



Indiana Public Retirement System (INPRS)

Employer Reporting and Management (ERM) Employer Management User Manual - Employer

Indiana Public Retirement System (INPRS)
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Table of Contents

1	Introduction to Employer Management for Employer Users	6
2	ERM Glossary	7
3	Employer Numbers and Submission IDs	8
4	ERM Navigation Menu	9
	<i>Figure 1: ERM Home Page</i>	9
4.1	Access the Home Dashboard	9
	<i>Figure 2: Home Dashboard on the ERM Home Page</i>	10
4.1.1	Missing Member Report	10
4.2	Access and View Employer Account Options	10
	<i>Figure 3: Employer Management Options Menu</i>	11
	<i>Table 1: Actions Available for Employer Account Options Menu</i>	11
5	New Employer	12
6	Manage an Employer	13
6.1	Locate an Employer Account	13
	<i>Figure 4: Manage Employer Screen</i>	13
6.1.1	Search for a Specific Employer Account	14
	<i>Search for an employer by name</i>	14
	<i>Search for an employer by ID number</i>	14
6.1.2	Select an Employer Account	14
6.2	View Account Detail Information	14
	<i>Figure 5: Account Detail Tab, Manage Employer Screen</i>	15
6.3	Manage an Employer Contact	15
	<i>Figure 6: Contacts Tab, Manage Employer Screen</i>	15
6.3.1	Add an Employer Contact	16
	<i>Figure 7: Add Employer Contact, Manage Employer Screen</i>	16
6.3.2	Modify an Employer Contact	17
	<i>Figure 8: Modify Employer Contact, Manage Employer Screen</i>	17
6.3.3	Delete an Employer Contact	18
6.3.4	Add an Employer Contact Phone Number	18
	<i>Figure 9: Add Contact Phone Number, Manage Employer Screen</i>	18
6.3.5	Modify an Employer Contact Phone Number	19
	<i>Figure 10: Modify Contact Phone Number, Manage Employer Screen</i>	19
6.3.6	Delete an Employer Contact Phone Number	19
6.4	Manage Employer Addresses and Phone Numbers	19
	<i>Figure 11: Address & Phone Tab, Manage Employer Screen</i>	20
6.4.1	Add an Employer Address	20
	<i>Figure 12: Add/Modify Address, Manage Employer Screen</i>	21
6.4.2	Modify an Employer Address	21
6.4.3	Delete an Employer Address	22
6.4.4	Add an Employer Phone Number	22
	<i>Figure 13: Add Phone Number, Manage Employer Screen</i>	22

6.4.5	Modify an Employer Phone Number	23
	<i>Figure 14: Modify Phone Number, Manage Employer Screen</i>	<i>23</i>
6.4.6	Delete an Employer Phone Number	23
6.5	View Employer Funds	24
	<i>Figure 15: Funds Tab, Manage Employer Screen</i>	<i>24</i>
6.6	View Employer Groups	24
	<i>Figure 16: Groups Tab, Manage Employer Screen</i>	<i>24</i>
6.7	View Submission Unit Information for Employer Accounts	25
	<i>Figure 17: Submission Units Tab, Manage Employer Screen</i>	<i>25</i>
7	Transfer a Submission Unit	26
8	Merges and Splits (PERF)	27
9	Manage a Submission Unit	28
	<i>Figure 18: Submission Unit Option, Navigation Menu</i>	<i>28</i>
9.1	Locate a Submission Unit Account	28
	<i>Figure 19: Manage Submission Unit</i>	<i>29</i>
9.1.1	Search for a Specific Submission Unit Account	29
	<i>Search for a Submission Unit by ID number</i>	<i>29</i>
	<i>Search for a Submission Unit by name</i>	<i>29</i>
9.1.2	Select a Submission Unit Account	30
	<i>Select a Submission Unit from the scrollable grid:</i>	<i>30</i>
9.2	Manage Account Details Information	30
	<i>Figure 20: Account Details Tab, Manage Submission Unit</i>	<i>31</i>
9.3	Manage Submission Unit Address or Phone Number Information	31
	<i>Figure 21: Address & Phone Tab, Manage Submission Unit</i>	<i>32</i>
9.3.1	Add a Submission Unit Address	32
	<i>Figure 22: Add Address, Manage Submission Unit</i>	<i>33</i>
9.3.2	Modify a Submission Unit Address	33
	<i>Figure 23: Modify Address, Manage Submission Unit</i>	<i>34</i>
9.3.3	Add a Submission Unit Phone Number	34
	<i>Figure 24: Add Phone Number, Manage Submission Unit</i>	<i>35</i>
9.3.4	Modify a Submission Unit Phone Number	35
	<i>Figure 25: Modify Phone Number, Manage Submission Unit</i>	<i>35</i>
9.4	Manage Submission Unit Payment Administration	36
	<i>Figure 26: Payment Admin Tab, Manage Submission Unit</i>	<i>36</i>
9.4.1	Add Bank Account to a Submission Unit Account	36
	<i>Figure 27: Add Bank Account, Manage Submission Unit</i>	<i>37</i>
9.4.2	Modify Submission Unit Bank Account	38
	<i>Figure 28: Modify Bank Account, Manage Submission Unit</i>	<i>38</i>
9.5	Manage Wage and Contribution (W&C) Submission Information	38
	<i>Figure 29: W&C Tab, Manage Submission Unit</i>	<i>39</i>
	<i>Save and Confirm a Payroll Calendar</i>	<i>39</i>
	<i>Figure 30: Define Payroll Dates, Manage Submission Unit</i>	<i>39</i>
	<i>Figure 31: Confirm Payroll Calendar, Manage Submission Unit</i>	<i>40</i>
9.6	Manage Submission Unit Contact Information	40
	<i>Figure 32: Contacts Tab, Manage Submission Unit</i>	<i>40</i>
9.6.1	Add a Submission Unit Contact	40

<i>Figure 33: Add Submission Unit Contact, Manage Submission Unit</i>	41
9.6.2 Add an Existing Submission Unit Contact.....	42
<i>Add a Submission Unit Contact in the Administration Section</i>	42
<i>Figure 34: Administration Options, Navigation Menu</i>	43
<i>Figure 35: Employer User</i>	43
<i>Figure 36: Email Search, Employer User</i>	43
9.6.3 Add a Submission Unit Contact Phone Number	44
<i>Figure 37: Add/Edit Phone Number, Manage Submission Unit</i>	44
9.6.4 Modify a Submission Unit Contact.....	44
<i>Figure 38: Edit Submission Unit Contact, Manage Submission Unit</i>	45
9.6.5 Modify a Submission Unit Contact Phone Number	45
9.6.6 Delete a Submission Unit Contact Phone Number	46
9.7 View Submission Unit Contribution Type Details	46
9.7.1 PERF or TRF Hybrid	46
<i>Table 2: PERF or TRF Hybrid tab</i>	46
<i>Figure 39: (PERF) Hybrid Tab</i>	47
<i>Figure 40: (TRF) Hybrid Tab</i>	48
9.7.2 PERF or TRF My Choice.....	48
<i>Table 3: PERF or TRF My Choice tab</i>	48
<i>Figure 41: (PERF) My Choice Tab with Contribution Type Details</i>	49
<i>Figure 42: (TRF) My Choice Tab with Contribution Type Details</i>	50
9.7.3 1977 Fund Contribution Type Details.....	50
<i>Figure 43: 1977 Fund Contribution Type Details Tab</i>	52
9.7.4 JUIJRS System Contribution Type Details.....	52
<i>Figure 44: JU System Contribution Type Details Tab</i>	53
10 PERF Employer Enrollment Resolution	54
10.1.1 Select a Submission Unit Account	54
<i>Figure 45: Select Sub Unit</i>	54
<i>Figure 46: PERF Employer Enrollment Resolution</i>	55
<i>Figure 47: PERF Employer Enrollment Resolution Confirmation</i>	58
10.2 PERF My Choice Retirement Savings Plan Employer Open Enrollment.....	58
<i>Figure 48: Manage Submission Unit</i>	59
<i>Figure 49: My Choice Open Enrollment</i>	59
11 Transfer a Member	61
12 Manage Employer Users	62
12.1 Add a New Employer User	62
<i>Access the Administration options for adding a new Employer User:</i>	62
<i>Figure 50: Administration Options, Navigation Menu</i>	62
<i>Figure 51: Add Employer User, Search Submission Unit</i>	63
12.1.1 Identifying the Submission Unit	63
<i>Search for a Submission Unit by ID number:</i>	63
<i>Search for a Submission Unit by name:</i>	63
<i>Select a Submission Unit from the scrollable grid:</i>	63
12.1.2 Identifying an Employer Contact as an Employer User.....	63
<i>Figure 52: Create Employer User</i>	64

12.2	Modifying an Employer User	64
	<i>Figure 53: Modify Employer User</i>	65

1 Introduction to Employer Management for Employer Users

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)

Employer Users are Indiana Public Retirement System (INPRS) participants with access to manage their employer accounts in the Employer Reporting and Maintenance (ERM) application. Based on an individual's security role in the ERM application, Employer Users can conduct the following employer management functions:

- Modify employer information
- Modify Submission Unit information
- Add new Employer Users to ERM

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

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

This User Manual introduces you to all the features and screens associated with employer management functions in the ERM application, as well as how to enter, modify and view employer management data in ERM.

For instructions on how to log into the ERM application, reference the [ERM Overview 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.

2 ERM Glossary

Refer to the [ERM Glossary](#) document for a complete list and definitions.

NOTE: In other documents the various funds, systems, and plans may be abbreviated as follows:

- 1977 Fund, 77 Fund, PF77 – 1977 Police Officers’ and Firefighters’ Pension and Disability Fund
- CE, C&E, CAEP, EG&C - Excise, Gaming, and Conservation Officers’ Retirement Plan
- JU, JRS, JUDG – Judges’ Retirement System
- LE, LE DC, LE DB, LRS, LEGL – Legislators’ Retirement System (Defined Contribution or Defined Benefit)
- PA, PARF – Prosecuting Attorneys’ Retirement Fund
- PERF, PE, PR2, PR3, PMCH – Public Employees’ Retirement Fund Retirement Fund
- TRF, TRFF, TR2, TMCH – Indiana State Teachers’ Retirement Fund

No matter how they are abbreviated, the abbreviations refer to these named funds, systems, and plans and often are referred to as “fund”, “plan”, or “system”.

3 Employer Numbers and Submission IDs

In the ERM application, employers are assigned a unique Employer Number. Most transactions, including updating member records and submitting wage and contribution data, are completed using the Submission Unit ID. In the event payments are submitted to more than one Fund, there would be more than one submission unit ID but only one Employer Number. These numbers are generated by the ERM application. Any questions should be directed to INPRS.

4 ERM Navigation Menu

The *Navigation Menu* is to the left of the ERM *Home* page, as shown in Figure 1.

The selections in the *Navigation Menu* are:

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

Several selections have drop-down menus. The options available to Employer Users vary by security role. Options that are grayed out mean an Employer User does not have access.

