

Descriptive Transcript for *Understanding ERIS*

Descriptive transcript for *Understanding ERIS* is below.

Audio	Visual
<p>Greetings, everybody. My name is Desi. I'm an Outreach and Education Specialist at PERA, and today I'll be walking you through our program: <i>Understanding ERIS</i>.</p> <p>And ERIS stands for the Employer Reporting and Information System. And it's a web-based tool that employers like you use to send salary and contribution data to PERA, to enroll members, update member data, and more. And today, I am going to show you how to access and utilize the system so that you can complete your PERA reporting tasks in an effective and secure manner.</p>	<p>Welcome slide with a header that says "Understanding ERIS", and a note saying "PERA prohibits recording and distribution of this presentation".</p>
<p>So, here is today's agenda. First, we're going to welcome you to PERA, and tell you a little bit about ourselves.</p> <p>We'll introduce you to ERIS—the Employer Reporting and Information System—and we'll walk through how to create accounts for your agency.</p> <p>Then, once we're logged in, we will explore the ERIS menu together, and I'll show you what each module's purpose is.</p> <p>Finally, we'll walk through how to enroll employees into PERA, and how to update their data.</p>	

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<p>Now, some of you may be brand-new to administering a defined benefit plan. So, let's start with what is that? What is a pension?</p> <p>A pension is a retirement plan that is paid into while working that provides its members with a future monthly lifetime income. So, it's not like a 401(k), where the retirement account is determined by how much is contributed and the market performance.</p> <p>Instead, this benefit is calculated on a formula that takes into account the member's years of service and highest average salary.</p> <p>Additionally, members don't make investment decisions. Instead, the funds are professionally managed by the Minnesota State Board of Investment, making PERA's pensions a hands-off retirement plan that will pay benefits for a lifetime.</p>	
<p>Now, while some exclusions do apply, the basic rule of eligibility can be broken down to these two things: First, it's mandatory for public employees.</p> <p>So that would be any employee or public officer who performs services for a local governmental unit in Minnesota. That would include non-licensed teaching positions in schools, but would not include independent contractors.</p>	

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<p>And second, the employee's monthly pay from a single employer is expected to exceed the monthly salary threshold of \$425.</p> <p>So to clarify, that means that if the employee's monthly pay is \$425 or less, then the employee will not be eligible. But, if their pay is \$425 and <i>one</i> cent, then that one cent will put the employee over the threshold, and they will be eligible. And this is going to be all full-time employees and most part-time employees.</p> <p>Now, once an employee does become a member, they will remain a member until they terminate from their public service position.</p>	
<p>And those eligibility rules apply to all three of PERA's pension plans, which are listed here.</p> <p>Once your employee gains membership in a plan, a percentage of each paycheck is deducted, and these deductions are their member contributions.</p> <p>You—the employer—will also contribute a percentage of each paycheck, and the employer and employee contributions are pooled together and invested by the Minnesota State Board to help fund the pension.</p> <p>The percentage that the employee and the employer contribute differs depending on which plan. And you can see the rates listed here.</p>	<p>A chart lists the three PERA pension plans alongside their contribution rates; 6.5% for employees and 7.5% for employers for Coordinated, 11.8% for employees and 17.7% for employers for Police and Fire, and 5.83% for employees and 8.75% for employers for Correctional.</p>

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<p>These deductions are going to be of gross pre-tax income, which means they're tax deferred. So there's no taxes on these contributions now, but both federal and state taxes will be owed once the member begins drawing their benefit.</p> <p>Now, I do want to let you know, to keep in mind that the member's monthly pension payment is not based on how much the member contributes, or how well the investments perform. So your next question may be, well, how is that amount determined?</p>	
<p>PERA's pensions are calculated on a formula that takes into account these three factors: salary, years of service and age. And this is information that's provided by you—the employer—every payroll period. We update member accounts and we calculate pensions based on what the employer reports for salary, contribution coverage dates, service credits earned, and the age that the member is when they begin drawing their benefit.</p> <p>So it's very important that this information is reported accurately, and on time, because we rely on it to ensure that the member's retirement payments are reflecting the correct service credits and highest average salary.</p> <p>And, of course, the way that you report this information is through the Employer Reporting and Information System—ERIS.</p>	

