which includes: <ul style="list-style-type: none"> <li>• Estimate Retirement Benefit now available on the RAC</li> <li>• Upload Pension Relief data</li> <li>• Retirement Application is only available on the RAC</li> </ul>
<i>Security Administrator</i>	This Employer User can add other Employer Users and assign and modify security roles for new and existing Users in the Submission Unit. This person can also view the security report, and add/modify employer and Submission Unit addresses, contacts and phone information.
<i>Wage and Contribution Administrator</i>	This Employer User can carry out these wage and contribution activities: <ul style="list-style-type: none"> <li>• Bulk upload wage and contribution entries and adjustments.</li> </ul>

Term	Definition	
		<ul style="list-style-type: none"> <li>• Submit online wage and contribution entries and adjustments.</li> <li>• View wage and contribution reports.</li> <li>• Resolve wage and contribution transactions sent to the Exception Queue.</li> <li>• View a full Social Security Number (SSN)</li> <li>• Add/verify payroll calendar information upon initial login.</li> <li>• Submit <b>PERF Employer Enrollment</b> form</li> </ul>
	<i>Wage and Contribution Operator</i>	This Employer User can enter wage and contribution transactions either online or via file upload.
	<i>Wage and Contribution Viewer</i>	This Employer User has view-only access to the payment administration screen and employer data, plus wage and contribution reports.
<b>Enlargement</b>	Existing PERF participating submission unit wanting to provide PERF coverage for additional position titles not currently covered.	
<b>EPPA</b>	Employer Pension Plans Administration, now titled the Employer Advocate (EA) Team, now titled Employer Advocate (EA) Team.	
<b>ER</b>	Employer	
<b>ERM</b>	The acronym stands for Employer Reporting and Maintenance. This application is used to enroll members and maintain member information, plus submit member wage and contribution data.	
<b>Exception Queue</b>	<p>If a transaction entered into the ERM application – either via online entry or bulk upload – contains errors or is waiting on more information, it is placed in the Exception Queue. Additional action must be taken on such a transaction before it is accepted by ERM and becomes effective. Some examples of why a transaction is put in the Exception Queue are:</p> <ul style="list-style-type: none"> <li>• Member's birth date is after the member's hire date.</li> <li>• SSN/Pension ID/Last Name combination on a transaction within a bulk upload does not match any SSN/Pension ID/Last Name combination in the ERM application.</li> <li>• Statewide Baseline Examination (<a href="#">1977 Police Officers' &amp; Firefighters' Fund Application for Membership, State Form 04928</a>) results are needed ('77 Fund only). This form is only available from the EA Team.</li> <li>• Wages and contributions are submitted for a member not enrolled in the Submission Unit being reported.</li> <li>• Member has the option of being enrolled in the My Choice Retirement Savings Plan (formerly ASA Only Plan) but has not made an election yet.</li> </ul>	
<b>Excludable Condition</b>	An excludable condition is a condition in which the Fund physician has determined the firefighter/police officer cannot file for a disability claim for the first 4 years of employment and stays on for the duration of employment.	
<b>FICA</b>	Federal Insurance Contributions Act ;United States payroll tax instituted by the Federal Government	
<b>Fund</b>	A retirement plan in which a Submission Unit participates. Funds, all under the INPRS umbrella, are:	

Term	Definition
	<ul style="list-style-type: none"> <li>• 1977 Police Officers' and Firefighters' Pension and Disability Fund (also known as '77 Fund) ('77)</li> <li>• Indiana State Teachers' Retirement Fund (TRF), both Hybrid and My Choice</li> <li>• Judges' Retirement System (also known as Judges' Fund or 1977 and 1985 Judges' Retirement System) (JRS)</li> <li>• Legislators' Retirement System (LRS)</li> <li>• Prosecuting Attorneys' Retirement Fund (PARF)</li> <li>• Public Employees' Retirement Fund (PERF), both Hybrid and My Choice (Local Government Employees and State Employees)</li> <li>• State Excise Police, Gaming Agent, Gaming Control Officer and Conservation Enforcement Officers' Retirement Plan (CE), now known as Excise, Gaming and Conservation Officers' Retirement Plan (EG&amp;C).</li> </ul>
<b>Fund Lost Annual Interest</b>	This is the rate charged on the late employer contributions and is paid to the Fund.
