ERM Overview QRG - Employer

This document was previously titled, *ERM Overview – Employer User QRG*. Use this Quick Reference Guide (QRG) for directions to access the Employer Reporting and Maintenance (ERM) application and for identifying the primary Employer User functions, which are:

- Manage employer and Submission Unit information
- Add and maintain member information
- Submit wages and contributions and enter adjustments
- Add Employer Users
- Run and view reports

ERM Application Overview Topics

- **Access ERM Home Page**
- **Employer Management Functions**
- **Member Management Functions**
- **Wage and Contribution Functions]**
- **Administration Functions**
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- **Employer Reports**

Access the ERM Home Page

To access the ERM *Home* page:

- Access the ERM application and log in. The ERM *Home* page displays (Figure 1).
- Select a Submission Unit by clicking the Submission Unit name in the grid.
- Click **Next** to access the Home Dashboard for the Submission Unit. The Home Dashboard contains the following sections:
    - Notifications – Lists notifications
    - Payroll Calendar – Displays payroll submissions
    - Exceptions Summary – Displays exceptions by type, number, and age
    - Missing Member Report – Displays missing member reports

Figure 1: ERM Home Page

> **NOTE:** Any functions in the *Navigation Menu* that the user's security role does not allow the user to access will be grayed out.

Employer Management Functions

Clicking the ▷ next to the **Employer** option in the Navigation Menu opens a drop-down menu (Figure 2) that allows access to managing employer and Submission Unit accounts by:

- Updating an existing employer's address, phone information and employer contacts.
- Updating information for an existing Submission Unit, including address and phone information, Submission Unit contacts and bank account information.

Detailed instructions for completing these employer management functions are in the *Employer Reporting and Management (ERM) Employer Management User Manual*.

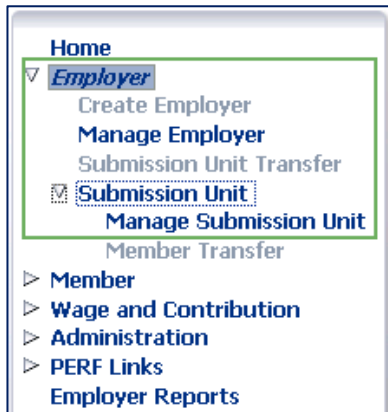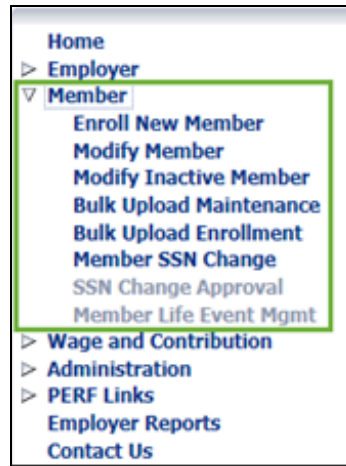*Figure 2: Employer Management Functions*   *Figure 3: Member Management Functions*

Member Management Functions

Clicking the ▷ next to the **Member** option in the Navigation Menu opens a drop-down menu (Figure 3) that allows access to complete member management functions, including:

- **Enroll New Member**: Create a new member account

- **Modify Member:** Update information and inactive member information

- **Bulk Upload Maintenance:** Employer Users can update multiple member accounts through one file upload. To view the file layout visit the INPRS website, *Employer Reporting & Maintenance*, *File Templates* section.

Bulk Upload Enrollment: Employer Users can enroll several members into the same Submission Unit through one file upload. To view the file layout visit the INPRS website, *Employer Reporting & Maintenance*, *File Templates* section.

Detailed instructions for completing these member management functions are found in the *Employer Reporting and Management (ERM) Member Management User Manual - Employer*.

> **NOTE:** **Effective 12/31/2009**, employers are to submit contributions, records, and reports electronically in a uniform format through a secure connection over the Internet. Set up of employer, users, wage and contribution submissions and instructions on completing tasks are included in the manuals and QRGs available on the ERM – Manuals page and the ERM – Quick Reference Guides page of the INPRS website.

Wage and Contribution Functions

Clicking the ▷ next to the **Wage and Contribution** option in the Navigation Menu opens a drop-down menu (Figure 4) that allows completion of wage and contribution management functions, including:

Figure 4: Wage and Contribution Functions

- **File Upload:** Upload Wage and Contribution, Adjustment, Missed Regular Wage and Contribution or Settlement Adjustment files. To view the file layout visit the INPRS website, *Employer Reporting & Maintenance*, *File Templates* section.

- **Online Entry:** Enter wage and contribution information directly into ERM.

- **Online Adjustment**: Make adjustments to wage and contribution information in ERM. Submission Reports – View and manage wage and contribution submission reports and submit for payment.

Detailed instructions for completing these wage and contribution functions are found in the *Employer Reporting and Management (ERM) Wage & Contribution User Manual*.

Administration Functions

Clicking the ▷ next to the **Administration** option in *Navigation Menu* opens a drop-down menu (Figure 5) that allows completion of administration functions.

Figure 5: Administration Functions

New Employer Users can be created by clicking on the *Users* link. Detailed instructions for completing this administration function can be found in the *Employer Reporting and Management (ERM) Employer Management User Manual*.
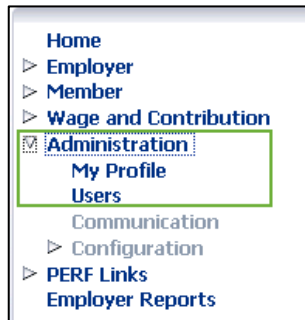
PERF Links

The *PERF Online* links are accessed directly from the ERM application. This helps ensure that the ERM application is a one-stop shop for INPRS Fund duties.

Employer Reports

Depending on the user's security role, the user can view and print reports to help manage information housed in the ERM application such as:

- Member Enrollment

- Member Maintenance

- Annual Wage and Contribution

- Wage and Contribution History

- Exceptions: Member Enrollment, Wage and Contribution and Member Maintenance

- ERM Security
- Sub Unit Contribution Details History Report
- Member Service Credit History Report
- Recent Member Elections Report

Detailed descriptions of the reporting options are found in the *Employer Reporting and Management (ERM) Overview User Manual*.

> **NOTE:** To ensure that both employers and INPRS staff perform functions in ERM consistently and efficiently, the ERM manuals have been written for Employer and Staff. The Employer versions are available from the Employer Reporting & Maintenance page of the INPRS website. (IC 5-10.2-2-12.5)

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