Figure 1: ERM Home Page

The screenshot shows the ERM Home Page. On the left is a navigation menu with links: Home, Employer, Member, Wage and Contribution, Administration, PERF Links, Employer Reports, and Contact Us. The main content area has a header with the INPRS logo, a welcome message for 'shelley horner', and the date 'Saturday, June 1, 2019'. Below the header is a 'Search Submission Unit' section with input fields for 'Submission Unit ID' and 'Submission Unit Name', and a 'Search' button. Below that is a 'Submission Units' section with a table of submission units. The table has columns for 'Submission Unit Code', 'Submission Unit Title', and 'Fund Name'. The table lists five submission units: 0920020 (Indiana Public Schools, PERF), 0920021 (Indiana Charter Schools, PERF), 0097099 (Indiana Charter Schools, TRF), 0092020 (Indiana Public Schools, TRF), and 0097081 (PURDUE POLYTECHNIC HIGH SCHOOL INDIANAPOLIS, TRF). A 'Next' button is at the bottom of the table.

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

4.1 Access the Home Dashboard

To access the *HomeDashboard*:

1. Select a Submission Unit from the grid on the ERM *Home* page.

NOTE: Only the Submission Units that the user's security role allows the user to access display in the grid.

2. Click **Next**. The *Home Dashboard* for the selected Submission Unit opens, as shown in Figure 2.

Figure 2: Home Dashboard on the ERM Home Page

Home Dashboard Submission Unit : CITY OF INDIANAPOLIS

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* has these sections for the selected Submission Unit:

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

NOTE: For more information about the Home Dashboard, see the [ERM Overview Manual - Employer](#).

4.1.1 Missing Member Report

For details about the report, refer to the [ERM Missing Member Report QRG - Employer](#) available on the [ERM – Quick Reference Guides](#) page of the INPRS website.

4.2 Access and View Employer Account Options

Click the ► to the left of *Employer* in the *Navigation Menu*. A drop-down menu displays all employer management options, as shown in Figure 3. Actions associated with each option are described in Table 1.

Figure 3: Employer Management Options Menu

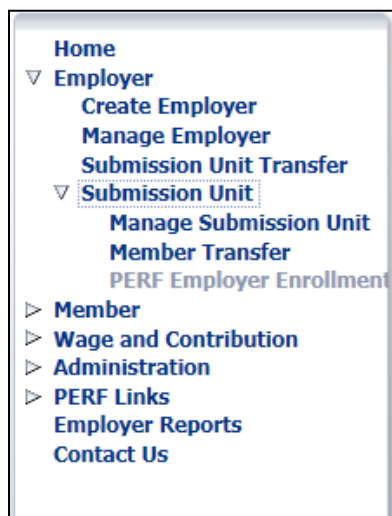


Table 1: Actions Available for Employer Account Options Menu

Menu Option	Action
Create Employer	Create a new employer account in the ERM application (INPRS Staff User-only).
Manage Employer	Update information in 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"> Manage Submission Unit: Update information for an existing Submission Unit. Member Transfer: Move a member between two Submission Units (INPRS Staff User-only).

5 New Employer

This process is managed by the INPRS Employer Advocate (EA) Team. All related forms and documents are available from the EA Team. If you have questions, contact INPRS.

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6 Manage an Employer

NOTE: Throughout this section all required fields marked with an asterisk (*) must be completed before the record can be processed.

NOTE: Several subsections in this section are titled **View**. These are areas that the employer can view but cannot make changes. If you have questions about these actions, contact INPRS.

Employer Users can add, delete, modify or view information in employer accounts, including:

- **Account Details** (view-only)
- **Contact information**
- **Address and phone number**
- **Funds** (view-only)
- **Groups** (view-only)
- **Submission Unit information** (view only)

The specific employer information that an Employer User can access and update depends upon his or her security role.

6.1 Locate an Employer Account

To locate an existing employer account, choose **Manage Employer** from the drop-down menu below **Employer** in the *Navigation Menu*.

This takes you to the *Manage Employer* screen shown in Figure 4.

Figure 4: Manage Employer Screen

The screenshot displays the 'Manage Employer' interface. At the top, there is a 'Search Employer' section with input fields for 'Employer Name' and 'Employer Number', and a 'Search' button. A green box labeled 'Section 1' highlights the search area. Below this is a table of employers with columns for 'Employer Name', 'Status', 'Status Date', and 'Employer Number'. A green box labeled 'Section 2' highlights the table. At the bottom, there is an 'Account Detail' section with tabs for 'Contacts', 'Address & Phone', 'Funds', 'Groups', and 'Submission Units'. The 'Account Detail' tab is selected, showing fields for 'Employer Number', 'Employer Name', 'Email Address', 'Status', and 'Effective Date'. A green box labeled 'Section 3' highlights the account details section.

Employer Name	Status	Status Date	Employer Number
New County	Active	01/01/1980	1000
New Town	Active	05/01/2009	1001
New County	Active	01/12/2012	1002
Hamilton County	Active	02/01/2012	1003

Account Detail | Contacts | Address & Phone | Funds | Groups | Submission Units

Employer Number: 1000
Employer Name: New County
Email Address:
Status: Active
Effective Date: 01/01/1980

The *Manage Employer* screen contains three sections for searching and managing information in employer accounts.

- **Section 1** contains search fields that allow you to locate employer account information using either the employer name or ID number.

NOTE: This section is mostly used by INPRS Staff Users. The employer account that your security role allows you to view is auto-populated in Section 2 of the screen.

- **Section 2** of the *Manage Employer* screen contains a grid that is automatically populated with the employer account(s) that you have permission to view.
- **Section 3** displays several tabs that contain demographic data for the employer account.

6.1.1 Search for a Specific Employer Account

Search for an employer by name

1. Enter the name of the employer in the **Employer Name** field.
2. Click **Search**.

Search for an employer by ID number

1. Enter the employer's ID number in the **Employer Number** field.
2. Click **Search**.

6.1.2 Select an Employer Account

All employer records that you have permission to view displays in the scrollable grid found in Section 2 of the *Manage Employer* screen, shown in Figure 4. To select an employer using the scrollable grid:

1. Click the employer name on the grid.
2. Once you select an employer record to view, the tabs in Section 3 populate with the chosen employer's demographic data. The tabs found in this section are:
 - **Account Detail**
 - **Contacts**
 - **Address & Phone**
 - **Funds**
 - **Groups**
 - **Submission Units**

6.2 View Account Detail Information

The **Account Detail** tab, shown in Figure 5, displays employer account details, including:

- **Employer Number**
- **Employer Name**

- Email Address
- Status
- Effective Date

Figure 5: Account Detail Tab, Manage Employer Screen

Search Employer

Employer Name

Employer Number

Search

Employers

Employer Name	Status	Status Date	Employer Number
New County	Active	01/01/1980	1000
New Town	Active	05/01/2009	1001
New County	Active	01/12/2012	1002
Hamilton County	Active	02/01/2012	1003

Account Detail

Contacts

Address & Phone

Funds

Groups

Submission Units

Employer Number: 1000

Employer Name: New County

Email Address:

Status: Active

Effective Date: 01/01/1980

NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Account Detail** tab.

6.3 Manage an Employer Contact

To manage employer contact information, choose the **Contacts** tab. This displays a table containing all contacts for the employer account, as shown in Figure 6.

Figure 6: Contacts Tab, Manage Employer Screen

Search Employer

Employer Name

Employer Number

Search

Employers

Employer Name	Status	Status Date	Employer Number
New County	Active	08/29/2011	1000

Account Detail

Contacts

Address & Phone

Funds

Groups

Submission Units

Contacts

Action	First Name	Middle Name	Last Name	Email Address	Effective Date
Modify Delete	Sean		Maynard	smaynard@new.gov	10/01/2008

Add Contact

Contact Phone Numbers

Action	Phone Type	Phone	Extension
Modify Delete	CELL	(999) 555-2222	
Modify	MAIN	(555) 555-2221	

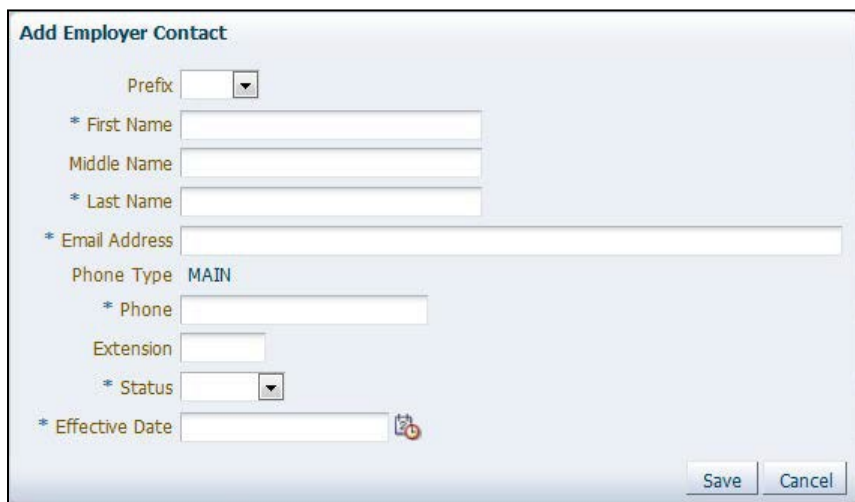
Add Phone Number

6.3.1 Add an Employer Contact

To add an employer contact

1. Click **Add Contact** under the *Contacts* table. This opens an *Add Employer Contact* Dialog Box, as shown in Figure 7. The Dialog Box contains the following fields:
 - **Prefix**
 - **First Name**
 - **Middle Name**
 - **Last Name**
 - **Email Address**
 - **Phone Type**
 - **Phone**
 - **Extension**
 - **Status**
 - **Effective Date**

Figure 7: Add Employer Contact, Manage Employer Screen



2. Click the arrow to the right of the **Prefix** field to access a drop-down menu of prefix choices. This field is not required.
3. Enter the first name of the employer contact in the **First Name** field.
4. Enter the middle name of the employer contact, if applicable, in the **Middle Name** field. This field is not required.
5. Enter the last name of the employer contact in the **Last Name** field.
6. Enter the contact's email address in the **Email Address** field.
7. Enter the contact's 10-digit phone number in the Phone field. The required format is shown in a pop-up bubble when you click the **Phone** field.

8. Enter the contact's telephone extension number (if applicable) in the **Extension** field. This field is not required.
9. Click the arrow next to the **Status** field to access a drop-down menu of the following status choices:
 - **Active**
 - **Inactive**
10. Choose **Active**.
11. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
12. Click **Save**.

6.3.2 Modify an Employer Contact

To modify an employer contact

1. Click the **Modify** link in the **Action** column of the *Contacts* table. A *Modify Employer Contact* Dialog Box opens, as shown in Figure 8. The Dialog Box contains the following modifiable fields:
 - **Prefix**
 - **First Name**
 - **Middle Name**
 - **Last Name**
 - **Email Address**
 - **Status**
 - **Effective Date**

Figure 8: Modify Employer Contact, Manage Employer Screen



2. Click the field(s) you want to modify.
3. Enter the updated employer contact information.
4. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click **Save**.