<b>Group</b>	This classification specifies the type of employer. If, for example, INPRS needs to send notification of a new service available to state employers (those reporting payroll to the Auditor of State, effective July 1, 2023 the title is changed to State Comptroller), an INPRS Staff User could search for employers in the state group and direct the communication to them.
<b>IAC</b>	Indiana Administrative Code
<b>IC</b>	Indiana Code; Legislation passed by the Indiana General Assembly.
<b>INPRS</b>	The acronym stands for the Indiana Public Retirement System.
<b>Interest</b>	When contributions are not reported at the time the member receives payment for wages, any interest a member lost because of this late reporting is due to him or her. Interest is also due to the Fund for this late reporting. The calculation of interest in ERM is based on the payroll date. This is the date the member was actually paid the wages.
<b>Interest Calculation Indicator</b>	EA Team can turn off the interest calculation by Fund if needed.
<b>JU/JRS/JUDG</b>	Judges' Retirement System
<b>Last Check Date (LCD)</b>	This is the last payroll date an employee is included on once he or she has completely separated from employment. It is a required field if Last Day in Pay is reported. An employee's Last Check Date occurs on or after the employee's Last Day in Pay. This date is used to signal whether all wage and contribution information for a member requesting a retirement or DC distribution has been received or is in progress.
<b>Last Day in Covered Position</b>	<p>The date a member's creditable pension service, and the associated contributions, stop. This date is to be reported when an employee moves from a participating or covered position to a non-covered position but remains employed with the employer in some capacity.</p> <p><b>NOTE:</b> A retirement and/or DC distribution cannot be processed until the employee has completely separated from employment and a Last Day in Pay has been reported.</p>
<b>Last Day in Pay (LDIP)</b>	The last day an employee was employed in a covered or non-covered position. This is the date on which the employee/employer relationship is severed and the employee has no legal or contractual right to return to their position. In the event a member has been on a leave of absence (paid or unpaid) immediately preceding their termination, the date of the actual termination is entered as the last day in pay and the date of the member's last pay check would be entered as the last check date; the last check date can be prior to the termination date. The member's termination life event, along with the last day in pay and last check date, is entered in ERM immediately upon the member's termination.

Term	Definition								
	<p><b>NOTE:</b> A retirement and/or DC distribution cannot be processed until the employee has completely separated from employment and a Last Day in Pay has been reported.</p>								
<b>LE/LRS</b>	Legislators' Retirement System								
<b>Liability Types</b>	<p>When transferring all members of one Submission Unit to another, an indication must be made as to where the liability for the Fund is to be placed after the transfer.</p> <table border="1" data-bbox="571 378 1432 1486"> <tr> <td data-bbox="571 378 990 646"><i>Merged With Liability</i></td> <td data-bbox="990 378 1432 646">The members of one Submission Unit are incorporated into another Submission Unit. The Submission Unit incorporating the new members assumes responsibility for the employer share contributions as well as all liabilities and assets of the dissolving Submission Unit's INPRS account.