

# **Indiana Public Retirement System (INPRS) Employer Reporting and Maintenance (ERM) Overview Manual – Employer**

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# Introduction to the ERM Application for Employer Users

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**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)

Due to recent Indiana State legislation, all employers who report contributions to one of the INPRS Funds must report these contributions electronically. The Employer Reporting and Maintenance (ERM) application was developed to serve as the tool for reporting these contributions to INPRS and to help make employers' interactions with INPRS less complex and more efficient.

For employers that participate in multiple Funds (for example: PERF/TRF or PERF/1977 Fund), ERM is a one-stop application. Employers no longer need to access multiple systems to perform certain duties. The ERM application allows employers to maintain employer-related information, enroll new members, maintain member information and submit wage and contribution data for each member, all in one location.

The main sections of the ERM application are:

- Employer Management
- Member Management
- Wage and Contribution
- Administration
- Reporting

This User Manual is an introduction to the employer functions available in the ERM application. For more specific information on each function, refer to the corresponding User Manual.

## ERM Glossary

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Refer to the [ERM Glossary](#) document for a complete list and definitions available on the [ERM – Manuals](#) page of the INPRS website.

# ERM Application Navigation

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To view and manage INPRS accounts to which you have access, you must log into the ERM application.

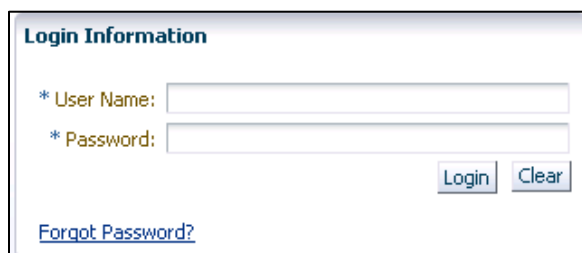
## Log in to the ERM Application

**NOTE:** If accessing ERM for the first time as a new unit a one-time data certification screen appears. If you are the initial user for multiple Submission Units, then you must certify the data for each Submission Unit.

To log into the ERM application for the first time:

1. Access the INPRS ERM application. The *Login Information* screen displays (Figure 1).

**Figure 1: ERM Login Information Screen**



2. Enter your user name into the **User Name** field.
  - Your **User Name** must be the email address you use for work-related activities or the one you use for contact with INPRS. This must be a unique email address. You cannot use the same email address that someone else uses to log into the ERM application.
  - If you cannot remember your User Name, you must contact INPRS.
3. Enter the temporary password that was sent to you via email in the **Password** field.
4. Click **Login** to submit the information. If needed, click **Clear** to clear the fields.
5. After clicking **Login**, the *Change Password* screen displays (Figure 2). You must enter a new password for your User Name and provide an answer for the Security Question you select.
  - The new password must meet the following criteria:
    - Password cannot be the same as the User Name.
    - Minimum password length is 8 characters.
    - Maximum password length is 50 characters.
    - The password must contain three of the following attributes:
      - Uppercase letters
      - Lowercase letters
      - Numeric characters
      - Spaces
      - Special characters
    - The password cannot be the same as one of the past 24 passwords for the account.
  - Keep in mind:
    - The password expires every 90 days, and a new one must be created.
    - Passwords are case sensitive.

- If you forget your password, you must answer the security question you selected. After answering the question correctly, a new temporary password is sent to your email address.
- After logging in unsuccessfully five times, your account is locked, and you must contact your system administrator to re-gain access to the ERM application.
- Duplicate logins are not allowed. For example, you may not have two sessions active with the same login information.
- After 30 minutes of inactivity, the session expires, and you are automatically logged out.

**NOTE:** If you are automatically logged out due to inactivity, you lose any information that you have entered but have not saved.

**Figure 2: Change Password Screen**

6. Once you have entered the required information, click **Submit**. A confirmation pop-up box displays (Figure 3). Click **Continue** to access the ERM *Home* page.

**Figure 3: Confirmation**

**NOTE:** If you are designated as the first person from your organization to log into the ERM application, you are required to verify information about your organization. Also, you are the individual who sets up other users at your organization as needed.

One user who is required to be set up is the Add and Modify ACH; this person sets up the bank accounts that are used for contribution payments. Ensure this user and the bank accounts are set up in a timely manner as wage and contribution information cannot be submitted for payment until a bank account is set up and verified.