6.3.3 Delete an Employer Contact

To delete an employer contact

1. Click the **Delete** link in the **Action** column on the appropriate line of the *Contacts* table. A confirmation box opens.
2. Click **OK** to delete the contact.

6.3.4 Add an Employer Contact Phone Number

To add a phone number to a contact's account

1. Choose a contact from the **Contacts** table.
2. Click **Add Phone Number**. This opens the *Add Phone Number* dialog box shown in Figure 9. The dialog box contains the following fields:
 - **Phone Type**
 - **Phone**
 - **Extension**

Figure 9: Add Contact Phone Number, Manage Employer Screen



1. Click the arrow to the right of the **Phone Type** field to access a drop-down menu containing the following options:
 - **Main**
 - **Fax**
 - **Cell**

Every contact must have at least one phone number identified as **Main**. For all additional contact phone numbers, choose the correct phone type option.

2. Enter the phone number for the Submission Unit in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
3. If a particular extension is required. Enter this number in the Extension field. This field is not required.
4. Click **Save**.

6.3.5 Modify an Employer Contact Phone Number

To modify a contact's phone number

1. Choose a contact from the *Contacts* table. The phone numbers for the contact display in the *Contact Phone Numbers* table.
2. Click the **Modify** link in the **Action** column of the *Contact Phone Numbers* table at the bottom of the screen. This opens the *Modify Phone Number* dialog box shown in Figure 10. The dialog box contains the following fields:
 - **Phone Type**
 - **Phone**
 - **Extension**

Figure 10: Modify Contact Phone Number, Manage Employer Screen



3. Place your cursor in the field(s) you want to modify.
4. Enter the updated employer phone information.
5. Click **Save**.

6.3.6 Delete an Employer Contact Phone Number

To delete a contact phone number from a contact's account

1. Choose a contact from the *Contacts* table. The phone numbers for that contact display in the *Contact Phone Numbers* table.
2. Click the **Delete** link in the **Action** column on the appropriate line of the *Contact Phone Numbers* table. A confirmation box opens.
3. Click **OK** to delete the phone number.

6.4 Manage Employer Addresses and Phone Numbers

To manage an employer's address or phone number, choose the **Address & Phone** tab. This displays two tables, as shown in Figure 11. One table contains employer address information, and the other contains employer phone number information.

Figure 11: Address & Phone Tab, Manage Employer Screen

Search Employer

Employer Name

Employer Number

Search

Employers

Employer Name	Status	Status Date	Employer Number
New County	Active	08/29/2011	1000

Account Detail

Contacts

Address & Phone

Funds

Groups

Submission Units

Action	Address Type	Address	City	County	State	Zip Code
Modify Delete	PRIMARY	West Street	Indianapolis	49 Marion (In	IN-INDIANA	46204
Modify Delete	DEPARTMENT	South Street	Avon	32 Hendricks	IN-INDIANA	44204

Add Address

Action	Phone Type	Phone	Extension	Effective Date
Modify	MAIN	(317) 555-5555		
Modify Delete	CELL	(317) 555-4233		01/31/2000

Add Phone

6.4.1 Add an Employer Address

To add an employer address

- Click **Add Address** below the *Address* table on the screen. The *Add/Modify Address* dialog box opens, as shown in Figure 12. The dialog box contains the following fields:
 - Address Type**
 - Address**
 - City**
 - County**
 - State**
 - Zip Code**
 - Organizational Email**
 - Effective Date**

Figure 12: Add/Modify Address, Manage Employer Screen

Add / Modify Address

* Address Type

* Address

* City

* County

* State IN-INDIANA

* Zip Code

Organizational Email

* Effective Date

Save Cancel

2. Click the arrow next to the **Address Type** field to access a drop-down menu of these address types:
 - **Primary**
 - **Department**
3. Choose the appropriate address type.
4. Enter the employer's street address in the **Address** fields.
5. Enter the city name in the **City** field.
6. Click the arrow next to the **County** field to access a drop-down menu of Indiana counties. Click the correct county to populate the field. This field is only required if the employer's address is in Indiana.
7. The **State** field defaults to Indiana but can be changed. Click the arrow next to the **State** field to access a drop-down menu of states. Click the correct state, and the **State** field automatically updates.
8. Enter the five-digit **Zip Code** in the **Zip Code** field. The required format is shown in a pop-up bubble when you click the **Zip Code** field.
9. Enter the employer's email address in the **Organizational Email** field. This field is not required.
10. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
11. Click **Save**.

6.4.2 Modify an Employer Address

To modify an employer address

1. Click the **Modify** link in the **Action** column of the *Address* table. The *Add/Modify Address* Dialog Box shown in Figure 12 opens.
2. Place your cursor in the field(s) you want to modify.
3. Enter the updated employer address information.

4. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click **Save**.

6.4.3 Delete an Employer Address

To delete an employer address

1. Click the **Delete** link in the **Action** column on the appropriate line of the *Address* table. A confirmation box opens.
2. Click **OK** to delete the address.

6.4.4 Add an Employer Phone Number

To add an employer phone number

1. Choose an employer address from the *Address* table.
2. Click **Add Phone**. This opens the *Add Phone Number* dialog box shown in Figure 13.
3. The dialog box contains the following fields:
 - **Phone Type**
 - **Phone**
 - **Extension**
 - **Effective Date**

Figure 13: Add Phone Number, Manage Employer Screen



4. Click the arrow to the right of the **Phone Type** field to access a drop-down menu containing the following options:
 - **Main**
 - **Fax**
 - **Cell**

Every employer must have at least one phone number identified as **Main**. For all additional contact phone numbers, choose the correct phone type option.

5. Enter the phone number for the employer in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.

6. If a particular extension is required, enter this number in the **Extension** field. This field is not required.
7. Enter the date the phone number becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
8. Click **Save**.

6.4.5 Modify an Employer Phone Number

To modify an employer phone number

1. Choose an employer address from the *Address* table. All the phone numbers associated with that employer address display in the *Phone Table*.
2. Click the **Modify** link in the **Action** column of the *Phone* table at the bottom of the screen. This opens the *Modify Phone Number* dialog box shown in Figure 14. The dialog box contains the following fields:
 - **Phone Type**
 - **Phone**
 - **Extension**
 - **Effective Date**

Figure 14: Modify Phone Number, Manage Employer Screen



3. Place your cursor in the field(s) you want to modify.
4. Enter the updated employer phone information.
5. Enter the date the phone number becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
6. Click **Save**.

6.4.6 Delete an Employer Phone Number

To delete an employer phone number

1. Choose an employer address from the *Address* table. All the phone numbers associated with that employer address display in the *Phone* table.
2. Click the **Delete** link in the **Action** column on the appropriate line of the *Phone* table. A confirmation box opens.
3. Click **OK** to delete the phone number.

6.5 View Employer Funds

The **Funds** tab, shown in Figure 15, displays employer Fund details, including:

- **Fund Code**
- **Status**
- **Effective Date**

Figure 15: Funds Tab, Manage Employer Screen

Search Employer

Employer Name:

Employer Number:

Employers

Employer Name	Status	Status Date	Employer Number
New County	Active	08/21/2011	9999999
New County	Active	08/29/2011	1000

Account Detail | Contacts | Address & Phone | Funds | Groups | Submission Units

Action	Fund Code	Status	Effective Date
	PERF	Active	08/22/2011
	TRF	Active	08/22/2011
	JU	Active	08/22/2011
	CE	In-Active	08/24/2011
	77	Active	08/22/2011
	PA	Active	08/24/2011

NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Funds** tab.

6.6 View Employer Groups

The **Groups** tab, shown in Figure 16, displays groups associated with the employer account. For more information about the use of Groups within the ERM application, refer to the [ERM Glossary](#).

Figure 16: Groups Tab, Manage Employer Screen

Search Employer

Employer Name:

Employer Number:

Employers

Employer Name	Status	Status Date	Employer Number
New County	Active	08/21/2011	9999999
New County	Active	08/29/2011	1000

Account Detail | Contacts | Address & Phone | Funds | Groups | Submission Units

Groups

STATE
UNIVERSITIES

NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Groups** tab.

6.7 View Submission Unit Information for Employer Accounts

The **Submission Units** tab, shown in Figure 17, displays details about the Submission Units associated with an employer account, including:

- **Submission Unit ID**
- **Submission Unit Name**
- **Effective Date**
- **Submission Unit Type**
- **Fund Name**

Figure 17: Submission Units Tab, Manage Employer Screen

☒ Search Employer

Employer Name

Employer Number

☒ Employers

Employer Name	Status	Status Date	Employer Number
New County	Active	08/21/2011	9999999
New County	Active	08/29/2011	1000

Account Detail Contacts Address & Phone Funds Groups **Submission Units**

Unit ID	Unit Name	Effective Date	Unit Type	Fund Name
1234569	New County-Police Dept	08/22/2011	State	77
1234570	New County-Judges	08/22/2011	State	JU
1234568	New County-University	08/22/2011	University	TRF
1234567	New County-Library	08/22/2011	Library	PERF

NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Submission Units** tab.

7 Transfer a Submission Unit

Sometimes a Submission Unit needs to be transferred from one employer account to another. This can occur, for instance, when two participating employers merge. This must be done by INPRS. The Employer must contact the EA Team.

8 Merges and Splits (PERF)

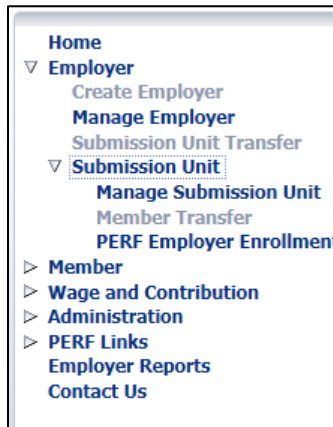
This procedure of PERF withdrawal and/or enlargement and joining process for employers who merge or split must be done by the EA Team. Examples are two or more employers may merge to form a new entity, or they may merge under the name of one of the employers, or a group of employees also may split off from an employer to form their own entity. In each of these cases, pension liability for service under the old employers must be assigned.

9 Manage a Submission Unit

NOTE: Throughout this section all required fields marked with an asterisk (*) must be completed before the record can be processed.

To manage a Submission Unit that already exists in the ERM application, click the arrow to the left of *Submission Unit* in the *Navigation Menu*. This opens a drop-down menu of all possible actions that you can perform on a Submission Unit account, as shown in Figure 18.

Figure 18: Submission Unit Option, Navigation Menu



The selections in the Submission Unit drop down menu:

- **Manage Submission Unit**
- **Member Transfer**
- **PERF Employer Enrollment Resolution**

Choose **Manage Submission Unit** to access the *Manage Submission Unit* screen. The **Member Transfer** option is grayed out for Employer Users, as it is an INPRS Staff User-only function. The **PERF Employer Enrollment Resolution** option is only available to PERF Employers.