</td> </tr> <tr> <td data-bbox="571 646 990 1045"><i>Merged Without Liability</i></td> <td data-bbox="990 646 1432 1045">The members of one Submission Unit are incorporated into another Submission Unit. The Submission Unit incorporating the new members subsequently assumes responsibility for the employer share contributions, beginning on the effective date of the merger. The Submission Unit that is losing its members retains liability for service and contributions of those members for the time frame that member worked for that Submission Unit up to the date of the merge.</td> </tr> <tr> <td data-bbox="571 1045 990 1255"><i>Withdrawn</i></td> <td data-bbox="990 1045 1432 1255">A Submission Unit elects to no longer participate in an INPRS plan. All members within the Submission Unit automatically become vested and qualify for retirement. Only their credited service is used to determine their retirement benefits.</td> </tr> <tr> <td data-bbox="571 1255 990 1486"><i>Withdrawn (Privatization)</i></td> <td data-bbox="990 1255 1432 1486">A Submission Unit is no longer eligible to participate in an INPRS plan because it no longer meets the Fund's guidelines. All members within the Submission Unit automatically become vested and qualify for retirement. Only their credited service is used to determine their retirement benefits.</td> </tr> </table>	<i>Merged With Liability</i>	The members of one Submission Unit are incorporated into another Submission Unit. The Submission Unit incorporating the new members assumes responsibility for the employer share contributions as well as all liabilities and assets of the dissolving Submission Unit's INPRS account.	<i>Merged Without Liability</i>	The members of one Submission Unit are incorporated into another Submission Unit. The Submission Unit incorporating the new members subsequently assumes responsibility for the employer share contributions, beginning on the effective date of the merger. The Submission Unit that is losing its members retains liability for service and contributions of those members for the time frame that member worked for that Submission Unit up to the date of the merge.	<i>Withdrawn</i>	A Submission Unit elects to no longer participate in an INPRS plan. All members within the Submission Unit automatically become vested and qualify for retirement. Only their credited service is used to determine their retirement benefits.	<i>Withdrawn (Privatization)</i>	A Submission Unit is no longer eligible to participate in an INPRS plan because it no longer meets the Fund's guidelines. All members within the Submission Unit automatically become vested and qualify for retirement. Only their credited service is used to determine their retirement benefits.
<i>Merged With Liability</i>	The members of one Submission Unit are incorporated into another Submission Unit. The Submission Unit incorporating the new members assumes responsibility for the employer share contributions as well as all liabilities and assets of the dissolving Submission Unit's INPRS account.								
<i>Merged Without Liability</i>	The members of one Submission Unit are incorporated into another Submission Unit. The Submission Unit incorporating the new members subsequently assumes responsibility for the employer share contributions, beginning on the effective date of the merger. The Submission Unit that is losing its members retains liability for service and contributions of those members for the time frame that member worked for that Submission Unit up to the date of the merge.								
<i>Withdrawn</i>	A Submission Unit elects to no longer participate in an INPRS plan. All members within the Submission Unit automatically become vested and qualify for retirement. Only their credited service is used to determine their retirement benefits.								
<i>Withdrawn (Privatization)</i>	A Submission Unit is no longer eligible to participate in an INPRS plan because it no longer meets the Fund's guidelines. All members within the Submission Unit automatically become vested and qualify for retirement. Only their credited service is used to determine their retirement benefits.								