Another user who is required to be set up is the Wage and Contribution Administrator. This person confirms the payroll dates for the Submission Unit. Ensure this user is set up and the payroll dates are confirmed in a timely manner as wage and contribution information cannot be submitted until payroll dates are confirmed.

Detailed instructions on how to add new Employer Users to the ERM application can be found in the [Employer Reporting and Maintenance \(ERM\) Employer Management User Manual – Employer](#).

## Access the ERM Home Page

The first page you see after logging into the ERM application is the *Home* page (Figure 4). On the *Home* page, you find the *ERM Navigation Menu*, *Search Submission Unit* section and *Submission Units* table.

**Figure 4: ERM Home Page**

Submission Unit Code	Submission Unit Title	Fund Name
0920020	Indiana Public Schools	PERF
0920021	Indiana Charter Schools	PERF
0097099	Indiana Charter Schools	TRF
0092020	Indiana Public Schools	TRF
0097081	PURDUE POLYTECHNIC HIGH SCHOOL INDIANAPOLIS	TRF

## Access the Home Dashboard

To access the *Home Dashboard* for a Submission Unit:

1. Select a **Submission Unit** from the *Submission Units* table on the *Home* page.

**NOTE:** Only the Submission Units the security role allows the processor to access display in the table.

2. Click **Next**. The *Home Dashboard* for the selected Submission Unit opens (Figure 5).

**Figure 5: Home Dashboard**

**Home Dashboard** Submission Unit : CITY OF INDIANAPOLIS

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**Notifications**

Title	Author	Date Received	Message
No data to display.			

---

**Exceptions Summary**

Exception Type	Count	Oldest (In Days)
Wage and Contribution or Adjustment	0	N/A
Wage and Contribution Settlement Adjustment	0	N/A
Member Enrollment	0	N/A
Member Maintenance	1	76
Missing Members Greater Than 60 Days	1590	2325

**Payroll Calendar**

Pay Date	Status
5/17/2019	Past Due
5/24/2019	Past Due
5/24/2019	Past Due
5/31/2019	Past Due

---

**Missing Member Report**

Click here to generate Missing Member Report for the user [View Missing Member Report](#)

[Back](#)

The *Home Dashboard* displays the following sections for the selected Submission Unit:

- Notifications
- Exceptions Summary
- Payroll Calendar
- Missing Member Report

## Notifications

The *Notifications* section lists any active notifications that have been sent to the selected Submission Unit. The columns include:

- Title
- Author
- Date Received
- Message

## Payroll Calendar

The *Payroll Calendar* displays payroll submissions for a Submission Unit in a table format with the following columns:

- Payroll Date (MM/DD/YYYY)
- Status

The *Payroll Calendar* is updated with the previous five and next 5 payroll submissions.

## Exceptions Summary

The *Exceptions Summary* lists:

- Exception Type
- Count
- Oldest Record Age (In Days)

**Figure 6: Exception Queue**

The *Exception Queue* screen displays tabs for four Exception Queues depending on participation of the My Choice Retirement Savings Plan. They are: **Wage and Contribution or Adjustment (W&C or Adj tab)**, **Settlement**, **Member Enrollment (MBR Enroll tab)**, **Member Maintenance (MBR Maint tab)**, and the **My Choice** tab. The screen automatically defaults to the **Exception Queue** tab for the link chosen in the *Exceptions Summary* section on the *Home Dashboard*.

## Missing Member Report

The *Missing Member Report* section allows viewing those members in the Submission Unit who have not had a wage and contribution transaction submitted for between 30 and 59 days (>30). To view a missing member report, click **View Missing Member Report**, as shown in Figure 7.