9.1 Locate a Submission Unit Account

The *Manage Submission Unit* screen, shown in Figure 19, contains three sections for locating and managing information about Submission Units entered in the ERM application.

Figure 19: Manage Submission Unit

Search Submission Unit

Submission Unit ID: 0920020
Submission Unit Name:
[Search](#)

Submission Units

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
0920020	Indiana Public Schools	School Districts and...	Indiana	Participating	PERF

Account Details | Address & Phone | Payment Admin | W & C | Contacts | Hybrid | My Choice

Employer Name: Indiana
Unit Name: Indiana Public Schools
Unit Type: School Districts and Education Employers
Department of Education No:
Tax ID:
Status: Participating
Effective Date: 1/1/2019
Plan Selection: Both
Default Plan: PERF My Choice
Plan Effective Date: 7/1/2019
Does Employer have Classifications: No
Classification Effective Date: 7/1/2019

[Display Current Plan Election](#)

Search Submission Unit section contains search fields that allow you to locate Submission Unit account information using either the Submission Unit ID number or name.

NOTE: This section is mostly used by INPRS Staff Users. The Submission Unit accounts that your security role allows you to view are auto-populated in Section 2 of the screen.

- The *Submission Units* section contains a scrollable grid that is automatically populated with a list of the Submission Units you have permission to view and/or modify. Depending on fund affiliation, this section may also contain the link to the My Choice Open Enrollment.
- The bottom section displays tabs for **Account Details**, **Address & Phone**, **Payment Admin**, **W & C**, **Contacts**, **Hybrid**, and **My Choice**. PERF or TRF Submission Units see one or two tabs (Hybrid and/or My Choice) depending on plan election. All other funds see the **Contribution Type Details** tab. Additional fields show PERF submission units on the **Hybrid** or **My Choice** tabs, as applicable.

9.1.1 Search for a Specific Submission Unit Account

Search for a Submission Unit by ID number

1. Enter the Submission Unit ID number in the **Submission Unit ID** field.
2. Click **Search**.

Search for a Submission Unit by name

1. Enter the name of the Submission Unit in the **Submission Unit Name** field.
2. Click **Search**.

9.1.2 Select a Submission Unit Account

All Submission Unit records that you have permission to view display in the scrollable grid in the *Submission Units* section.

Select a Submission Unit from the scrollable grid:

1. Scroll through the grid until the record for the Submission Unit you want to update is visible.
2. Click the line associated with the Submission Unit record you want to view.

Once you have selected a Submission Unit to modify, the tabs below the scrollable grid populates with the chosen Submission Unit's data.

NOTE: For Employer Users who only have access to one Submission Unit account, the grid in Section 2 and the tabs in the bottom section display only the information for that Submission Unit.

9.2 Manage Account Details Information

The **Account Detail** tab on the *Manage Submission Unit* screen, as shown in Figure 20, displays Submission Unit account information, including:

- **Employer Name**
- **Unit Name**
- **Unit Type**
- **Department of Education No.**
- **Tax ID**
- **Status**
- **Effective Date**
- **Plan Selection**
- **Default Plan**
- **Plan Effective Date**
- **Does Employer have Classifications** (PERF Only)
- **Classification Effective Date** (PERF Only)

Figure 20: Account Details Tab, Manage Submission Unit

Employer > Submission Unit > Manage Submission Unit

Wednesday, April 27, 2016
Logout

Search Submission Unit

Submission Unit ID

Submission Unit Name

Search

Submission Units

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
888888	New County - Auditor	Other Government	New County	Participating	PERF

Acct Detail

Addr & Phone

Pay Admin

W & C

Contacts

PERF Hybrid

MyChoice

Employer Name: New County

Unit Name: New County - Auditor

Unit Type: Other Government Entity

Department of Education No:

Tax ID:

Status: Participating

Effective Date: 1/1/2016

Plan Selection: PERF Hybrid

Default Plan:

Plan Effective Date: 1/1/2016

Does Employer have Classifications: No

Do any of these Classifications offer BOTH Hybrid and MyChoice?!

Classification Effective Date:

Mandatory Contributions (ASA) Paid By: Employer

Mandatory Contributions (ASA) Paid By Effective Date: 7/1/2016

Display Current Plan Election

The **Account Details** tab contains the **Display Current Plan Election** button

NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Account Details** tab.

9.3 Manage Submission Unit Address or Phone Number Information

To manage Submission Unit address or phone number information, choose the **Address & Phone** tab. This displays two tables, as shown in Figure 21. One has Submission Unit address information, and one has Submission Unit phone number information.

Figure 21: Address & Phone Tab, Manage Submission Unit

Search Submission Unit

Submission Unit ID:

Submission Unit Name:

Submission Units

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
8888888	New County - Auditor	Other Government...	New County	Participating	PERF

Acct Detail Addr & Phone Pay Admin W & C Contacts PERF Hybrid MyChoice

Address

Action	Address Type	Address	City	State	Zip	County
Modify	PRIMARY	123 Street	Indianapolis	IN-INDIANA	55555	1 Adams (Decatur)

Add Address

Phone Number

Action	Phone Type	Effective Date	Phone	Extension
Modify	Main	01/01/2016	(555) 555-5555	

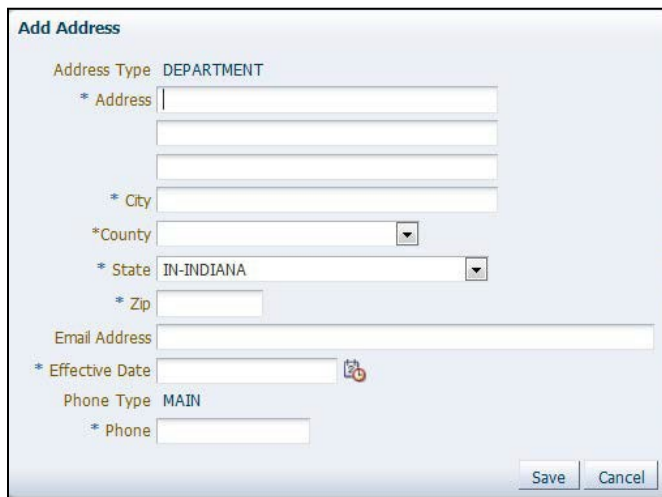
Add Phone Number

9.3.1 Add a Submission Unit Address

To add a Submission Unit address

1. Click **Add Address** below the *Address* table on the screen. An **Add Address** dialog box opens, as shown in Figure 22. The dialog box contains the following fields:
 - **Address Type**
 - **Address**
 - **City**
 - **County**
 - **State**
 - **Zip**
 - **Submission Unit Email Address**
 - **Effective Date**
 - **Phone Type**
 - **Phone**

Figure 22: Add Address, Manage Submission Unit



2. The **Address Type** defaults to **Department** and cannot be changed.
3. Enter the street address of the Submission Unit in the **Address** fields.
4. Enter the city name in the **City** field.
5. Click the arrow next to the **County** field to access a drop-down menu of Indiana counties. Choose the correct county to populate the field. This field is only required if the Submission Unit's address is in Indiana.
6. The **State** field defaults to Indiana but can be changed. Click the arrow next to the field to access a drop-down menu of states. Choose the correct state, and the **State** field automatically updates.
7. Enter the 9-digit ZIP Code (ZIP + 4) in the **Zip** field. The required format is shown in a pop-up bubble when you click the **Zip** field.
8. Enter the Submission Unit's email address in the **Email Address** field. This field is not required.
9. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
10. Enter the phone number for the Submission Unit in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field. The phone type defaults to **Main**; this cannot be changed.
11. Verify that all required fields are completed, and then click **Save**.

9.3.2 Modify a Submission Unit Address

To modify a Submission Unit address

1. Click the **Modify** link in the **Action** column on the appropriate line of the **Address** table. A **Modify Address** Dialog Box opens, as shown in Figure 23. The Dialog Box contains the following modifiable fields:
 - **Address**
 - **City**
 - **County**
 - **State**

- Zip
- Submission Unit Email Address
- Effective Date

Figure 23: Modify Address, Manage Submission Unit

2. Place the cursor in the field to be modified.
3. Enter the updated Submission Unit address information.
4. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Verify that all required fields are populated, then click **Save**.

9.3.3 Add a Submission Unit Phone Number

To add a Submission Unit Phone Number

1. Choose a Submission Unit address from the *Address* table.
2. Click **Add Phone Number**. An **Add Phone Number** dialog box opens, as shown in Figure 24. The dialog box contains the following fields:
 - Phone Type
 - Phone
 - Extension
 - Effective Date

Figure 24: Add Phone Number, Manage Submission Unit



3. Click the arrow to the right of the **Phone Type** field to access a drop-down menu containing the following options:

- **Main**
- **Fax**
- **Cell**

The **Phone Type** field defaults to **Main**. Every Submission Unit must have at least one phone number identified as *Main*. For all additional contact phone numbers, choose the correct phone type option.

Enter the phone number for the Submission Unit in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.

4. If a particular extension is required, enter this number in the **Extension** field.
5. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
6. Click **Save**.

9.3.4 Modify a Submission Unit Phone Number

To modify a Submission Unit phone number

1. Choose a Submission Unit address from the *Address* table. All the phone numbers associated with that Submission Unit display in the *Phone Number* table.
2. Click the **Modify** link in the **Action** column of the *Phone* table at the bottom of the screen. This opens the **Modify Phone Number** dialog box, as shown in Figure 25.

Figure 25: Modify Phone Number, Manage Submission Unit



3. Place your cursor in the field you want to modify.
4. Enter the updated Submission Unit phone information.

5. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
6. Click **Save**.

9.4 Manage Submission Unit Payment Administration

To manage Submission Unit payment administration information, choose the **Payment Admin** tab. This displays a table, where bank account information related to the Submission Unit is entered and stored as shown in Figure 26. INPRS Staff Users can view the information contained in this table but cannot modify it.

Figure 26: Payment Admin Tab, Manage Submission Unit

Search Submission Unit

Submission Unit ID:

Submission Unit Name:

Submission Units

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
8888888	New County - Auditor	Other Government	New County	Participating	PERF

Acct Detail **Addr & Phone** **Pay Admin** **W & C** **Contacts** **PERF Hybrid** **MyChoice**

Action	Bank	Description	Account Number	Routing Number	Account Type	Default	Status	Effective Date
Modify	New County Bank	Checking	123456489	051000017	Checking	Yes	Inactive	01/01/2016
Modify	New County Bank	Checking 1	123456489	041215032	Checking	Yes	Inactive	01/01/2016

9.4.1 Add Bank Account to a Submission Unit Account

To Add Bank Account

1. Click **Add Bank Account** below the *Bank* table. This opens an **Add Bank Account** dialog box, as shown in Figure 27. The dialog box contains the following fields:
 - **Bank**
 - **Description**
 - **Account Number**
 - **Routing Number**
 - **Account Type**
 - **Default Account**
 - **Effective Date**

Figure 27: Add Bank Account, Manage Submission Unit



2. Enter the name of the bank associated with the Submission Unit in the **Bank** field.
3. If applicable, enter a description in the **Description** field.
4. Enter the bank account number in the **Account Number** field.
5. Enter the routing number for the bank account in the **Routing Number** field.
6. Click the arrow next to the **Account Type** field to access a drop-down menu containing a list of bank account types. These bank account types are:
 - **Savings**
 - **Checking**
7. Click the appropriate enter to populate the field.
8. Click the arrow next to the **Default Account** field to access a drop-down menu containing **Yes** and **No**. Choose the appropriate answer.
 - Any time you must choose between multiple bank accounts, the *Default* account automatically is selected.
 - When the *Default* account is automatically selected but is not to be used, you must manually select a different bank account from the drop-down menu.