<b>Life Event</b>	<p>In the ERM application, life events are a way to denote a member being placed on leave, returning from leave, moving from a covered position to a non-covered position or terminating employment, for example. Life events are:</p> <ul style="list-style-type: none"> <li>• Adoption Leave (PERF and TRF only)</li> <li>• Advanced Study/Sabbatical (TRF and '77 Fund only)</li> <li>• Approved Educational Travel (TRF only)</li> <li>• Covered to Non-covered Position</li> <li>• Disability Leave (PERF, TRF, '77 Fund and CE/EG&amp;C Fund only)</li> <li>• Elected Official ('77 Fund only)</li> <li>• Family Medical Leave Act (FMLA )</li> <li>• Family Medical Leave (non-member) (TRF only)</li> </ul>								

Term	Definition	
	<ul style="list-style-type: none"> <li>• Maternity Leave (TRF only)</li> <li>• Medical Leave (TRF only)</li> <li>• Medical Leave (non-member) PERF/TRF</li> <li>• USERRA Military Leave</li> <li>• Return From Leave</li> <li>• Return From USERRA Military Leave</li> <li>• Return From Suspension</li> <li>• Sick Leave (TRF and '77 Fund only)</li> <li>• Suspension (Paid)</li> <li>• Suspension (Unpaid)</li> <li>• Teacher Exchange (TRF only)</li> <li>• Terminate Employment</li> <li>• Work Experience (TRF only)</li> <li>• Worker's Comp (PERF and TRF only)</li> <li>• None of the Above</li> </ul>	
	<b>Valid Life Events – PERF</b>	<b>Valid Field Values for File Upload</b>
	Covered to Non-covered Position	CNC
	LOA-Adoption Leave	LADP
	LOA-Disability Leave	LDIS
	LOA-FMLA (Member)	LFMA
	LOA-Medical Leave (non-member)	LMDB
	LOA-USERRA Military Leave	LUSA
	LOA-Worker's Comp	LWCB
	LOA-None of the Above	LPLA
	Return from Leave	RFL
	Return from Suspension	RFS
	Return from USERRA Military Leave	RFML
	Suspension (Paid)	SU
	Suspension (Unpaid)	SUU
	Terminate Employment	TE
	<b>Valid Life Events – TRF</b>	<b>Valid Field Values for File Upload</b>
	Covered to Non-covered Position	CNC
	LOA-Adoption Leave	LADP
	LOA-Advanced Study/Sabbatical	LAST
	LOA-Approved Educational Travel	LTRV
	LOA-Disability Leave	LDIS
	LOA-FMLA	LFMA
	LOA-FMLA (non-member)	LFMB
	LOA-Maternity Leave	LMAT
	LOA-Medical Leave	LMDA
	LOA-Medical Leave (non-member)	LMDB
	LOA-USERRA Military Leave	LUSA

<b>Valid Life Events – TRF</b>	<b>Valid Field Values for File Upload</b>
LOA-Sick Leave	LSCK
LOA-Teacher Exchange	LTCH
LOA-Work Experience	LEXP
LOA-Worker's Comp	LWCB
LOA-None of the Above	LPLA
Return from Leave	RFL
Return from Suspension	RFS
Return from USERRA Military Leave	RFML
Suspension (Paid)	SU
Suspension (Unpaid)	SUU
Terminate Employment	TE
<b>Valid Life Events – JU Fund</b>	<b>Valid Field Values for File Upload</b>
Covered to Non-covered Position	CNC
LOA-FMLA	LFMA
LOA-USERRA Military Leave	LUSA
LOA-None of the Above	LPLA
Return from Leave	RFL
Return from Suspension	RFS
Return from USERRA Military Leave	RFML
Suspension (Paid)	SU
Suspension (Unpaid)	SUU
Terminate Employment	TE
<b>Valid Life Events – '77 Fund</b>	<b>Valid Field Values for File Upload</b>
Covered to Non-covered Position	CNC
LOA-Advanced Study/Sabbatical	LAST
LOA-Disability Leave	LDIS
LOA-Elected Official	EEO
LOA-FMLA	LFMA
LOA-USERRA Military Leave	LUSA
LOA-Sick Leave	LSCK
LOA-None of the above	LPLA
Return from Leave	RFL
Return from USERRA Military Leave	RFML
Return from Suspension	RFS
Suspension (Paid)	SU
Suspension (Unpaid)	SUU
Terminate Employment	TE

Term	Definition
<b>Member</b>	An individual who participates in any INPRS Fund.
<b>Missing Member</b>	A member who has a Member Sub Unit Status of "Active," but is not reported by their employer during a payroll process.
<b>Monetary Tolerance</b>	The EA Team can set the amount of rounding difference that is acceptable on the interest calculations.
<b>New Unit</b>	Qualifying employer or submission unit electing to join PERF
<b>OQM</b>	Operations Quality Management (OQM), formerly titled Retirement Quality Assurance (RQA)
<b>PARF/PE/PA</b>	Prosecuting Attorneys' Retirement Fund
<b>Pay Period End Date</b>	The ending date of the period that the wage being reported was accrued or earned.