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<p>Now in this section, we're going to cover the basics of ERIS, including what is it, what's its purpose, and who uses it.</p>	
<p>ERIS is a secure web-based platform that employers use to report any and all information about their governmental unit to PERA. And if your unit has an Internet capabilities, then you have to use ERIS for your PERA tasks. Only agencies without internet access can complete reporting duties by mail. The rest of you will use ERIS.</p> <p>Some of the more common tasks that you will use ERIS for are: enrolling new employees into PERA as members, and updating members' employment or personal data. You can also use ERIS to send salary and contribution data to PERA each pay period. And you'll be able to complete reports that PERA generates in order to collect or validate member data.</p> <p>Now, one of the many upsides of using ERIS instead of mail is that ERIS is directly tied to our internal database. So when you update a member's account, the information is automatically updated for PERA, as well.</p>	
<p>There are three types of users on ERIS. We have administrators, representatives, and contracting payroll providers.</p> <p>No matter what type of user account that you have, every ERIS user is required to have their own individual account. And you are responsible for keeping your username</p>	

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<p>and your password confidential. It is critical that you don't share your account with others. PERA tracks all actions that are taken by each account, which means that you are responsible for any changes that are made under your username.</p>	
<p>The first step an employer takes before registering for ERIS is determining who will serve as the ERIS System Administrator for their agency. And there can be only two administrator accounts per agency.</p> <p>And Administrators, they have access to all reports and all features on ERIS. Administrators are also able to create ERIS Representative accounts, and they are in charge of setting the security level for the representative accounts.</p>	
<p>Now for ERIS representatives there's no limit to how many there can be per agency, and their access to reports and features depend on what is set up by the Administrator.</p>	
<p>And finally, we have Contracted Payroll Provider accounts.</p> <p>These accounts are for payroll firms that do payroll services for multiple governmental units. So if you are a contractor payroll firm, you will need to contact PERA first in order to get an ERIS account.</p> <p>And Contracted Payroll Providers will have their own unique ERIS account even if they do payroll for several different governmental units.</p>	

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<p>Also, initially, Contracted Payroll Provider accounts are only given access to the “Transmit File” module. So they will need to request access rights from someone at the governmental unit, and once the Administrator from that unit grants rights, they will be allowed to access other modules in ERIS.</p>	
<p>So now that we know what ERIS is and who can use it, let's walk through how to create ERIS accounts, starting with an ERIS Administrator account.</p>	<p>The home page of PERA’s website appears. At the top is various drop-down menus to choose from, including one labeled “Employers”.</p>
<p>Now, our first step is to head to the main website, mnpera.org, and we're going to select “Employers” from the top menu bar.</p>	<p>“Employers” is selected, revealing a drop-down menu.</p>
<p>And then we are going to click on that first menu item that says “ERIS Login”.</p>	<p>An arrow points to the top menu item labeled “ERIS Login”.</p>
<p>That's going to take us here, and if we already had access, this is where we would log on. But since we're requesting access for the first time, we're going to look below the login button and click on where it says “Request Access”.</p>	<p>The ERIS sign-on page appears. There are two blanks to enter a username and password. Below the blanks is a button labeled “Log In”, and below that button is a link labeled “Request Access”.</p>
<p>Now, for today's example, let's say that we are an employee named John Doe, and we've been nominated by our agency to be the System Administrator.</p>	<p>A new page appears with the header, “Register For ERIS Access - Pre-Qualifying Step”. Below is a blank to write in the employer unit ID, as well as blanks to write in a first and last name.</p>
<p>So here, we are going to enter our employer unit ID. And when we enter this, we want to make sure to just enter the numbers. Don't enter any dashes.</p>	<p>“999999” is entered in the employer unit blank.</p>

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<p>Now, if you don't know what your employer unit ID is, you can find this on written correspondence from PERA, or you can use the lookup feature on our website.</p>	
<p>Then, we're going to enter our first and last name, and we'll click that blue submit button.</p>	<p><i>John</i> is entered in the first name blank, and <i>Doe</i> is entered in the last name blank.</p>
<p>This registration page will then appear for us to complete. Make sure to enter all the bold information here.</p> <p>Now for the second question here, where it asks if we are employed by this employer or contracted for payroll support, if you are not a payroll provider service account, you are going to be choosing “employee”. And that will be the majority of you.</p> <p>A reminder that if you are a payroll firm who is trying to get a Contracted Payroll Provider account, you are going to have to contact PERA first in order to get your account set up.</p>	<p>The ERIS registration page appears, asking for John Doe’s job title. This page also asks if John Doe is “employed by this employer or contracted for payroll support?” with two options to choose from: “Employee”, or “Contracted Payroll Support”.</p>
<p>So now we're going to scroll down.</p> <p>Here we're going to make sure that we enter a business address and business phone number. And we’ll make sure that we enter our correct e-mail so that PERA can contact us if they have any issues or questions.</p> <p>And regarding the security information at the bottom—you do not have to use your mother's maiden name if you're not comfortable with that. You can use a secret word instead. Just be aware you're going to</p>	<p>The page scrolls down, displaying other requested information such as John Doe’s address, work phone, and security information [email address and mother’s maiden name].</p>