Figure 7: Missing Member Report on ERM Home >30

Missing Members <span>Export to Excel</span>							
Pension Id	Last Name	SSN	Days Missing	Last Payroll Date	Last Pay Period Date	Open Life Event	Retired w, SUS
000374420	ABSHIRE	5278	47	7/6/2022	6/25/2022		
000487599	ACKERMAN	2226	47	7/6/2022	6/25/2022		
001094657	ADAMS	1916	47	7/6/2022	6/25/2022		
001246072	ADEDEJI	0023	47	7/6/2022	6/25/2022		
001021647	ALLEN	4978	47	7/6/2022	6/25/2022		
001265904	Alley	1967	47	7/6/2022	6/25/2022		
001007442	AMONETTE	3894	47	7/6/2022	6/25/2022		
001035981	ANAND	5651	47	7/6/2022	6/25/2022		
000682086	ANDERSON	7362	47	7/6/2022	6/25/2022		
001078330	BALLA	6158	47	7/6/2022	6/25/2022		
000352239	BARLEY	0997	47	7/6/2022	6/25/2022		
000636977	BARNES	9586	47	7/6/2022	6/25/2022		
000525309	BARTON	7603	47	7/6/2022	6/25/2022		
001059355	BASTIN	4967	621	12/9/2020	11/28/2020		SDIS
000472990	BATTINA	6173	47	7/6/2022	6/25/2022		
001116705	BAWIHRIN	6857	47	7/6/2022	6/25/2022		
000534855	BEATY	1926	47	7/6/2022	6/25/2022		
000997653	BILLMAN	6163	47	7/6/2022	6/25/2022		
001249412	Blahay	8633	47	7/6/2022	6/25/2022		
001283338	Blinn	7840	47	7/6/2022	6/25/2022		
001094273	BLOUGH	2632	47	7/6/2022	6/25/2022		

The *Missing Member Report* displays the following information, as shown in Figure 7:

- Pension ID
- Last Name
- SSN (partial)
- Days Missing
- Last Payroll Date
- Last Pay Posted Date
- Open Life Event
- Retired with SUS

If the **Missing Members Greater Than 60 Days** is selected from the *Exception Summary* section (Figure 3), or by clicking on the **Miss MBR > 60** tab in the *Exception Queue*,

**Figure 8: Missing Member Report >60**

Exception Queue Submission Unit : HOOSIER LOTTERY

W&C or Adj		Settlement	MBR Enroll	MBR Maint	Miss MBR > 60	My Choice
PID	SSN	Last Name	Last Pay Period End Date	Resolve By Date	ERROR	Action
000259162	***-**-8945	Sprick	3/9/2019	6/8/2019	No W&C, W&C Adjustment, or Life Event in the past 60 days.	Terminate Member
001222894	***-**-1099	Metten	3/9/2019	6/8/2019	No W&C, W&C Adjustment, or Life Event in the past 60 days.	Terminate Member
000405144	***-**-6327	ROSEBROUGH	3/9/2019	6/8/2019	No W&C, W&C Adjustment, or Life Event in the past 60 days.	Terminate Member
000476577	***-**-8878	Taylor	3/9/2019	6/8/2019	No W&C, W&C Adjustment, or Life Event in the past 60 days.	Terminate Member
000920508	***-**-5294	NASH	3/9/2019	6/8/2019	No W&C, W&C Adjustment, or Life Event in the past 60 days.	Terminate Member
	***-**-				No W&C, W&C Adjustment, or	

**Information**  
Records older than 90 days may result in the inability to submit future Wage and Contribution reports.

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## ERM Navigation Menu

The *ERM Navigation Menu* (Figure 9) is located on the left side of the *ERM Home* page.

**Figure 9: ERM Navigation Menu**



The options in the *Navigation Menu* are:

- Home
- Employer
- Member
- Wage and Contribution
- Administration
- PERF Links
- Employer Reports
- Contact Us

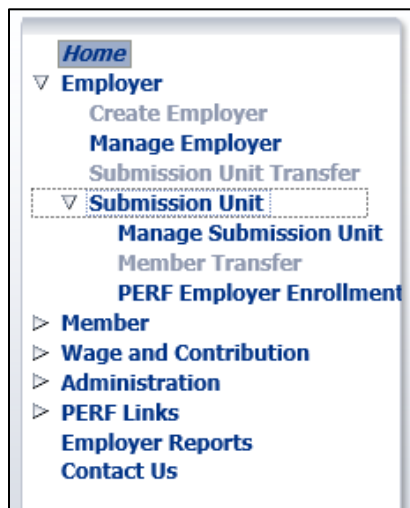
Several of the selections in the *Navigation Menu* have drop-down menus. The options available to Employer Users vary by security role. Any functions that Employer Users cannot access display grayed out in the *Navigation Menu*.

## Navigation Menu - Employer Management Options

Clicking the arrow to the left of **Employer** in the *Navigation Menu* opens a drop-down menu of all employer account options (Figure 10).