NOTE: Only one bank account may be designated as the default bank account for a Submission Unit.

9. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
10. Click **Save**.

NOTE: ERM automatically assigns any newly created bank account with status of **Inactive**. Once the bank account is authenticated, ERM updates the status to **Active**. It may take up to 10 business days to authenticate the account. During that time, this bank account is not available for contribution payments. If the bank account cannot be authenticated, an INPRS Staff member contacts you, via phone or email, and instruct you to change the status to **Invalid**.

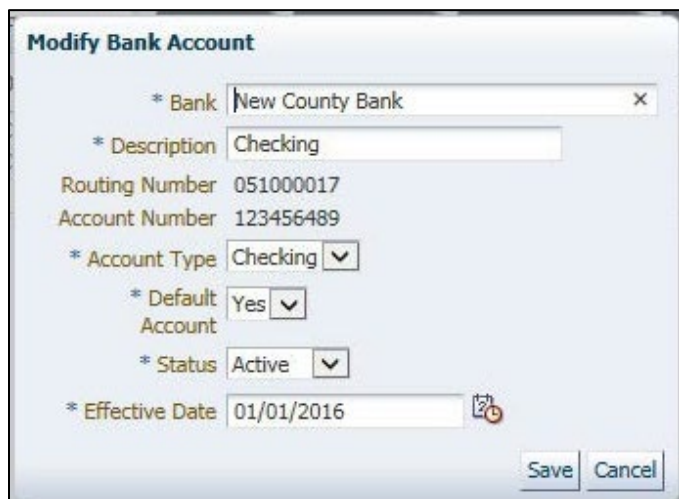
9.4.2 Modify Submission Unit Bank Account

To Modify a Submission Unit's Bank Account

1. Click the **Modify** link found in the **Action** column on the appropriate line of the *Bank* table at the bottom of the screen. This opens the **Modify Bank Account** dialog box, as shown in Figure 28.

NOTE: The **Routing Number** and **Account Number** cannot be changed. If the situation requires this change a new bank account must be added. Refer to the *Add Bank Account to a Submission Unit Account* section of this manual for details.

Figure 28: Modify Bank Account, Manage Submission Unit



2. Click the field(s) you want to modify.
3. Enter the updated Submission Unit bank account information.
4. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
5. Click **Save**.

9.5 Manage Wage and Contribution (W&C) Submission Information

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. The Staff versions are available from INPRS's document management system (PPM).

Choosing the **W&C** tab displays information about payroll data. As shown in Figure 29, the information includes:

- **First payroll date** associated with each payroll frequency
- **Period designations** (payroll frequencies)
- **Payroll effective date** for each payroll frequency/first payroll date combination
- **Payroll Calendar**

Figure 29: W&C Tab, Manage Submission Unit

Search Submission Unit

Submission Unit ID:

Submission Unit Name:

Submission Units

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
8888888	New County - Auditor	Other Government	New County	Participating	PERF

Acct Detail | Addr & Phone | Pay Admin | **W & C | Contacts | PERF Hybrid | MyChoice**

First Payroll Date	Period Designation	Payroll Effective Start Date	Payroll Effective End Date	Payroll Calendar
1/4/2016	Bi-weekly - 1	1/1/2016		Create Payroll Calendar Modify Payroll Calendar
1/8/2016	Weekly - 1	1/1/2016		Create Payroll Calendar Modify Payroll Calendar

Employer Users save and confirm a payroll calendar to a Submission Unit account upon their initial login through the **W&C** tab on the *Manage Submission Unit* screen.

Save and Confirm a Payroll Calendar

1. Click the **Create Payroll Calendar** link in the **Payroll Calendar** column on the appropriate line of the table under the **W&C** tab. This opens the **Define Payroll Dates** dialog box, shown in Figure 30.

Figure 30: Define Payroll Dates, Manage Submission Unit

Define Payroll Dates

Year 2016

#	Payroll Date
1	1/8/2016
2	1/15/2016
3	1/22/2016
4	1/29/2016
5	2/5/2016
6	2/12/2016
7	2/19/2016
8	2/26/2016
9	3/4/2016
10	3/11/2016
11	3/18/2016
12	3/25/2016
13	4/1/2016
14	4/8/2016
15	4/15/2016

You may not designate payroll dates that fall on a weekend or state holiday. Should a payroll date fall on a weekend or state holiday, please adjust the date to the next business day.

2. The applicable payroll dates are entered by INPRS Staff into the **Payroll Date** fields in the Dialog Box. The number of required payroll dates varies depending upon the payroll frequency.

3. Click **Save** if the dates are correct. If the dates are incorrect, contact INPRS staff. A confirmation screen displays, as shown in Figure 31.
4. Confirm that the entered payroll dates are correct by selecting **Agree** in the dialog box. The Payroll Calendar is saved to the ERM application.

Figure 31: Confirm Payroll Calendar, Manage Submission Unit

A confirmation dialog box titled "Confirm" with a checkmark icon. The text inside reads: "Click 'Agree' to confirm these payroll dates for the calendar year. If you wish to change these dates, you must contact INPRS." At the bottom, there are two buttons: "Agree" and "Cancel".

9.6 Manage Submission Unit Contact Information

To manage Submission Unit contact information, choose the **Contacts** tab. This displays a table containing all applicable contacts for the Submission Unit, as shown in Figure 32. To search for an existing contact use the **First Name**, **Last Name**, or **Contact Status** fields in the *Contacts* section of the screen.

NOTE: Once you click **Agree** in the *Confirm* dialog box, you cannot make any changes to the payroll calendar through the ERM application. Should you need to update the payroll calendar for any reason, you must contact INPRS. You cannot submit wages and contributions to the ERM application until you have confirmed your payroll dates.

Figure 32: Contacts Tab, Manage Submission Unit

The screenshot shows the "Contacts" tab within the "Manage Submission Unit" interface. At the top, there's a table for "Submission Units" with columns: Unit ID, Unit Name, Unit Type, Employer Name, Status, and Fund Name. Below this is a navigation bar with tabs: Acct Detail, Addr & Phone, Pay Admin, W & C, **Contacts**, PERF Hybrid, and MyChoice. The "Contacts" section includes search fields for First Name, Last Name, and Contact Status, along with a Search button. Below the search fields is a table of contacts with columns: Action, First Name, Last Name, Email Address, and Contact Types. The table lists three contacts: Dinah Shore, Whitney Deal, and Bob Test. At the bottom, there's an "Add Contact" button and a "Contact Phone Numbers" section with a table for phone numbers (Action, Phone Type, Phone, Extension) and an "Add Phone Number" button.

9.6.1 Add a Submission Unit Contact

To Add a Submission Unit Contact

1. Click **Add Contact** below the *Contacts* table on the screen. The *Add Submission Unit Contact* dialog box opens, as shown in Figure 33.

Figure 33: Add Submission Unit Contact, Manage Submission Unit

Add Submission Unit Contact

Prefix

* First Name

Middle Name

* Last Name

* Email Address

Phone Type **Main**

* Phone

Extension

* Status

* Effective Date

* Contact Types

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

Save Cancel

2. Click the arrow to the right of the **Prefix** field to access a drop-down menu of prefix choices. Click the applicable prefix to populate the field. This field is not required.
3. Enter the first name of the Submission Unit contact in the **First Name** field.
4. Enter the middle name of the Submission Unit contact, if applicable, in the **Middle Name** field. This field is not required.
5. Enter the last name of the Submission Unit contact in the **Last Name** field.
6. Enter the contact's email address in the **Email Address** field.
7. Enter the contact's 10-digit phone number in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field. The phone type defaults to **Main**; this cannot be changed.
8. If a particular extension is required, enter this number in the **Extension** field.
9. Click the arrow next to the **Status** field to access a drop-down menu of these status choices:
 - **Active**
 - **Inactive**
10. Choose the **Active** status.
11. Enter the date the new information becomes effective in the **Effective Date** field. The required format is shown in a pop-up bubble when you click the **Effective Date** field.
12. Choose the contact type, using the shuttle window in the **Contact Type** field. The contact types listed depends on the fund.

- a. Choose the appropriate contact type(s) from this list, found in the box on the left:
 - **Authorized Agent**
 - **Authorized Agent-Clerk Treasurer**
 - **Authorized Agent-Trustee(77 Fund Only)**
 - **Authorized Agent-Controller (77 Fund Only)**
 - **Chief (77 Fund Only)**
 - **Superintendent (TRF Only)**
 - **Pension Secretary**
 - **Personnel**
 - **Rate Letter**
 - **Retirement**
 - **Treasurer/Finance**
 - **Wage and Contribution**
 - **Other Contact**
13. Click the right single arrow to move the chosen contact type to the box on the right side of the screen.
 - a. If a contact type is added to the box on the right side of the screen by mistake, complete the following steps:
 - b. In the box on the right side of the screen, highlight the appropriate contact type from the list.
 - 1) Click the left single arrow to move the contact type to the box on the left side of the screen.
 - 2) Verify the entered information is correct and then click **Save**.

NOTE: For the definition of each contact type, see the [ERM Glossary](#) document available from the INPRS website.

9.6.2 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.

Add a Submission Unit Contact in the *Administration* Section

1. Access the *Administration* section of the ERM application as shown in Figure 34.

Figure 34: Administration Options, Navigation Menu



2. Click **Users**, and the *Employer User* screen displays, as shown in Figure 35.

Figure 35: Employer User

The 'Employer User' screen is divided into several sections. At the top, there is a 'Search Submission Unit' section with input fields for 'Submission Unit ID' and 'Submission Unit Name', and a 'Search' button. Below this is a 'Submission Units' section containing a table with two columns: 'Unit ID' and 'Unit Name'. The table has one row with the values '8010000' and 'New County - PERF'. At the bottom is a 'Submission Unit Contacts' section with a table that has five columns: 'Action', 'Employer User', 'First Name', 'Last Name', and 'Email'. The table has one row with the values 'Modify User', 'Yes', 'Jamie', 'Wells', and 'jwells1@new.gov'. There is also an 'Add Contacts' button at the bottom left of this section.

Unit ID	Unit Name
8010000	New County - PERF

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

3. Select the Submission Unit for the contact to be added and click **Add Contacts**. This opens the **Email Search** dialog box, as shown in Figure 36.