<b>Pay Period Start Date</b>	The starting date of the period that the wage being reported was accrued or earned.
<b>Payroll Calendar</b>	The series of dates associated with a submission unit payroll. These are the dates that INPRS expect wage and contribution submission to occur based on the dates in the payroll calendar.
<b>Payroll Date</b>	The date that payroll information is considered final and disbursed to the employee (the check or direct deposit date).
<b>PERF</b>	Public Employees' Retirement Fund
<b>PERF Hybrid Plan (Fund)</b>	The Hybrid Plan is a defined benefit (DB) plan with a defined contribution (DC), formerly known as an Annuity Savings Account (ASA), component. At retirement, eligible members receive a defined benefit amount for life, based on age, salary, and years of service.
<b>PERF My Choice: Retirement Savings Plan (Fund)</b>	This is referred to as PMCH in the INPAS system. Formerly the ASA Only Plan. This account is funded by a 3 percent employee fixed mandatory contribution and a variable employer contribution. These contributions are paid by the employer on behalf of the member. Interest and earnings may also be added to this account. There is a PERF My Choice and TRF My Choice Plan. PERF My Choice has a State Employee and Local Government Employee version according to the employer of the PERF My Choice member.
<b>PID</b>	Pension ID
<b>Plan</b>	<p>A retirement plan in which a Submission Unit participates. Funds, often referred to as Plans, all under the INPRS umbrella, are:</p> <ul style="list-style-type: none"> <li>• 1977 Police Officers' and Firefighters' Pension and Disability Fund (also known as '77 Fund) ('77)</li> <li>• Indiana State Teachers' Retirement Fund (TRF), both Hybrid and My Choice</li> <li>• Judges' Retirement System (also known as Judges' Fund or 1977 and 1985 Judges' Retirement System) (JRS)</li> <li>• Legislators' Retirement System (LRS)</li> <li>• Prosecuting Attorneys' Retirement Fund (PARF)</li> <li>• Public Employees' Retirement Fund (PERF), both Hybrid and My Choice (Local Government Employees and State Employees)</li> <li>• State Excise Police, Gaming Agent, Gaming Control Officer and Conservation Enforcement Officers' Retirement Plan (CE), now known as Excise, Gaming and Conservation Officers' Retirement Plan (EG&amp;C).</li> </ul>
<b>Pre-note</b>	The pre-note process is a validation with the employer's bank to ensure the bank account information entered into ERM is correct.
<b>Reappointment</b>	A Reappointment is a firefighter or police officer that is returning to any previous 1977 Fund employer. Prior to July 1, 2020, under a reappointment

Term	Definition	
	the member can only return to the department in which the member left in the event they are over the age of 36. As of July 1, 2020 (HEA 1043), the maximum age for new police officers is 40 years of age and as of May 1, 2023, the maximum age for firefighters is 40 years of age (maximum age on or before May 1, 2023 is 36). Depending on the age and service if the member took a refund, the member is required to buy back the refunded service. Prior to July 1, 2020, if the member is less than 40 the member can be reappointed, but also return to ANY 1977 Fund Department. Reappointments require a new approved Statewide Baseline Examination ( <a href="#">1977 Police Officers' &amp; Firefighters' Fund Application for Membership, State Form 04928</a> ) from the new police or fire department. The maximum age restriction for entry into the Fund of age 40 does not apply. This form is only available from the EA Team.	
<b>RQA</b>	Retirement Quality Assurance now known as Operations Quality Management (OQM)	
<b>Settlement Adjustment</b>	An additional payment (or series of payments) made to a member as resolution of a legal suit, union grievance or a contract settled retroactively after the fiscal year is completed. INPRS Staff must review the adjustment and corresponding documentation, then approve the settlement adjustment in ERM before payment can be made and the adjustment posted.	
<b>SSN</b>	Social Security Number	
<b>Staff User</b>	An INPRS employee who has been given the proper security role(s) to perform certain functions within the ERM application.	
