

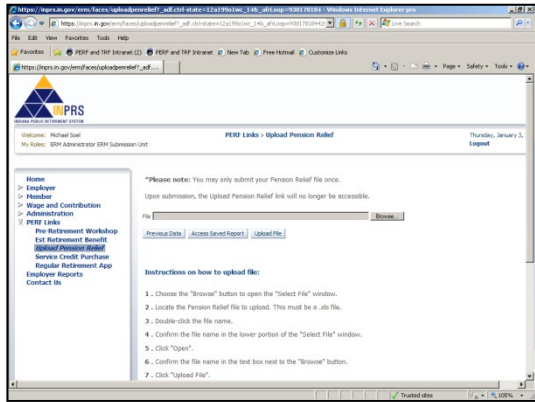
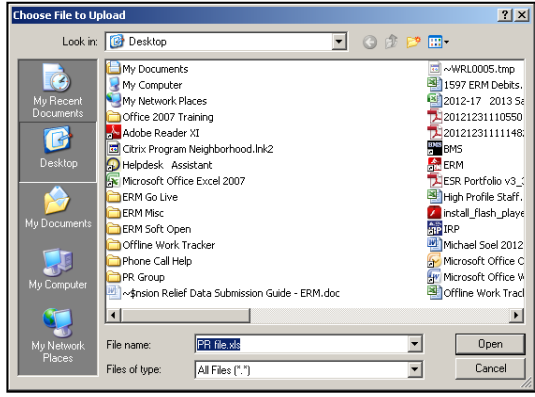
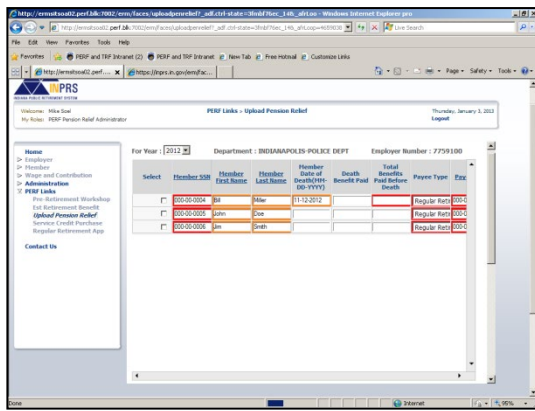
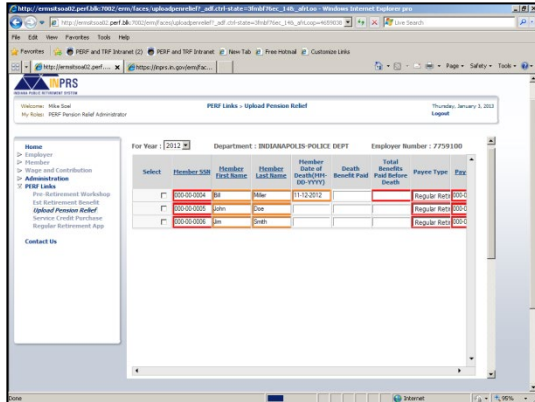


