

ERM Inactive Member Management QRG - Employer

Use this quick reference guide (QRG) to help manage member accounts in the Employer Reporting and Maintenance (ERM) application.

Access the Modify Inactive Member Screen

To access the **Modify Inactive** Member screen to locate and update inactive member accounts in ERM:

Access the ERM application. Choose **Member** from the **Navigation Menu**.

1. Choose **Modify Inactive Member** from the drop-down menu. The **Modify Inactive Member** screen displays.

Locate an Inactive Member's Account

Use the fields in the Search Member section of the **Modify Inactive Member** screen (Figure 1) to locate an inactive member account by:

- Member's **Last Name** and the last 4 digits of the member's Social Security Number (**Last 4 SSN**)
- Member's **Full SSN**
- Member's 9-digit **Pension ID**

To locate an inactive member account:

- Enter search criteria into the correct search field on the **Modify Inactive Member** screen.
- Click **Search**.

Figure 1: Search Fields on the Modify Inactive Member Screen

Search Member

Search for a Member based on Last Name and last four digits of SSN or Full SSN or Pension ID

Last Name

Last 4 SSN

Or

Full SSN

Or

Pension ID

Search Result

View an Inactive Member's Account

Information for the member whose record matches the data entered into the search fields will be displayed at the bottom of the **Modify Inactive Member** screen. This part of the screen contains 3 or 4 sections depending on the member's fund affiliation:

1. **Member Demographics** section displays member demographics:
 - **First Name, Middle Name, and Last Name**
 - **Gender**
 - **Marital Status**
2. **Member Submission Units** section contains a grid that displays the Submission Unit(s) with which the member is inactive.

Figure 2: Search Results Sections

Member Demographics

First Name: NEW
Middle Name:
Last Name: TRF33
Gender: Male
Marital Status: Married

TRF Fund Pre-1996 Member: No

Member Submission Units

Action	Unit ID	Unit Name	Hire Date	Status	Status Effective Date
Modify	€	STATE AUDITOR	3/28/2019	Inactive	5/15/2019

My Choice

Plan Election: My Choice
Effective Date: 3/28/2019
Plan Election Input: My Choice
Input Election Date: 5/24/2019
Vesting Percentage: 0 %

Life Events

Action	Life Event	Last Day in Pay	Last Check Date	Effective Date
Modify	Termination	5/15/2019	6/15/2019	5/15/2019

NOTE: Member Submission Unit information is view only and cannot be modified.

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3. **My Choice** section contains the PERF or TRF My Choice Plan/PERF or TRF Hybrid Fund elections, when the election was made and the vesting percentage in the My Choice plan.
4. **Life Events** section contains life events associated with the member at the specific submission unit selected. For members who are associated with more than one Submission Unit, the information associated with the life events change depending upon the Submission Unit selected in the **Submission Units** section.

NOTE: Member Submission Unit information displayed only includes the submission unit(s) the processor has permission to view.

Manage Inactive Member Accounts

Depending on the processor's individualized security role and the Fund associated with the member's Submission Unit, an inactive member's termination-related dates can be modified.

Modify a Member's Account

To modify member termination dates:

1. Click the **Modify** link in the **Life Events** section at the bottom of the **Modify Inactive Member** screen. This opens the **Modify Termination Dates** dialog box.
2. Enter the member's updated termination date into the **Last Day in Pay** field. The required format for this field appears in a pop-up bubble when the field is clicked.
3. Enter the date of the member's last paycheck into the **Last Check Date** field. Select the date from the drop-down list.
4. Click **Save**.

Figure 3: Modify Termination Dates

The screenshot shows a web-based form titled "Add Member Life Event". It has three main input fields: "Life Event" (a dropdown menu set to "Termination"), "Last Day in Pay" (a text input field containing "7/19/2021"), and "Last Check Date" (a dropdown menu). The "Last Check Date" dropdown is open, displaying a list of dates from 07/07/2021 to 12/22/2021. Below the form, there are "Save" and "Cancel" buttons. A small text box on the right side of the form states: "Terminate Employment' Life Event is saved in the system, and will be viewable in the 'Modify Inactive Member' screen."