<b>Staff User Security Roles</b>	When adding Staff Users, administrators must assign a security role to each. This security role determines the amount of access a User has in the ERM application, which in turn dictates the activities a User can complete. Some security roles offer limited access to the application, while others let Users complete nearly every activity available. This is an INPRS Staff User-only term. The following is a list of the specific security roles applicable to Staff Users, along with a description of each:	
	<i>ERM Administrator</i>	This Staff User can create employer accounts and Submission Unit accounts as well as modify information in those accounts. He or she can also transfer Submission Units and members. Finally, this User can add new Employer Users, configure Fund information and manage system parameters.
	<i>ERM Communications</i>	This Staff User can send notifications in the ERM application.
	<i>ERM Enrollment Administrator</i>	This Staff User can enroll members in a Submission Unit and resolve member transactions sent to the Exception Queue. This User can also modify member information, including a member's name and hire date.
	<i>ERM Life Event Administrator</i>	This Staff User can modify/delete life events for a member. Life events must be deleted in reverse chronological order.
	<i>ERM Manual Adjustment Administrator</i>	This Staff User can submit a manual adjustment.
	<i>ERM Manual Adjustment Auditor</i>	This Staff User can approve or revoke manual adjustments

Term	Definition	
	<i>ERM Member Administrator</i>	This Staff User can resolve member management transactions sent to the Exception Queue. He or she can also manage member accounts and modify member information, including a member's name and hire date. Finally, this User may perform PERF/TRF transfers and view a member's full SSN.
	<i>ERM Pension Relief Administrator</i>	This Staff User can access pension relief functions from ERM and upload pension relief data to INPRS Web.
	<i>ERM Retirement Administrator</i>	This Staff User can access INPRS Web which includes: <ul style="list-style-type: none"> <li>• Regular Retirement Application</li> <li>• Upload Pension Relief</li> <li>• Estimate Retirement Benefit</li> </ul>
	<i>ERM Security Administrator</i>	This Staff User can add new Staff and Employer Users and assign and modify security roles for new and existing Users within the application.
	<i>ERM Service Credit Administrator</i>	This Staff User can submit a service credit adjustment. <b>NOTE:</b> This User may not also be an ERM Service Credit Auditor
	<i>ERM Service Credit Auditor</i>	This Staff User can approve or revoke service credit adjustments.
	<i>ERM SSN Change Approving User</i>	This Staff User can approve a member's SSN change. <b>NOTE:</b> This User may not also be an ERM SSN Change Submitting User.
	<i>ERM SSN Change Submitting User</i>	This Staff User can submit a member's SSN change.
	<i>ERM Submission Unit Administrator</i>	This Staff User can modify Submission Unit account information, including payroll calendars, and add Employer Users.
	<i>ERM Viewer</i>	This Staff User can view this information: <ul style="list-style-type: none"> <li>• Employer information</li> <li>• Member information</li> <li>• Exception Queue</li> <li>• Wage and contribution reports</li> </ul>
	<i>ERM Wage and Contribution Administrator</i>	This Staff User may perform these wage and contribution activities: <ul style="list-style-type: none"> <li>• Edit payment dates.</li> <li>• Manage system parameters.</li> <li>• Release settlement adjustments for payment.</li> </ul>

Term	Definition
	<ul style="list-style-type: none"> <li>• Resolve wage and contribution transactions sent to the Exception Queue.</li> <li>• Submit online wage and contribution entries and adjustments.</li> <li>• Upload wage and contribution entries and adjustments</li> <li>• View a full SSN.</li> <li>• View wage and contribution reports</li> </ul>
<b>Submission Unit</b>	<p>This is a participating unit associated with an employer. Each Submission Unit is a specific employer division participating in a single Fund -- CE, JU, LE, PA, PERF, TRF or '77. If an employer participates in multiple Funds, multiple Submission Units are associated with the same employer.</p> <p>It is also possible for two Submission Units with the same name to be listed twice under an employer if the employer participates in multiple Funds. For example, Indianapolis Public Schools (IPS) participates in TRF for teachers and in PERF for its other staff. That means IPS would be listed twice under the same employer – once for TRF and once for PERF.</p> <p>Most activity in the ERM application takes place at the Submission Unit level.</p>
<b>Survey</b>	Actuarial Survey form; This form is used to gather census data from non-state employers who are joining PERF or enlarging PERF coverage.
