Employer Reporting and Maintenance (ERM)

Employer Management User Manual

Employer User

Indiana Public Retirement System (INPRS)
One North Capitol Avenue, Suite 001
Indianapolis, IN 46204
(317) 233-4162

INPRS
INDIANA PUBLIC RETIREMENT SYSTEM

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Introduction to Employer Management for Employer Users

Employer Users are Indiana Public Retirement System (INPRS) participants with access to manage their employer accounts in the Employer Reporting and Maintenance (ERM) application. Based on an individual's security role in the ERM application, Employer Users can conduct the following employer management functions:

- Modify employer information
- Modify Submission Unit information
- Add new Employer Users to ERM

Employer Users also have view-only access to the following information:

- Employer account details
- Employer Fund assignments
- Submission Unit account details
- Submission Unit contribution type details
- Submission Unit wage and contribution submission information

This User Manual introduces you to all the features and screens associated with employer management functions in the ERM application, as well as how to enter, modify and view employer management data in ERM.

For instructions on how to log into the ERM application, reference the *ERM Overview User Manual – Employer User.*

Glossary of Important ERM Terms

The following are some important terms you need to know in order to carry out employer management duties in the ERM application.

Table 1: ERM Terms

Term	Definition	
Adjustment	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.	
Bulk Uploads	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.	
Contact Types	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:	
	Authorized Agent	This person, named by the Submission Unit's board, is the first line of contact for all Fund matters. He or she 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 PERF and may be modified only by INPRS Staff Users.
	Authorized Agent – Clerk-Treasurer	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.
	Authorized Agent – Controller	This person has the role of an Authorized Agent and the titles and duties of a Controller.
	Authorized Agent – Trustee	This person has the role of an Authorized Agent and the titles and duties of a Trustee.
	Chief	This person is responsible for overall administrative duties for '77 Fund Submission Units.
	Other Contact	This person should be contacted only if a concern doesn't fall into another category.
	Pension Secretary	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
	Personnel	This person is the contact for new enrollment-related questions.
	Rate Letter	This person receives the rate letters.

Term	Definition	
	Retirement	This person is the contact for retirement-related questions.
	Superintendent	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.
	Treasurer/Finance	This person is responsible for ensuring that funds are available for wages and contributions.
	Wage and Contribution	This person is responsible for submitting wages and contributions for a Submission Unit and should be contacted if there are any issues with those submissions.
Covered Position	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.	
Effective Date	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 will not use the new address for any correspondence until that effective date.	
Employer	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).	
Employer User	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.	
Employer User Security Role	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:	
	Enrollment Administrator	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.
	Life Event Administrator	This Employer User can modify/ delete all life events for a member

Term	Definition	
	Member Administrator	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.
	Member Viewer	This Employer User has view-only access to member data, including member reports.
	Payment Administrator	This Employer User can view the payment administration screen, enter and update bank account information, and authorize payment on wage and contribution entries.
	PERF Pension Relief Administrator	This Employer User can access pension relief functions from ERM and upload pension relief data to the INPRS Web.
	PERF Retirement Administrator	This Employer User may access INPRS Web which includes: • Estimate Retirement Benefit • Upload Pension Relief • PERF Regular Retirement Application
	Security Administrator	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.
	Wage and Contribution Administrator	This Employer User can carry out these wage and contribution activities: • Bulk upload wage and contribution entries and adjustments. • Submit online wage and contribution entries and adjustments. • View wage and contribution reports. • Resolve wage and contribution transactions sent to the Exception Queue. • View a full Social Security Number (SSN) • Add/verify payroll calendar information upon initial login.

Term	Definition	
		• Submit PERF Enrollment Resolution Form
	Wage and Contribution Operator	This Employer User can enter wage and contribution transactions either online or via file upload.
	Wage and Contribution Viewer	This Employer User has view-only access to the payment administration screen and employer data, plus wage and contribution reports.
ERM	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.	
Exception Queue	If a transaction entered into the ERM application – either via online entry or bulk upload – contains errors or is waiting on more information, it will be 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: • Member's birth date is after the member's hire date. • 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. • Statewide Baseline Examination results are needed ('77 Fund only). • Wages and contributions are submitted for a member not enrolled in the Submission Unit being reported. • Member has the option of being enrolled in the MyChoice Retirement Savings Plan (formerly ASA Only Plan) but hasn't made an election yet.	
Fund	A retirement plan in which a Submission Unit participates. Funds, all under the INPRS umbrella, are: • 1977 Police Officers' and Firefighters' Pension and Disability Fund (also known as '77 Fund) ('77) • Indiana State Teachers' Retirement Fund (TRF) • Judges' Retirement System (also known as Judges' Fund or 1977 and 1985 Judges' Retirement System) (JU) • Legislators' Retirement System (LE) • Prosecuting Attorneys' Retirement Fund (PA) • Public Employees' Retirement Fund (PERF) • State Excise Police, Gaming Agent, Gaming Control Officer and Conservation Enforcement Officers' Retirement Plan (CE)	
Group	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), an INPRS Staff User could search for employers in the state group and direct the communication to them.	
INPRS	The acronym stands for the Indiana Public Retirement System.	
Interest	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	

<table>
<tr><th>Term</th><th colspan="2">Definition</th></tr>
<tr><td></td><td colspan="2">interest in ERM is based on the payroll date. This should be the date the member was actually paid the wages.</td></tr>
<tr><td>Last Check Date</td><td colspan="2">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 should occur on or after his or her Last Day in Pay. This date will be used to signal whether all wage and contribution information for a member requesting a retirement or Annuity Savings Account (ASA) distribution has been received or is in progress.</td></tr>
<tr><td>Last Day in Covered Position</td><td colspan="2">The date a member's creditable pension service, and the associated contributions, stop. This date should 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.
NOTE: A retirement and/or ASA distribution cannot be processed until the employee has completely separated from employment and a Last Day in Pay has been reported.</td></tr>
<tr><td>Last Day in Pay</td><td colspan="2">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 should be 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, should be entered in ERM immediately upon the member's termination.
NOTE: A retirement and/or ASA distribution cannot be processed until the employee has completely separated from employment and a Last Day in Pay has been reported.</td></tr>
<tr><td rowspan="3">Liability Types</td><td colspan="2">When transferring all members of one Submission Unit to another, an indication must be made as to where the liability for the Fund will be placed after the transfer.</td></tr>
<tr><td>Merged With Liability</td><td>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>Merged Without Liability</td><td>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>
</table>

Term	Definition	
	Withdrawn	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.
	Withdrawn (Privatization)	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.
Life Event	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: • Adoption Leave (PERF and TRF only) • Advanced Study/Sabbatical (TRF and '77 Fund only) • Approved Educational Travel (TRF only) • Covered to Non-covered Position • Disability Leave (PERF, TRF,'77 Fund and CE Fund only) • Elected Official ('77 Fund only) • Family Medical Leave Act (FMLA) • Maternity Leave (TRF only) • Medical Leave (TRF only) • USERRA Military Leave • Return From Leave • Return From USERRA Military Leave • Return From Suspension • Sick Leave (TRF and '77 Fund only) • Suspension (Paid) • Suspension (Unpaid) • Teacher Exchange (TRF only) • Terminate Employment • Work Experience (TRF only) • Worker's Comp (PERF and TRF only) • None of the Above	

Valid Life Events – PERF	*Valid Field Values for File Upload*
Covered to Non-covered Position	CNC
LOA-Adoption Leave	LADP
LOA-Disability Leave	LDIS

Valid Life Events – PERF	***Valid Field Values for File Upload***
LOA-FMLA (Member)	LFMA
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

Valid Life Events – TRF	***Valid Field Values for File Upload***
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-Maternity Leave	LMAT
LOA-Medical Leave	LMDA
LOA-USERRA Military Leave	LUSA
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

Valid Life Events – JU Fund	***Valid Field Values for File Upload***
Covered to Non-covered Position	CNC
LOA-FMLA	LFMA

Valid Life Events – JU Fund	Valid Field Values for File Upload
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

Valid Life Events – '77 Fund	Valid Field Values for File Upload
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
Member	An individual who participates in any INPRS Fund.
Pay Period End Date	The ending date of the period that the wage being reported was accrued or earned.
Pay Period Start Date	The starting date of the period that the wage being reported was accrued or earned.
Payroll Date	The date that payroll information is considered final and disbursed to the employee (the check or direct deposit date).
Settlement Adjustment	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.
Staff User	An INPRS employee who has been given the proper security role(s) to perform certain functions within the ERM application.

Term	Definition	
Staff User Security Roles	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:	
	ERM Administrator	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.
	ERM Communications	This Staff User can send notifications in the ERM application.
	ERM Enrollment Administrator	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.
	ERM Life Event Administrator	This Staff User can modify/delete life events for a member. Life events must be deleted in reverse chronological order.
	ERM Manual Adjustment Administrator	This Staff User can submit a manual adjustment.
	ERM Manual Adjustment Auditor	This Staff User can approve or revoke manual adjustments
	ERM Member Administrator	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.
	ERM Pension Relief Administrator	This Staff User can access pension relief functions from ERM and upload pension relief data to INPRS Web.
	ERM Retirement Administrator	This Staff User can access INPRS Web which includes: • Regular Retirement Application • Upload Pension Relief • Estimate Retirement Benefit
	ERM Security Administrator	This Staff User can add new Staff and Employer Users and assign and modify security roles for new and existing Users within the application.

Term	Definition	
	ERM Service Credit Administrator	This Staff User can submit a service credit adjustment. **NOTE:** This User may not also be an ERM Service Credit Auditor
	ERM Service Credit Auditor	This Staff User can approve or revoke service credit adjustments.
	ERM SSN Change Approving User	This Staff User can approve a member's SSN change. **NOTE:** This User may not also be an ERM SSN Change Submitting User.
	ERM SSN Change Submitting User	This Staff User can submit a member's SSN change.
	ERM Submission Unit Administrator	This Staff User can modify Submission Unit account information, including payroll calendars, and add Employer Users.
	ERM Viewer	This Staff User can view this information: • Employer information • Member information • Exception Queue • Wage and contribution reports
	ERM Wage and Contribution Administrator	This Staff User may perform these wage and contribution activities: • Edit payment dates. • Manage system parameters. • Release settlement adjustments for payment. • Resolve wage and contribution transactions sent to the Exception Queue. • Submit online wage and contribution entries and adjustments. • Upload wage and contribution entries and adjustments • View a full SSN. • View wage and contribution reports

Employer Numbers and Submission Unit IDs

In the ERM application, employers are assigned a unique Employer Number. Most Transactions, including updating member records and submitting wage and contribution data, are completed using the Submission Unit ID. In the event you submit payments to more than one Fund, you would have more than one submission unit ID but only one Employer Number

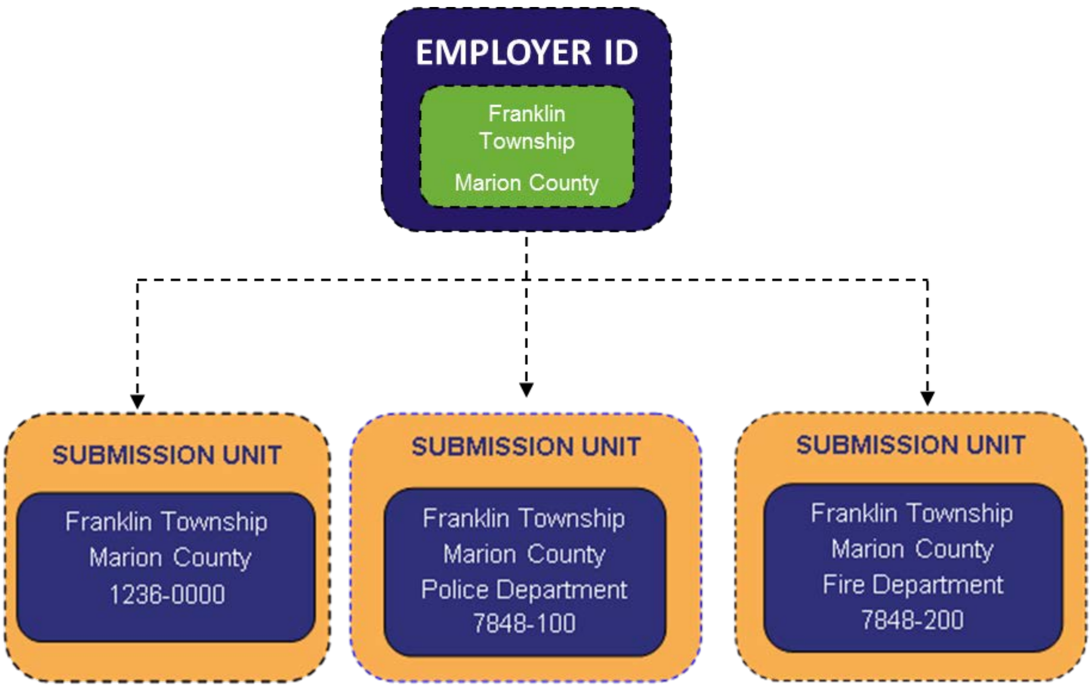
For example, Franklin Township is the employer but has three submission unit IDs used to submit data to INPRS, one for PERF, and two for the ‘77 fund: one for police, one for fire.

These Submission Unit IDs are linked with the employer number in the ERM application.

In summary, within the ERM application, employers are assigned a unique Employer number and the numbers that formerly were used as employer numbers are called Submission Unit IDs.

Submission Unit IDs are linked with the employer number in the ERM application, as shown in Figure 1.

Figure 1: Submission Unit IDs



For most transactions, including enrollment of new members and submitting wage and contribution data, use the Submission Unit ID.

ERM Navigation Menu

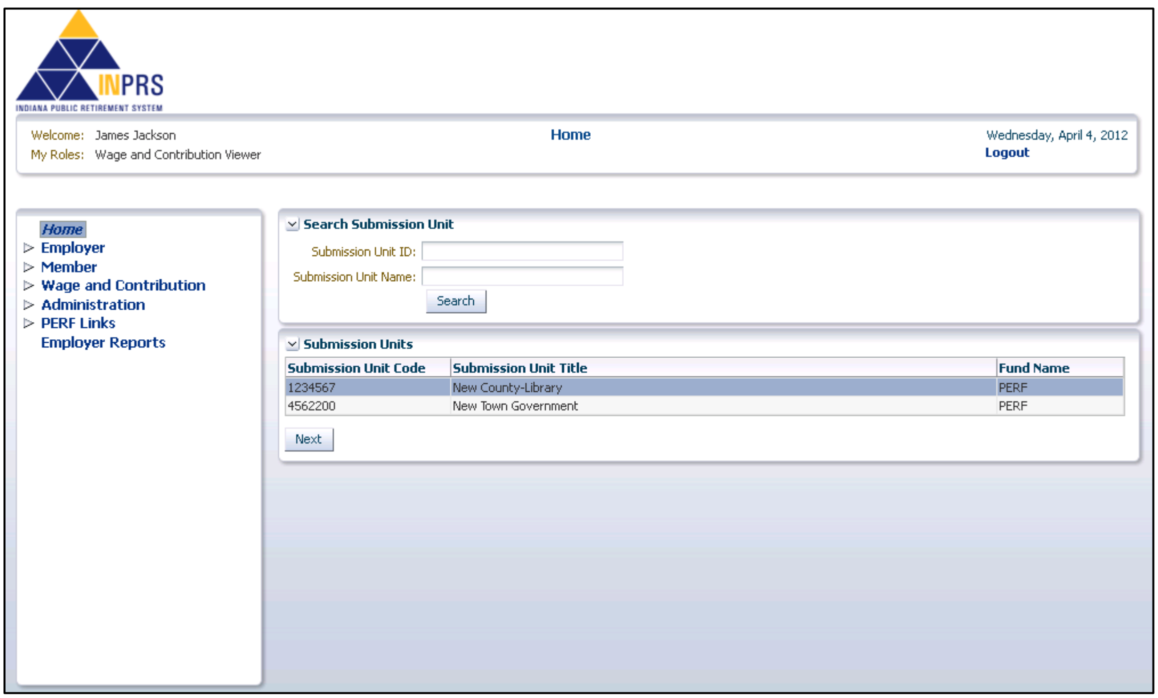
The Navigation Menu is on the left side of the ERM *Home* page, as shown in Figure 2.

The selections in the Navigation Menu are:

- Home
- Employer
- Member
- Wage and Contribution
- Administration
- PERF Links
- Employer Reports
- Contact Us

Several selections have drop-down menus. The options available to Employer Users vary by security role. Any options that Employer Users cannot access will display grayed out in the Navigation Menu.

Figure 2: ERM Home Page



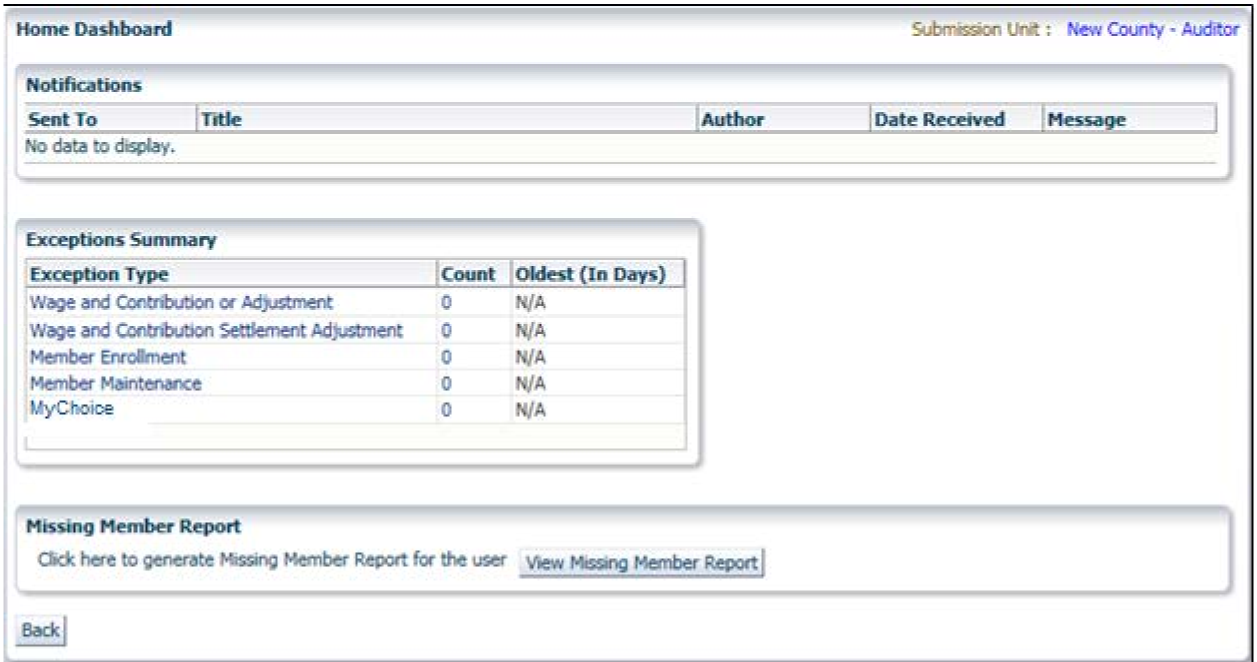
Accessing the Home Dashboard

To access the Home Dashboard for a Submission Unit:

1. Select a Submission Unit from the grid on the *Home* page.

2. Click the **Next** button. The Home Dashboard for the selected Submission Unit opens, as shown in Figure 3.

Figure 3: Home Dashboard on the ERM Home Page



The Home Dashboard contains the following sections for the selected Submission Unit:

- Notifications
- Exceptions Summary
- Payroll Calendar
- Missing Member Report

NOTE: For more information about the Home Dashboard, see the *ERM Overview User Manual for Employer Users*.

Accessing and Viewing Employer Account Options

Click the arrow to the left of *Employer* in the Navigation Menu to open a drop-down menu of all employer account options, as shown in Figure 4. Actions associated with each option are described in Table 1.