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<p>have to remember what that secret word is in order to verify your account.</p> <p>Once we have all our information filled out, we'll hit that blue Submit button.</p>	
<p>Now, after hitting submit, we should see a success message. Click OK and close our website.</p>	<p>A pop-up message appears: "Submission was successful. Click OK to continue".</p>
<p>You will then receive a confirmation e-mail that will look like this, and we will also e-mail you a registration packet. You are going to need to review and sign that registration agreement. And you will also need to get a signature from an authorized signer to approve your access.</p> <p>Once you e-mail the signed registration agreement to us, we will process it which usually takes one day. We will then e-mail you a temporary password to login to ERIS. And we recommend that you use the copy/paste function, as you'll need to enter the password twice. First to log on, and then again as your old password, to create your own new password.</p>	<p>An example of an email is displayed.</p>
<p>After you do create your new password, you will be taken to the ERIS homepage, which looks like this.</p>	<p>The ERIS home page appears. A menu on the left lists various options, including "Member Account", a search module, "Enroll Member", "Maintain Employer", "Transmit File", "SDR Reporting", and "Pending Reports".</p>
<p>So now that we are successfully logged in as an administrator, we can add employees from our agency as ERIS representatives.</p>	<p>Under "Maintain Employer", <i>Employer Contacts</i> is circled.</p>

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<p>So, to start, let's select <i>Employer Contacts</i> from the menu.</p>	
<p>That will bring up this screen.</p> <p>Now, as you can see, there is a search function on the screen, and that allows you to search for both existing representative accounts at your agency, as well as anybody who is listed as an employer contact, but who doesn't have ERIS access.</p> <p>Since we haven't created any representative accounts for our agency yet, we're going to ignore the search feature for now, but I will go over it in depth later on in this presentation.</p>	<p>The Employer Contact page appears. At the top is written, "To find a specific contact person, enter a full or partial name and select 'Search'; or select the person from the list below of all current contacts, active ERIS users, and former ERIS users. Alternatively, you can use 'Contact Role' (and ERIS Account Status if authorized) to find all persons having the role you select." Below that are blanks to enter a last and first name, and drop-down menus to select a contact role or ERIS account status. Below that is a button labeled "Add New Contact".</p>
<p>Instead, let's look below that, and click on the "Add New Contact" button.</p>	<p>An arrow points to the "Add New Contact" button.</p>
<p>That will bring up this screen where you can enter information of the employee that we're adding as an ERIS representative.</p> <p>For this example, we're adding our colleague Mary Smith as a rep. We must complete all the bold sections, including the phone and e-mail address, as well as select Mary's role, which will be as a "Payroll Contact". Once all the information is entered, click "Add ERIS Access" to continue.</p>	<p>A new screen appears, asking for contact information such as first and last name, email, phone, and address. There is a menu to choose the individual's role from. At the bottom of the screen is a button labeled "Add ERIS Access".</p>
<p>That will bring us to this page where we can now set up Mary's security access for each screen. There are three security settings to</p>	<p>A new page appears for Mary. This page lists all the screens on ERIS, including "Enroll Member", "Maintain Contact", "Transmit File", "Member Account", "Update Enrollment", and "Pending</p>

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<p>choose from: No Rights, Read Only access, or Modify Rights.</p> <p>“No Rights” means that the representative will have zero access, and they won't even be able to view that particular screen.</p> <p>“Read Only” means that the representative can view the screen, but they can't make any changes.</p> <p>And “Modify Rights” means that the representative will have full access to the features in that section of ERIS.</p> <p>Once we're done choosing Mary's security access, we will hit Submit to save our changes.</p>	<p>Reports”. Next to each screen is a drop-down menu to choose either “No Rights”, “Read Only”, or “Modify Rights”.</p>
<p>And here we have a pop-up letting us know that Mary's account has successfully been activated.</p> <p>Mary is then going to receive an e-mail from PERA with a temporary password. And she will login using that temporary password and the username that's displayed in the pop-up here: SMIT1111.</p> <p>Now, it's very important that you write down this username before you click the OK button, because the username is not included in the e-mail that Mary was sent. Also, once you hit OK, this popup is going to go away, and we will not be able to see what her username is anymore. So we need to make sure that we write down SMIT1111, and share it with Mary, so that</p>	<p>A pop-up message appears: “Web access activated. Inform Mary Smith of their user name [SMIT1111]. PERA will notify new account holder by email of their password. Click OK to continue”.</p>