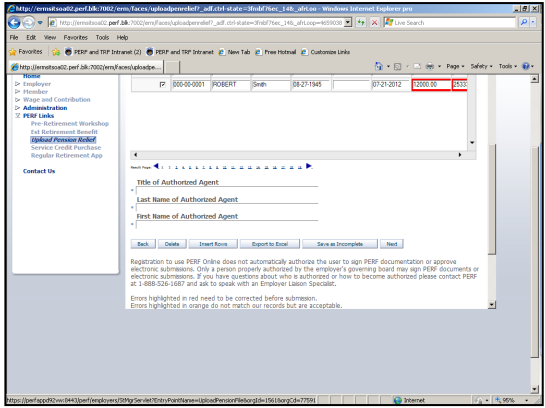
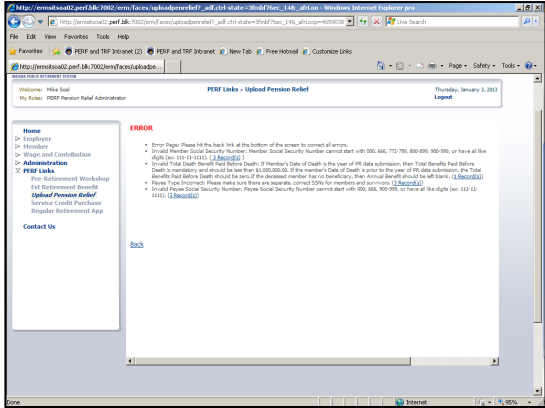
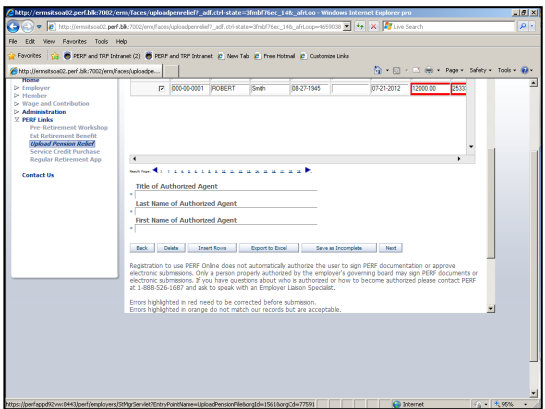


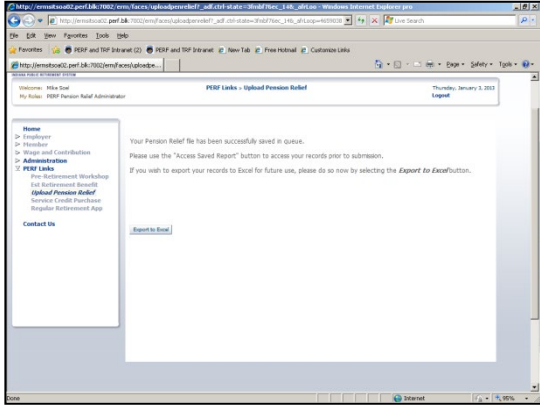
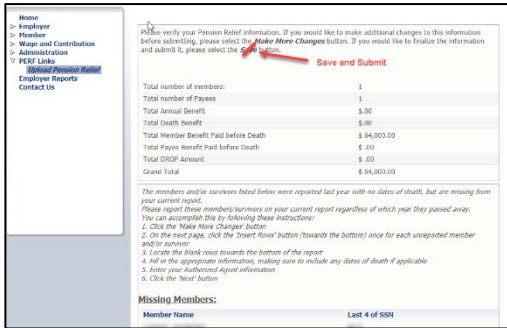
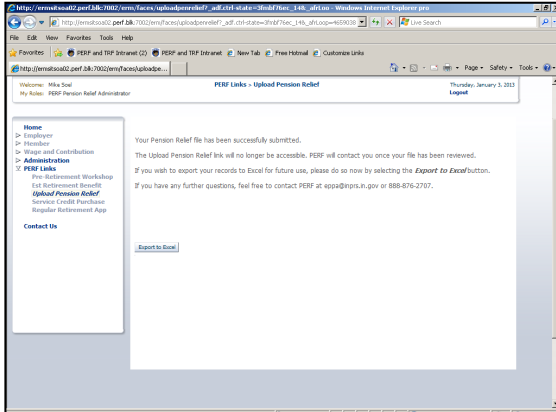
## Pension Relief Data Submission Guide