Figure 4: Employer Account Options Menu

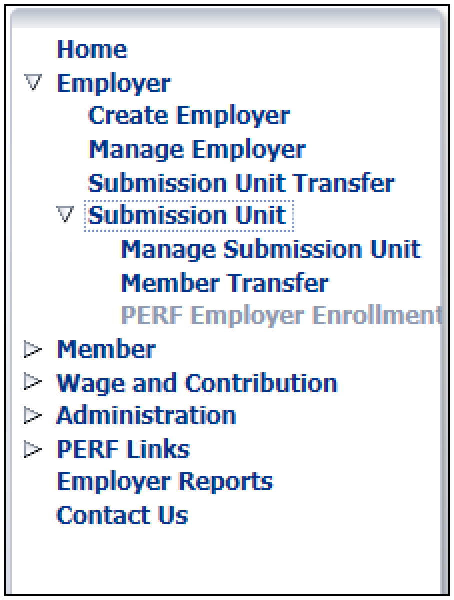


Table 2: Actions Available for Employer Account Options Menu

Menu Option	Action
Create Employer	Create a new employer account in the ERM application (INPRS Staff User-only).
Manage Employer	Update information in an existing employer account. Add new Submission Units to an existing employer account (INPRS Staff User-only).
Submission Unit Transfer	Transfer a Submission Unit between two employer accounts (INPRS Staff User-only).
Submission Unit	The Submission Unit option has an additional drop-down menu that allows you to complete the following activities: • Manage Submission Unit: Update information for an existing Submission Unit. • Member Transfer: Move a member between two Submission Units (INPRS Staff User-only).

Managing an Employer

Employer Users can add, delete, modify or view information in employer accounts, including:

- Account Details (view-only)
- Contact information
- Address and phone number
- Funds (view-only)
- Groups (view-only)
- Submission Unit information (view only)

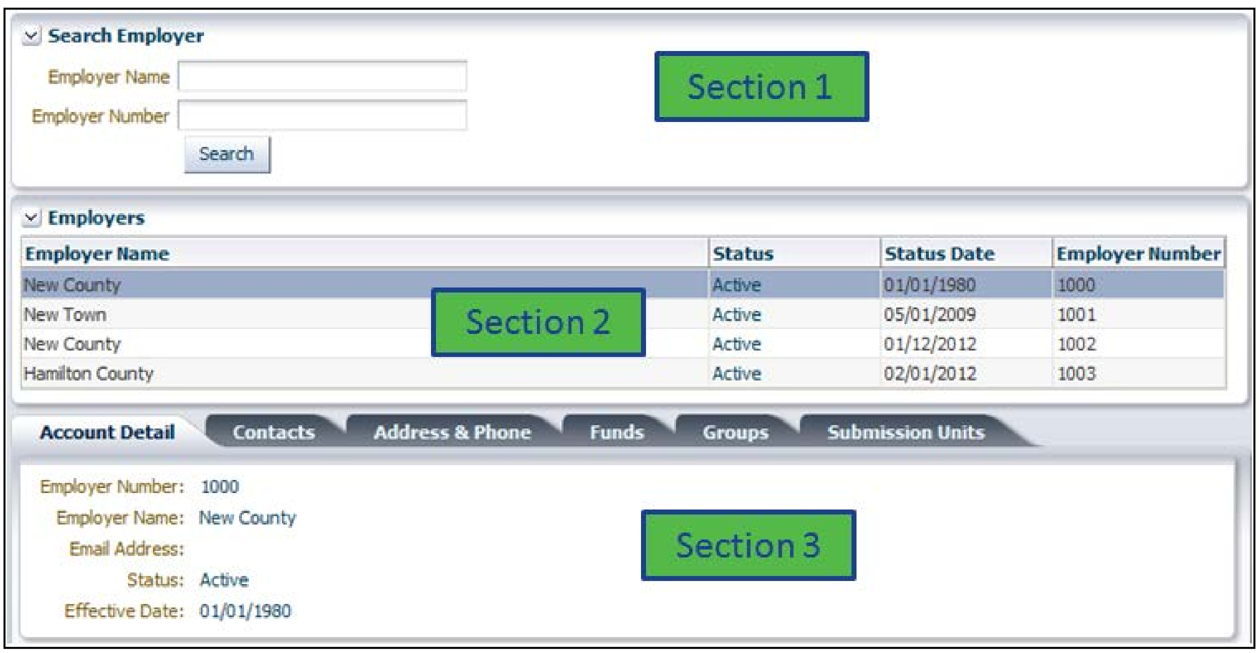
The specific employer information that an Employer User can access and update depends upon his or her security role.

Locating an Employer Account

To locate an existing employer account, choose *Manage Employer* from the drop-down menu below *Employer* in the Navigation Menu.

This takes you to the *Manage Employer* screen shown in Figure 5.

Figure 5: Manage Employer Screen



The *Manage Employer* screen contains three sections for searching and managing information in employer accounts.

- **Section 1** contains search fields that allow you to locate employer account information using either the employer name or ID number.

NOTE: This section is mostly used by INPRS Staff Users. The employer account that your security role allows you to view is auto-populated in Section 2 of the screen.

- **Section 2** of the *Manage Employer* screen contains a grid that is automatically populated with the employer account(s) that you have permission to view.
- **Section 3** displays several tabs that contain demographic data for the employer account.

Searching for a Specific Employer Account

To search for an employer by name:

1. Type the name of the employer in the **Employer Name** field.
2. Click the **Search** button.

To search for an employer by ID number:

1. Type the employer's ID number in the **Employer Number** field.
2. Click the **Search** button.

Selecting an Employer Account

All employer records that you have permission to view will display in the scrollable grid found in Section 2 of the *Manage Employer* screen, shown in Figure 5. To select an employer using the scrollable grid:

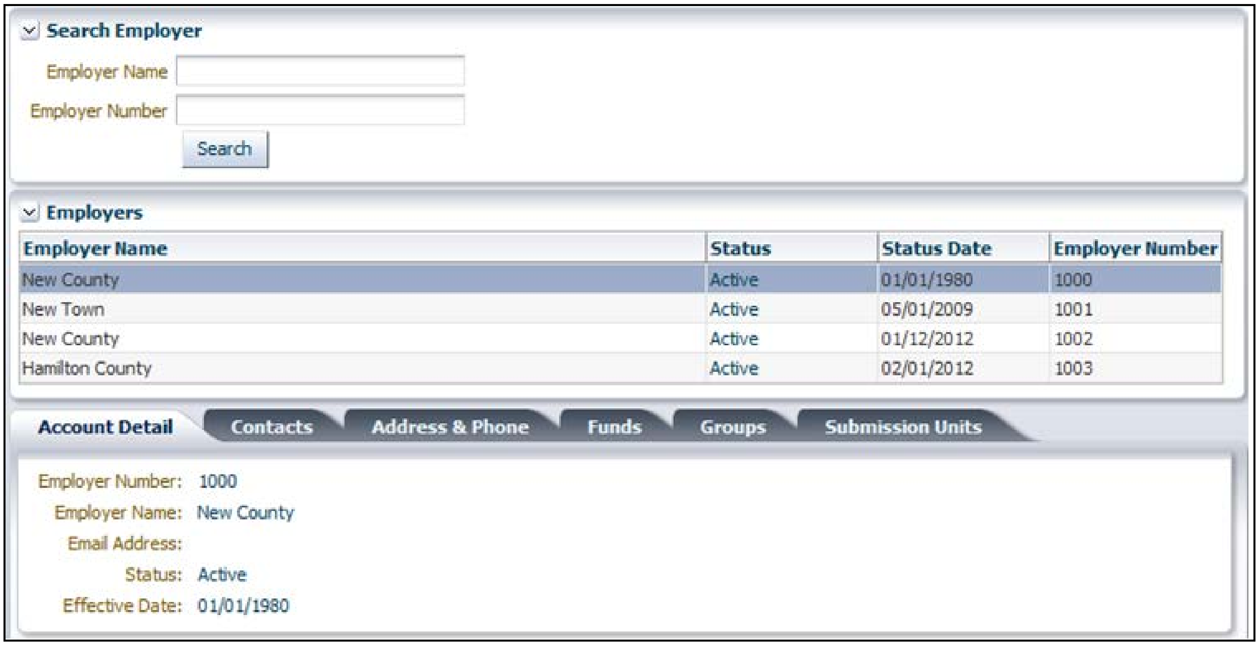
1. Click the employer name in the grid.
2. Once you select an employer record to view, the tabs in Section 3 populate with the chosen employer's demographic data. The tabs found in this section are:
    - Account Detail
    - Contacts
    - Address & Phone
    - Funds
    - Groups
    - Submission Units

Viewing Account Detail Information

The Account Detail tab, shown in Figure 6, displays employer account details, including:

- Employer Number
- Employer Name
- Email Address
- Status
- Effective Date

Figure 6: Account Detail Tab on the Manage Employer Screen

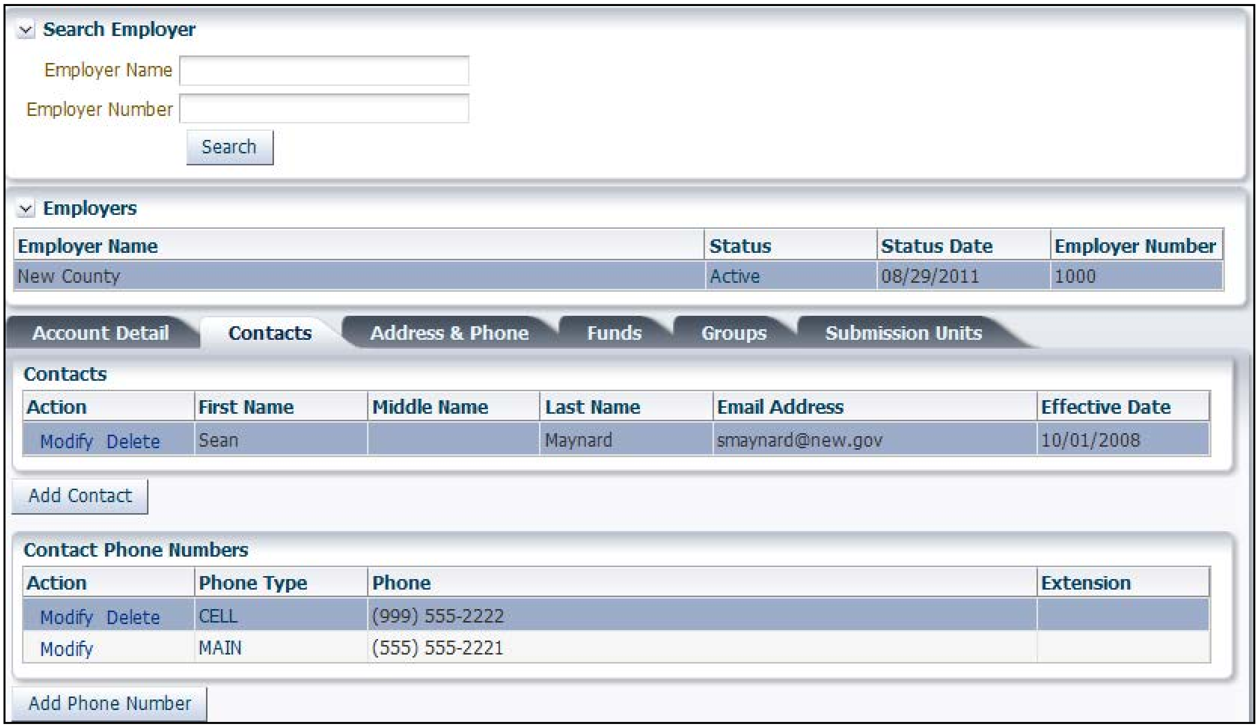


> **NOTE:** Employer Users have view-only access to the information contained in the fields associated with the **Account Detail** tab.

Managing an Employer Contact

To manage employer contact information, choose the **Contacts** tab. This displays a table containing all contacts for the employer account, as shown in Figure 7.

Figure 7: Contacts Tab on the Manage Employer Screen

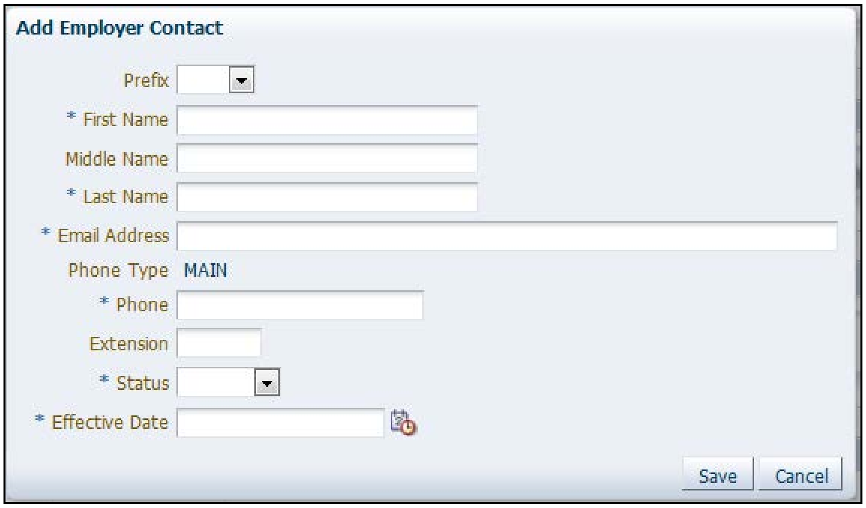


Adding an Employer Contact

To add an employer contact:

1. Click the **Add Contact** button under the Contacts table. This opens an **Add Employer Contact** pop-up box, as shown in Figure 8. The pop-up box contains the following fields:
    - Prefix
    - First Name
    - Middle Name
    - Last Name
    - Email Address
    - Phone Type
    - Phone
    - Extension
    - Status
    - Effective Date

Figure 8: Add Employer Contact Pop-Up Box on the Manage Employer Screen



2. Click the arrow to the right of the **Prefix** field to access a drop-down menu of prefix choices. This field is not required.
3. Type the first name of the employer contact in the **First Name** field.
4. Type the middle name of the employer contact, if applicable, in the **Middle Name** field. This field is not required.
5. Type the last name of the employer contact in the **Last Name** field.
6. Type the contact's email address in the **Email Address** field.
7. Type the contact's 10-digit phone number in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
8. Type the contact's telephone extension number (if applicable) in the **Extension** field. This field is not required.
9. Click the arrow next to the **Status** field to access a drop-down menu of the following status choices:
   - Active
   - Inactive

   Choose *Active*.
10. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
11. Click the **Save** button.

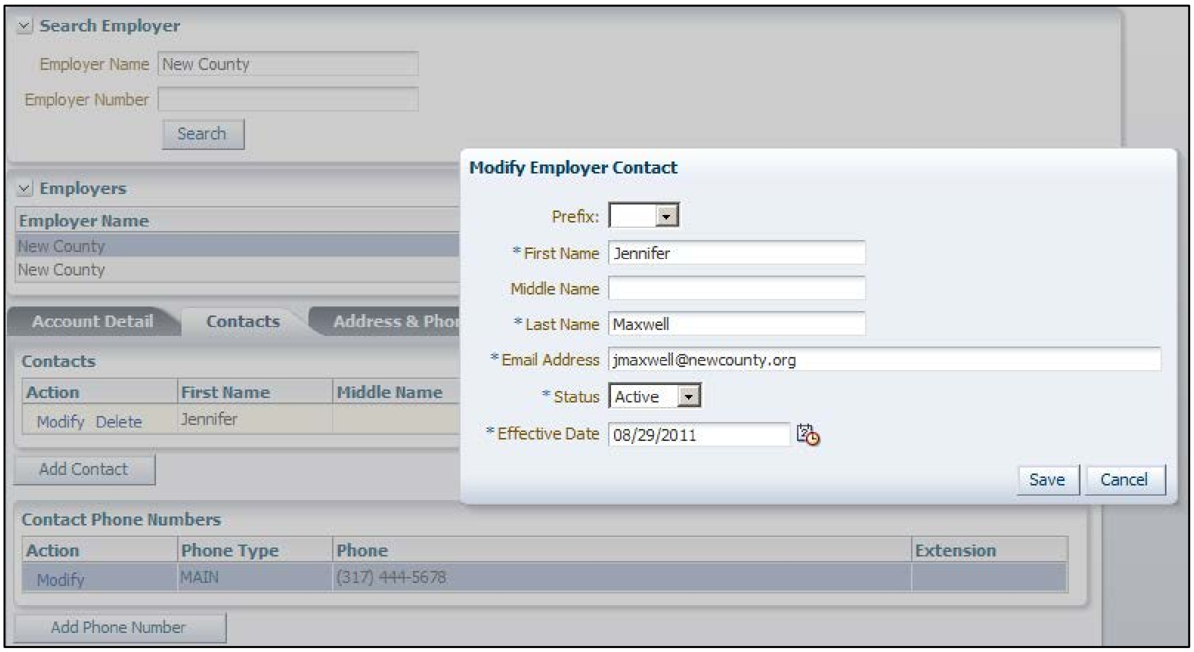
NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Modifying an Employer Contact

To modify an employer contact:

1. Click the *Modify* hyperlink in the **Action** column of the Contacts table. A **Modify Employer Contact** pop-up box opens, as shown in Figure 9. The pop-up box contains the following modifiable fields:
    - Prefix
    - First Name
    - Middle Name
    - Last Name
    - Email Address
    - Status
    - Effective Date

Figure 9: Modify Employer Contact Pop-Up Box on the Manage Employer Screen



2. Click the field(s) you want to modify.
3. Enter the updated employer contact information.
4. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Deleting an Employer Contact

To delete an employer contact:

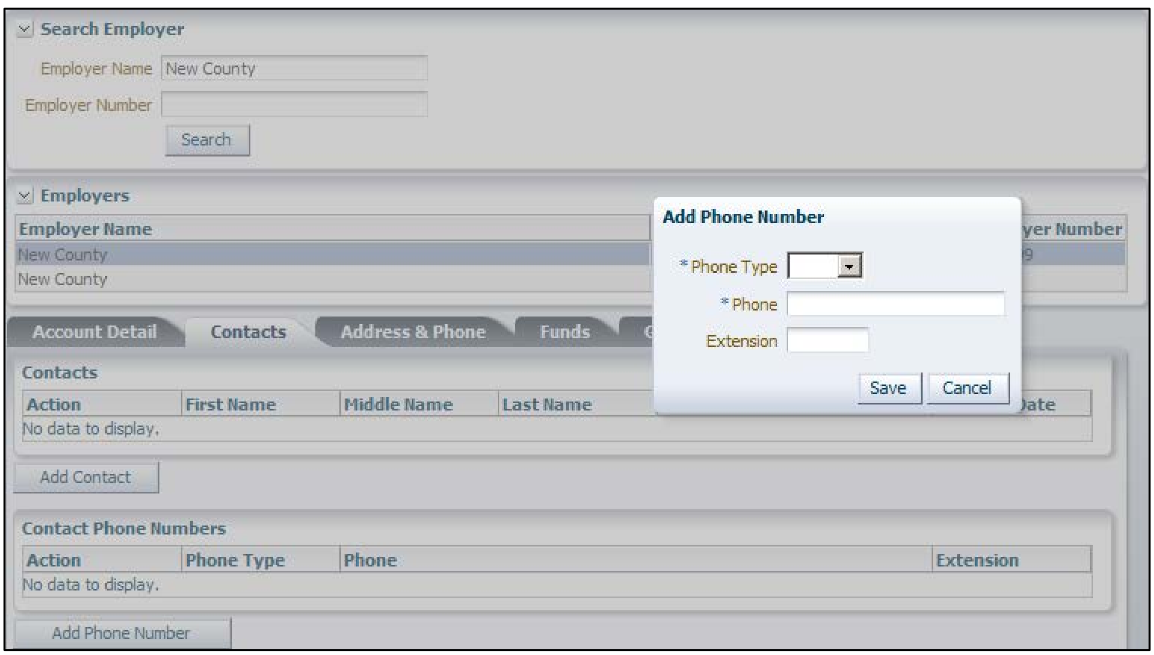
1. Click the *Delete* hyperlink in the **Action** column on the appropriate line of the Contacts table. A confirmation box opens.
2. Click the **OK** button to delete the contact.

Adding an Employer Contact Phone Number

To add a phone number to a contact's account:

1. Choose a contact from the Contacts table.
2. Click the **Add Phone Number** button. This opens the **Add Phone Number** pop-up box shown in Figure 10. The pop-up box contains the following fields:
    - Phone Type
    - Phone
    - Extension

Figure 10: Add Contact Phone Number Pop-Up Box on the Manage Employer Screen



3. Click the arrow to the right of the **Phone Type** field to access a drop-down menu containing the following options:
    - Main
    - Fax
    - Cell

    Every contact must have at least one phone number identified as *Main.* For all additional contact phone numbers, choose the correct phone type option.

4. Type the phone number for the Submission Unit in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
5. If a particular extension is required. Type this number in the **Extension** field. This field is not required.
6. Click the **Save** button.