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<p>she can log on when she receives her temporary password.</p>	
<p>Now, in this next section, we're going to go through each feature and module on ERIS, and show you what you can do, and how to do it.</p>	
<p>So, let's head back to the homepage. And turn our attention to the menu on the left.</p>	<p>The ERIS home page appears.</p>
<p>Now, before we go down the list, I do want to point out the “Change Password” module. Pretty self explanatory, but clicking on this will open up this, where you can change your password.</p> <p>The passwords do expire every six months, but you can change your password at any time.</p> <p>And again, reminder that an ERIS users must keep their usernames and their passwords confidential. And you should never share your account with anyone else. PERA tracks all actions that are taken by each account, so that means that you are accountable for any changes that are made under your username.</p>	<p>The change password page appears, asking for the old password once and the new password twice.</p>
<p>Now, let's start with the first menu item: “Member Account”.</p>	<p>“Member Account” is circled on the left-hand menu.</p>
<p>If you click on this, it will bring you here, where you can search for and access a member’s record by entering their Social Security number.</p>	<p>The member account page appears, asking for a member’s Social Security number in order to search.</p>
<p>Now, this module does not have an alternate search feature, so you do need to</p>	<p>Under “Search”, <i>Employee</i> is circled on the left-hand menu.</p>

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<p>have the member's valid Social Security number in order to search for them.</p> <p>And so, if you're looking for a specific person's account, but you don't have their Social Security number, you're better off using the search module.</p>	
<p>If we click on <i>Employee</i>, that'll bring us here, where we can search for specific employees at our agency, by their last four their first name, their last name, or we can search more generally to get a list of all the employees at our unit who are under a specific plan, or who are all terminated, or who are all active.</p>	<p>The search module appears with various search criteria.</p>
<p>This module also allows you to search PERA's database to see if a particular employee is drawing benefits from PERA.</p>	<p>Under "Search", <i>Benefit Recipient</i> is circled on the left-hand menu.</p>
<p>If you click on where it says "Benefit Recipient", it'll bring up this screen. And you do need to have the employee's nine-digit Social Security number in order to search for them.</p>	<p>The benefit recipient search page appears, asking for a Social Security number.</p>
<p>Now, the next module on the menu is "Enroll Member". And you may have guessed that this is what you will use when you want to enroll a new employee into PERA.</p> <p>And before I move on, I do want to let you know that later in this presentation, we are going to be spending more time walking through how to enroll a member. And I will also show you how to utilize the search function.</p>	<p>"Enroll Member" is circled on the left-hand menu.</p>

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<p>Now, the next item on the menu is “Maintain Employer”.</p>	<p>“Maintain Employer” is circled on the left-hand menu.</p>
<p>And we did look at this module earlier when we walked through how to create a representative account.</p> <p>Now, the “Maintain Employer” module is for adding new contacts as ERIS representatives, or for adding a contact with no ERIS rights. Also, your agency may require that a person be contacted for specific questions or specific job functions, but they may not be done through ERIS. So you can use this module to add somebody as an active contact without granting them ERIS rights.</p>	<p>The Employer Contact page appears. At the top is a search function: blanks to enter a last and first name, and drop-down menus to select a contact role or ERIS account status. Below that is a button labeled “Add New Contact”.</p>
<p>Now, with the search function, you can search for existing ERIS representatives, either by their contact role or by their account status.</p> <p>Or you can search by the first name, last name if you want to find a specific person. And this searches a database of both active and former ERIS users.</p>	<p>The drop-down menus to choose a contact role or ERIS account status are selected, displaying their options.</p>
<p>So let's look up our newest ERIS Representative: Mary Smith. I'll type her last name and her first name.</p>	<p>Smith is entered in the blank next to last name; Mary is entered in the blank next to first name.</p>
<p>I'll hit that blue search button, and the results will appear at the bottom.</p>	<p>Search results appear at the bottom, listing Mary Smith.</p>
<p>So to make changes to Mary’s account, we're going to click on her last name right here. That will bring up her account. And since I'm an administrator and Mary is a</p>	<p>Mary’s account appears, listing information such as first and last name, email, phone, address, and role.</p>