Figure 36: Email Search, Employer User

The 'Email Search' dialog box is shown. It has a search field for 'Email' with a 'Search' button. Below this is a section for 'Contacts' with two columns: 'Available Contacts' and 'Selected Contacts'. There are four arrows between these columns: 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.

4. When the shuttle window displays, enter the email address for the contact into the **Email** field and click **Search**. If the email address is found, it displays in the *Available Contacts* list on the left side of the shuttle window.
5. Click the right facing single arrow to move the email address to the *Selected Contacts* list on the right side of the screen. Click **Save** to add the contact to the Submission Unit.
6. Once the contact is added, return to the *Manage Submission Unit* screen to modify the contact, if necessary.

9.6.3 Add a Submission Unit Contact Phone Number

To Add a Submission Unit Contact Phone Number

1. Choose a Submission Unit contact from the *Contacts* table.
2. Click **Add Phone Number**. This opens the **Add/Edit Phone Number** dialog box, as shown in Figure 37. The dialog box contains the following fields:
 - **Phone Type**
 - **Phone**
 - **Extension**

Figure 37: Add/Edit Phone Number, Manage Submission Unit



3. Click the arrow to the right of the **Phone Type** field to access a drop-down menu of the following options:
 - **Main**
 - **Cell**
 - **Fax**
4. Every contact must have at least one phone number identified as *Main*. For all additional contact phone numbers, choose the correct phone type option from the drop-down menu.
5. Enter the phone number for the contact in the **Phone** field. The required format is shown in a pop-up bubble when you click the **Phone** field.
6. If a particular extension is required, enter this number in the **Extension** field.
7. Click **Save**.

9.6.4 Modify a Submission Unit Contact

To Modify a Submission Unit Contact

1. Click the **Modify** link in the **Action** column on the appropriate line of the *Submission Unit Contacts* table. The *Edit Submission Unit Contact* dialog box opens, as shown in Figure 38. The dialog box contains the following modifiable fields:

- **Prefix**
- **First Name**
- **Middle Name**
- **Last Name**
- **Status**
- **Effective Date**
- **Contact Type Id**

NOTE: Contact Types *Superintendent* for TRF and *Authorized Agent* for PERF can only be modified by an INPRS Staff User.

Figure 38: Edit Submission Unit Contact, Manage Submission Unit

Edit Submission Unit Contact

Prefix: Mrs. ▼

* First Name: Danielle

Middle Name:

* Last Name: Elliott

Email Address: abc@fakeemail.com

* Status: Inactive ▼

* Effective Date: 1/1/2016

* Contact Types: Auth Agent - Clerk-Treasurer, Wage and Contribution, Treasurer/Finance, Personnel, Retirement, Rate Letter, Other Contact

Authorized Agent:

Save Cancel

2. Click the field(s) you want to modify.
3. Enter the updated Submission Unit contact information.
4. Click **Save**.

9.6.5 Modify a Submission Unit Contact Phone Number

To Modify a Submission Unit Contact Phone Number

1. Choose a contact from the *Contacts* table. All phone numbers associated with that contact displays in the *Contact Phone Numbers* table.

2. Click the **Modify** link in the **Action** column on the appropriate line of the *Phone* table at the bottom of the screen. This opens the *Add/Edit Phone Number* dialog box, as shown in Figure 37.
3. This box contains the following fields:
 - **Phone Type**
 - **Phone**
 - **Extension**
4. Place your cursor in the field(s) you want to modify.
5. Enter the updated contact's phone information.
6. Click **Save**.

9.6.6 Delete a Submission Unit Contact Phone Number

Only Submission Unit contact phone numbers designated as *Cell* or *Fax* can be deleted. To delete a Submission Unit contact phone number:

1. Choose a contact from the *Contacts* table. All phone numbers associated with that contact displays in the *Contact Phone Numbers* table.
2. Click the **Delete** link in the **Action** column of the *Phone* table at the bottom of the screen. A confirmation box displays.
3. Click **OK** to delete the phone number.

9.7 View Submission Unit Contribution Type Details

The **Contribution Type Details** tab displays details about the Fund associated with a Submission Unit account and the types of contributions made to that Fund. The information for each Fund type is different. The name and number of tabs viewable may be different depending on Fund affiliation.

NOTE: Employer Users have view-only access to the information contained in the fields associated with the **Contribution Type Details** tab of the *Modify Submission Unit* screen.

NOTE: PERF and TRF no longer have a separate **Contribution Type Details** tab. The information from that tab is now part of the **Hybrid** or **My Choice** tabs for PERF and TRF. For all other Funds, the **Contribution Type Details** tab is available.

9.7.1 PERF or TRF Hybrid

For PERF or TRF, the **Hybrid** tab displays contribution type details with the following fields, as shown in Figures 39 and 40:

Table 2: PERF or TRF Hybrid tab

PERF Hybrid	TRF Hybrid
<ul style="list-style-type: none"> • Employer • Submission Unit 	<ul style="list-style-type: none"> • Employer • Submission Unit

Figure 40: (TRF) Hybrid Tab

Search Submission Unit

Submission Unit ID:

Submission Unit Name:

Submission Units

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
0045032	NORTHWEST INDIANA SPEC ED COOP	School Districts and ...	NORTHWEST IN SP...	Participating	TRF

Acc Dets Add & Ph Pay Admin W & C Alt Cal Contacts **Hybrid** My Choice MME

Employer: NORTHWEST IN SP ED COOP

Submission Unit: NORTHWEST INDIANA SPEC ED COOP

Fund: TRF

Total Mandatory Contribution (ASA) Percentage: 3%

Total Mandatory Contribution (ASA) Percentage Effective Date:

Employer Contribution (DB) Percentage: 6%

Employer Contribution (DB) Percentage Effective Date: 07/01/2022

Mandatory Contribution(ASA) Paid By: Split-by Position

Mandatory Contribution (ASA) Paid By Effective Date: 7/9/2012

Voluntary Contribution (ASA Pre-tax): ☒

Voluntary Contribution (ASA Pre-tax) Effective Date: 7/9/2003

9.7.2 PERF or TRF My Choice

For PERF or TRF the **My Choice** tab, the contribution details are displayed in the following fields, as shown in Figure 41 and Figure 42:

Table 3: PERF or TRF My Choice tab

PERF My Choice	TRF My Choice
<ul style="list-style-type: none"> • Employer • Submission Unit • Fund • Total Mandatory Contribution • Total Mandatory Contribution Effective Date • Normal Cost • Normal Cost Effective Date • Supplemental Cost • Supplemental Cost Effective Date • Required to Pay Supplemental Cost (<i>Local Government/Political Subdivison only if joined prior to July 1, 2015, otherwise</i>) <ul style="list-style-type: none"> ○ YES: Forfeiture goes to ER Reserve • Required to Pay Supplemental Costs Effective Date • Forfeiture goes to ER Reserve • Matching Contribution • Matching Contribution Effective Date • Voluntary Contribution (ASA Pre-tax) * 	<ul style="list-style-type: none"> • Employer • Submission Unit • Fund • Total Mandatory Contribution (ASA) Percentage • Total Mandatory Contribution (ASA) Effective Date • Normal Cost • Normal Cost Effective Date • Supplemental Costs • Supplemental Costs Effective Date • Matching Contribution • Matching Contribution Effective Date • Mandatory Contributions (ASA) Paid By • Mandatory Contributions (ASA) Paid By Effective Date

PERF My Choice	TRF My Choice
<ul style="list-style-type: none"> Voluntary Contribution (ASA Pre-tax) Effective Date * Mandatory Contributions (ASA) Paid By Mandatory Contributions (ASA) Paid By Effective Date 	

* **Effective 1/01/2018** Voluntary Pre-Tax Contributions are no longer an option for new participation by members or employers. Participation cannot be changed or added as of 1/01/2018. Employers and members already enrolled in the Voluntary Pre-Tax Contributions prior to 1/01/2018 must remain in the plan as is. The election for participation in this plan is irrevocable for both the member and the employer.

Figure 41: (PERF) My Choice Tab with Contribution Type Details

Search Submission Unit

Submission Unit ID:

Submission Unit Name:

Submission Units

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
1173000	CITY OF INDIANAPOLIS	City	CITY OF INDIANAP...	Participating	PERF

Account Details Address & Phone Payment Admin W & C Contacts Hybrid My Choice

My Choice

Employer: CITY OF INDIANAPOLIS
 Submission Unit: CITY OF INDIANAPOLIS
 Fund: PERF

Total Mandatory Contribution (ASA) Percentage: 3.0%
 Total Mandatory Contribution (ASA) Percentage Effective Date: 1/1/1800
 Normal Cost: 1.2%
 Normal Cost Effective Date: 1/1/2019
 Supplemental Costs: 7%
 Supplemental Costs Effective Date: 01/01/2019
 Required to Pay Supplemental Costs: Y
 Required to Pay Supplemental Costs Effective Date: 1/1/2017
 Forfeiture goes to ER Reserve: Y
 Forfeiture goes to ER Reserve Effective Date: 1/1/2017
 Matching Contribution: 0%
 Matching Contribution Effective Date: 1/1/2017
 Voluntary Contribution (My Choice Pre-Tax): Y
 Voluntary Contribution (My Choice Pre-Tax) Effective Date: 1/1/2017
 Mandatory Contributions (ASA) Paid By: Employer
 Mandatory Contributions (ASA) Paid By Effective Date: 09/26/2012

Figure 42: (TRF) My Choice Tab with Contribution Type Details

▼ Search Submission Unit

Submission Unit ID

Submission Unit Name

Search

▼ Submission Units

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
0049011	Indianapolis Public Schools	School Districts and...	INDIANAPOLIS PUB...	Participating	TRF

Account Details

Address & Phone

Payment Admin

W & C

Contacts

Hybrid

My Choice

Employer: INDIANAPOLIS PUBLIC SCHOOLS

Submission Unit: Indianapolis Public Schools

Fund: TRF

Total Mandatory Contribution (ASA) Percentage: 3.0%

Total Mandatory Contribution (ASA) Percentage Effective Date: 7/1/2016

Normal Cost: 5%

Normal Cost Effective Date: 7/1/2018

Supplemental Costs: 2.5%

Supplemental Costs Effective Date: 07/01/2018

Matching Contribution: 0%

Matching Contribution Effective Date: 7/1/2018

Mandatory Contributions (ASA) Paid By: Split-by Position

Mandatory Contributions (ASA) Paid By Effective Date: 08/02/2012

Modify

Display Current Rates

9.7.3 1977 Fund Contribution Type Details

NOTE: In ERM, ASA is included in field titles because this is standard verbiage in ERM. However, ASA does not apply to the 1977 Fund.