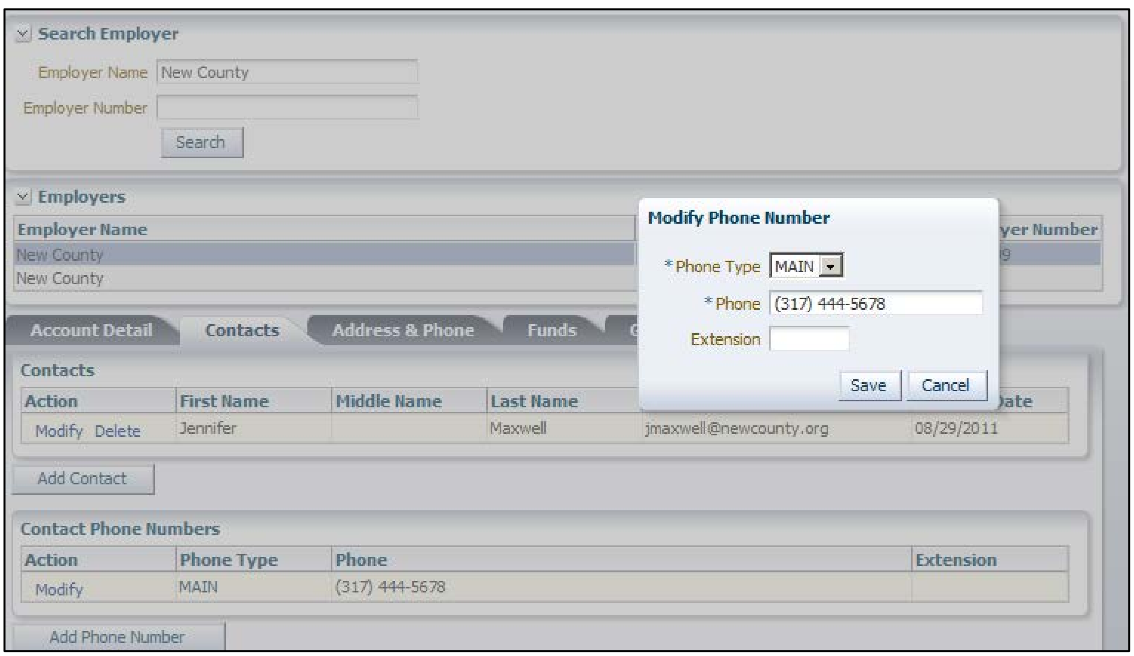
NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Modifying an Employer Contact Phone Number

To modify a contact's phone number:

1. Choose a contact from the Contacts table. The phone numbers for the contact display in the Contact Phone Numbers table.
2. Click the *Modify* hyperlink in the **Action** column of the Contact Phone Numbers table at the bottom of the screen. This opens the **Modify Phone Number** pop-up box shown in Figure 11. The pop-up box contains the following fields:
    - Phone Type
    - Phone
    - Extension

Figure 11: Modify Contact Phone Number Pop-Up Box on the Manage Employer Screen



3. Place your cursor in the field(s) you want to modify.
4. Type the updated employer phone information.
5. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Deleting an Employer Contact Phone Number

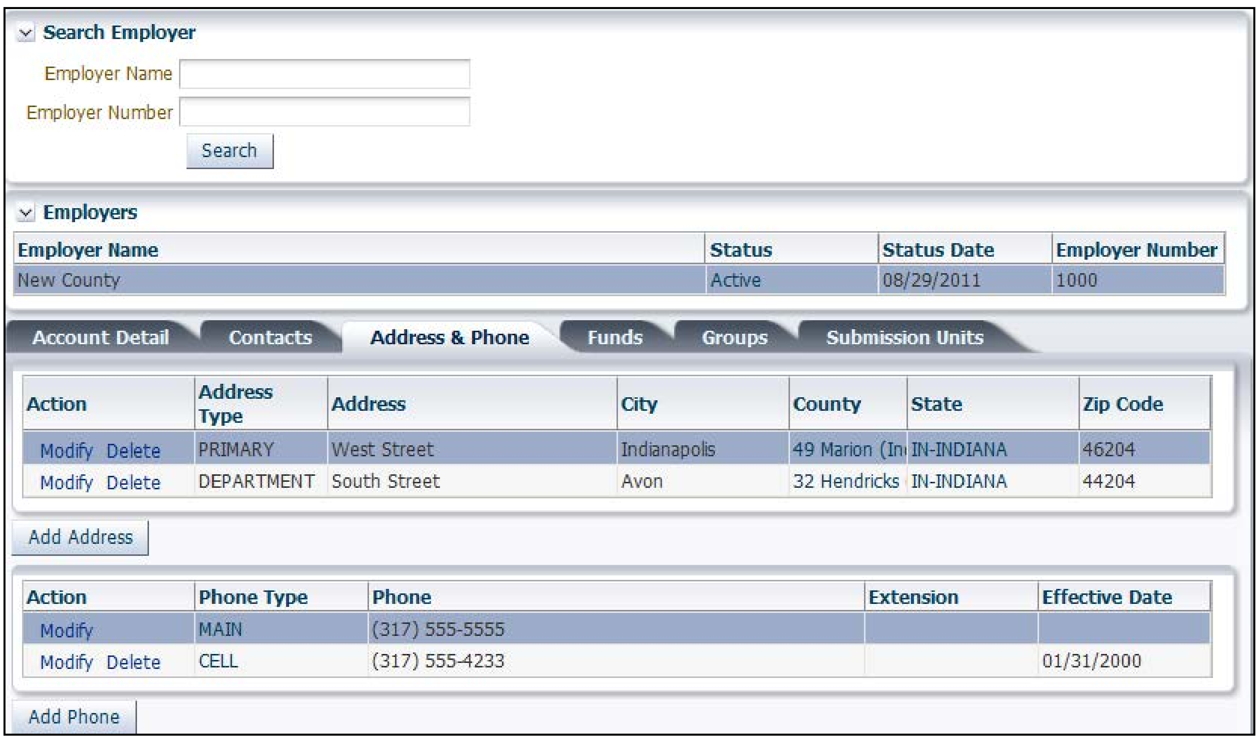
To delete a contact phone number from a contact's account:

1. Choose a contact from the Contacts table. The phone numbers for that contact display in the Contact Phone Numbers table.
2. Click the *Delete* hyperlink in the **Action** column on the appropriate line of the Contact Phone Numbers table. A confirmation box opens.
3. Click the **OK** button to delete the phone number.

Managing Employer Addresses and Phone Numbers

To manage an employer's address or phone number, choose the **Address & Phone** tab. This will display two tables, as shown in Figure 13. One table contains employer address information, and the other contains employer phone number information.

Figure 12: Address & Phone Tab on the Manage Employer Screen

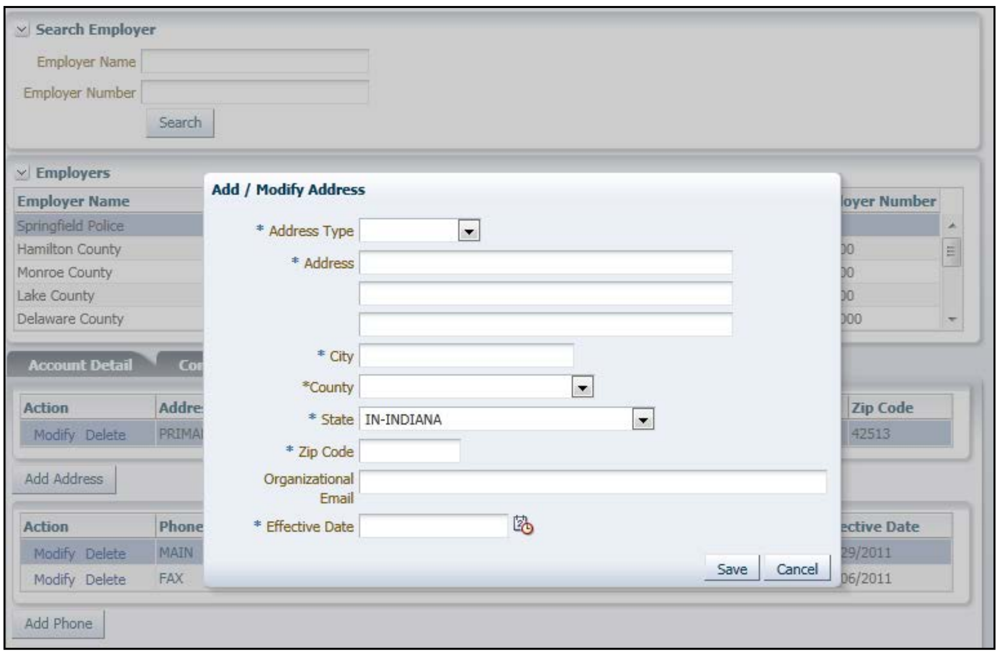


Adding an Employer Address

To add an employer address:

1. Click the **Add Address** button below the Address table on the screen. The **Add/Modify Address** pop-up box opens, as shown in Figure 13. The pop-up box contains the following fields:
    - Address Type
    - Address
    - City
    - County
    - State
    - Zip Code
    - Organizational Email
    - Effective Date

Figure 13: Add/Modify Address Pop-Up Box on the Manage Employer Screen



2. Click the arrow next to the **Address Type** field to access a drop-down menu of these address types:
    - Primary
    - Department

   Choose the appropriate address type.
3. Type the employer's street address in the **Address** fields.
4. Type the city name in the **City** field.

5. Click the arrow next to the **County** field to access a drop-down menu of Indiana counties. Click the correct county to populate the field. This field is only required if the employer's address is in Indiana.
6. The **State** field defaults to Indiana but can be changed. Click the arrow next to the **State** field to access a drop-down menu of states. Click the correct state, and the **State** field will automatically update.
7. Type the five-digit Zip Code in the **Zip Code** field. The required format is shown in a pop-up bubble when you click the **Zip Code** field.
8. Type the employer's email address in the **Organizational Email** field. This field is not required.
9. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
10. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Modifying an Employer Address

To modify an employer address:

1. Click the *Modify* hyperlink in the **Action** column of the Address table. The **Add/Modify Address** pop-up box shown in Figure 13 opens.
2. Place your cursor in the field(s) you want to modify.
3. Type the updated employer address information.
4. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Deleting an Employer Address

To delete an employer address:

1. Click the *Delete* hyperlink in the **Action** column on the appropriate line of the Address table. A confirmation box opens.
2. Click the **OK** button to delete the address.

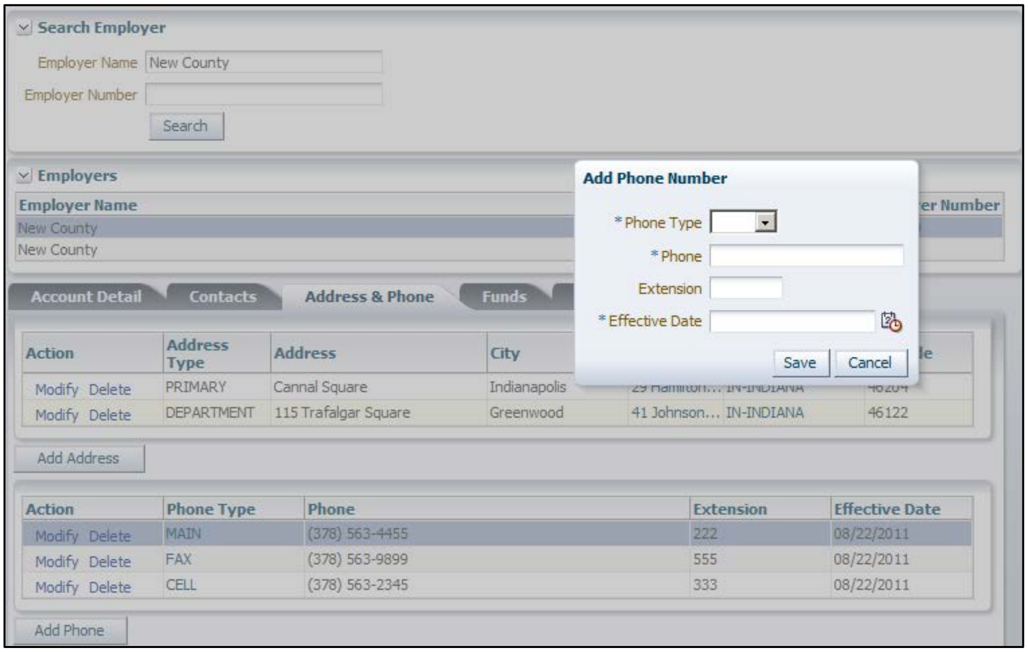
Adding an Employer Phone Number

To add an employer phone number:

1. Choose an employer address from the Address table.
2. Click the **Add Phone** button. This opens the **Add Phone Number** pop-up box shown in Figure 14. The pop-up box contains the following fields:
    - Phone Type

- Phone
- Extension
- Effective Date

Figure 14: Add Phone Number Pop-Up Box on the Manage Employer Screen



3. Click the arrow to the right of the **Phone Type** field to access a drop-down menu containing the following options:

    - Main
    - Fax
    - Cell

    Every employer must have at least one phone number identified as *Main.* For all additional contact phone numbers, choose the correct phone type option.

4. Type the phone number for the employer in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
5. If a particular extension is required, type this number in the **Extension** field. This field is not required.
6. Type the date the phone number becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
7. Click the **Save** button.

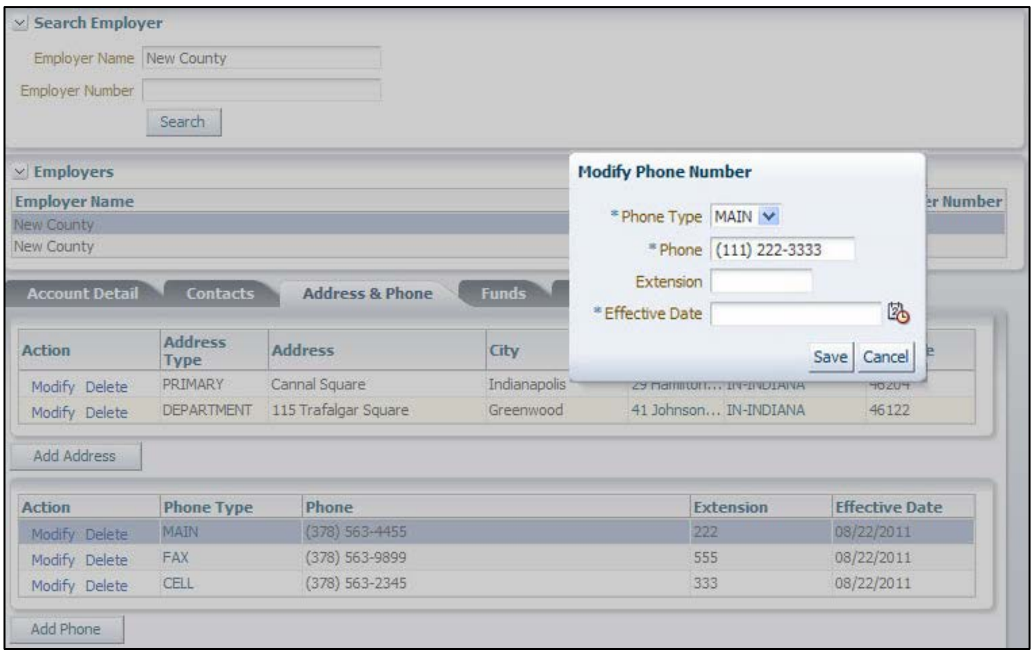
NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Modifying an Employer Phone Number

To modify an employer phone number:

1. Choose an employer address from the Address table. All the phone numbers associated with that employer address display in the Phone Table.
2. Click the *Modify* hyperlink in the **Action** column of the Phone table at the bottom of the screen. This opens the **Modify Phone Number** pop-up box shown in Figure 15. The pop-up box contains the following fields:
    - Phone Type
    - Phone
    - Extension
    - Effective Date

Figure 15: Modify Phone Number Pop-Up Box on the Manage Employer Screen



3. Place your cursor in the field(s) you want to modify.
4. Type the updated employer phone information.
5. Type the date the phone number becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
6. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Deleting an Employer Phone Number

To delete an employer phone number:

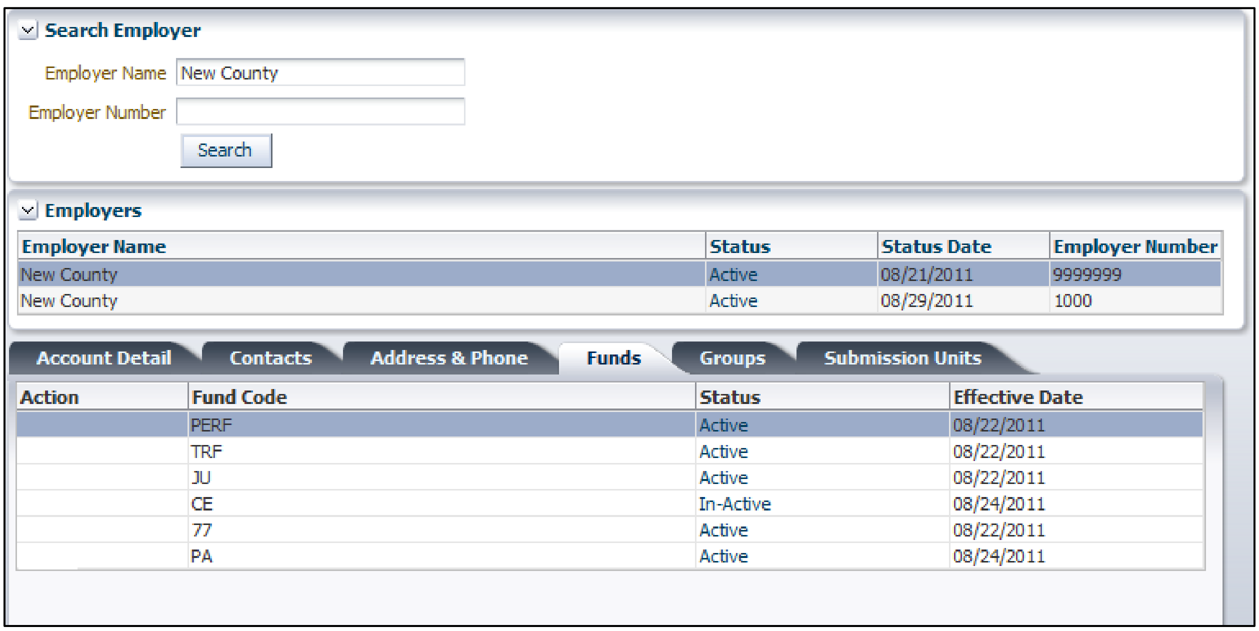
1. Choose an employer address from the Address table. All the phone numbers associated with that employer address display in the Phone table.
2. Click the *Delete* hyperlink in the **Action** column on the appropriate line of the Phone table. A confirmation box opens.
3. Click the **OK** button to delete the phone number.

Viewing Employer Funds

The **Funds** tab, shown in Figure 16, displays employer Fund details, including:

- Fund Code
- Status
- Effective Date

Figure 16: Funds Tab on the Manage Employer Screen


Search Employer

Employer Name: New County

Employer Number:

Search

Employers

Employer Name	Status	Status Date	Employer Number
New County	Active	08/21/2011	9999999
New County	Active	08/29/2011	1000

Account Detail | Contacts | Address & Phone | Funds | Groups | Submission Units

Action	Fund Code	Status	Effective Date
	PERF	Active	08/22/2011
	TRF	Active	08/22/2011
	JU	Active	08/22/2011
	CE	In-Active	08/24/2011
	77	Active	08/22/2011
	PA	Active	08/24/2011

NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Funds** tab.

Viewing Employer Groups

The **Groups** tab, shown in Figure 17, displays groups associated with the employer account. For more information about the use of Groups within the ERM application, see the *Glossary of Important Terms* in this manual.

Figure 17: Groups Tab on the Manage Employer Screen

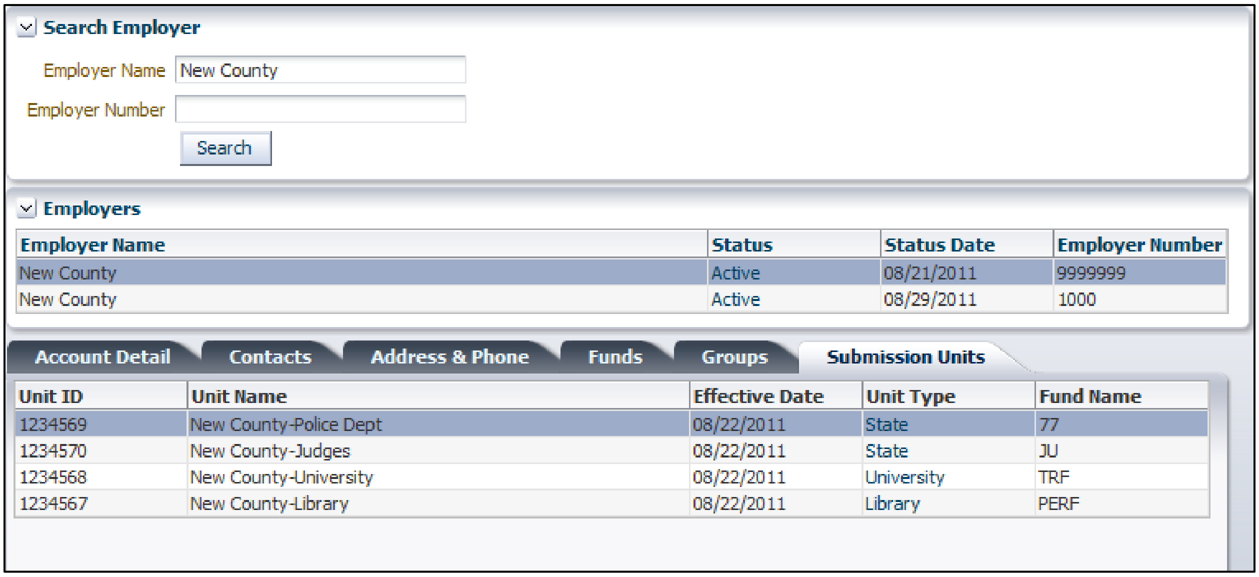
NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Groups** tab.