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<p>representative, I'm able to make changes to any of her information here.</p>	
<p>Now if I scroll to the bottom, I'll see this screen, which allows me to change Mary's security access for each module.</p> <p>I can completely limit her access to a specific module by choosing "No Rights". I could give her "Read Only" rights, which would allow her to view certain screens, but not make any changes on them. Or, I could get Mary full access to the features in that section of ERIS by choosing "Modify Rights".</p>	<p>The page scrolls, revealing Mary's security rights for each screen. This page lists all the screens on ERIS, including "Enroll Member", "Maintain Contact", "Transmit File", "Member Account", "Update Enrollment", and "Pending Reports". Next to each screen is a drop-down menu to choose either "No Rights", "Read Only", or "Modify Rights".</p>
<p>So let's say that I want Mary to be able to enroll new members. "Enroll Member" is the first module on this list. And you can see that as of now, Mary's security level is set to "No Rights", and that means that Mary currently has no access to this function.</p> <p>No worries, though. Because all we got to do is click on the down arrow, choose "Modify Rights", and that will allow Mary full access. Once we're done choosing the security settings, we'll have that blue submit button, and it'll save our changes.</p>	<p>The drop-down menu next to "Enroll Member" is selected. "Modify Rights" is chosen from the menu.</p>
<p>Now, let's move on to the next menu item, "Transmit File".</p>	<p>On the left-hand menu, "Transmit File" is circled.</p>
<p>The "Transmit File" module is what you'll use to submit reports and data files to PERA.</p>	<p>The "Transmit File" page appears. There are three options for the type of file: SDR or demographic file, exclusion reporting file, or secure document upload. Below the</p>

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Your first step would be to select the type of file that you want to submit.	options are a button labeled “Choose File” and a submit button.
The first two options are for submitting reports, such as the <i>Salary Deduction Report</i> or the <i>Annual Exclusion Report</i> .	SDR or demographic file and exclusion reporting file are circled.
And the third option is for submitting documents that contain private data.	Secure document upload is circled.
You will then click that gray choose file button, then you will select the correct file through your browser.	An arrow points to the “Choose File” button.
<p>When using this module to submit reports, be aware the file must be formatted properly, and it must end with the proper extension. And you can find instructions on how to properly format these reports in chapter nine of the Employer Manual.</p> <p>Now, there are circumstances where you may want to double check that your reports are formatted properly before sending them into PERA.</p> <p>For example, maybe it's your agency's first time formatting or sending reports, or maybe your agency recently upgraded its software system, and you need to check if programming is set up correctly.</p> <p>In those situations, you will want to test your files first by using the “Transmit Test File” module.</p>	On the left-hand menu, “Transmit Test File” is circled.
With this module, you will follow the same steps. Select the file type, choose the correct file from your browser, and then hit submit.	The transmit test file page appears, which looks similar to the transmit file page: three options for the type of file, and a “Choose File” button below.

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<p>Now, be aware that files that are submitted through the “Test” module are not sent to PERA, they're just analyzed. So if we determined that the file is good to go, you'll need to resubmit it using the “Transmit File” module.</p>	
<p>Now when it comes to the SDR, employers do not have to submit it via a data file as they also have the option to submit the report manually. And that brings us to our next menu item, which is “SDR Reporting”.</p>	<p>On the left-hand menu, “SDR Reporting” is circled. The options below “SDR Reporting” include <i>New SDR</i>, <i>SDR History</i>, and <i>SDR Summary Report</i>.</p>
<p>So, let's look at “New SDR”. Here, employers can complete their <i>Salary Deduction Report</i> by manually inputting the data in the fields provided.</p>	<p>On the left-hand menu, <i>New SDR</i> is circled, and the new SDR page appears. “Use the fields below to create your Salary Deduction Report” is written at the top. Below are various criteria to choose from, including pay schedule, payroll calendar, plan type, paid date, begin and end date, and pay type.</p>
<p>Now, for “SDR History”, that allows you to search for and view SDR’s that your agency had previously submitted. And it'll allow you to view SDR’s from up to two years ago.</p>	<p>On the left-hand menu, <i>SDR History</i> is circled, and the SDR history search page appears. “Use the fields below to view a listing of Salary Deduction Reports of your agency that have been saved and/or submitted to PERA” is written at the top. Below are four fields: SDR status, pay schedule, the paid from date, and the paid to date.</p>
<p>Next we have “SDR Summary Report”.</p> <p>And this is what you use when auditors are requesting a breakdown of the employee versus employer contributions each payroll period.</p>	<p>On the left-hand menu, <i>SDR Summary Report</i> is circled, and the SDR summary report page appears. “Use the fields below to view and print a listing of the Salary Deduction Report (SDR) Contributions by plans that have been received by PERA” is</p>