Table 1 describes the actions associated with each option in the drop-down menu.

**Figure 10: Employer Account Options Menu**



**Table 1: Actions Available for Employer Account Options Menu**

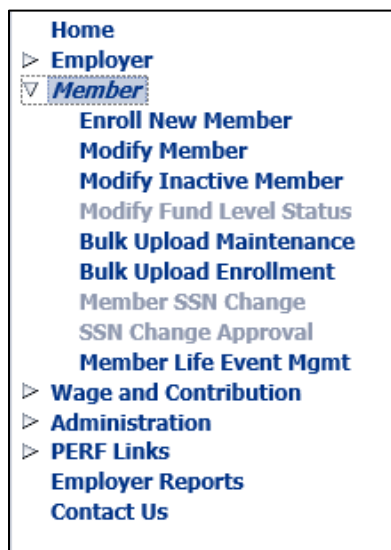
Menu Option	Action
Create Employer	Create a new employer account in ERM (INPRS Staff User-only).
Manage Employer	Update information for an existing employer account. Add new Submission Units to an existing employer account (INPRS Staff User-only).
Submission Unit Transfer	Transfer a Submission Unit between two employer accounts (INPRS Staff User-only).
Submission Unit	The Submission Unit option has an additional drop-down menu that allows you to complete the following activities: <ul style="list-style-type: none"> <li>Update information for an existing Submission Unit account.</li> <li>Transfer a member between two Submission Units (INPRS Staff User-only).</li> </ul>

## Navigation Menu - Member Management Options

Clicking the arrow to the left of **Member** in the *Navigation Menu* opens a drop-down menu of all member management options, as shown in Figure 11.

Table 2 describes the actions associated with each option in the drop-down menu.

**Figure 11: Member Management Options Menu**



**Table 2: Actions Available for Member Account Options Menu**

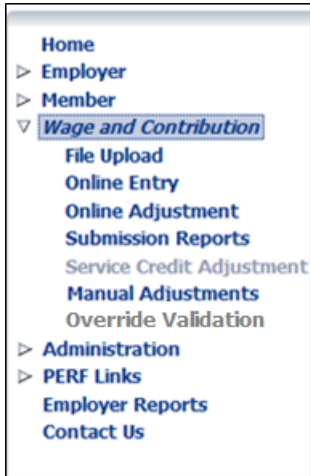
Menu Option	Action
Enroll New Member	Create a new member account in the ERM application.
Modify Member	Update information for a member account.
Modify Inactive Member	Modify an inactive member's termination dates
Modify Fund Level Status	Restricted access to change Fund from Hybrid to My Choice or vice versa.
Bulk Upload Maintenance	Make changes to multiple member accounts within a Submission Unit all at once through a file upload.
Bulk Upload Enrollment	Enroll multiple members into the same Submission Unit through a file upload.
Member SSN Change	Change a member's Social Security Number (SSN) (INPRS Staff User-only).
SSN Change Approval	Approval of an SSN change (INPRS Staff User-only).
Member Life Event Management	Edit/Delete Member Life Events (INPRS Staff User -only)

## Navigation Menu - Wage and Contribution Options

Clicking the **Wage and Contribution** option in the *Navigation Menu*, shown in Figure 12, allows Employer Users to access Wage and Contribution options.

Table 3 describes the actions associated with each option in the drop-down menu.

**Figure 12: Wage and Contribution Options Menu**



**Table 3: Actions Available for Wage and Contribution Account Options Menu**

Menu Option	Action
File Upload	Upload a Wage and Contribution, Adjustment, Regular Missed Wage and Contribution or Settlement Adjustment file to ERM.
Online Entry	Enter wage and contribution information directly into ERM.
Online Adjustment	Adjust wage and contribution information in ERM.
Submission Reports	View and manage wage and contribution submission reports and process those reports for payment.
Service Credit Adjustment	Enter, submit, and approve service credit adjustments (INPRS Staff User-only).
Manual Adjustment	Enter, submit, and approve adjustments to transactions that were submitted prior to January 1, 1991, for TRF and prior to January 1, 1987, for PERF, '77 Fund, and JU/JRS Fund (INPRS Staff User-only).
Override Validation	Clears errors that should not have been presented during the wage and contribution reporting process for all funds. (INPRS Staff User-only)

## Navigation Menu - Administration Options

Clicking on the arrow to the left of **Administration** in the *Navigation Menu* opens a drop-down menu of all administrative functions (Figure 13).