Viewing Submission Unit Information for Employer Accounts

The **Submission Units** tab, shown in Figure 18, displays details about the Submission Units associated with an employer account, including:

- Submission Unit ID
- Submission Unit Name
- Effective Date
- Submission Unit Type
- Fund Name

Figure 18: Submission Units Tab on the Manage Employer Screen

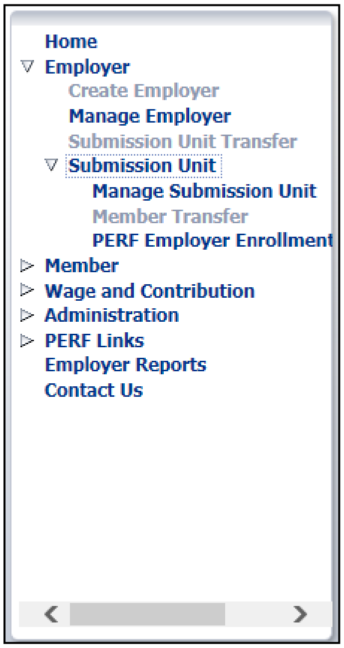


NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Submission Units** tab.

Managing a Submission Unit

To manage a Submission Unit that already exists in the ERM application, click the arrow to the left of *Submission Unit* in the Navigation Menu. This opens a drop-down menu of all possible actions that you can perform on a Submission Unit account, as shown in Figure 19.

Figure 19: Submission Unit Option in Navigation Menu



The selections in the drop-down menu are:

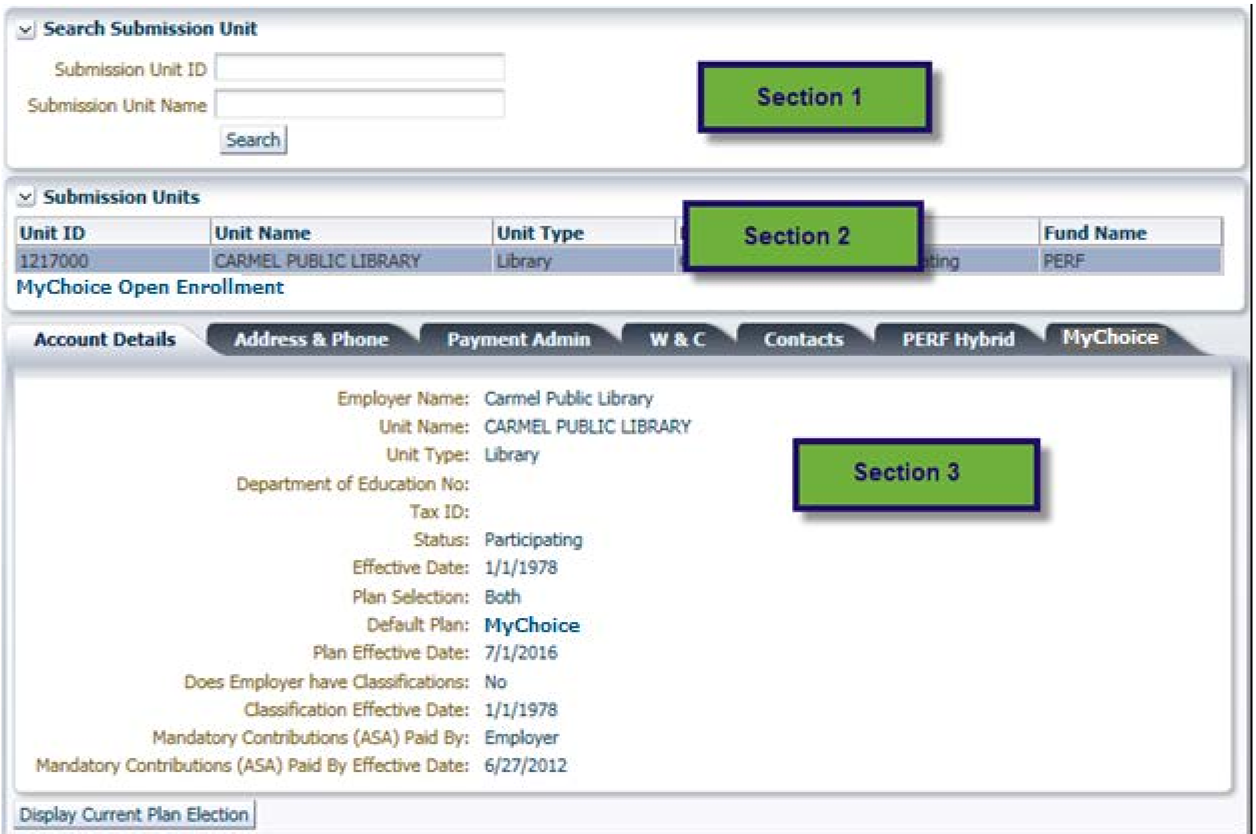
- Manage Submission Unit
- Member Transfer
- PERF Employer Enrollment Resolution

Choose *Manage Submission Unit* to access the *Manage Submission Unit* screen. The *Member Transfer* option will be grayed out for Employer Users, as it is an INPRS Staff User-only function. The *PERF Employer Enrollment Resolution* option will only be available to PERF Employers.

Locating a Submission Unit Account

The *Manage Submission Unit* screen, shown in Figure 20, contains three sections for locating and managing information about Submission Units entered in the ERM application.

Figure 20: Manage Submission Unit Screen



- **Section 1** contains search fields that allow you to locate Submission Unit account information using either the Submission Unit ID number or name.

  NOTE: This section is mostly used by INPRS Staff Users. The Submission Unit accounts that your security role allows you to view are auto-populated in Section 2 of the screen.

- **Section 2** of the *Manage Submission Unit* screen contains a scrollable grid that is automatically populated with a list of the Submission Units you have permission to view and/or modify. Depending on fund affiliation, this section may also contain the link to the MyChoice Open Enrollment.
- **Section 3** displays several tabs that contain demographic data for the Submission Unit. PERF Submission Units will see one or two tabs (PERF Hybrid and/or MyChoice) in Section 3 depending on plan elections in the PERF Hybrid Fund and/or MyChoice Plan. All other funds will see the **Contribution Type Details** tab. Additional fields will show for PERF submission units.

Searching for a Specific Submission Unit Account

To search for a Submission Unit by ID number:

1. Type the Submission Unit ID number in the **Submission Unit ID** field.
2. Click the **Search** button.

To search for a Submission Unit by name:

1. Type the name of the Submission Unit in the **Submission Unit Name** field.
2. Click the **Search** button.

Selecting a Submission Unit Account

All Submission Unit records that you have permission to view display in the scrollable grid in Section 2.

To select a Submission Unit from the scrollable grid:

1. Scroll through the grid until the record for the Submission Unit you want to update is visible.
2. Click the line associated with the Submission Unit record you want to view.

Once you have selected a Submission Unit to modify, the tabs below the scrollable grid will populate with the chosen Submission Unit's data.

> **NOTE:** For Employer Users who only have access to one Submission Unit account, the grid in Section 2 and the tabs in Section 3 display only the information for that Submission Unit.

Managing Account Details Information

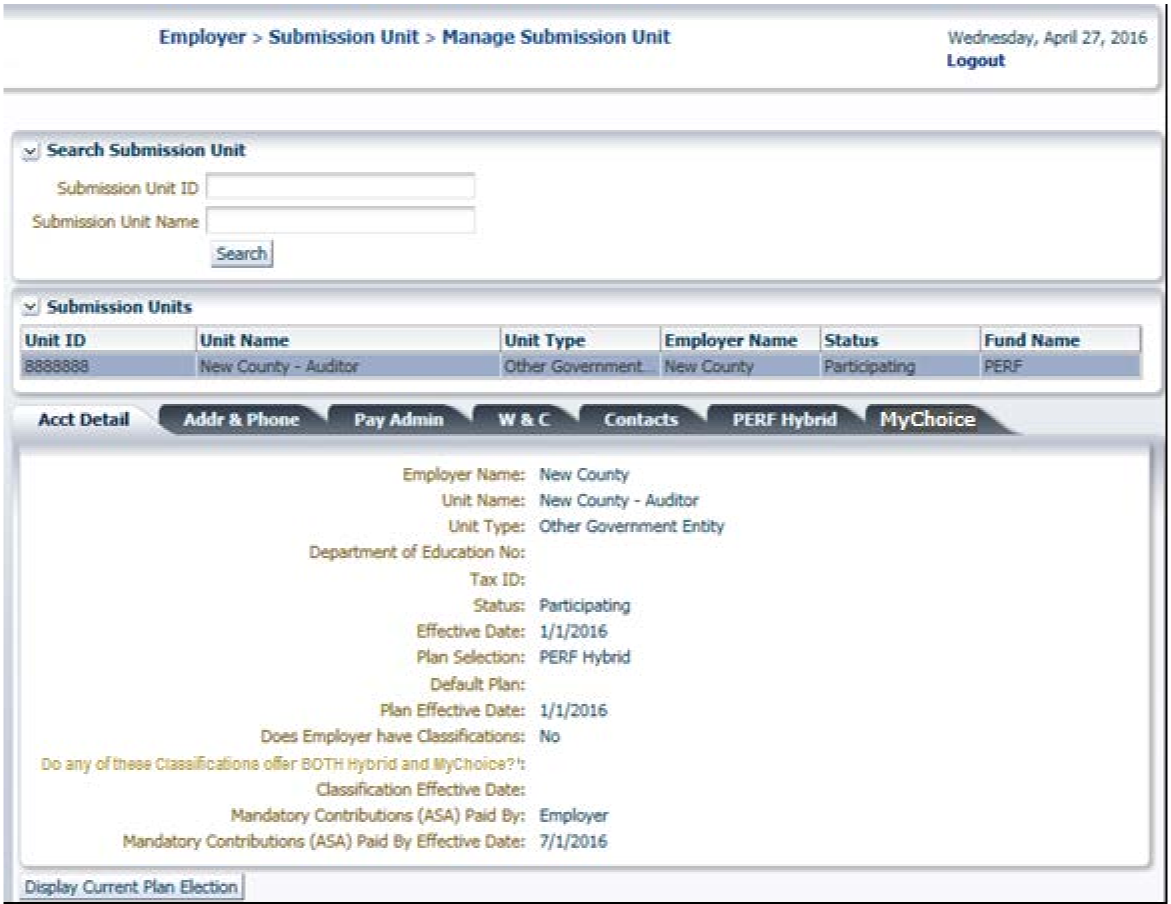
The Account Details tab on the *Manage Submission Unit* screen, as shown in Figure 21, displays Submission Unit account information, including:

- Employer Name
- Submission Unit Name
- Submission Unit Type
- Department of Education No.
- Tax ID
- Status
- Effective Date
- Plan Selection
- Default Plan (PERF Only)
- Plan Effective Date (PERF Only)
- Does Employer have Classifications? (PERF Only)
- Do any of these Classifications offer BOTH Hybrid and ASA Only? (PERF Only)
- Classification Effective Date (PERF Only)
- Mandatory Contribution (ASA) Paid By

  NOTE: If the **Mandatory Contribution (ASA)** is *Split-Employee/Employer*, this field will also show: *Mandatory Contribution (ASA) Paid by Employer*.

- Mandatory Contribution (ASA) Paid By Effective Date

Figure 21: Account Details Tab on the Manage Submission Unit Screen



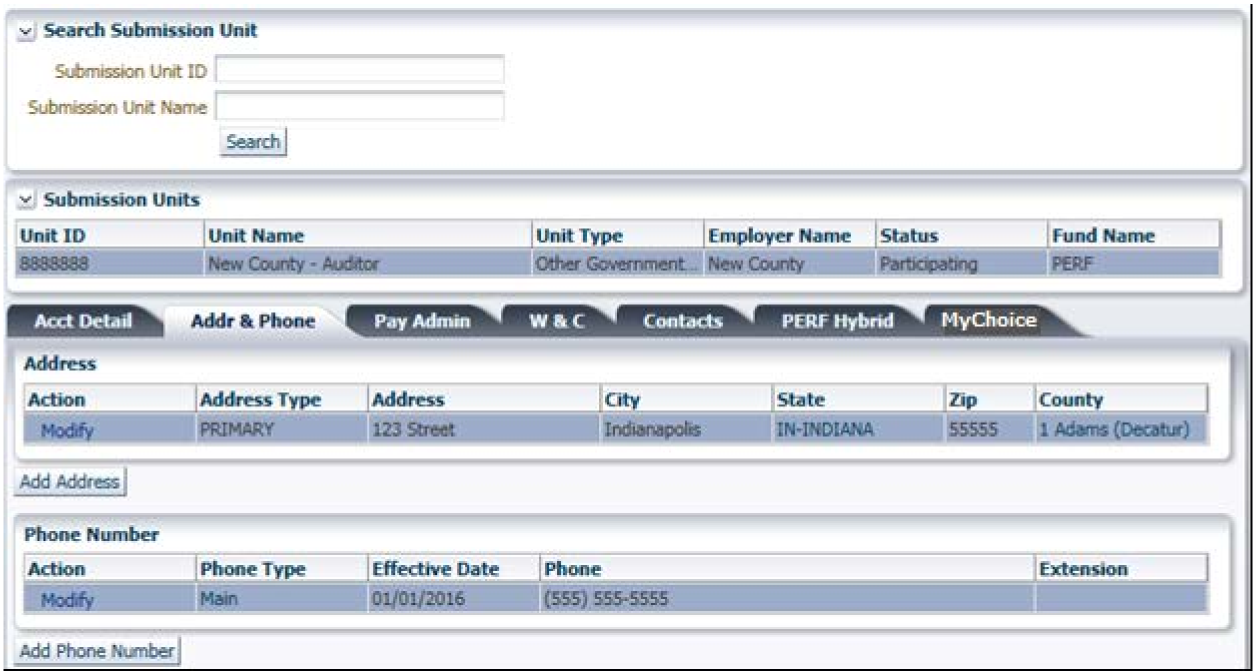
The **Account Details** tab contains the **Display Current Plan Election** button

NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Account Details** tab.

Managing Submission Unit Address or Phone Number Information

To manage Submission Unit address or phone number information, choose the **Address & Phone** tab. This will display two tables, as shown in Figure 22. One has Submission Unit address information, and one has Submission Unit phone number information.

Figure 22: Address & Phone Tab on the Manage Submission Unit Screen

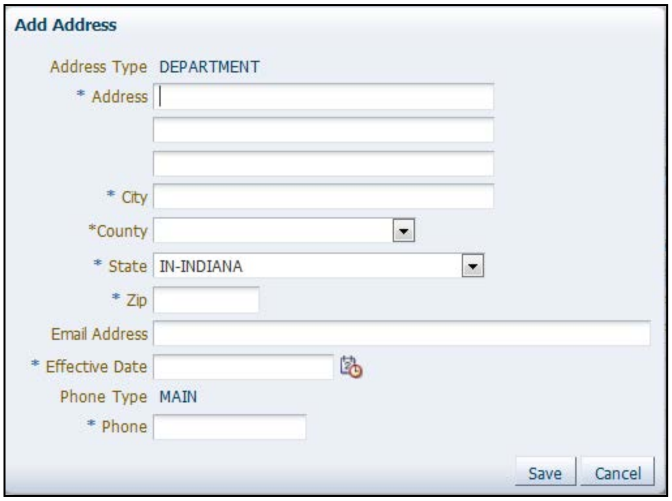


Adding a Submission Unit Address

To add a Submission Unit address:

1. Click the **Add Address** button below the Address table on the screen. An **Add Address** pop-up box opens, as shown in Figure 23. The pop-up box contains the following fields:
    - Address Type
    - Address
    - City
    - County
    - State
    - Zip
    - Submission Unit Email Address
    - Effective Date
    - Phone Type
    - Phone

Figure 23: Add Address Pop-Up Box on the Manage Submission Unit Screen



2. The **Address Type** will default to “Department” and cannot be changed.
3. Type the street address of the Submission Unit in the **Address** fields.
4. Type the city name in the **City** field.
5. Click the arrow next to the **County** field to access a drop-down menu of Indiana counties. Choose the correct county to populate the field. This field is only required if the Submission Unit’s address is in Indiana.
6. The **State** field defaults to Indiana but can be changed. Click the arrow next to the field to access a drop-down menu of states. Choose the correct state, and the **State** field will automatically update.
7. Type the five-digit Zip Code in the **Zip** field. The required format is shown in a pop-up bubble when you click the **Zip** field.
8. Type the Submission Unit’s email address in the **Email Address** field. This field is not required.
9. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
10. Type the phone number for the Submission Unit in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field. The phone type will default to *Main*; this cannot be changed.
11. Click the **Save** button. All required fields, denoted with an asterisk (*), must be completed before saving.

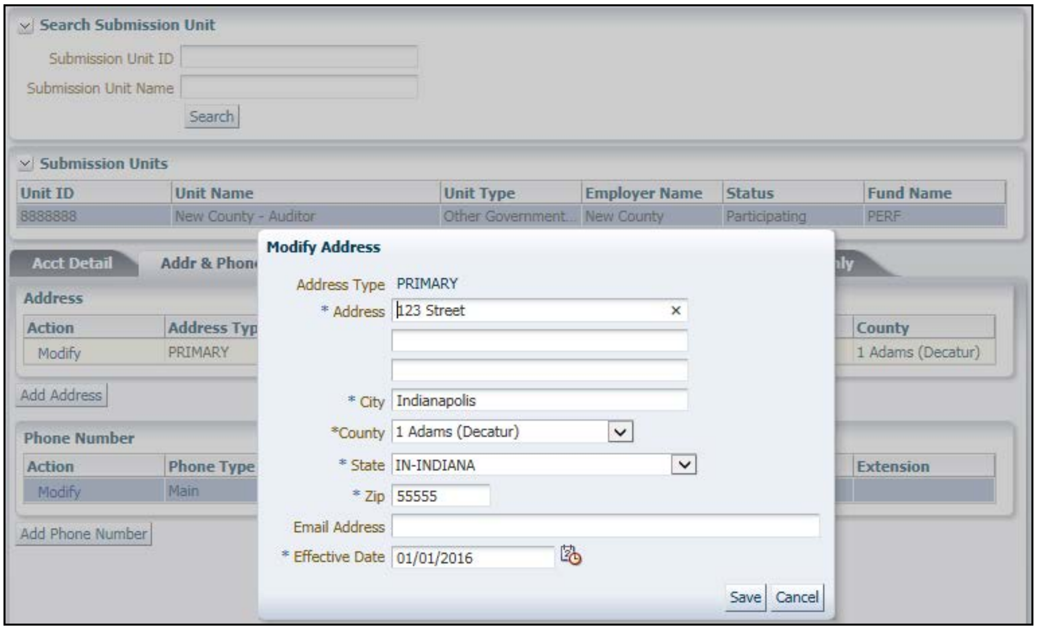
Modifying a Submission Unit Address

To modify a Submission Unit address:

1. Click the *Modify* hyperlink in the **Action** column on the appropriate line of the Address table. A **Modify Address** pop-up box opens, as shown in Figure 24. The pop-up box contains the following modifiable fields:
    - Address

- City
- County
- State
- Zip
- Submission Unit Email Address
- Effective Date

Figure 24: Modify Address Pop-Up Box on the Manage Submission Unit Screen



2. Click the field(s) you want to modify.
3. Enter the updated Submission Unit address information.
4. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

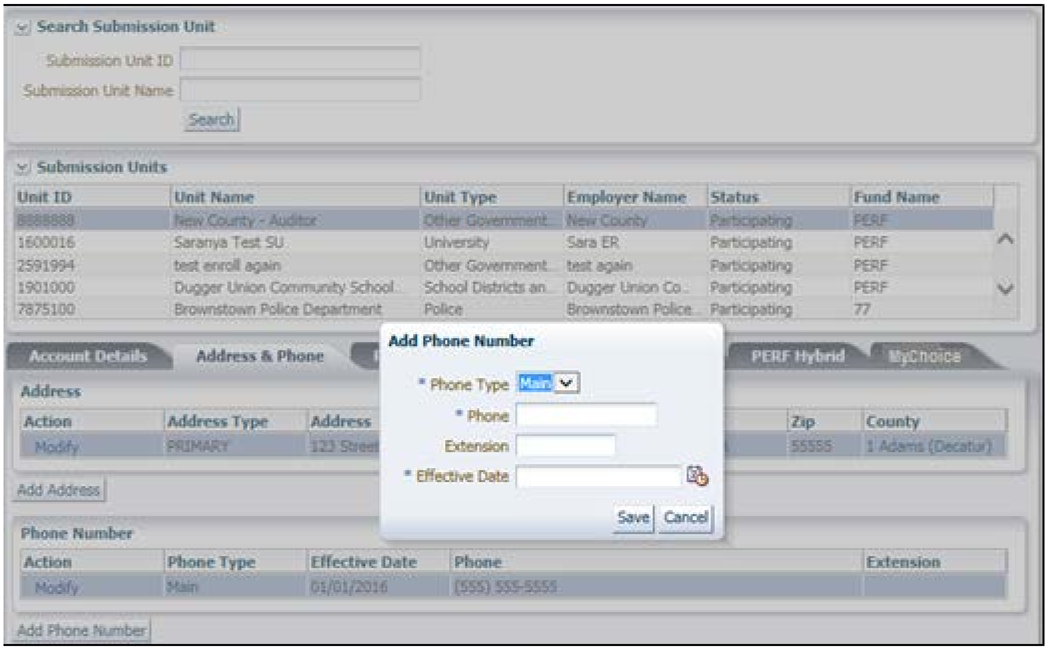
Adding a Submission Unit Phone Number

To add a Submission Unit phone number:

1. Choose a Submission Unit address from the Address table.
2. Click the **Add Phone Number** button. An **Add Phone Number** pop-up box opens, as shown in Figure 25. The pop-up box contains the following fields:
    - Phone Type
    - Phone

- Extension
- Effective Date

Figure 25: Add Phone Number Pop-Up Box on the Manage Submission Unit Screen



3. Click the arrow to the right of the **Phone Type** field to access a drop-down menu containing the following options:
   - Main
   - Fax
   - Cell

   The **Phone Type** field will default to *Main.* Every Submission Unit must have at least one phone number identified as *Main.* For all additional contact phone numbers, choose the correct phone type option.

