# **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.

## 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 1: Search Fields on the Modify Inactive Member Screen

Search Mearch Mearch Mearch for a		ne and last four digits of SSN	or Full SSN or Pension ID	
Last Name				
Last 4 SSN				
	Or			
Full SSN				
	Or			
Pension ID				
	Search			
earch Res	ult			

#### Figure 2: Search Results Sections

ed mber: No				
nber: No				
nber: No				
mber: No				
mber: No				_
Units		1		
Jnit ID	Unit Name	Hire Date		Status Effective Date
	STATE AUDITOR	3/28/2019	Inactive	5/15/2019
ce 019 y Choice /24/2019 %				
ifa fuant		Last Day in Day	Last Chark Date	Effective Date
Contraction of the second second				5/15/2019
1	re 24/2019	Init ID Unit Name STATE AUDITOR STATE AUDITOR STATE AUDITOR STATE AUDITOR Ife Event	Init ID Unit Name Hire Date STATE AUDITOR 3/28/2019 Choice 24/2019 % Ife Event Last Day in Pay	Init ID Unit Name Hire Date Status STATE AUDITOR: 3/28/2019 Inactive 19 Choice 24/2019 % Ife Event Last Day in Pay Last Check Date



#### 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* 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.
- Type the date of the member's last paycheck into the Last Check Date field. Select the date from the dropdown list.
- 4. Click Save.

#### Figure 3: Modify Termination Dates

dd Hember Life	Event		
* Life Event	Termination		V
* Last Day in Pay	7/19/2021	10	
Last Check Date	07/07/2021 07/21/2021 08/04/2021 09/18/2021 09/15/2021 09/29/2021 10/27/2021 10/27/2021 11/10/2021 11/24/2021 12/22/2021		Life Event is saved in the system, e 'Modify Inactive Member' screen Save Cance