Table 4 describes the actions associated with each function in the drop-down menu.

**Figure 13: Administration Options Menu**



**Table 4: Actions Available for Administration Options Menu**

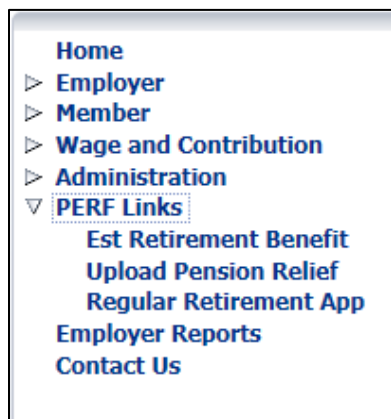
Menu Option	Action
My Profile	Change your login password for ERM.
Users	Add new employer users to ERM.
Communication	Send notifications to ERM Users (INPRS Staff User-only).
Configuration	Configure Fund and system parameters (INPRS Staff User- only).

## Navigation Menu - Links to PERF Online

Clicking on the arrow to the left of **PERF Links** in the *Navigation Menu* opens a drop-down menu of all associated links (Figure 14).

Table 5 describes the actions associated with each link in the drop-down menu.

**Figure 14: PERF Links Options Menu**



**Table 5: Actions Available for PERF Links Options Menu**

Menu Option	Action
Est Retirement Benefit	Directs you to the Estimated Retirement Benefit screen on PERF Online.
Upload Pension Relief	Directs you to the Upload Pension Relief screen on PERF Online.

Menu Option	Action
Regular Retirement App	Directs you to the Regular Retirement Application screen on PERF Online.

## Navigation Menu - Report Options

Clicking on **Employer Reports** in the *Navigation Menu* opens a screen listing all the available employer reports (Figure 15).

Table 6 describes the actions associated with the *Employer Reports* section.

**Figure 15: Employer Reports Menu**



**Table 6: Actions Available for Reporting Options Menu**

Menu Option	Action
Employer Reports	View, run, and print the available employer reports.

# ERM Application Screen Elements

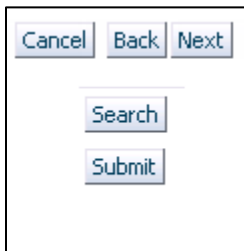
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The ERM application uses a variety of screen elements as part of the user interface to ease navigation and assist in information management.

## Buttons

Buttons (Figure 16) are used to submit information and move to or from various screens.

**Figure 16: Button Examples**



## Links

Links (Figure 17) allow the user to quickly move to another section in the ERM application.

**Figure 17: Link Examples**



## Fields

Fields (Figure 18) are used to gather information from you. Either enter the information directly into the field or select the information from a drop-down menu, if available.

**Figure 18: Field Examples**

The screenshot shows a web form titled "Modify Member Fund PERF". It contains several input fields: "Voluntary Contribution (Pre-Tax) %" with the value "7", "Voluntary Contribution Date" with the value "5/11/1999", and a dropdown menu for "Is Member an Elected Official ?" set to "Yes". Below this is another dropdown menu for "Elected Official Type" which is open, showing a list of roles including "County Auditor", "County Clerk", "County Recorder", "County Treasurer", "Coroner", "Sheriff", "State Elected Auditor", "State Elected Treasurer", "State Elected Secretary", "County Surveyor", and "Any Elected Official not listed above". The "County Auditor" option is currently selected. Other partially visible fields include "Elected Official Effective Date" and "New County - University".

## Pop-up Bubbles

Pop-up bubbles (19) provide additional information or prompt for required actions.

**Figure 19: Pop-up Bubble Examples**

The screenshot shows a form with two fields: "State" with the value "IN-INDIANA" and "Zip Code" which is empty. A red error bubble with a white 'X' icon is displayed above the "Zip Code" field. The bubble contains the text: "Error: A value is required. You must enter a value." Below the "State" field, there is a text label "##### or #####-####".

## Pop-up Boxes

Pop-up boxes (Figure 20) display when information needs to be entered or selected.