   Type the phone number for the Submission Unit in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
4. If a particular extension is required, type this number in the **Extension** field.
5. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
6. Click the **Save** button.

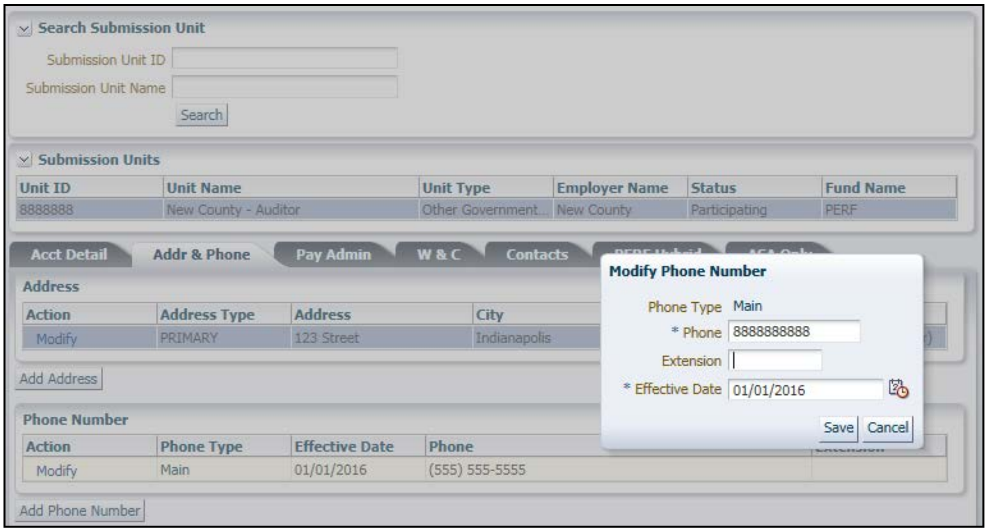
NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Modifying a Submission Unit Phone Number

To modify a Submission Unit phone number:

1. Choose a Submission Unit address from the Address table. All the phone numbers associated with that Submission Unit display in the Phone Number table.
2. Click the *Modify* hyperlink in the **Action** column of the Phone table at the bottom of the screen. This opens the Modify Phone Number pop-up box, as shown in Figure 26.

Figure 26: Modify Phone Number Pop-Up Box on the Manage Submission Unit Screen



3. Place your cursor in the field you want to modify.
4. Type the updated Submission Unit phone information.
5. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
6. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Managing Submission Unit Payment Administration

To manage Submission Unit payment administration information, choose the **Payment Admin** tab. This displays a table, where bank account information related to the Submission Unit is entered and stored as shown in Figure 27.

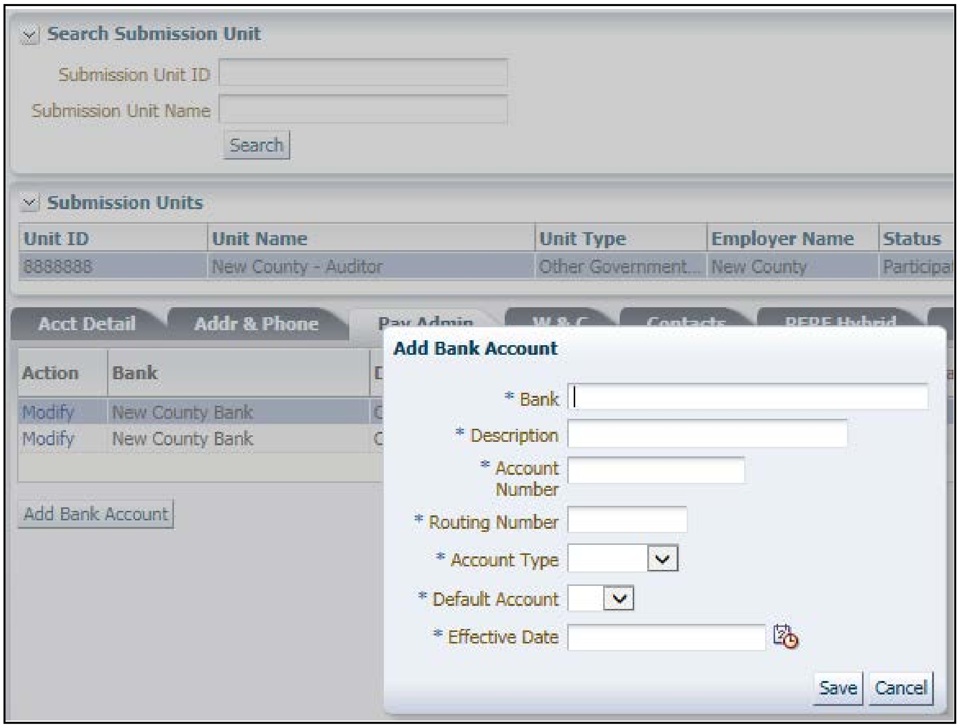
Figure 27: Payment Admin Tab on the Manage Submission Unit Screen

Adding Bank Account to a Submission Unit Account

To add bank account:

1. Click the **Add Bank Account** button below the Bank table. This opens an **Add Bank Account** pop-up box, as shown in Figure 28. The pop-up box contains the following fields:
    - Bank
    - Description
    - Account Number
    - Routing Number
    - Account Type
    - Default Account
    - Effective Date

Figure 28: Add Bank Account Pop-up Box on the Manage Submission Unit Screen



2. Type the name of the bank associated with the Submission Unit in the **Bank** field.
3. If applicable, type a description in the **Description** field.
4. Type the bank account number in the **Account Number** field.
5. Type the routing number for the bank account in the **Routing Number** field.
6. Click the arrow next to the **Account Type** field to access a drop-down menu containing a list of bank account types. These bank account types are:
   - Savings
   - Checking

   Click the appropriate type to populate the field.
7. Click the arrow next to the **Default Account** field to access a drop-down menu containing *Yes* and *No*. Choose the appropriate answer.
   - Any time you must choose between multiple bank accounts, the *Default* account will automatically be selected.
   - When the *Default* account is automatically selected but is not to be used, you must manually select a different bank account from the drop-down menu.

NOTE: Only one bank account may be designated as the default bank account for a Submission Unit.

8. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
9. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

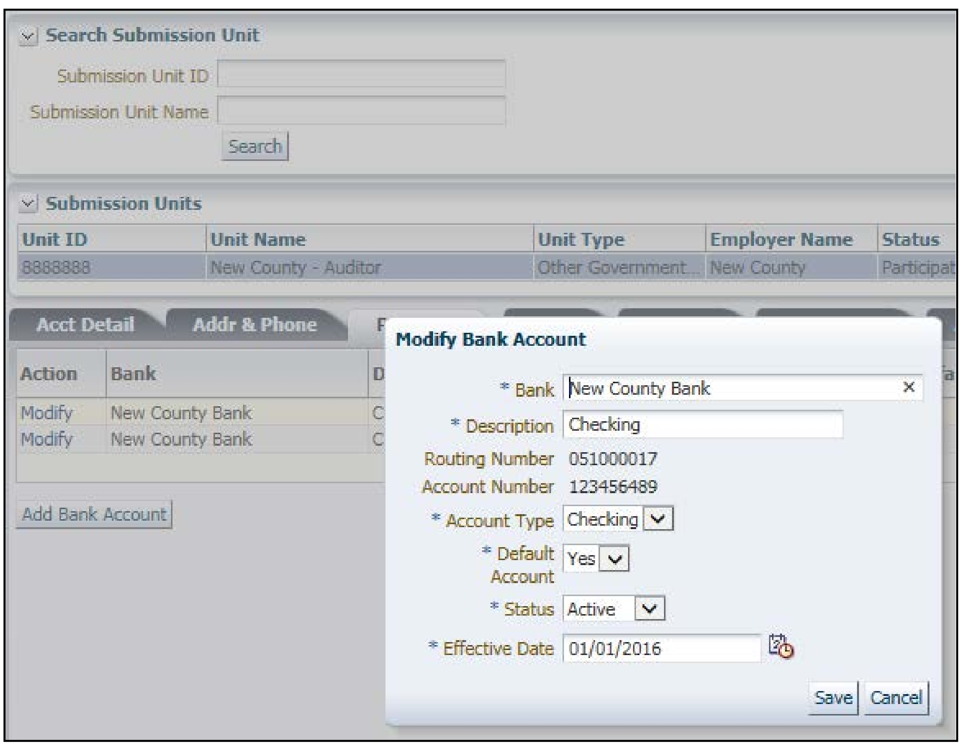
NOTE: ERM will automatically assign any newly created bank account a status of "Inactive." Once the bank account is authenticated, ERM will update the status to "Active." It may take up to 10 business days to authenticate the account. During that time, this bank account will not be available for contribution payments. If the bank account cannot be authenticated, an INPRS Staff member will contact you, via phone or email, and instruct you to change the status to "Invalid."

Modifying Submission Unit Bank Account

To modify a Submission Unit's bank account:

1. Click the *Modify* hyperlink found in the **Action** column on the appropriate line of the Bank table at the bottom of the screen. This opens the Modify Bank Account pop-up box, as shown in Figure 29.

Figure 29: Modify Bank Account Pop-up Box on the Manage Submission Unit Screen



2. Click the field(s) you want to modify.
3. Enter the updated Submission Unit bank account information.

4. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click the **Save** button.

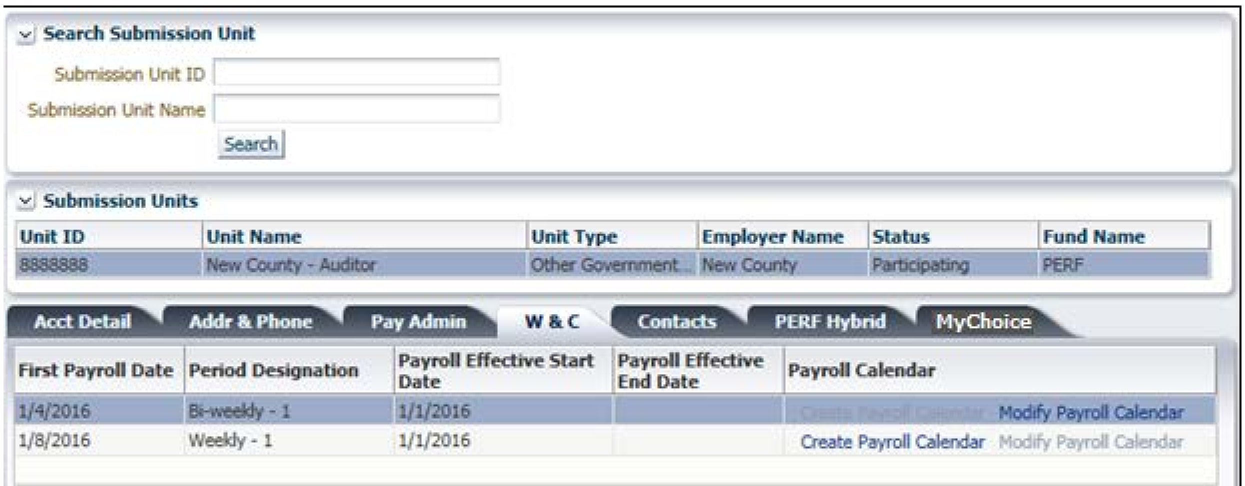
NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Managing Wage and Contribution (W&C) Submission Information

Choosing the **W&C** tab displays information about payroll data. As shown in Figure 30, the information includes:

- First payroll date associated with each payroll frequency
- Period designations (payroll frequencies)
- Payroll effective date for each payroll frequency/first payroll date combination
- Payroll Calendar

Figure 30: W&C Tab on the Manage Submission Unit Screen

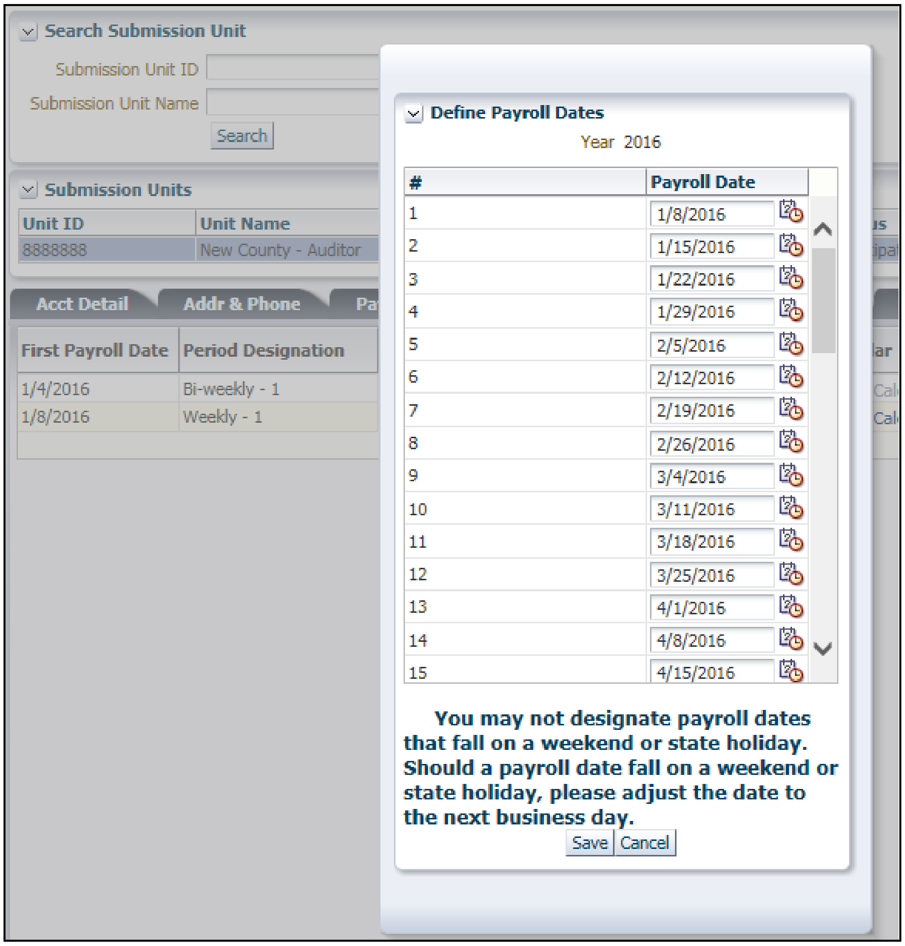


Employer Users will save and confirm a payroll calendar to a Submission Unit account upon their initial login through the **W&C** tab on the *Manage Submission Unit* screen.

To save and confirm a payroll calendar:

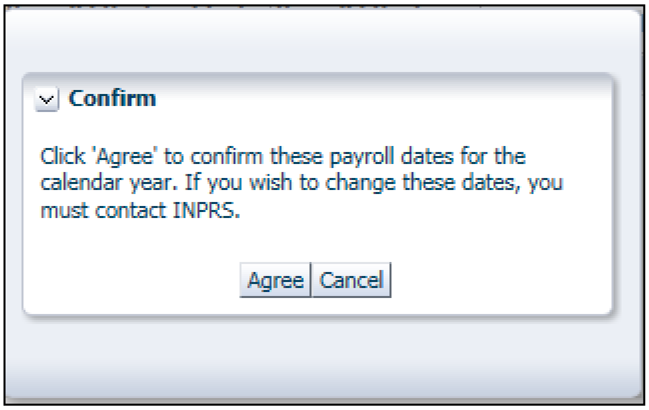
1. Click the *Create Payroll Calendar* hyperlink in the **Payroll Calendar** column on the appropriate line of the table under the **W&C** tab. This opens the **Define Payroll Dates** pop-up box, shown in Figure 32.

Figure 31: Define Payroll Dates Pop-up Box on the Manage Submission Unit Screen



2. The applicable payroll dates will be entered by INPRS Staff into the **Payroll Date** fields in the pop-up box. The number of required payroll dates varies depending upon the payroll frequency.
3. Click the **Save** button if the dates are correct. If the dates are incorrect, contact INPRS staff. A confirmation screen displays, as shown in Figure 32.
4. Confirm that the entered payroll dates are correct by selecting the **Agree** button in the pop-up box. The Payroll Calendar is saved to the ERM application.

Figure 32: Confirm Payroll Calendar Pop-Up Box on the Manage Submission Unit Screen

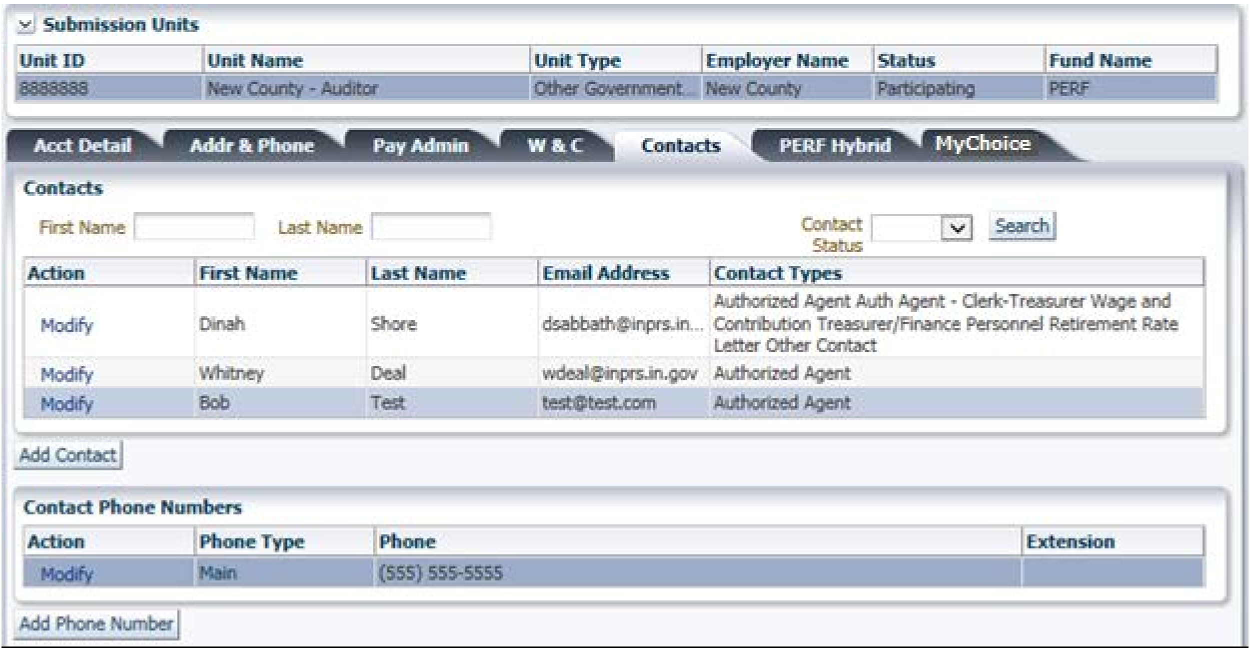


NOTE: Once you click the **Agree** button in the Confirm pop-up box, you will not be able to make any changes to the payroll calendar through the ERM application. Should you need to update the payroll calendar for any reason, you must contact INPRS. You will not be able to submit wages and contributions to the ERM application until you have confirmed your payroll dates.

