ERM Manage Submission Contact and User QRG - Employer

This quick reference guide (QRG) is for use during the annual and continuing management of contact and user information in the Employer Reporting and Maintenance (ERM) application.

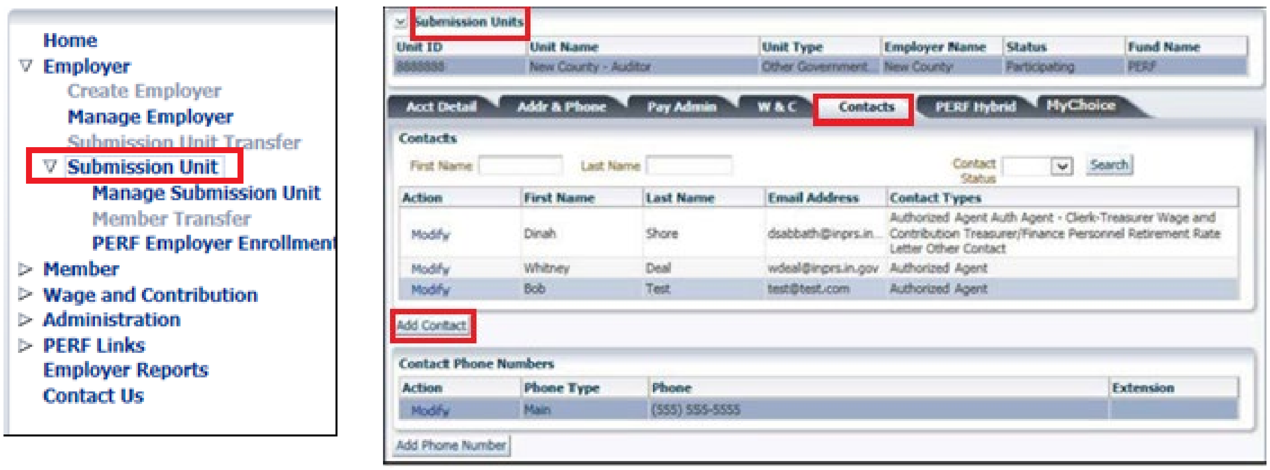
Manage Submission Contact and User

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

Manage Submission Unit Contact Information

To manage Submission Unit contact information. click **Employer** then click **Manage Submission Unit**. Your unit populates as seen in Figure 1. Click the Contact tab, click the drop-down next to **Contact Status**, select **Active**, and click **Search** to see your active contacts.

Figure 1: Submission Units, Contacts tab



Modify Existing Submission Unit Contact

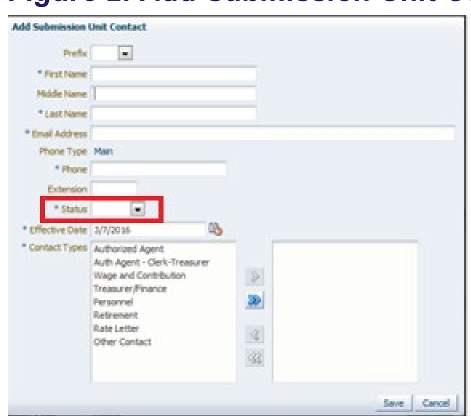
To modify an existing submission unit contact, click **Modify**, in the **Action** column (Figure1), next to the name of the contact you want to select. Here you can update the contact **Status** or **Contact Types** for that individual.

Add a New Submission Unit Contact

To add a new submission unit contact, click **Add Contact** (Figure 1) to populate the pop-up screen.

On the *Add Information Unit Contact* screen, complete the requested information and for the **Status**, click the ∇ and select **Active**.

Figure 2: Add Submission Unit Contact



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Add an Existing Submission Unit Contact

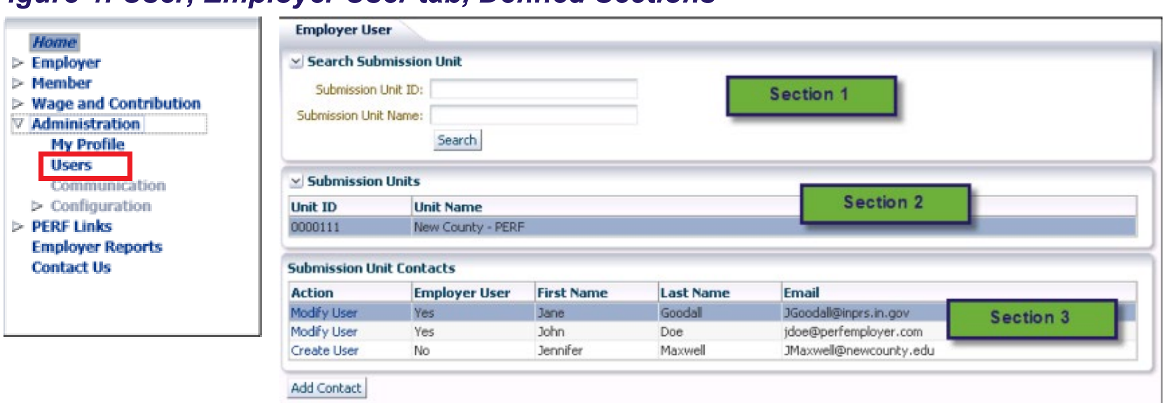
Each Submission Unit contact must have an email address that is unique in the ERM application. If you attempt to add a contact and you get a message stating that the contact cannot be added because the contact's email address already exists, you must add the contact through the **Administration** section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

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 **Employer User** must be added as a **Submission Unit Contact** in the ERM application. To access options for adding new user, click the **Users** tab as seen in the image below.(Figure 4).

Figure 4: User, Employer User tab, Defined Sections



Section 1 allows you to search for unit you are wanting to make updates to if it has not prepopulated in **Section 2. Section 3** select **Create User** to grant user roles to a **New Contact** or select **Modify User** for an existing contact to make any updates or deactivate their access to ERM for your unit.

References

For detailed instructions refer to the *Manage an Employer* section for contact information and the *Manage a Submission Unit* section for user roles of the *Employer Reporting Maintenance (ERM) Employer Management User Manual* available on the INPRS website.