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<p>And you can search for and view contribution reports from pay periods that go as far back as two years.</p>	<p>written at the top. Below are four fields: the paid from date, the paid to date, the received from date, and the received to date.</p>
<p>Now the next module that we have is “Pending Reports”. Pending reports are reports that are automatically generated by ERIS to obtain data on members. Some of these are annual reports that you will have to complete every year, and others are follow-up reports to collect missing member data, or to validate data if a discrepancy is found in your SDR.</p> <p>So if PERA needs you to complete a specific report, you will see the report listed in this section. And as the employer, you will need to review and complete these reports.</p>	<p>On the left-hand menu, “Pending Reports” is circled.</p>
<p>In our example here, the Missing Enrollment report needs to be completed.</p>	<p>Under “Pending Reports”, <i>Missing Enrollments</i> is circled.</p>
<p>To view the report, we'll click on it, and that'll open this screen, which has information and instructions on how to complete the report.</p> <p>Once you've completed all your pending reports, your menu will change to say <i>No Reports</i>.</p>	<p>The <i>Missing Enrollments</i> report appears, listing members alongside an “Update Enrollment” link.</p>
<p>And now we are finally on to the last module, which is the “Annual Leave Report”.</p>	<p>On the left-hand menu, “Annual Leave Report” is circled. Below “Annual Leave Report” are two options: <i>Enter Report Data</i>, and <i>Transmit Data File</i>.</p>
<p>If your <i>Annual Leave Report</i> needs to be completed, you will see options for how to</p>	<p>The <i>Annual Leave Report</i> appears. There are several types of data requested,</p>

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<p>complete it under the menu. If you select “Enter Report Data”, it will open up this screen here where you can enter the data manually.</p>	<p>including the employee’s Social Security number, leave type, begin and end date of their leave, hourly rate of pay, and total hours missed.</p>
<p>If you select “Transmit Data File”, it will open up this screen, where you can upload a data file from your browser.</p>	<p><i>Transmit Data File</i> is circled, and the Annual Leave Transmit page appears. “Select the file you wish to upload” is written at the top. Below is a button labeled “Choose File”, and a button labeled “Upload”.</p>
<p>Now, once your <i>Annual Leave Report</i> is successfully submitted, your menu options will change. “Enter Report Data” and “Transmit Data File” will go away, and “Amend Report Data” comes up instead.</p> <p>So if you had made an error on your report, you would click on “Amend Report Data”, and that would allow you to make changes to the information you had provided.</p>	<p>Under “Annual Leave Report” on the left-hand menu, <i>Enter Report Data</i> and <i>Transmit Data File</i> disappear, and <i>Amend Report Data</i> appears in its place.</p>
<p>Now, in the last section of our program, we're going to head back to ERIS and cover how to enroll employees and how to update employment status.</p>	<p>The ERIS home page appears.</p>
<p>First, let's walk through the process of how to enroll a new employee.</p> <p>For this example, let's say we just hired a new employee: Bob. And Bob just started a full-time, permanent position at our county. And Bob doesn't have any exclusions, and he meets all requirements. So, he is immediately eligible, and we must enroll him right</p>	<p>On the left-hand menu, <i>New Enrollment</i> is selected from under “Enroll Member”.</p>

Audio	Visual
away. So we'll start off by selecting "New Enrollment".	
That will bring us here.	An enrollment request page appears. There is a drop-down menu to choose the member's plan name from, and blanks to enter their Social Security number in.
And the first thing we will do is select the plan that we're enrolling Bob into. You're going to see different plan options here, depending on what plans you have at your unit.	The drop-down menu is selected, displaying plan options: Coordinated, Correctional, DCP Elected Officials, Exempt, and Police and Fire.
<p>Now, you may be wondering what the "Exempt" plan is for. "Exempt" is what you choose if your new hire is a) PERA benefit recipient, and b) under the full Social Security retirement age.</p> <p>Since these employees are already drawing a benefit from PERA, they're exempt from PERA's pension plans, but you will still need to enroll them in the Exempt plan here, and report their salary on the SDR, because these employees are subject to annual earnings limits that are set by Social Security until they reach the full Social Security retirement age.</p> <p>So, to be clear, you will only choose "Exempt" for new hires who are both a) drawing a benefit from PERA, and b) under the full Social Security Retirement Age.</p>	
Now, let's say that we don't know if Bob is drawing a benefit from PERA, but we know that he's old enough to be drawing a benefit, so it is possible. If you're unsure	On the left-hand menu, <i>Benefit Recipient</i> is circled from under the search module.