**Figure 20: Pop-up Box Window Example**

The screenshot shows a 'Pop-up Box Window' titled 'Add Employer Contact'. It contains several input fields and dropdown menus. The fields are: 'Prefix' (a dropdown menu), '\* First Name' (a text box), 'Middle Name' (a text box), '\* Last Name' (a text box), '\* Email Address' (a text box), '\* Phone Type' (a dropdown menu), '\* Phone' (a text box), 'Extension' (a text box), '\* Status' (a dropdown menu), and '\* Effective Date' (a text box with a calendar icon). At the bottom right, there are 'Save' and 'Cancel' buttons.

## Shuttle Windows

Shuttle Windows (Figure 21) allow you to make selections from a list. Select an option from the list in the box on the left side of the screen. Click the ► arrow to shuttle the item to the box on the right side of the screen.

Click the ►► arrow to shuttle all the items found in the box on the left side of the screen to the box on the right side of the screen.

To deselect an item, follow the same process to move the items from the right box to the left box, using the ◀ or ◀◀ arrow(s).

**Figure 21: Shuttle Window Example**

The screenshot shows a 'Shuttle Window' titled 'Modify Groups'. It has two main sections: a list of groups on the left and an empty box on the right. The list of groups includes 'DEFAULT', 'STATE', 'CHARTER SCHOOLS', and 'UNIVERSITIES'. Between the list and the box are four arrows: a single right arrow (►), a double right arrow (►►), a single left arrow (◀), and a double left arrow (◀◀). At the bottom right, there are 'Save' and 'Cancel' buttons.

## General Search Features

As you navigate the ERM application, you find tables of information (Figure 22). Click the line of information you want to view. In some cases, you may also need to click an additional button, such as **Next**.

**Figure 22: Table Example**

Submission Units		
Submission Unit Code	Submission Unit Title	Fund Name
1234569	New County - Police Dept	77
1234570	New County - Judges	JU
1234568	New County - University	TRF
1234567	New County-Library	PERF
4562200	New Town Government	PERF

Next

Also, you encounter tabs as part of ERM navigation. Click the tab of the content area you want to view (Figure 23).

**Figure 23: Tabs Example**

Account Detail	Contacts	Address & Phone	Funds	Groups	Submission Units
<p>Employer Number: 1000 Employer Name: New County Email Address: newcounty@new.gov Status: Active Effective Date: 01/01/1980</p>					

# Introduction to Employer Management

---

When you click the **Employer** option in the *Navigation Menu*, the options available in the drop-down menu allow you to complete specific employer management activities in the ERM application. Depending upon your individualized security role, Employer Users may be able to:

- Modify employer information
- Modify Submission Unit information

As part of making modifications, Employer Users are able to:

- Update information for an existing employer account, such as the employer's address and phone number and employer contacts
- Update information for an existing Submission Unit account, such as the Submission Unit's address and phone number, Submission Unit contacts and bank account information

Employer Users also have view-only access to the following information:

- Employer account details
- Employer Fund assignments
- Submission Unit wage and contribution information
- Submission Unit contribution type details
- Submission Unit account details

## Modify Employer Information

Choosing the **Manage Employer** option from the drop-down menu allows you to add, modify, or delete information associated with employer accounts in the ERM application, including:

- Contact information
- Address and phone number

Employer Users have view-only access to the information contained in the fields associated with the following tabs on the *Manage Employer* screen:

- Account Detail
- Funds
- Groups
- Submission Units

Detailed instructions for managing employer accounts are found in the [Employer Reporting and Maintenance \(ERM\) Employer Management User Manual – Employer](#).

## Modify Submission Unit Information

Clicking the arrow to the left of **Manage Employer** and then clicking the arrow to the left of **Submission Unit** in the *Navigation Menu* opens a drop-down menu of all possible actions that you can perform on a Submission Unit account.

Choose **Manage Submission Unit** from the drop-down menu. This allows you to add, modify or delete information associated with Submission Unit accounts in the ERM application, including:

- Contact information

- Address and phone number
- Bank account information

The specific Submission Unit information that you can access, and update depends on your individualized security role.

