

ERM Manage Submission Contact and User QRG

- Employer

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

1. Manage Submission Unit Contact Information

Manage Submission Contact and User

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

To manage Submission Unit contact information, do the following:

- Click **Employer**
- Click ▾ to open the **Submission Unit** menu options.
- Select **Manage Submission Unit**. Your unit populates as seen in Figure 1.
- Select the **Contact** tab and click the ▾ next to **Contact Status**.
- Select **Active**.
- Click **Search** to see your active contacts.

Figure 1: Submission Units, Contacts tab

The screenshot displays the ERM application interface. On the left is a navigation menu with options: Home, Employer (expanded), Create Employer, Manage Employer, Submission Unit Transfer, Submission Unit (highlighted with a red box), Manage Submission Unit, Member Transfer, PERF Employer Enrollme, Member, Wage and Contribution, Administration, PERF Links, Employer Reports, and Contact Us. The main content area is titled 'Submission Units' (highlighted with a red box) and shows a table with columns: Unit ID, Unit Name, Unit Type, Employer Name, Status, and Fund Name. Below this is a tabbed interface with tabs: Acct Detail, Addr & Phone, Pay Admin, W & C, Contacts (highlighted with a red box), PERF Hybrid, and MyChoice. The 'Contacts' tab is active, showing a 'Contacts' section with search fields for First Name, Last Name, and Contact Status, and a 'Search' button. Below the search fields is a table with columns: Action, First Name, Last Name, Email Address, and Contact Types. The table contains three rows of contact information. Below the table is an 'Add Contact' button (highlighted with a red box) and a 'Contact Phone Numbers' section with a table for adding phone numbers.

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
000000	New County - Auditor	Other Government	New County	Participating	PERF

Action	First Name	Last Name	Email Address	Contact Types
Modify	Dinah	Shore	dabbath@inprs.in	Authorized Agent Auth Agent - Clerk-Treasurer Wage and Contribution Treasurer/Finance Personnel Retirement Rate Letter Other Contact
Modify	Whitney	Deal	wdeal@inprs.in.gov	Authorized Agent
Modify	Bob	Test	test@test.com	Authorized Agent

Action	Phone Type	Phone	Extension
Modify	Main	(555) 555-5555	

2. Modify Existing Submission Unit Contact

To modify an existing submission unit contact do the following:

Click **Modify** in the **Action** column (Figure1) next to the name of the contact you want to select. Here you can update the contact **Status** or **Contact Types** for that individual.

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3. Add a New Submission Unit Contact

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

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

Figure 2: Add Submission Unit Contact

Profile ▾

* First Name

Middle Name

* Last Name

* Email Address

Phone Type Main

* Phone

Extension

* Status ▾

* Effective Date 3/7/20 05

* Contact Types

- Authorized Agent
- Auth Agent - Clerk-Treasurer
- Wage and Contribution
- Treasurer/Finance
- Personnel
- Retirement
- Auto Letter
- Other Contact

Save Cancel

4. Add an Existing Submission Unit Contact

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

After **Administration**, click **Users** for the **Employer User** screen to display (Figure 3). Select **Add Contacts** to search for the email address of your existing contact to apply any user roles, but also permission to be an active contact for more than one submission unit.

Figure 3: Users, Employer User tab, Submission Unit Contacts section

Home

- Employer
- Member
- Wage and Contribution
- Administration
- My Profile
- Users
- Communication
- Configuration
- PERF Links
- Employer Reports
- Contact Us

Employer User

✓ Search Submission Unit

Submission Unit ID:

Submission Unit Name:

Search

✓ Submission Units

Unit ID	Unit Name
8010000	New County - PERF

Submission Unit Contacts

Action	Employer User	First Name	Last Name	Email
Modify User	Yes	Jamie	Wells	jwells1@new.gov

Add Contacts

5. Manage Employer Users

ERM security administrators can add new **Employer Users** in the ERM application. Before a new **Employer User** can be added and assigned a security role, the **Employer User** must be added as a **Submission Unit Contact** in the ERM application. To access options for adding new user, click the **Users** tab as seen in Figure 4.

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Figure 4: Users, Employer User tab, Defined Sections

Employer User

Section 1: Search Submission Unit

Submission Unit ID:
Submission Unit Name:

Section 2: Submission Units

Unit ID	Unit Name
0000111	New County - PERF

Section 3: Submission Unit Contacts

Action	Employer User	First Name	Last Name	Email
Modify User	Yes	Jane	Goodall	JGoodall@inprs.in.gov
Modify User	Yes	John	Doe	jdoe@perfemployer.com
Create User	No	Jennifer	Maxwell	JMaxwell@newcounty.edu

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

6. References

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