<b>Task Manager</b>	Web-based system used to communicate with Voya.
<b>Teachers' Retirement Fund (TRF)</b>	Official title is the Indiana State Teachers' Retirement Fund. This fund is referred to as TRFF in the INPAS system. The laws and regulations governing the TRF may be found in IC 5-10.2, IC 5-10.4, IC 5-10.5, 35 IAC, and <a href="#">Internal Revenue Code Section 401</a> govern TRF, as well as specific resolutions adopted by the Board of Trustees.
<b>TRF Hybrid Plan (Fund)</b>	The Hybrid Plan is a defined benefit (DB) plan with a defined contribution (DC), formerly known as an Annuity Savings Account (ASA), component. At retirement, eligible members receive a defined benefit amount for life, based on age, salary, and years of service.
<b>TRF My Choice: Retirement Savings Plan</b>	This is referred to as TMCH in the INPAS system. Formerly the ASA Only Plan. This account is funded by a 3 percent employee fixed mandatory contribution and a variable employer contribution. These contributions are paid by the employer on behalf of the member. Interest and earnings may also be added to this account. There is a PERF My Choice and TRF My Choice Plan.
<b>Transactions that Failed Validation with Errors</b>	<p>Indicates a transaction contains information that is incorrect, based on business validations and/or Fund rules. The transaction is sent to the Exception Queue awaiting corrections to the incorrect information. Transactions with errors cannot be submitted for payment until they are corrected. For more information and to find common solutions, check the <a href="#">Wage and Contribution Exception Queue Troubleshooting QRG – Employer</a> available from the <a href="#">ERM – Quick Reference Guide</a> page of the INPRS website, or the Appendix in the <a href="#">Employer Reporting and Maintenance (ERM) Wage and Contribution (W&amp;C) User Manual – Employer</a>. Available from the <a href="#">ERM – Manuals</a> page of the INPRS website as well as PPM and the Operations Library.</p> <p>For example: Error code A-10 for PERF/TRF says “mandatory contributions do not total 3% of reported wages.” The solution is to correct the mandatory pre- or post-tax amount or correct the wages amount. See also <b>Transactions that Failed Validation with Warnings</b>.</p>

Term	Definition
<b>Transactions that Failed Validation with Warnings</b>	<p>Indicates a transaction that seems unusual to ERM based on information previously submitted for this member. However, the information is not necessarily incorrect (compare with <b>Transactions that Failed Validation with Errors</b>); the warning is a flag for the employer to examine the transaction's accuracy. For example: Warning code L-55 states that wages for this period exceed previous period wages by more than 15%. However, this may be a correct entry for a pay period that includes over-time payment. Warnings do not prevent a transaction from being processed for payment; however, a <b>Transaction that Failed Validation with Errors</b> does.</p> <p><b>NOTE:</b> Once you select Process for Payment, all Transactions That Failed Validation with Warnings be included in the payment.</p>
<b>Transfer</b>	<p>A transfer is when a firefighter or police officer is moving from one police or fire department in the 1977 Fund to another police or fire department in the 1977 Fund. Transfers require a new approved Statewide Baseline Examination (<a href="#">1977 Police Officers' &amp; Firefighters' Fund Application for Membership, State Form 04928</a>) from the new police or fire department. The maximum age restriction for entry into the Fund of age 36 does not apply. This form is only available from the EA Team.</p>
<b>TRF</b>	Indiana State Teachers' Retirement Fund
<b>W&amp;C</b>	Wage and Contribution