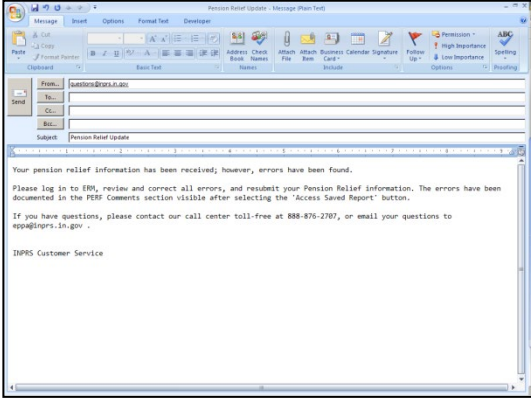
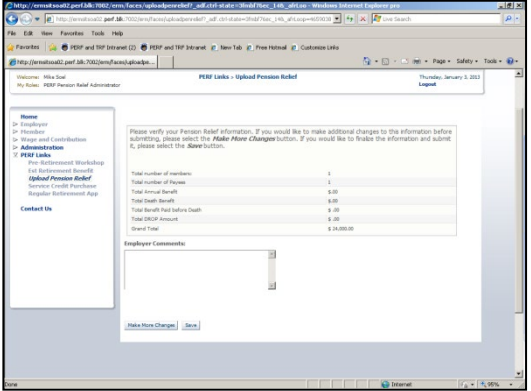
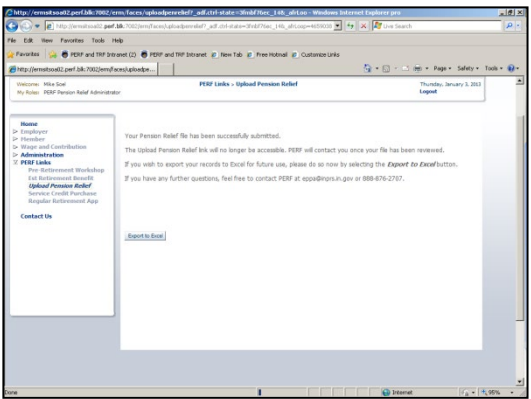
### Instructions for Submitting Pension Relief Data to INPRS using ERM

Step	Action
1.	<p>If you are not already listed as a user in ERM, your staff ERM security administrator must add you as a user contact in ERM with the security role of <b>PERF Pension Relief Administrator</b> before you can submit the report electronically. If your password has expired since last year, use the <b>Forgot Password</b> option on the ERM home page or have your staff ERM security administrator generate you a new temporary password.</p> <p>If your staff ERM security administrator needs assistance with adding you as a user contact in ERM, they should follow pg. 2 of the <a href="#">Getting Started in ERM Guide</a>.</p>
2.	<p><b>Log into ERM at this link:</b> <a href="#">ERM Login Page</a></p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;">  </div> <div style="width: 50%;"> <p><b>Log In Help</b></p> <ul style="list-style-type: none"> <li>• Use your full email address as your <b>User Name</b> and the temporary password you received via email from the email address <a href="mailto:1-inprsnoreply@inprs.in.gov">1-inprsnoreply@inprs.in.gov</a></li> <li>• If your staff security administrator has added you in ERM and you have not received the emailed password, it may be in your SPAM or Junk folder. If you are still unable to locate it in your SPAM or Junk folder, conduct a search in your email box for the aforementioned email address.</li> </ul> <p>If your account becomes locked or disabled, contact your staff security administrator to unlock your account and generate a new emailed password.</p> </div> </div>
3.	<p><b>Navigate to the Pension Relief Upload page</b></p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;">  </div> <div style="width: 50%;"> <p>Once you are logged into ERM, look to the ERM menu on the left side of screen and click on the arrow next to the menu item labeled <b>PERF Links</b>. In the drop-down menu, click <b>Upload Pension Relief</b>, choose the submission unit on the main page and click <b>Display Link</b>.</p> </div> </div>