Managing Submission Unit Contact Information

To manage Submission Unit contact information, choose the **Contacts** tab. This displays a table containing all applicable contacts for the Submission Unit, as shown in Figure 33. To search for an existing contact use the **First Name**, **Last Name**, or **Contact Status** fields in the Contacts section of the screen.

Figure 33: Contacts Tab on the Manage Submission Unit Screen

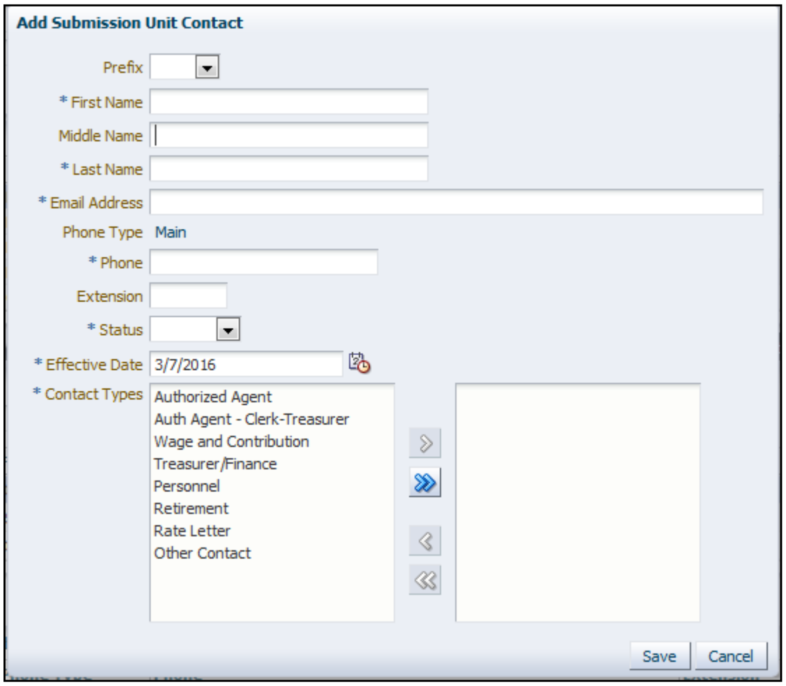


Adding a Submission Unit Contact

To add a Submission Unit contact:

1. Click the **Add Contact** button below the Contacts table on the screen. The **Add Submission Unit Contact** pop-up box opens, as shown in Figure 34.

Figure 34: Add Submission Unit Contact Pop-Up Box on the Manage Submission Unit Screen



2. Click the arrow to the right of the **Prefix** field to access a drop-down menu of prefix choices. Click the applicable prefix to populate the field. This field is not required.
3. Type the first name of the Submission Unit contact in the **First Name** field.
4. Type the middle name of the Submission Unit contact, if applicable, in the **Middle Name** field. This field is not required.
5. Type the last name of the Submission Unit contact in the **Last Name** field.
6. Type the contact's email address in the **Email Address** field.
7. Type the contact's 10-digit phone number in the **Phone** field**.** The required format is shown in a pop-up bubble when you click the **Phone** field. The phone type will default to *Main*; this cannot be changed.
8. If a particular extension is required, type this number in the **Extension** field.
9. Click the arrow next to the **Status** field to access a drop-down menu of these status choices:
    - Active
    - Inactive

   Choose the *Active* status.
10. Type the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
11. Choose the contact type, using the shuttle window in the **Contact Type** field. The contact types listed will depend on the fund.

a. Choose the appropriate contact type(s) from this list, found in the box on the left:
   - Authorized Agent
   - Authorized Agent-Clerk Treasurer
   - Authorized Agent-Trustee(77 Fund Only)
   - Authorized Agent-Controller (77 Fund Only)
   - Chief (77 Fund Only)
   - Superintendent (TRF Only)
   - Pension Secretary
   - Personnel
   - Rate Letter
   - Retirement
   - Treasurer/Finance
   - Wage and Contribution
   - Other Contact

b. Click the right single arrow to move the chosen contact type to the box on the right side of the screen.

c. If a contact type is added to the box on the right side of the screen by mistake, complete the following steps:

   i. In the box on the right side of the screen, highlight the appropriate contact type from the list.

   ii. Click the left single arrow to move the contact type to the box on the left side of the screen.

NOTE: For the definition of each contact type, see the *Glossary of Important ERM Terms* in this manual.

12. Verify the entered information is correct and then click the **Save** button. All required fields, denoted with an asterisk (*), must be completed before saving.

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 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.

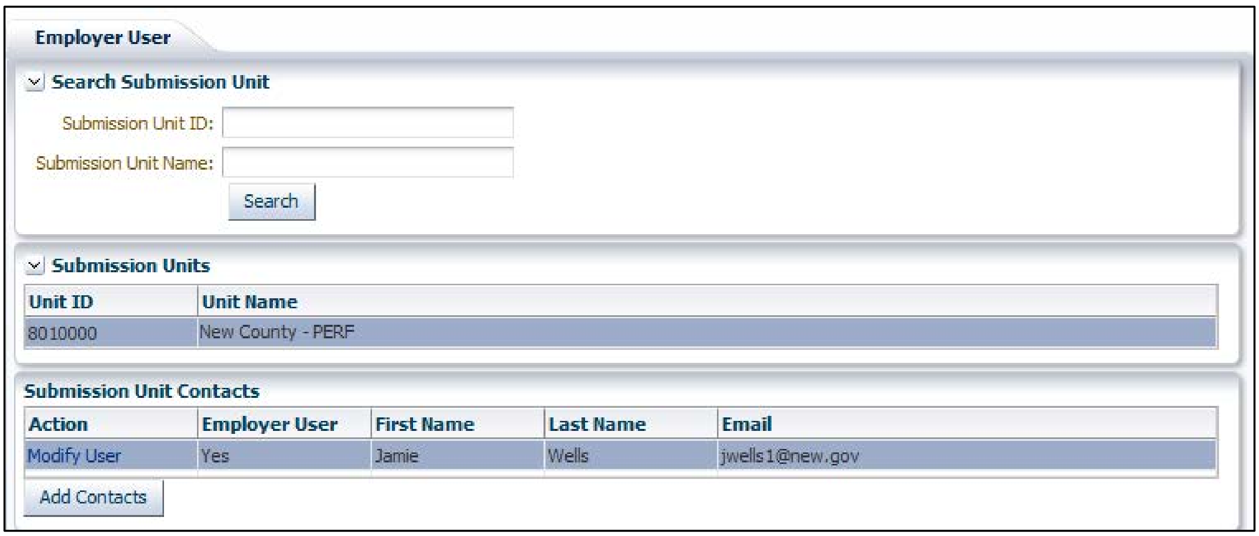
To add a Submission Unit contact in the Administration section:

1. Access the Administration section of the ERM application as shown in Figure 35.

Figure 35: Administration Options in Navigation Menu

Click *Users*, and the *Employer User* screen will display, as shown in Figure 36.

Figure 36: Employer User Screen



2. Select the Submission Unit for the contact to be added and click the **Add Contacts** button. This opens the **Email Search** pop-up box, as shown in Figure 37.

Figure 37: Email Search Pop-up Box on the Employer User Screen

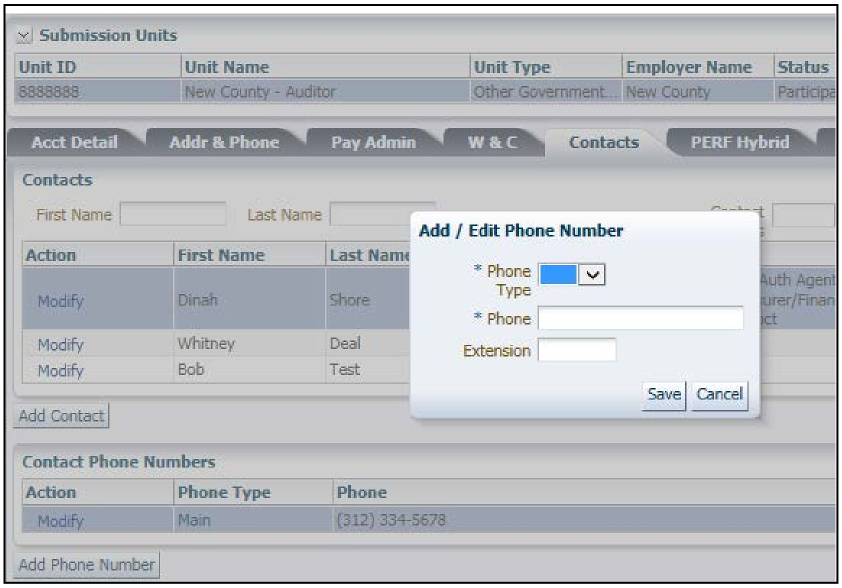
3. When the shuttle window displays, type the email address for the contact into the **Email** field and click the **Search** button. If the email address is found, it will display in the Available Contacts list on the left side of the shuttle window.
4. Click the right facing single arrow to move the email address to the Selected Contacts list on the right side of the screen. Click **Save** to add the contact to the Submission Unit.
5. Once the contact is added, return to the *Manage Submission Unit* screen to modify the contact, if necessary.

Adding a Submission Unit Contact Phone Number

To add a Submission Unit contact phone number:

1. Choose a Submission Unit contact from the Contacts table.
2. Click the **Add Phone Number** button. This opens the **Add/Edit Phone Number** pop-up box, as shown in Figure 38. The pop-up box contains the following fields:
    - Phone Type
    - Phone
    - Extension

Figure 38: Add/Edit Phone Number Pop-up Box on the Manage Submission Unit Screen



3. Click the arrow to the right of the **Phone Type** field to access a drop-down menu of the following options:
   - Main
   - Cell
   - Fax

   Every contact must have at least one phone number identified as *Main.* For all additional contact phone numbers, choose the correct phone type option from the drop-down menu.
4. Type the phone number for the contact in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
5. If a particular extension is required, type this number in the **Extension** field.
6. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Modifying a Submission Unit Contact

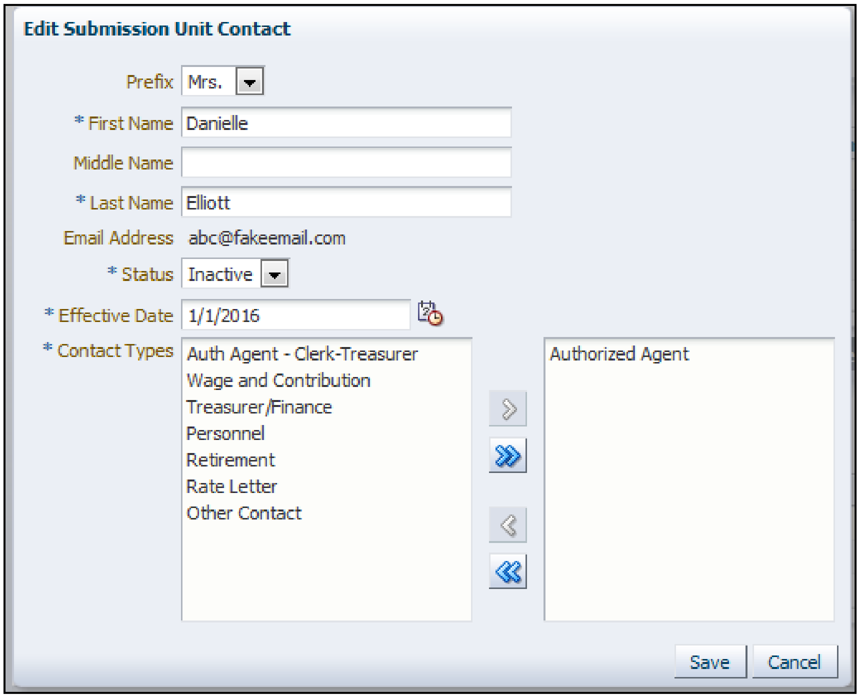
To modify a Submission Unit contact:

1. Click the *Modify* hyperlink in the **Action** column on the appropriate line of the Submission Unit Contacts table. The **Edit Submission Unit Contact** pop-up box opens, as shown in Figure 39. The pop-up box contains the following modifiable fields:
   - Prefix
   - First Name
   - Middle Name
   - Last Name

- Status
- Effective Date
- Contact Type Id

NOTE: Contact Types *Superintendent* for TRF and *Authorized Agent* for PERF can only be modified by an INPRS Staff User.

Figure 39: Edit Submission Unit Contact Pop-up Box on the Manage Submission Unit Screen



2. Click the field(s) you want to modify.
3. Enter the updated Submission Unit contact information.
4. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Modifying a Submission Unit Contact Phone Number

To modify a Submission Unit contact phone number:

1. Choose a contact from the Contacts table. All phone numbers associated with that contact will display in the Contact Phone Numbers table.
2. Click the *Modify* hyperlink in the **Action** column on the appropriate line of the Phone table at the bottom of the screen. This opens the **Add/Edit Phone Number** pop-up box, as shown in Figure 39. This box contains the following fields:
   - Phone Type

- Phone
- Extension

3. Place your cursor in the field(s) you want to modify.
4. Type the updated contact's phone information.
5. Click the **Save** button.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Deleting a Submission Unit Contact Phone Number

Only Submission Unit contact phone numbers designated as *Cell* or *Fax* can be deleted. To delete a Submission Unit contact phone number:

1. Choose a contact from the Contacts table. All phone numbers associated with that contact will display in the Contact Phone Numbers table.
2. Click the *Delete* hyperlink in the **Action** column of the Phone table at the bottom of the screen. A confirmation box will open.
3. Click **OK** to delete the phone number.

Viewing Submission Unit Contribution Type Details

The Contribution Type Details tab displays details about the Fund associated with a Submission Unit account and the types of contributions made to that Fund. The information for each Fund type is different. The name and number of tabs viewable may be different depending on Fund affiliation.

NOTE: Employer Users have view-only access to the information contained in the fields associated with the Contribution Type Details tab of the *Modify Submission Unit* screen.

PERF Hybrid

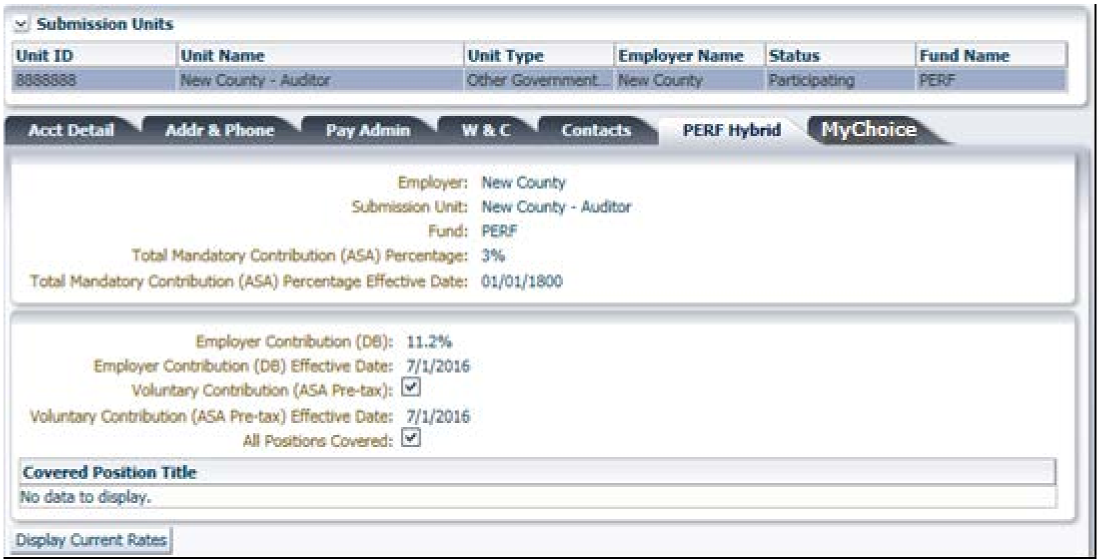
For PERF, the **PERF Hybrid** tab displays contribution type details with the following fields, as shown in Figure 40:

- Employer
- Submission Unit
- Fund
- Total Mandatory Contribution (ASA) Percentage
- Total Mandatory Contribution (ASA) Percentage Effective Date
- Employer Contribution (DB)
- Employer Contribution (DB) Effective Date
- Voluntary Contribution (ASA Pre-tax) *

- Voluntary Contribution (ASA Pre-tax) Effective Date *
- All Positions Covered

* As of 1/01/2018 Voluntary Pre-Tax Contributions are no longer an option for new participation by members or employers. Participation cannot be changed or added as of 1/01/2018. Employers and members already enrolled in the Voluntary Pre-Tax Contributions prior to 1/01/2018 must remain in the plan as is. The election for participation in this plan is irrevocable for both the member and the employer.

Figure 40: PERF Hybrid Screen



My Choice Contribution Details

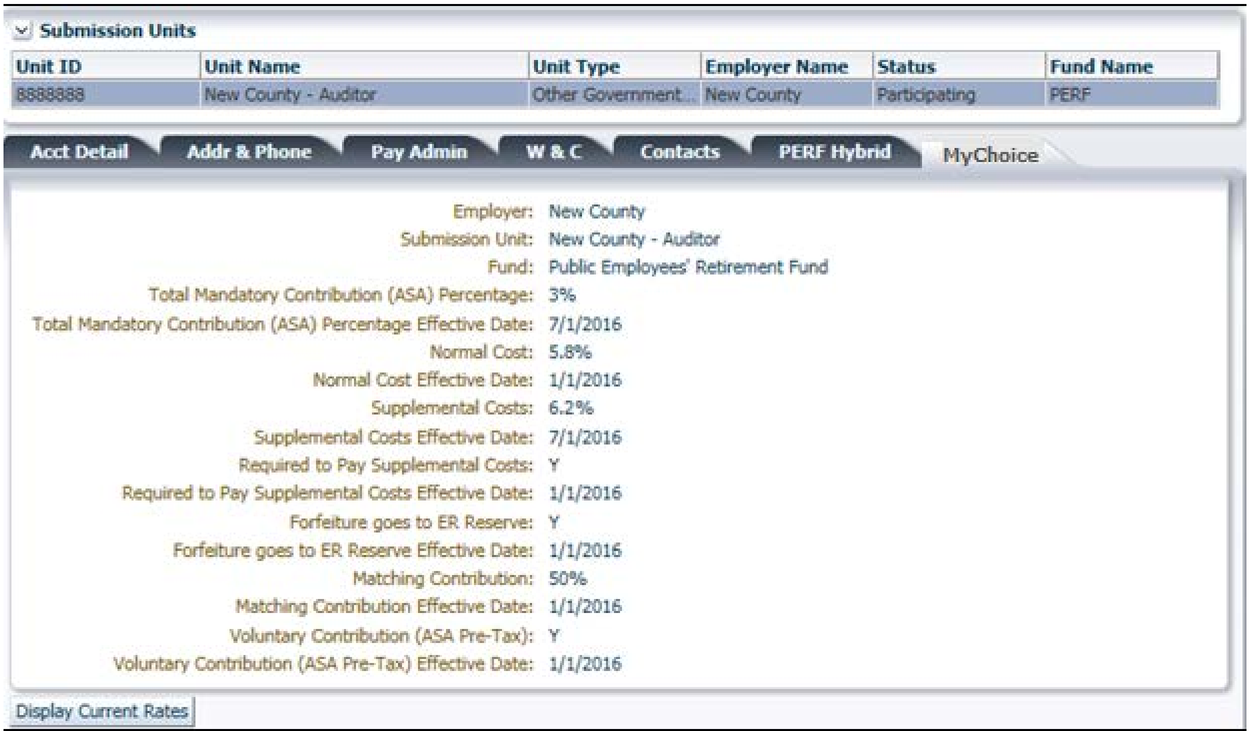
For the **MyChoice** (formerly ASA Only) tab, the contribution details are displayed in the following fields, as shown in Figure 41:

- Employer
- Submission Unit
- Fund
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Normal Cost
- Normal Cost Effective Date
- Supplemental Cost
- Supplemental Cost Effective Date
- Required to Pay Supplemental Cost
    - YES: Forfeiture goes to ER Reserve

- Matching Contribution Percentage
- Matching Contribution Percentage Effective Date
- Voluntary Contribution (ASA Pre-tax) *
- Voluntary Contribution (ASA Pre-tax) Effective Date *

* As of 1/01/2018 Voluntary Pre-Tax Contributions are no longer an option for new participation by members or employers. Participation cannot be changed or added as of 1/01/2018. Employers and members already enrolled in the Voluntary Pre-Tax Contributions prior to 1/01/2018 must remain in the plan as is. The election for participation in this plan is irrevocable for both the member and the employer.