Detailed instructions for managing Submission Unit accounts are found in the [Employer Reporting and Maintenance \(ERM\) Employer Management User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

# Introduction to Member Management

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When you click the **Member** option in the *Navigation Menu*, a drop-down menu opens. The options allow you to complete the following member management activities in the ERM application:

- Enroll a new member
- Modify a member account
- Conduct bulk maintenance of member accounts
- Conduct bulk enrollment of new members

## Enroll a New Member

Choosing the **Enroll New Member** option in the drop-down menu allows you to create a new member account in the ERM application. The major steps in enrolling a new member are:

- Select a Submission Unit.
- Enter and verify a member's Social Security Number (SSN).
- Select a member position.
- Enter member demographics.
- Enter plan election
- Verify enrollment.

Detailed instructions for enrolling a member are found in the [Employer Reporting and Maintenance \(ERM\) Member Management User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

**NOTE:** This process varies slightly for 1977 Fund enrollments. You can find detailed instructions in the [Employer Reporting and Maintenance \(ERM\) Member Management User Manual – Employer](#)

## Enter a Hire Date (1977 Fund)

These additional steps occur in the Exception Queue after you have received notification from INPRS:

1. Select a **Submission Unit** on the *Home* page.
2. Select an exception from the **Transaction Type** column in the *Exceptions Summary* section on the *Home Dashboard*.
3. Click the **Enter Hire Date** link.
4. Enter the member's hire date and click **OK**.

## Modify a Member

Choosing the **Modify Member** option from the drop-down menu allows you to modify specific information associated with member accounts in the ERM application, including:

- Name
- Gender
- Marital Status
- Member Fund information (PERF and TRF only)
- Life Events – including terminating a member

## Modify an Inactive Member

Choosing the **Modify Inactive Member** option from the drop-down menu allows you to modify an inactive member's termination information in the ERM application, including:

- Last Check Date
- Last Day in Pay

Detailed instructions for modifying inactive member accounts are found in the [Employer Reporting and Maintenance \(ERM\) Member Management User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

## Bulk Maintenance of Member Accounts

When you need to make changes for multiple members, and all the members belong to the same Submission Unit, choose the **Bulk Upload Maintenance** option from the drop-down menu. The major steps are:

1. Select a Submission Unit.
2. Upload the file that contains the updated information.
3. Review the confirmation screen.

Detailed instructions for enrolling a member are found in the [Employer Reporting and Maintenance \(ERM\) Member Management User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

## Bulk Enrollment of New Members

To enroll large groups of members into the same Submission Unit, choose the **Bulk Upload Enrollment** option from the drop-down menu and then complete the following steps:

1. Select a Submission Unit.
2. Upload the file that contains the enrollment information.
3. Validate member Fund data.
4. Review confirmation screen.

Detailed instructions for enrolling a member are found in the [Employer Reporting and Maintenance \(ERM\) Member Management User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

## Member Social Security Number (SSN) Change

To change a member's SSN, contact the Employer Advocate (EA) Team at INPRS. The Employer cannot change the SSN.

# Introduction to Wage and Contribution

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**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.

When you click the **Wage and Contribution** option in the *Navigation Menu*, a drop-down menu opens. The options available in the drop-down menu allow you to complete the following wage and contribution activities in the ERM application:

- Upload wage and contribution, adjustment, missed regular wage and contributions, and settlement adjustment files
- Enter wage and contribution online
- Complete an online wage and contribution adjustment
- View and manage wage and contribution submission reports and process those reports for payment

## Upload Wage and Contribution, Adjustment, Regular Missed Wage and Contributions, and Settlement Adjustment Files

Employer Users can upload Wage and Contribution, Adjustment, Regular Missed Wage and Contributions, and Settlement Adjustment files to the ERM application. To upload, complete the following steps:

1. Select a report type.
2. Choose a payroll date.
3. Select a Submission Unit/payroll frequency combination(s).
4. Select a file to upload.
5. Submit the file for validation against a set of business rules.

Detailed instructions for uploading files are found in the [Employer Reporting and Maintenance \(ERM\) Wage and Contribution \(W&C\) User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

## Online Wage and Contribution Entry

Employer Users can enter wage and contribution files directly into the ERM application online. To complete an online wage and contribution entry, complete the following steps:

1. Select the Submission Unit.
2. Select a payroll frequency.
3. Select a payroll date.
4. Select the report type.
5. Enter report information.
6. Submit the report for validations against a set of business rules.