Step	Action
4.	<p data-bbox="298 151 899 212"><b>Submit Your Pension Relief Data For Validation</b> <i>Choose one of the two options listed below</i></p> <div data-bbox="298 226 829 625">  </div> <div data-bbox="298 638 829 1031">  </div> <div data-bbox="298 1043 829 1451">  </div> <p data-bbox="873 226 1427 682"><b>OPTION 1</b> <b>Upload Pension Relief Excel File</b></p> <ol data-bbox="873 310 1427 682" style="list-style-type: none"> <li>1. Click <b>Browse</b></li> <li>2. When the upload window displays, locate and then choose your completed Pension Relief Excel File.</li> <li>3. Click <b>Open</b></li> <li>4. For <i>Blank Excel Template</i>, click here: <a href="#">PR Excel Template</a></li> <li>5. For <i>Template Field Level Guide</i>, click here: <a href="#">Pension Relief Worksheet Field Level Guide</a></li> <li>6. Click <b>Upload File</b></li> </ol> <p data-bbox="873 1052 1427 1423"><b>OPTION 2</b> <b>Update Data Submitted in the Previous Year</b></p> <ol data-bbox="873 1157 1427 1423" style="list-style-type: none"> <li>1. Click <b>Previous Data</b></li> <li>2. The ERM system will pull up the data your submission unit submitted to INPRS last year.</li> <li>3. Enter updated information into the appropriate fields</li> </ol> <p data-bbox="873 1367 1427 1423">Example. <i>Annual benefits, monthly payments, dates of death, survivor information, etc.</i></p>
5.	<p data-bbox="298 1472 935 1503"><b>Correct Any Errors On Your Pension Relief Report</b></p> <div data-bbox="298 1518 829 1917">  </div> <ul data-bbox="883 1518 1427 1906" style="list-style-type: none"> <li>• Review your Pension Relief information on the form page by using the scroll arrows on the bottom and on the right of the form window.</li> <li>• Look for the field boxes outlined in red, which contain the errors. You must fix all red-box errors before you can submit your file to INPRS. All entries with red-box errors should sort to the top of the form page.</li> <li>• For the boxes outlined in <b>orange</b> you will receive the following message:</li> </ul>

Step	Action
	  <p><i>Please verify that these flagged records are accurate. They are records where more than one survivor/payee record is connected with a single member's record. Please check for duplication within the group – that the member or survivor/payees are not listed more than once – and that everyone listed is truly connected to this member.</i></p> <ul style="list-style-type: none"> <li>If your Pension Relief report contains more than 50 retirees, the report will display on multiple web pages. You can move to the next page by clicking the page number links below the form.</li> <li>To view the error messages, enter your Authorized Agent information in the three boxes below the form and click <b>Next</b>. Click the link at the end of each error message to identify the retirees that have the errors in their information.</li> <li>After reviewing the error messages, click the back link below the messages to return to the form page and make the corrections.</li> <li>Use the document at this link for guidance on how to correct your errors: <a href="#">Pension Relief Worksheet Field Level Guide</a></li> </ul> <p>For information on correct formatting of the data, click the <b>View Templates</b> link from the upload page.</p>
6.	<h3 data-bbox="300 1161 576 1192">Saving As Incomplete</h3>  <ul style="list-style-type: none"> <li>If you would like to save an incomplete report to submit to INPRS at a later time, after first following Step 4 above, enter your Authorized Agent information in the three boxes below the form area and then click <b>Save As Incomplete</b>.</li> </ul> <p><b>NOTE:</b> Your report will not save until you have followed these instructions and have received the <i>Confirmation</i> page (pictured left). You will lose all your data if you fail to follow these instructions correctly. After getting the <b>Save as Incomplete</b> confirmation page, click <b>Logout</b> on the right side of the webpage. Do not click the ◀ back arrow at the top left of your internet</p>

Step	Action	
	<p><b>Save As Incomplete confirmation page:</b></p> 	<p>browser, or the red X in the upper right corner of your browser.</p> <ul style="list-style-type: none"> <li>You have the option of exporting an Excel version of your report for your records at this point by clicking the button below the confirmation message. You can also do this while submitting the final version to INPRS after correcting your errors.</li> </ul> <p>To re-access your saved report, you must click <b>Upload Pension Relief</b> in the ERM menu under <b>PERF Links</b>, choose the submission unit on the main page, click <b>Display Link</b>, then click the <b>Access Saved Report</b>. You may then continue fixing the errors and prepare to submit to INPRS.</p>
7.	<p><b>Submitting Your Corrected Pension Relief Report to INPRS</b></p> <p><b>Totals Page:</b></p>  <p><b>Success Page:</b></p>  <p>From the <i>Success</i> page, you have the option to export an Excel version of your completed report to use next year. Once you leave the <i>Success</i> page, you will no longer be able to export to Excel.</p>	<ul style="list-style-type: none"> <li>Once all red-box errors have been corrected, enter your Authorized Agent information in the three boxes below the form and then click <b>Next</b>.</li> <li>If all errors have been corrected, you will get the <i>Totals</i> page (pictured left). Review the <i>Totals</i> page to ensure the numbers are correct before submitting to INPRS.</li> <li><b>Underneath your totals, you may see a list of retirees and/or survivors that were reported in the prior year without a date of death but are not listed on the current report you are in the process of submitting to INPRS. Review the list and then follow the on screen instructions to correct, if applicable.</b></li> <li><b>If applicable, you will see <i>Deceased Member Without Survivor Listed</i>. Follow the instructions to verify there is no survivor or provide survivor information.</b></li> <li>At this point, you can either click <b>Save and Submit</b> to submit the report to INPRS or click <b>Make More Changes</b> if you would like to return to the form page and edit the information further.</li> <li>If you choose to click <b>Save and Submit</b> and submit the finished report to INPRS, you will receive the success page (pictured left) as well as email confirmation.</li> </ul> <p><b>NOTE:</b> The report is not officially submitted until you have <b>Save and Submit</b> on the <i>Totals</i> page and have received the <i>Success</i> page. If clicked this is not done correctly, you will lose all your</p>