Audio	Visual
<p>about a new employee’s benefit status, reminder that you can double check by clicking <i>Benefit Recipient</i> from under the search module.</p>	
<p>That will bring us here, where you can search PERA’s database to see if Bob is drawing a retirement or disability benefit from PERA.</p>	<p>The benefit recipient search module appears. There is a blank asking for the individual’s Social Security number.</p>
<p>First thing we do is enter their Social Security number.</p>	<p>Bob’s Social Security number is entered in the blank.</p>
<p>Hit the blue search button, and the result will pop up here. And, as you can see, Bob is not a benefit recipient. And that means that we can continue enrolling him into PERA.</p>	<p>A message appears, stating: “Not a PERA Benefit Recipient. Enroll in PERA if eligibility requirements are met.”</p>
<p>So, let's head back to the “New Enrollment” page.</p>	<p>On the left-hand menu, <i>New Enrollment</i> is selected from under “Enroll Member”. The enrollment request page appears. There is a drop-down menu to choose the member’s plan name from, and blanks to enter their Social Security number in.</p>
<p>We will enter the plan name. In Bob's case, we’ll choose the Coordinated Plan.</p>	<p>“Coordinated” is selected from the drop-down menu.</p>
<p>Then I'll enter Bob's Social Security number twice. And I want to pause here just to clarify that you must enter your employee's actual Social Security number. Do not enter a fake Social Security number as a placeholder. You do need to enter their correct one here when you're enrolling them.</p>	<p>Bob’s Social Security number is entered twice in the blanks.</p>

Audio	Visual
<p>Once everything is completed, hit that blue submit button, then it'll bring up this screen where we're going to enter Bob's personal data.</p> <p>Again, the bold information is required: last name, first name, date of birth, home address.</p> <p>Now, we want the correct date of birth here, as we use that for formula-based pension plans. The address is also very important in case we need to get in touch with the member and send them important plan information through the mail.</p>	<p>The new enrollments page appears. Several pieces of personal information are requested.</p>
<p>Now, let's scroll down.</p>	<p>The page scrolls down to the employment data section. Bolded information includes the member's hire date and position title. Other requested information includes position classification, eligibility date, and exclusion code.</p>
<p>And here, we are going to enter Bob's employment data. Now, it's very important that we enter the correct dates here.</p>	<p>“Hire Date” is circled. “Eligibility Date” is circled.</p>
<p>The hire date is the date the individual became an employee. And the eligibility date is the date that the employee became eligible for coverage in a PERA plan. For most employees, these dates will be the same, and for Bob, they will be the same date. He was hired on March 3rd, 2024, and he came eligible March 3rd, 2024.</p>	<p>03/03/2024 is entered in the blank next to “Hire Date”. 03/03/2024 is entered in the blank next to “Eligibility Date”.</p>
<p>Once we have everything filled out, we'll hit submit, and that will enroll Bob.</p>	

Audio	Visual
<p>Now, you may notice that the last question here asks for an exclusion code. If your employee's hire date and eligibility date are the same, leave this as "No Selection". However, if the employee you're enrolling had been excluded from PERA up to this point, you'll need to enter the exclusion code that prevented the employee from PERA membership in the past.</p> <p>So, on that note, let's look at an example of how to enroll an employee who had previously been excluded.</p>	<p>"Exclusion Code" is circled.</p>
<p>So, let's say we have our employee, Sam. And we hired them to a five-month temporary position at our county on February 21st, 2024, but we never enrolled her, because temporary positions that are under six months are excluded from PERA.</p> <p>However, a couple months later in April, let's say that Sam's employer decides to extend her position for another five months, meaning her position is now a total of 10 months. That means that Sam's position is no longer excluded, so we will need to enroll her.</p> <p>We would do all the same steps as before, but once we get to this page, we will need to be mindful of these dates.</p>	<p>A blank employment data section appears.</p>
<p>We will enter the hire date as February 21st, 2024; and the eligibility date will be the beginning of the pay period in which her position was extended: April 15th, 2024.</p>	<p>02/21/2024 is entered as the "Hire Date". 04/15/2024 is entered as the "Eligibility Date".</p>