For the 1977 Fund, the **Contribution Type Details** tab displays the following fields, as shown in Figure 43:

- **Employer**
- **Submission Unit**
- **Fund**
- **Total Mandatory Contribution (ASA) Percentage**
- **Total Mandatory Contribution (ASA) Effective Date**
- **Employer Contribution (DB) Percentage**
- **Employer Contribution (DB) Percentage Effective Date**
- **DROP Participation**

Below these fields is a second set of information detailing additional details associated with the Certified First Class Salary. Below the table is the *Contribution Type Details* section of the screen, which contains the following fields:

- **Mandatory Contribution (ASA) Paid By**
- **Mandatory Contribution (ASA) Paid By Effective Date**



NOTE: If the **Mandatory Contribution** is **Split-Employee/Employer**, this field also shows: **Mandatory Contribution Paid by Employer**.

- **Certified First Class Salary - Base Salary**
- **Certified First Class Salary - Longevity**
- **Total**
- **Certified First Class Salary Effective Date**

NOTE: The first-class salary is defined by State law as the “salary of a first class patrolman or first class firefighter” means the highest nonpromoted salary of a patrolman or firefighter plus all longevity increases, if provided by the employer, for:

- (1) service of not more than twenty (20) years; or
- (2) service of more than twenty (20) years but no more than twenty-five (25) years if provided as a result of the meet and confer process under [IC 36-8-22](#); but does not include remuneration or allowances for fringe benefits, incentive pay, holiday pay, insurance, clothing, automobiles, firearms, education, overtime, or compensatory time off. ([IC 36-8-8-6.5](#), [IC 36-8-8-7](#), and [IC 36-8-1-11](#))

Upon retirement, benefits are based on the first-class salary effective for the member's employer in the year service ends. This first-class salary varies by employer and is certified annually to the 1977 Fund by the employer's governing board. Each fund member who qualifies for a retirement benefit payment under [IC 8-8-10\(c\)](#) of this chapter is entitled to receive a monthly benefit equal to fifty percent (50%) of the monthly salary of a first class patrolman or firefighter in the year the member ended the member's active service. ([IC 8-8-11\(c\)](#))

3.1.4. HW/IO System Contribution Time Details

For the IU Fund, the **Contribution Type Details** tab contains

- Now these fields is a table that displays a list of positions

Below the table is the *Contribution Type Details* section of the screen, which contains the following fields:

- _____

Figure 44: JU System Contribution Type Details Tab

Search Submission Unit					
Submission Unit ID					
Submission Unit Name					
<input type="button" value="Search"/>					

Submission Units					
Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
5001000	JUDGES RETIREMENT SYSTEM	Other Government...	STATE OF INDIANA	Participating	JU
5001089	WAYNE COUNTY AUDITOR	County	WAYNE COUNTY	Participating	JU
5001084	VIGO COUNTY AUDITOR	County	VIGO COUNTY	Participating	JU
5001082	VANDERBURGH COUNTY AUDITOR	County	VANDERBURGH C...	Participating	JU
5001079	TIPPECANOE COUNTY AUDITOR	County	TIPPECANOE COU...	Participating	JU

Account Details	Address & Phone	Payment Admin	W & C	Contacts	Contribution Type Details																
Fund Details <p style="text-align: right;">Employer: STATE OF INDIANA</p> <p style="text-align: right;">Submission Unit: JUDGES RETIREMENT SYSTEM</p> <p style="text-align: right;">Fund: JU</p> <p>Total Mandatory Contribution (ASA) Percentage: 6%</p> <p>Total Mandatory Contribution (ASA) Percentage Effective Date: 01/01/1800</p> <table border="1"> <thead> <tr> <th>Position Title</th> <th>Certified Salary</th> </tr> </thead> <tbody> <tr><td>Circuit Court Judge</td><td>\$137,062.00</td></tr> <tr><td>Superior Court Judge</td><td>\$137,062.00</td></tr> <tr><td>County Court Judge</td><td>\$137,062.00</td></tr> <tr><td>Municipal Court Judge</td><td>\$137,062.00</td></tr> <tr><td>Court of Appeals Judge</td><td>\$160,468.00</td></tr> <tr><td>Tax Court Judge</td><td>\$160,468.00</td></tr> <tr><td>Probate Court Judge</td><td>\$137,062.00</td></tr> </tbody> </table>						Position Title	Certified Salary	Circuit Court Judge	\$137,062.00	Superior Court Judge	\$137,062.00	County Court Judge	\$137,062.00	Municipal Court Judge	\$137,062.00	Court of Appeals Judge	\$160,468.00	Tax Court Judge	\$160,468.00	Probate Court Judge	\$137,062.00
Position Title	Certified Salary																				
Circuit Court Judge	\$137,062.00																				
Superior Court Judge	\$137,062.00																				
County Court Judge	\$137,062.00																				
Municipal Court Judge	\$137,062.00																				
Court of Appeals Judge	\$160,468.00																				
Tax Court Judge	\$160,468.00																				
Probate Court Judge	\$137,062.00																				
Contribution Type Details <p>Mandatory Contribution(ASA) Paid By: Employer</p> <p>Mandatory Contribution (ASA) Paid By Effective Date: 7/27/2012</p>																					

10 PERF Employer Enrollment Resolution

The *PERF Employer Enrollment Resolution* section allows for a submission unit to make changes to the plans offered by the unit. Submission units can elect to offer the PERF Hybrid, PERF My Choice, and/or a combination of the plans. This link is available to users with the Wage and Contribution Administrator security role.

10.1.1 Select a Submission Unit Account

All Submission Unit records that you have permission to view display in the scrollable grid in the *Submission Unit* section. To select a Submission Unit from the scrollable grid:

1. Scroll through the grid until the record for the Submission Unit you want to update is visible.
2. Click the line associated with the Submission Unit record you want to view.
3. Once you have selected a Submission Unit to modify, the tabs below the scrollable grid populates with the chosen Submission Unit's data.

NOTE: For Employer Users who only have access to one Submission Unit account, the grid in *Submission Units* section and the tabs in Section 3 display only the information for that Submission Unit.

4. Click **Next** as shown in the *Select Sub Unit* screen on Figure 45.

Figure 45: Select Sub Unit

Unit Code	Unit Title	Fund
1217000	CARMEL PUBLIC LIBRARY	PERF

Selected Submission Unit: CARMEL PUBLIC LIBRARY
Selected Submission Unit Code: 1217000

5. The *PERF Employer Resolution* screen displays as shown in Figure 46.

Figure 46: PERF Employer Enrollment Resolution

Employment Enrollment Resolution - Submission Unit: 1217000

Name of Governing Body

Name of Political Subvision

Plan Offering

☐ PERF Hybrid

☐ MyChoice

☒ Both PERF Hybrid and ASA Only to all employees, allowing the employee to choose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.

☐ MyChoice, in addition to PERF Hybrid, for which this governing body has already submitted a resolution to join PERF Hybrid.

☐ PERF Hybrid only to certain classes of employees and ASA Only to certain classes of employees.

☐ Both PERF Hybrid and ASA Only to certain classes of employees, allowing those employees to chose in which retirement plan the employee will participate, based upon the employee's previous participation in the Fund or the Plan.

Default Plan

Mandatory Member Contribution % Paid by the Employer, enter %

* Mandatory Contribution Election Effective Date

Groups for which employer pays the Mandatory member contributions

Mandatory Contribution Payment when Paid by Employer ☒ New Money Pick-Up ☐ Salary Reduction Pick-Up

Normal Cost Rate

Voluntary Matching Contribution Rate ☐ 0 ☒ 50

* Membership Effective Date

* Resolution Adopted Date

Signature

Title

Printed Name

Employee Classifications, if Option 5 or 6 under Plan Offering were selected

☒ I have reviewed and approved

The following fields should be completed in order to submit an employer resolution:

1. Name of Governing Body

2. Name of Political Subdivision

3. Plan Offering

a. Select one option:

1) Hybrid

a) Select this option if you want to only offer the Hybrid fund.

2) My Choice

- a) Select this option if you want to only offer the My Choice Retirement Savings Plan.
- 3) **Both Hybrid and My Choice** to all employees, allowing the employee to choose in which retirement plan the employee participates, based upon the employee's previous participation in the Fund or the Plan.
 - a) Select this option if you want to offer both plans and the option for the member to choose which fund they are a part of, based on previous participation.
- 4) **My Choice**, in addition to Hybrid, for which this governing body has already submitted a resolution to join Hybrid.
 - a) Select this option if you want to maintain your current Hybrid coverage for existing employees and enroll new hires into the My Choice.
- 5) **Hybrid only** to certain classes of employees and My Choice to certain classes of employees.
 - a) Select this option if you want to offer Hybrid to groups of employees and My Choice to other groups of employees.
- 6) **Both Hybrid and My Choice** to certain classes of employees, allowing those employees to choose in which retirement plan the employee participates, based upon the employee's previous participation in the Fund or the Plan.
 - a) Select this option if you want to offer both Hybrid and My Choice to certain groups of employees.

4. Default Plan

- a. The retirement fund, either My Choice or Hybrid, into which a member is automatically enrolled if the submission unit offers both options and the member fails to make an election within 60 days of their hire date. Select one option:

1) My Choice Retirement Savings Plan

2) Hybrid

5. Mandatory Member Contribution % Paid by the Employer

- a. Enter the percentage, between 0 percent and 3 percent, that is being paid by the employer. Any amount less than 3 percent is paid by the member.

6. Mandatory Contribution Election Effective Date

7. Groups for which employer pays the Mandatory member contributions

- a. Submission Units may elect to split the pickup of contributions by groups of employees. Enter the groups, if applicable. Submission Units can elect to pick up contributions for Exempt employees but not for Non-Exempt employees for example.

8. Mandatory Contribution Payment when paid by Employer

- a. Select **New Money Pick-Up** or **Salary Reduction Pick-Up**
 - 1) **New Money Pick-Up** means: Contributions designated as employee contributions for state law purposes, are being paid by the employer in addition to regular compensation as a

supplemental contribution that is separate and distinct from the employees' current or future compensation, and in lieu of contributions by the employees. These contributions are made on a pre-tax basis and are paid by the employer on behalf of the employee.

- 2) **Salary Reduction Pick-Up** means: Contributions designated as employee contributions for state law purposes, are being paid by the employer via a reduction in salary. These contributions are made on a pre-tax basis but are paid by the employee through a payroll deduction.

9. Normal Cost Rate

- a. A percentage calculated by INPRS' actuary and approved by the INPRS Board that would be equivalent to funding the pension in the PERF Hybrid fund. This rate is subject to change January 1 of each year. The submission unit can select the employer contribution rate for members participating in the My Choice Retirement Savings Plan. The contribution rate may not be higher than the normal cost of fund participation. The rate as of July 1, 2016 can be anywhere between 0 and 5.8 percent. As of January 1, 2017, the maximum normal cost percentage is 4.1 percent.

10. Voluntary Matching Contribution Rate

- a. Contributions made by the submission unit based on the member's voluntary contributions. The matching contributions must be either 0 percent or 50 percent of the voluntary contributions made by the member.

11. Membership Effective Date

12. Resolution Adopted Date

- a. This is the date the submission unit's governing body passed the resolution to join the My Choice Retirement Savings Plan.