Step	Action
	<p>data if you have not previously performed <b>Saved as Incomplete</b>.</p> <p><b>NOTE:</b> In some cases, users may need to scroll down on the screen to see/access the <b>Save</b> option.</p>
8.	<p><b>Handling a Pension Relief Report Rejected By INPRS</b></p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;">   <p><b>Success Page:</b></p>  </div> <div style="width: 50%;"> <ul style="list-style-type: none"> <li>• After successfully submitting your completed Pension Relief report to INPRS using ERM, you will now receive an email confirmation. Monitor your email inbox (and email SPAM folder) of the email account you use to login to ERM. If the report has additional problems, you will receive an email in late January or early February from the email address <a href="mailto:epa@inprs.in.gov">epa@inprs.in.gov</a>, requesting you to fix the issues.</li> <li>• To access your rejected report, you must click <b>Upload Pension Relief</b> in the ERM menu under <b>PERF Links</b>, choose the submission unit on the main page, click <b>Display Link</b>, then click <b>Access Saved Report</b>. You may then fix the errors and resubmit to INPRS. You may only have to type an explanation or answer a question posed to you by INPRS staff. You can do this by reading the INPRS staff comments towards the bottom of the form page, clicking <b>Next</b>, replying in the <b>Employer Comments</b> box, and then clicking <b>Save and Submit</b>.</li> </ul> <p><b>NOTE:</b> Be sure you receive the <i>Success</i> page (pictured left) and the email confirmation, or you have not successfully resubmitted.</p> <ul style="list-style-type: none"> <li>• If you have questions or need assistance with Pension Relief reporting, contact INPRS customer service:  Phone: (888) 876-2707  Email: <a href="mailto:epa@inprs.in.gov">epa@inprs.in.gov</a></li> </ul> <p>INPRS Pension Secretaries' Online Resource Page:  <a href="http://www.in.gov/inprs/pensionsecretariesresourcepage.htm">http://www.in.gov/inprs/pensionsecretariesresourcepage.htm</a></p> </div> </div>
9.	<p><b>Pension Relief Distribution Information</b></p> <ol style="list-style-type: none"> <li>1. In mid-June, your organization will receive a letter detailing the amount of your unit's Pension Relief distribution for the year.</li> <li>2. The total distribution amount is split evenly into two amounts. Each of those amounts is then deposited into the bank account INPRS has on file for your unit. One amount is deposited before July 1, and the other amount before October 1. This is all in accordance with Indiana State code.</li> </ol>

Step	Action
	<p data-bbox="298 142 1416 205">3. An email notification from INPRS will be sent to your staff ERM security administrator a few days prior to each distribution being deposited.</p> <p data-bbox="298 212 1416 331">4. If you need to make a change to your unit's bank account information which INPRS has on file for Pension Relief purposes, complete and then fax or mail the form at the link below no later than June 1 for your first scheduled deposit and no later than September 1 for the second scheduled deposit.</p> <p data-bbox="347 338 1042 371"><a href="#">Bank Account Information Update Form For Pension Relief</a></p>