Figure 41: MyChoice Contribution Details Screen

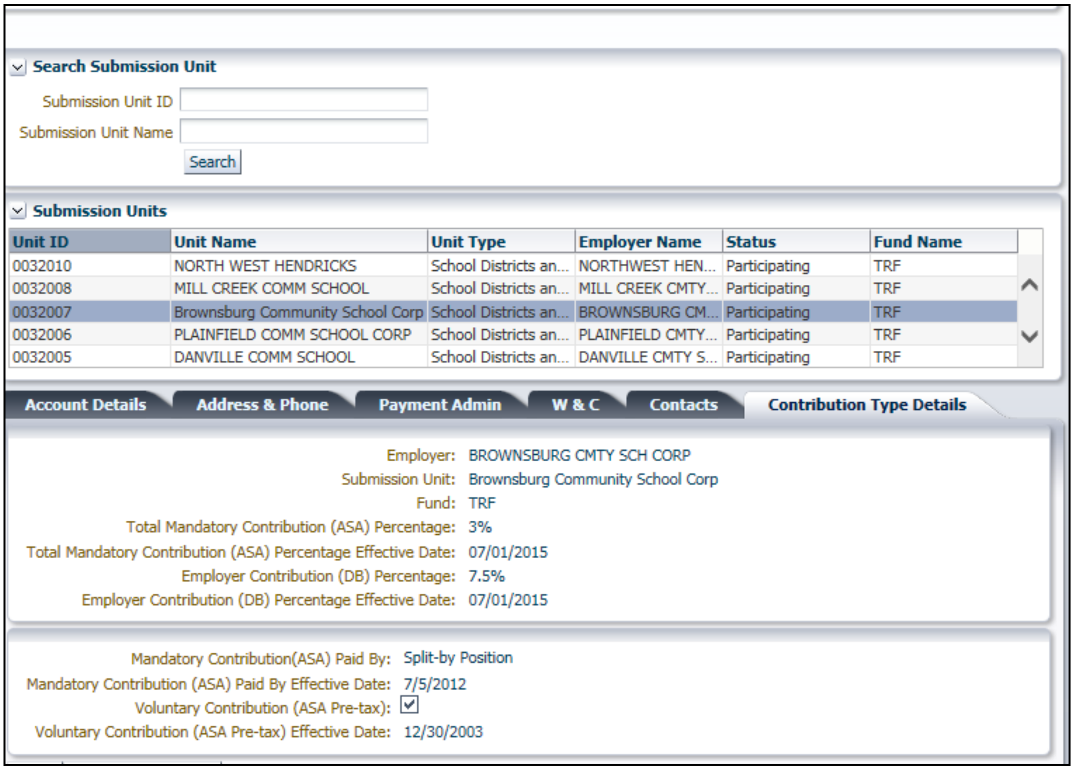


TRF Contribution Type Details

For TRF, the **Contribution Type Details** tab displays the following fields, as shown in Figure 42:

- Employer
- Submission Unit
- Fund Employer Contribution
- Employer Contribution Effective Date
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Mandatory Contribution (ASA) Paid By

Figure 42: TRF Contribution Type Details Screen



'77 Fund Contribution Type Details

For the '77 Fund, the **Contribution Type Details** tab displays the following fields, as shown in Figure 43:

- Employer
- Submission Unit
- Fund
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date
- Employer Contribution (DB)
- Employer Contribution Effective Date (DB)
- DROP Participation

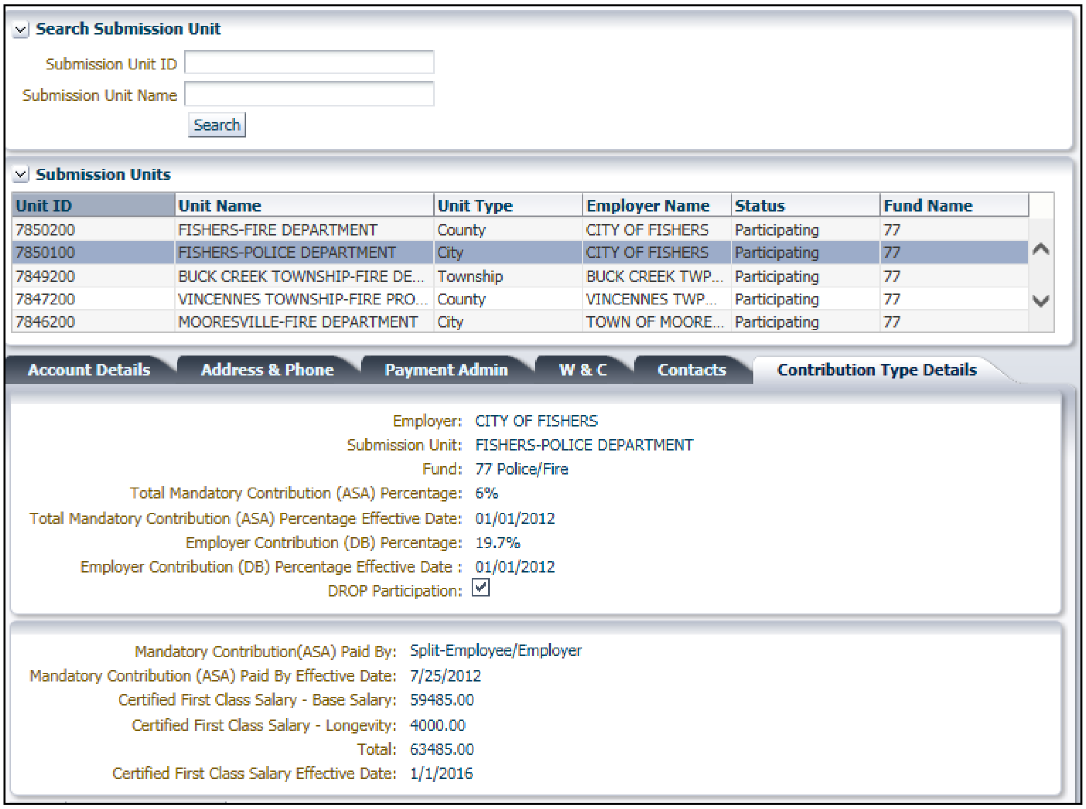
Below these fields is a second set of information detailing additional details associated with the Certified First Class Salary. Below the table is the *Contribution Type Details* section of the screen, which contains the following fields:

- Mandatory Contribution (ASA) Paid By

  NOTE: If the **Mandatory Contribution (ASA)** is *Split-Employee/Employer*, this field will also show: *Mandatory Contribution (ASA) Paid by Employer*.

- Certified First Class Salary (Base Salary and Longevity)

Figure 43: '77 Fund Contribution Type Details Screen



JU Fund Contribution Type Details

For the JU Fund, the **Contribution Type Details** tab contains two sections, as shown in Figure 44.

The *Fund Details* section displays the following information:

- Employer
- Submission Unit
- Fund
- Total Mandatory Contribution
- Total Mandatory Contribution Effective Date

Below these fields is a table that displays a list of position titles applicable to the JU Fund and their associated certified salaries.

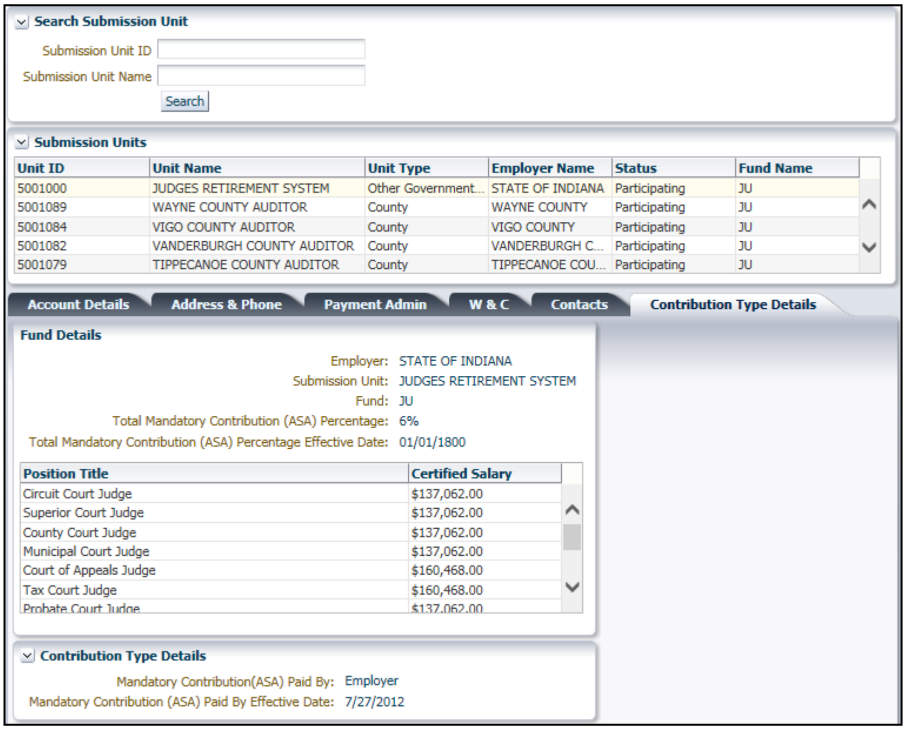
Below the table is the *Contribution Type Details* section of the screen, which contains the following fields:

- Mandatory Contribution (ASA) Paid By

  NOTE: If the **Mandatory Contribution (ASA)** is *Split-Employee/Employer*, this field will also show: *Mandatory Contribution (ASA) Paid by Employer*.

- Mandatory Contribution (ASA) Paid By Effective Date

Figure 44: JU Fund Contribution Type Details Screen



PERF Employer Enrollment Resolution

The PERF Employer Enrollment Resolution section allows for a submission unit to make changes to the plans offered by the unit. Submission units can elect to offer the PERF Hybrid, MyChoice, and/or a combination of the plans. This link is available to users with the Wage and Contribution Administrator security role.

Selecting a Submission Unit Account

All Submission Unit records that you have permission to view display in the scrollable grid in Section 2.

To select a Submission Unit from the scrollable grid:

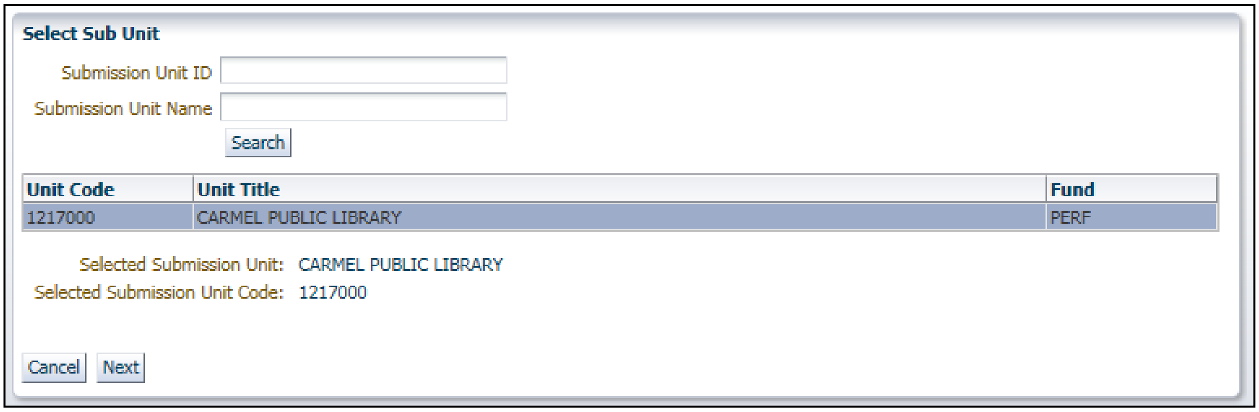
1. Scroll through the grid until the record for the Submission Unit you want to update is visible.
2. Click the line associated with the Submission Unit record you want to view.

Once you have selected a Submission Unit to modify, the tabs below the scrollable grid will populate with the chosen Submission Unit's data.

> **NOTE:** For Employer Users who only have access to one Submission Unit account, the grid in Section 2 and the tabs in Section 3 display only the information for that Submission Unit.

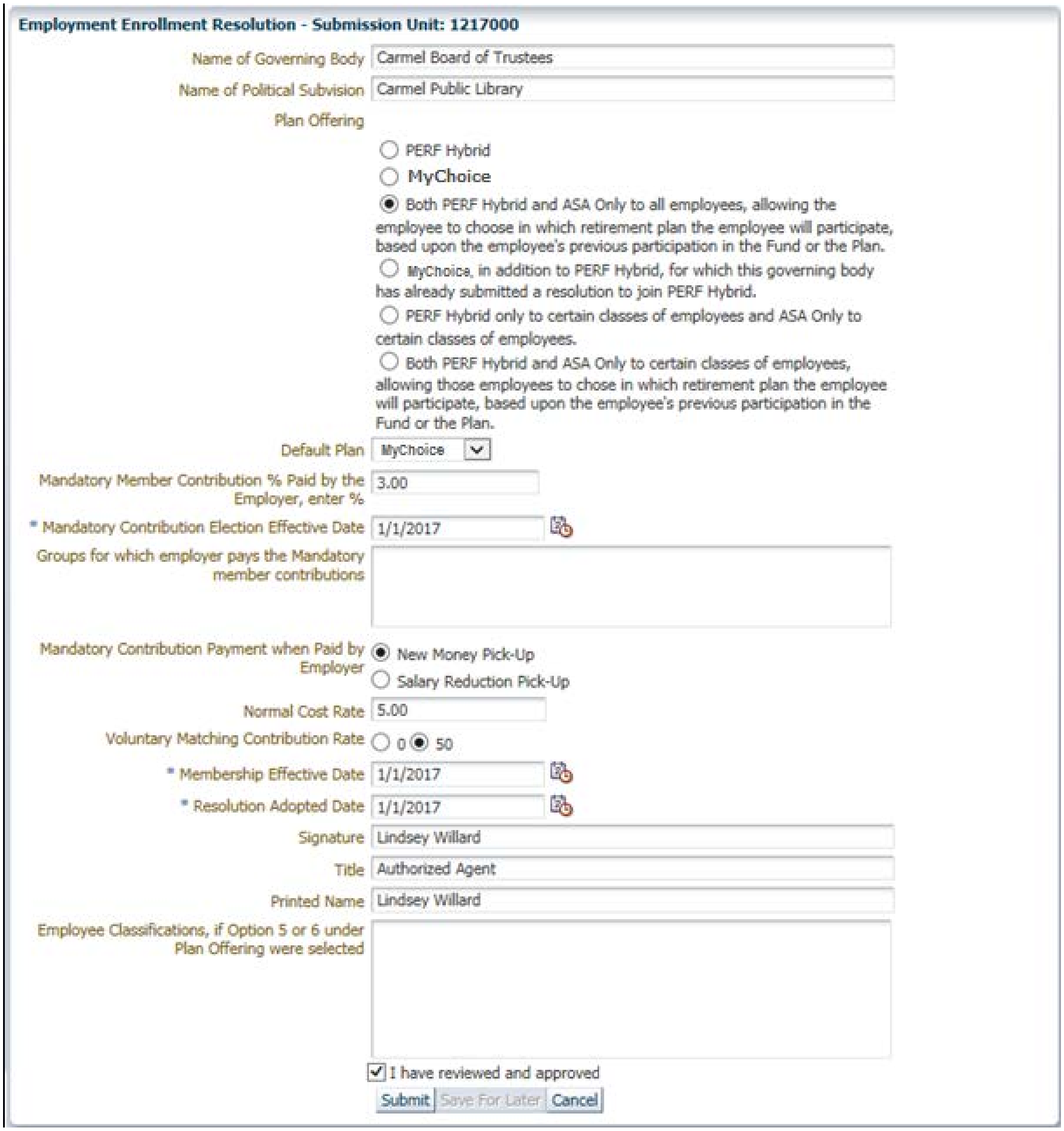
Click **Next** as shown in the Select Sub Unit screen on Figure 45.

Figure 45: Select Sub Unit Screen



The PERF Employer Enrollment Resolution screen will display as shown in Figure 46.

Figure 46: PERF Employer Enrollment Resolution Screen



Employment Enrollment Resolution - Submission Unit: 1217000

Name of Governing Body: Carmel Board of Trustees

Name of Political Subvision: Carmel Public Library

Plan Offering:

- PERF Hybrid
- MyChoice
- (selected) Both PERF Hybrid and ASA Only to all employees, allowing the employee to choose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.
- MyChoice, in addition to PERF Hybrid, for which this governing body has already submitted a resolution to join PERF Hybrid.
- PERF Hybrid only to certain classes of employees and ASA Only to certain classes of employees.
- Both PERF Hybrid and ASA Only to certain classes of employees, allowing those employees to chose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.

Default Plan: MyChoice

Mandatory Member Contribution % Paid by the Employer, enter %: 3.00

* Mandatory Contribution Election Effective Date: 1/1/2017

Groups for which employer pays the Mandatory member contributions:

Mandatory Contribution Payment when Paid by Employer: (selected) New Money Pick-Up / Salary Reduction Pick-Up

Normal Cost Rate: 5.00

Voluntary Matching Contribution Rate: 0 / (selected) 50

* Membership Effective Date: 1/1/2017

* Resolution Adopted Date: 1/1/2017

Signature: Lindsey Willard

Title: Authorized Agent

Printed Name: Lindsey Willard

Employee Classifications, if Option 5 or 6 under Plan Offering were selected:

I have reviewed and approved

Submit | Save For Later | Cancel

The following fields should be completed in order to submit an employer resolution:

- Name of Governing Body
- Name of Political Subdivision
- Plan Offering
  - o Select one option:
    - i. PERF Hybrid

1. Select this option if you want to only offer the PERF Hybrid fund.

ii. MyChoice

1. Select this option if you want to only offer the MyChoice Retirement Savings Plan.

iii. Both PERF Hybrid and MyChoice to all employees, allowing the employee to choose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.

1. Select this option if you want to offer both plans and the option for the member to choose which fund they are a part of, based on previous participation.

iv. MyChoice, in addition to PERF Hybrid, for which this governing body has already submitted a resolution to join PERF Hybrid.

1. Select this option if you want to maintain your current PERF Hybrid coverage for existing employees and enroll new hires into the MyChoice.

v. PERF Hybrid only to certain classes of employees and MyChoice to certain classes of employees.

1. Select this option if you want to offer PERF Hybrid to groups of employees and MyChoice to other groups of employees.

vi. Both PERF Hybrid and MyChoice to certain classes of employees, allowing those employees to choose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.

1. Select this option if you want to offer both PERF Hybrid and MyChoice to certain groups of employees.

- Default Plan
  - o The retirement fund, either MyChoice or PERF Hybrid, into which a member will be automatically enrolled if the submission unit offers both options and the member fails to make an election within 60 days of their hire date. Select one option:

i. MyChoice Retirement Savings Plan

ii. PERF Hybrid

- Mandatory Member Contribution % Paid by the Employer
  - o Enter the percentage, between 0% and 3%, that is being paid by the employer. Any amount less than 3% will be paid by the member.
- Mandatory Contribution Election Effective Date
- Groups for which employer pays the Mandatory member contributions
  - o Submission Units may elect to split the pickup of contributions by groups of employees. Enter the groups, if applicable. Submission Units can elect to pick up contributions for Exempt employees but not for Non-Exempt employees for example.
- Mandatory Contribution Payment when paid by Employer
  - o Select New Money Pick-Up or Salary Reduction Pick-Up

i. **New Money Pick-Up** means: Contributions designated as employee contributions for state law purposes, are being paid by the employer in addition to regular compensation as a supplemental contribution that is separate and distinct from the employees' current or future compensation, and in lieu of contributions by the employees. These contributions are made on a pre-tax basis and are paid by the employer on behalf of the employee.

ii. **Salary Reduction Pick-Up** means: Contributions designated as employee contributions for state law purposes, are being paid by the employer via a reduction in salary. These contributions are made on a pre-tax basis but are paid by the employee through a payroll deduction.