Audio	Visual
<p>Then, we will also need to enter the exclusion code that prevented Sam from PERA membership in the past.</p>	<p>The exclusion code drop-down menu is selected.</p>
<p>In this example, we're going to choose exclusion code 101, which is for temporary employees whose position is under six months.</p> <p>Once everything is filled out, we'll hit submit, and Sam will be enrolled.</p>	<p>"101 – Temp < 6 Months" is chosen from the drop-down menu.</p>
<p>Now, let's go over how to update a member's employment status.</p> <p>For this example, let us take a time machine to December of 2028. Bob's decided to quit, so we need to update his status as terminated.</p>	<p>The ERIS home page appears.</p>
<p>Our first step will be to pull up Bob's account. So let's select <i>Employee</i> from under the search module.</p>	<p>On the left-hand menu, <i>Employee</i> is circled from under the search module. The employee search module appears.</p>
<p>And here, we're going to type in Bob's Social Security number in this field. And then we'll click that blue search button. The results will pop up at the bottom.</p>	<p>The search results appear below the search fields. Bob is listed.</p>
<p>You may notice that under employment status, it says "New". But as Bob's fictional employer, we know he's been employed here since 2024, so why would his status still say new? The reason is that he's had zero employment status changes since his hire date. And so his status will show as new until a change is made.</p>	

Audio	Visual
<p>Now, to update Bob’s status, let's click on his name. And that will pull up his account.</p> <p>Now, as Bob's employer, we can make any changes to the information on the screen, including updating their mailing address if they have moved.</p>	<p>Bob’s account appears, displaying his personal data.</p>
<p>Now, before I move on, I do want to note that it's recommended to wait until all pay has been paid to your employee before you update their termination status. So with that in mind, let's scroll down.</p>	<p>Page scrolls down. Bob’s employment data is shown. There is a drop-down menu labeled as “New Status”, and below that is a blank to write in the new status date.)</p>
<p>So, find “New Status”. Click on the drop-down menu, and select “Terminated”.</p>	<p>The new status drop-down menu is selected, displaying options such as death, layoff, several types of leave, terminated, and Workers’ Comp. “Terminated” is selected from the list.</p>
<p>We will then enter the date that Bob terminated: December 31st, 2028. Then, we'll hit that blue submit button, and we'll be done.</p>	<p>In the blank next to “New Status Date” 12/31/2028 is written.</p>
<p>So, that was a lot of information. But let's recap.</p> <p>First off, what is ERIS? ERIS is a secure online system that is used for maintaining data on employees and completing PERA reporting duties. And if you have internet, you must use ERIS. You cannot use mail if you have internet capabilities at your unit.</p> <p>Next, there are three types of ERIS user accounts, and each one has different capabilities and security access. We have ERIS administrators, and they have full access to all the modules in ERIS, and they</p>	

Audio	Visual
<p>also have the ability to create representative accounts and to set up the representative's security access. So some ERIS representatives have full access to all the modules in ERIS, and some will have more limited access.</p> <p>And then we have Contracted Payroll Providers, who do payroll services for governmental units, and whose initial ERIS access is limited. So if a Contracted Payroll Provider wants access to other modules on ERIS, they will need to request access from each governmental unit's ERIS administrator.</p> <p>Then lastly, just a reminder, do not share your ERIS account with anybody. You are in charge of keeping your username and your password secure, and it's very important that you do, because you are responsible for any actions that are made under your username.</p>	
<p>And that is the end of our program. Reminder of the statutes that govern PERA. Chapter 353 and 356 is where you will find most of our information.</p>	<p>New slide appears, listing Minnesota Statutes 11A, 353, and 356.</p>
<p>Now, just a disclaimer, our programs are intended to provide general information. And if there is discrepancy between what's written into law and what's contained this presentation, then the statutes and regulations that are written into law will take precedence.</p>	

Audio	Visual
<p>Now, for more information, you can check out our website at www.mnpera.org.</p> <p>If you ever have questions about ERIS, you can contact us via e-mail at employer.reps@mnpera.org.</p> <p>You can also call us. Our local number is (651) 296-3636. And our toll free number is 1(888) 892-7372.</p> <p>Alright, and thank you, everybody, for attending today.</p>	