ERM Inactive Member Management QRG - Employer

Use this Quick Reference Guide (QRG) to help manage member accounts in the Employer Reporting and Maintenance (ERM) application.

Access the Modify Inactive Member Screen

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

Inactive Member Management

- **Access the Modify Inactive Member Screen**
- **Locate an Inactive Member's Account**
- **View an Inactive Member's Account**
- **Manage an Inactive Member's Account**
- **Modify an Inactive Member's Account**

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

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

Locate an Inactive Member's Account

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

- Member's last name and the last four digits of the member's Social Security Number (SSN)
- Member's full SSN
- Member's nine-digit Pension ID

To locate an inactive member account:

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

Figure 1: Search Fields on the Modify Inactive Member Screen

View an Inactive Member's Account

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

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

Figure 2: Search Results Sections

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

3. *My Choice* section contains the PERF or TRF My Choice Plan/PERF or TRF Hybrid Fund elections, when the election was made and the vesting percentage in the My Choice plan.

4. *Life Events* section contains life events associated with the member at the specific submission unit selected. For members who are associated with more than one Submission Unit, the information associated with the life events change depending upon the Submission Unit selected in the *Submission Unit*s section.

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

Manage Inactive Member Accounts

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

Modify a Member's Account

To modify member termination dates:

1. Click the **Modify** link in the *Life Events* section at the bottom of the *Modify Inactive Member* screen. This opens the *Modify Termination Dates* dialog box.

2. Type the member's updated termination date into the **Last Day in Pay** field. The required format for this field appears in a pop-up bubble when the field is clicked.

3. Type the date of the member's last paycheck into the **Last Check Date** field. Select the date from the drop-down list.

4. Click **Save**.

Figure 3: Modify Termination Dates