Detailed instructions for online entry are found in the [Employer Reporting and Maintenance \(ERM\) Wage and Contribution \(W&C\) User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

## Online Wage and Contribution Adjustment

Employer Users can complete wage and contribution adjustments online by completing the following steps:

1. Select the Submission Unit.
2. Select a payroll date.
3. Select the adjustment type.
4. Create the adjustment report.
5. Submit the report for validations against a set of business rules.

Detailed instructions for online adjustment are found in the [Employer Reporting and Maintenance \(ERM\) Wage and Contribution \(W&C\) User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

## Managing Submission Reports

Once the validation process is complete for both online and file upload submissions, the corresponding reports display in the *Submission Reports* table. As part of managing submission reports, you are able to:

- View submission reports.
- View validation results.
- Resolve errors in submission reports.
- Process submission reports for payments.
- Delete submission reports.

Detailed instructions for managing Submission Reports are found in the [Employer Reporting and Maintenance \(ERM\) Wage and Contribution \(W&C\) User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

## Service Credit Adjustment

The Employer cannot change Service Credit adjustments. Contact the Employer Advocate (EA) Team at INPRS.

## Introduction to Administration Functions

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When you click the **Administration** option in the *Navigation Menu*, a drop-down menu opens. The options in the drop-down menu allow authorized users to complete the following administration activities in the ERM application:

- Add employer users
- Manage employer users

### Manage Users

Employer users with an authorized security role can add new employer users by completing the following steps:

1. Select the Submission Unit.
2. Assign an employer user security role to the Submission Unit contact.

Detailed instructions for adding/managing Employer Users are found in the [Employer Reporting and Maintenance \(ERM\) Employer Management User Manual – Employer](#) available on the [ERM – Manuals](#) page of the INPRS website.

## Introduction to Reports

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Multiple reports are available to Employer Users in the ERM application. These reports can be customized to return specific data that is housed in the ERM application. Once the report details are returned, the results can be printed and or exported to Excel. The reports are:

- **Annual Wage and Contribution Report** – Use this report to generate the year-to-date total contributions by Submission Unit or by member.
- **Member Enrollment Exception Report** – Use this report to inform and enable the process of resolving member enrollment exceptions when cross-departmental research is required. This report includes information which identifies the member, Submission Unit, exception description, exception field(s), and transaction date.
- **Member Enrollment Report** – Use this report to monitor membership records. This report displays unique member identification information (Pension ID), member account status, Fund, member enrollment record information, and relevant effective dates.
- **Member Maintenance Exception Report** – Use this report to inform and enable the process of resolving member maintenance exceptions when cross-departmental research is required. This report includes information which identifies the member, Submission Unit, exception description, exception field(s), and transaction date.
- **Member Maintenance Report** – Use this report to review member maintenance information such as life events and member's status.
- **Member Service Credit History Report** – Use this report to find overall service totals for each fund a member has participated. Overlaps in service are not counted twice. For example, an individual cannot earn one year in PERF and one year in TRF for the same time period and have not been accounted for in this report. Years of participation from the PERF/TRF My Choice Plan does not reflect on this report. If a member is simultaneously in either the PERF Hybrid or TRF Hybrid fund as well as the PERF/TRF My Choice Plan, the member receives service in the PERF Hybrid or TRF Hybrid, as well as years of participation in the My Choice Plan.
- **Recent Member Elections Report** – Use this report to determine which fund members enrolled into (the PERF/TRF Hybrid or PERF/TRF My Choice Plan). The report provides a detailed listing of retro contributions due, per plan per member before and after the member decides on plan election. This report is only applicable if the submission unit participates in the My Choice Plan.
- **Security Report** – Use this report to generate a list of active ERM Employer User information, including names, email addresses, and security roles/access.
- **Sub Unit Contribution Details History Report** – Use this report to access submission unit contribution details. This report includes historical contribution rates and covered positions for all funds as well as certified salaries for the 77 Fund.
- **Wage and Contributions Exception Report** – Use this report to inform and enable the process of resolving wage and contribution exceptions when cross-departmental research is required. This report includes information which identifies the member, Submission Unit, exception description, exception field(s), payroll date, and due date.
- **Wage and Contributions History Report** – Use this report to access a history of wage and contribution report submissions. This report displays wage and contribution transactions (regular and adjustments) submitted in ERM for a specific Submission Unit during a date range or for a specific member. It displays the Pre-1996 TRF Fund Classification (for TRF only).