- Normal Cost Rate
    - A percentage calculated by INPRS' actuary and approved by the INPRS Board that would be equivalent to funding the pension in the PERF Hybrid fund. This rate is subject to change January 1 of each year. The submission unit can select the employer contribution rate for members participating in the MyChoice Retirement Savings Plan. The contribution rate may not be higher than the normal cost of fund participation. The rate as of July 1, 2016 can be anywhere between 0 and 5.8%. As of January 1, 2017, the maximum normal cost percentage will be 4.1%.
- Voluntary Matching Contribution Rate
    - Contributions made by the submission unit based on the member's voluntary contributions. The matching contributions must be either 0% or 50% of the voluntary contributions made by the member.
- Membership Effective Date
- Resolution Adopted Date
    - This is the date the submission unit's governing body passed the resolution to join the My Choice Retirement Savings Plan.
- Signature
- Title
- Printed Name
- Employee Classifications – If Option 5 or 6 under Plan Offering were selected
- Check the box *I have reviewed and approved* to confirm your entries.
- Select the Submit button to submit your elections.

The Resolution will be saved and the screen will reflect a completed resolution as shown in Figure 47.

Figure 47: PERF Employer Enrollment Resolution Confirmation Screen

To make corrections:

- Click the **Go Back** button

To print and save the Resolution:

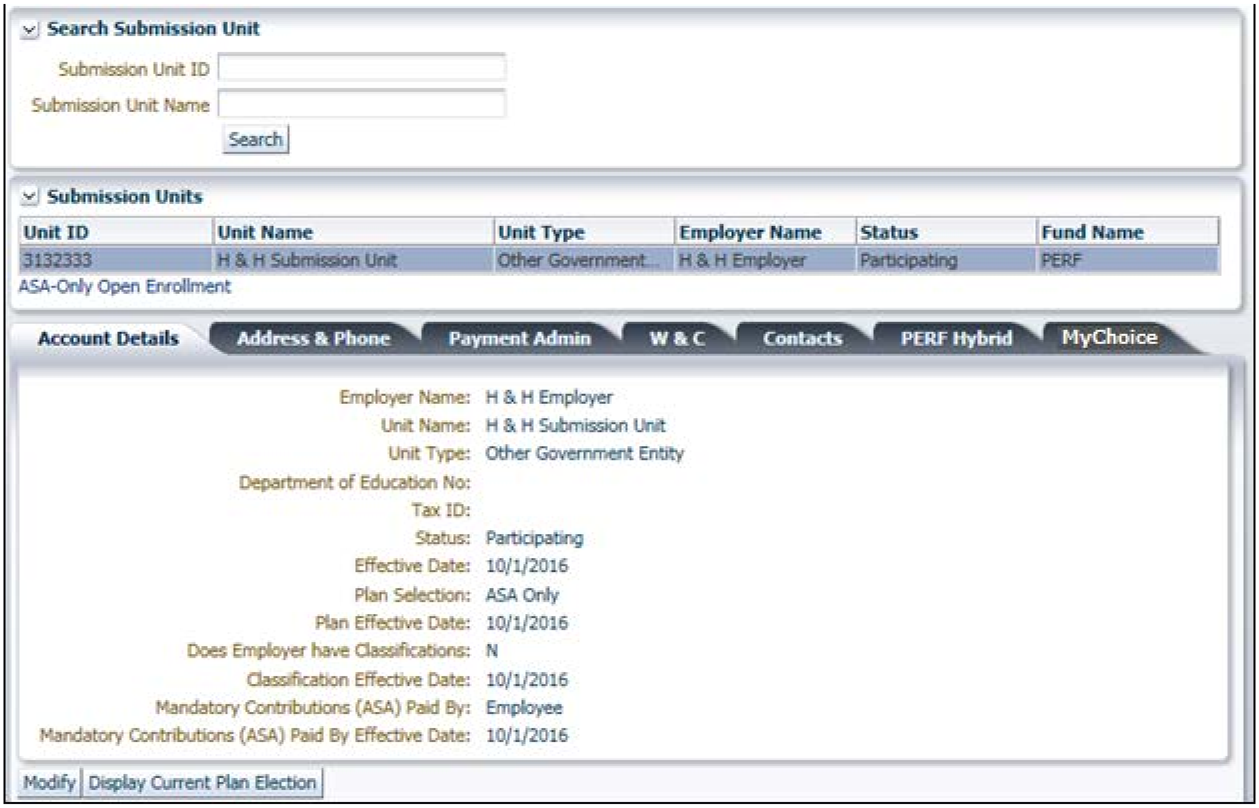
- Click the **View PDF in New Window** button

PERF MyChoice Retirement Savings Plan Employer Open Enrollment

Open Enrollment is available to employers who have elected to offer the MyChoice Retirement Savings Plan. Each year, elections for coverage can be made but nothing is required if no changes are needed.

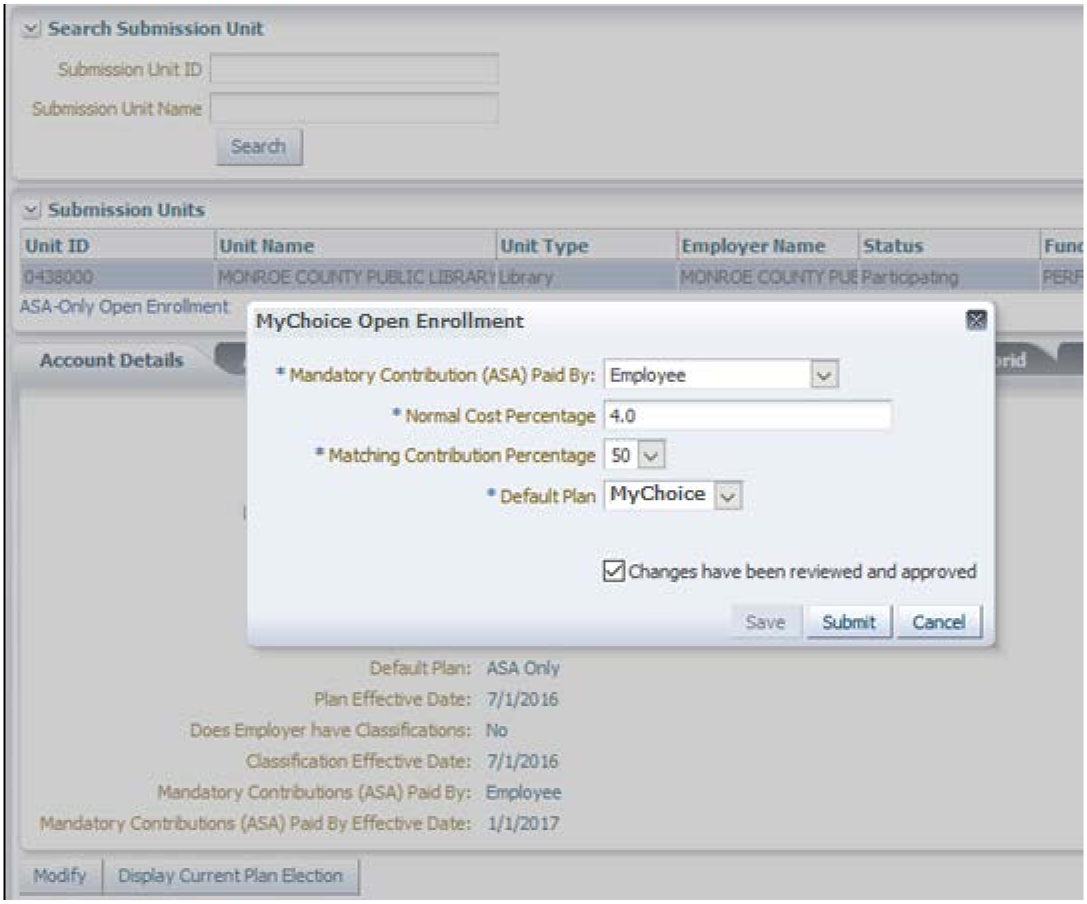
To make changes to the elections for the following year, click the **MyChoice Open Enrollment** link on the *Manage Submission Unit* screen as shown in Figure 48.

Figure 48: Manage Submission Unit Screen



1. Click the *MyChoice Open Enrollment* hyperlink in the Submission Unit grid. The **MyChoice Open Enrollment** pop-up box displays, as shown in Figure 49.

Figure 49: MyChoice Open Enrollment Pop-up Box



2. Choose who will pay the mandatory member contributions by selecting:
    - Employee
    - Employer
    - Split-by Position
    - Split-Employee/Employer
3. Enter the Normal Cost Percentage to contribute between 0 and the maximum.
    - The normal cost is a percentage calculated by INPRS' actuary and approved by the INPRS Board that would be equivalent to funding the pension in the PERF Hybrid fund. The submission unit can select the employer contribution rate for members participating in the MyChoice Retirement Savings Plan. As of January 1, 2017, the maximum normal cost percentage will be 4.0%.
4. Make a selection for Matching Contribution Percentage of either 0% or 50%
    - Matching contributions must be either 0% or 50% of the voluntary contributions made by the member. Matching contributions will default to 0% if the submission unit does not elect to match 50% of voluntary member contributions.

5. If an employer offers a choice between the PERF Hybrid and, they can also change the default plan if no choice is made by the member.
    - Select either PERF Hybrid or MyChoice as the default.
6. Select the Changes have been reviewed and approved box.
7. Click the submit button once all entries have been completed.
    - The changes will be effective January 1 of the following year.

Managing 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, he or she must be added as a Submission Unit contact in the ERM application.

> **NOTE:** For detailed information about how to add a Submission Unit contact, see the *Adding a Submission Unit Contact* in this manual.

Adding a New Employer User

To access the Administration options for adding a new Employer User:

1. Click the arrow to the right of *Administration* in the Navigation Menu. This opens the drop-down menu, shown in Figure 50. This menu shows all possible administrative actions that are available on a Submission Unit account. Any screens that Employer Users cannot access will display grayed out in the Navigation Menu.

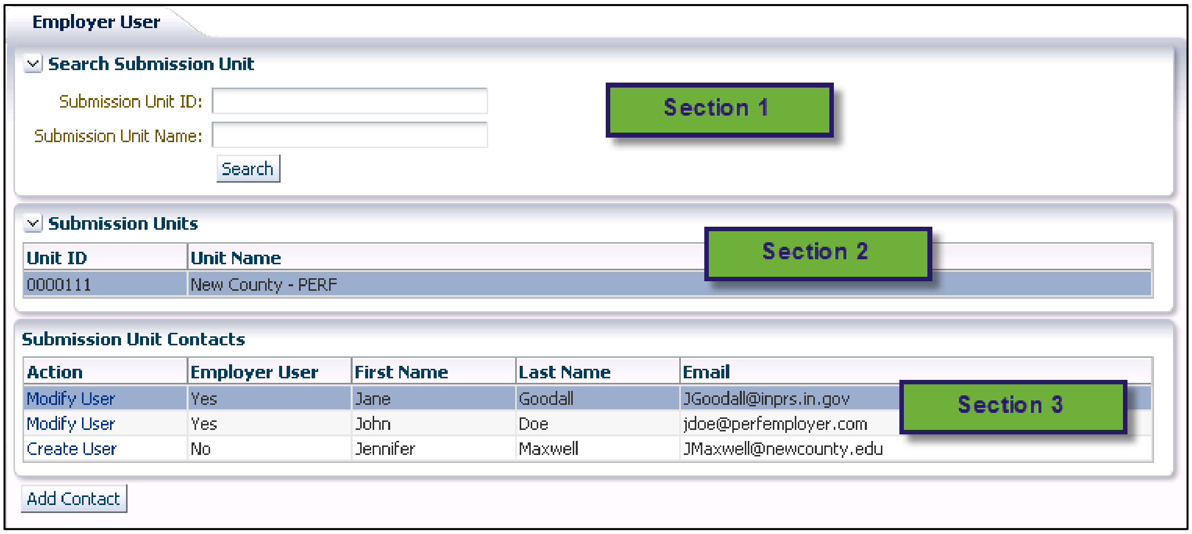
Figure 50: Administration Options in Navigation Menu

The options in the drop-down menu are:

- My Profile
- Users
- Communication
- Configuration

2. Choose *Users*, and the *Search Submission Unit* screen will display. The screen contains three sections, as shown in Figure 51.

Figure 51: Add Employer User on the Search Submission Unit Screen



- **Section 1** contains search fields that allow you to locate the Submission Unit account for the new contact, using either the Submission Unit ID number or name.

NOTE: This section is mostly used by INPRS Staff Users.

- **Section 2** displays only the Submission Unit(s) that match the search criteria provided and that you have permission to view.
- **Section 3** contains a list of the contacts for the Submission Unit account.

Identifying the Submission Unit

To search for a Submission Unit by ID number:

1. Type the Submission Unit ID number in the **Submission Unit ID** field.
2. Click the **Search** button.

To search for a Submission Unit by name:

1. Type the name of the Submission Unit in the **Submission Unit Name** field.
2. Click the **Search** button.

To select a Submission Unit from the scrollable grid:

1. Scroll through the grid until the record for the Submission Unit to which you want to add a user is visible.
2. Click the line associated with that Submission Unit record.

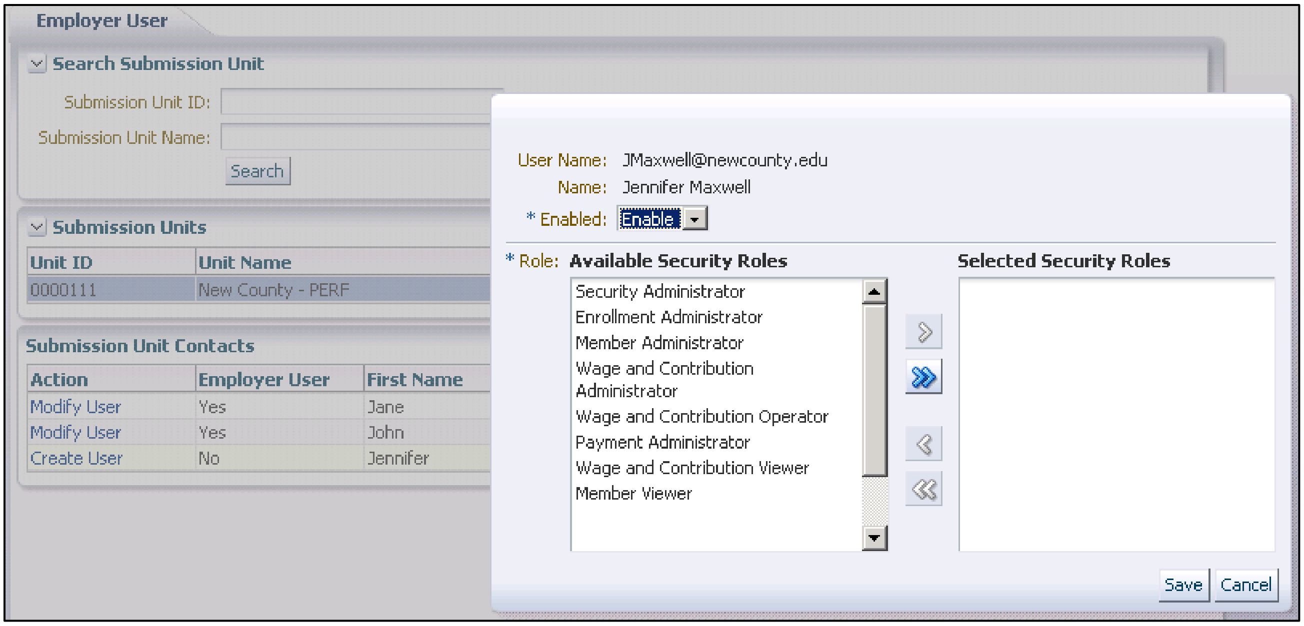
Identifying an Employer Contact as an Employer User

To assign a new Employer User role to an employer contact:

1. Locate the contact you want to identify as an Employer User in the Submission Unit Contacts table.

2. Click the *Create User* hyperlink next to the contact's name. The **Create Employer User** pop-up box displays, as shown in Figure 52.

Figure 52: Create Employer User Pop-up Box



3. Choose "Enable" from the drop-down menu in the **Enabled** field.
4. Select one or more security roles from the Available Security Roles window on the left side of the pop-up box. For details about each role, see the *Glossary of Important ERM Terms* in this manual.
5. Click the right single arrow to move the selected security role(s) to the right side of the shuttle window.
6. When you have assigned all applicable security roles, click the **Save** button. The value in the **Employer User** column of the table for the selected contact changes from *No* to *Yes*.

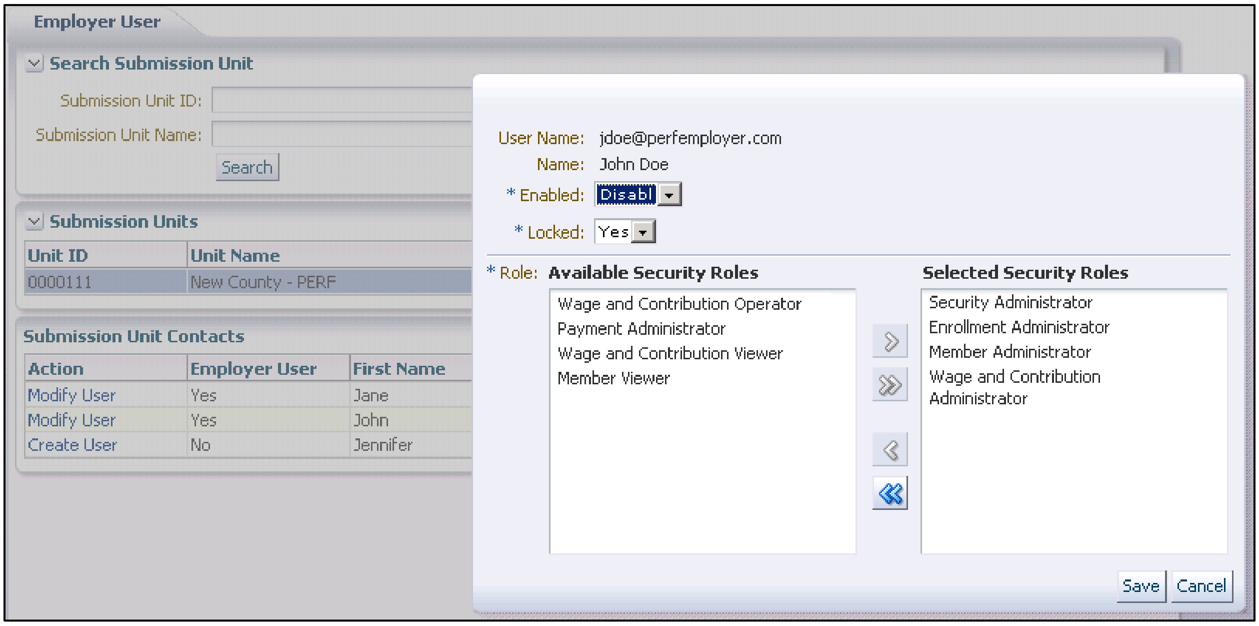
NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

Modifying an Employer User

To modify an Employer User:

1. Choose a Submission Unit from the list. The contacts for the Submission Unit then populate in the Submission Unit Contacts section of the screen.
2. Click the *Modify* hyperlink next to the user you need to modify in the *Search Submission Unit* screen associated with the *Users* option in the Navigation Menu. This opens the **Modify Employer User** pop-up box, shown in Figure 53.

Figure 53: Modify Employer User Pop-up Box



3. To disable an Employer User, choose *Disable* from the drop-down menu in the **Enabled** field. The chosen user will no longer be able to access the application.
4. To give an Employer User access to the ERM application, choose *Enable* from the drop-down menu in the **Enabled** field.
5. To lock an Employer User out of the application, choose *Yes* from the drop-down menu in the **Locked** field.
6. To unlock an Employer User account, choose *No* from the drop-down menu in the **Locked** field.
7. To add security roles for an Employer User, select one or more security roles from the Available Security Roles window to the left of the pop-up box.
8. Click the right single arrow to move the selected security role(s) to the right of the shuttle window.
9. To remove security roles for an Employer User, select one or more security roles from the Selected Security Roles window to the right of the shuttle window in the **Modify Employer User** pop-up box.
10. Click the left single arrow to move the selected security role(s) to the left of the shuttle window.
11. Click the **Save** button to save the changes for the Employer User in the ERM application.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

NOTE: If a Submission Unit contact designated as an Employer User leaves your organization, disable his or her Employer User account and change the contact status to *Inactive*.