13. Signature

14. Title

15. Printed Name

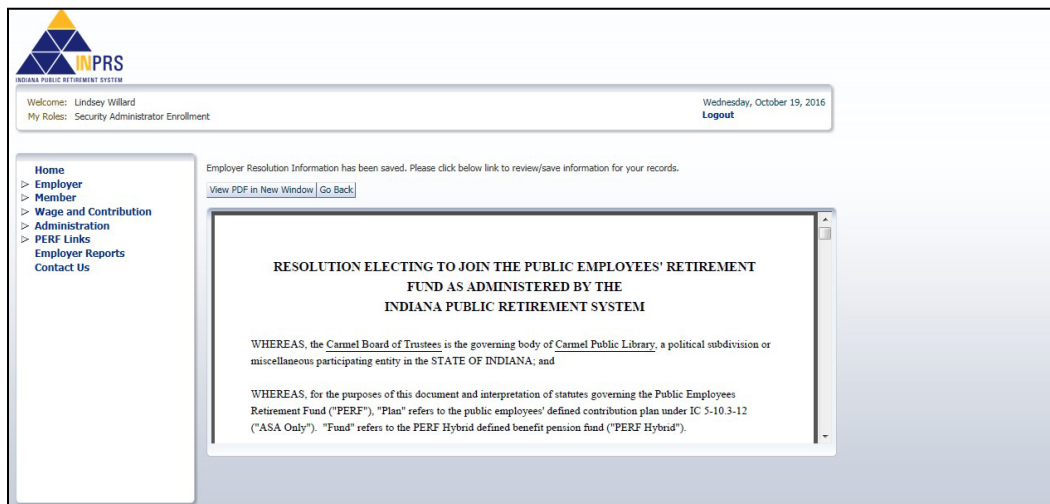
16. Employee Classifications – If Option 5 or 6 under Plan Offering were selected

17. Check the box ***I have reviewed and approved*** to confirm your entries.

18. Click **Submit** to submit your elections.

The Resolution is saved and the screen reflects a completed resolution as shown in Figure 47.

Figure 47: PERF Employer Enrollment Resolution Confirmation



To make corrections:

- Click **Go Back**

To print and save the Resolution:

- Click **View PDF in New Window**

10.2 PERF My Choice Retirement Savings Plan Employer Open Enrollment

Open Enrollment is available to PERF employers who have elected to offer the My Choice Retirement Savings Plan. Each year, elections for coverage can be made but nothing is required if no changes are needed.

To make changes to the elections for the following year, click the **My Choice Open Enrollment** link on the *Manage Submission Unit* screen as shown in Figure 48.

Figure 48: Manage Submission Unit

Search Submission Unit

Submission Unit ID:

Submission Unit Name:

Submission Units

Unit ID	Unit Name	Unit Type	Employer Name	Status	Fund Name
3132333	H & H Submission Unit	Other Government...	H & H Employer	Participating	PERF

ASA-Only Open Enrollment

Account Details | **Address & Phone** | **Payment Admin** | **W & C** | **Contacts** | **PERF Hybrid** | **MyChoice**

Employer Name: H & H Employer
 Unit Name: H & H Submission Unit
 Unit Type: Other Government Entity
 Department of Education No:
 Tax ID:
 Status: Participating
 Effective Date: 10/1/2016
 Plan Selection: ASA Only
 Plan Effective Date: 10/1/2016
 Does Employer have Classifications: N
 Classification Effective Date: 10/1/2016
 Mandatory Contributions (ASA) Paid By: Employee
 Mandatory Contributions (ASA) Paid By Effective Date: 10/1/2016

1. Click the **My Choice Open Enrollment** link in the Submission Unit grid. The *My Choice Open Enrollment* dialog box displays, as shown in Figure 49.

Figure 49: My Choice Open Enrollment

MyChoice Open Enrollment

* Mandatory Contribution (ASA) Paid By:

* Normal Cost Percentage:

* Matching Contribution Percentage:

* Default Plan:

☒ Changes have been reviewed and approved

Choose who pays the mandatory member contributions by selecting:

- **Employee**
- **Employer**
- **Split-by Position**
- **Split-Employee/Employer**

1. Enter the **Normal Cost Percentage** to contribute between 0 and the maximum.
 - The normal cost is a percentage calculated by INPRS's actuary and approved by the INPRS Board that would be equivalent to funding the pension in the PERF Hybrid fund. The submission unit can select the employer contribution rate for members participating in the My Choice Retirement Savings Plan. As of January 1, 2019, the maximum normal cost percentage is 4.2 percent.

2. Make a selection for **Matching Contribution Percentage** of either 0 percent or 50 percent
 - Matching contributions must be either 0 percent or 50 percent of the voluntary contributions made by the member. Matching contributions default to 0 percent if the submission unit does not elect to match 50 percent of voluntary member contributions.
3. If an employer offers a choice between the PERF Hybrid and, they can also change the default plan if no choice is made by the member.
 - Select either PERF Hybrid or My Choice as the default.
4. Select the Changes have been reviewed and approved box.
5. Click **Submit** once all entries have been completed.
 - The changes are effective January 1 of the following year.

11 Transfer a Member

Sometimes members need to be transferred from one Submission Unit to another. For example, this may occur when a Submission Unit merges with another Submission Unit. This process is handled by the EA Team.

12 Manage Employer Users

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

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.

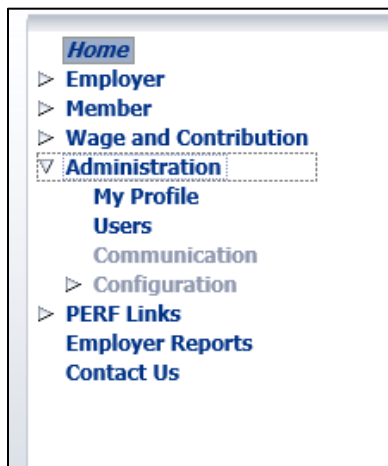
NOTE: For detailed information about how to add a Submission Unit contact, refer to the *Add a Submission Unit Contact* in this manual.

12.1 Add a New Employer User

Access the Administration options for adding a new Employer User:

1. Click the arrow to the right of *Administration* in the *Navigation Menu*. This opens the drop-down menu, shown in Figure 48. This menu shows all possible administrative actions that are available on a Submission Unit account. Any screens that Employer Users cannot access displays grayed out in the Navigation Menu.

Figure 50: Administration Options, Navigation Menu



The options in the drop-down menu are:

- **My Profile**
 - **Users**
 - **Communication**
 - **Configuration**
1. Choose **Users**, and the *Search Submission Unit* screen displays. The screen contains three sections, as shown in Figure 51.

Figure 51: Add Employer User, Search Submission Unit

The screenshot shows the 'Employer User' interface with three main sections:

- Section 1: Search Submission Unit** - Contains input fields for 'Submission Unit ID' and 'Submission Unit Name', a 'Search' button, and a green callout box labeled 'Section 1'.
- Section 2: Submission Units** - A scrollable table with columns 'Unit ID' and 'Unit Name'. It shows one record: '0000111' for 'New County - PERF'. A green callout box labeled 'Section 2' is present.
- Section 3: Submission Unit Contacts** - A table with columns 'Action', 'Employer User', 'First Name', 'Last Name', and 'Email'. It lists three contacts: Jane Goodall, John Doe, and Jennifer Maxwell. A green callout box labeled 'Section 3' is present.

At the bottom of the interface is an 'Add Contact' button.

- *Search Submission Unit* section contains search fields that allow you to locate the Submission Unit account for the new contact, using either the Submission Unit ID number or name.

NOTE: This section is mostly used by INPRS Staff Users.

- *Submission Unit* section displays only the Submission Unit(s) that match the search criteria provided and that you have permission to view.
- *Submission Unit Contacts* section contains a list of the contacts for the Submission Unit account.

12.1.1 Identifying the Submission Unit

Search for a Submission Unit by ID number:

1. Enter the Submission Unit ID number in the **Submission Unit ID** field.
2. Click **Search**.

Search for a Submission Unit by name:

1. Enter the name of the Submission Unit in the **Submission Unit Name** field.
2. Click **Search**.

Select a Submission Unit from the scrollable grid:

1. Scroll through the grid until the record for the Submission Unit to which you want to add a user is visible.
2. Click the line associated with that Submission Unit record.

12.1.2 Identifying an Employer Contact as an Employer User

To assign a new Employer User role to an employer contact:

1. Locate the contact you want to identify as an Employer User in the *Submission Unit Contacts* table.
2. Click the **Create User** link next to the contact's name. The *Create Employer User* dialog BOX displays, as shown in Figure 52.

Figure 52: Create Employer User

1. Choose **Enable** from the drop-down menu in the **Enabled** field.
2. Select one or more security roles from the *Available Security Roles* window on the left side of the dialog box. For details about each role, refer to the [ERM Glossary](#).
3. Click the right single arrow to move the selected security role(s) to the right side of the shuttle window.
4. When you have assigned all applicable security roles, click **Save**. The value in the **Employer User** column of the table for the selected contact changes from **No** to **Yes**.

NOTE: All required fields marked with an asterisk (*) must be completed before the record can be processed.

12.2 Modifying an Employer User

To modify an Employer User

1. Choose a Submission Unit from the list. The contacts for the Submission Unit then populate in the *Submission Unit Contacts* section of the screen.
2. Click the **Modify** link next to the user you need to modify in the *Search Submission Unit* screen associated with the *Users* option in the *Navigation Menu*. This opens the *Modify Employer User* dialog box, shown in Figure 53.

Figure 53: Modify Employer User

User Name: jdoe@perfemployer.com
Name: John Doe
* Enabled: **Disabl**
* Locked: **Yes**

* Role: **Available Security Roles**

- Wage and Contribution Operator
- Payment Administrator
- Wage and Contribution Viewer
- Member Viewer

Selected Security Roles

- Security Administrator
- Enrollment Administrator
- Member Administrator
- Wage and Contribution Administrator

Save Cancel

3. To disable an Employer User, choose **Disable** from the drop-down menu in the **Enabled** field. The chosen user can no longer access the application.
4. To give an Employer User access to the ERM application, choose **Enable** from the drop-down menu in the **Enabled** field.
5. To lock an Employer User out of the application, choose **Yes** from the drop-down menu in the **Locked** field.
6. To unlock an Employer User account, choose **No** from the drop-down menu in the **Locked** field.
7. To add security roles for an Employer User, select one or more security roles from the *Available Security Roles* window to the left of the dialog box.
8. Click the right single arrow to move the selected security role(s) to the right of the shuttle window.
9. To remove security roles for an Employer User, select one or more security roles from the *Selected Security Roles* window to the right of the shuttle window in the *Modify Employer User* dialog box.
10. Click the left single arrow to move the selected security role(s) to the left of the shuttle window.
11. Click **Save** to save the changes for the Employer User in the ERM application.

NOTE: If a Submission Unit contact designated as an Employer User leaves your organization, disable his or her Employer User account and change the contact status to **Inactive**.