P E R A

WELCOME TO PERA

PERA RETIREMENT PLANS

A pension is a retirement plan paid into while working that provides a future monthly lifetime income.

» Pensions are governed by Minn. Stat. §353 and §356.

» Participation is mandatory for eligible local government and school employees.

» Employers and members contribute a percentage of each paycheck to the retirement fund.

CALCULATING A PENSION

PERA calculates pensions based on three factors:

1. The member's reported salary,

2. Service credits earned every month, and

3. The age at which the member starts receiving their pension.

BASIC PENSION ELIGIBILITY

Membership is mandatory for MN public employees whose monthly pay from a single employer exceeds the salary threshold of $425. Once the salary threshold is met, membership to PERA is valid until the member terminates public employment.

ABOUT ERIS

ERIS is a secure, web-based platform that employers with internet capabilities use to complete PERA-reporting tasks, including:

» **Enroll** and **update** members' employment or personal data,

» **Send salary** and **contribution data** each pay period, and

» Complete **reports** to collect or validate member data.

THERE ARE THREE TYPES OF ERIS USERS:

1. **ERIS System Administrator:** Agencies have two administrator accounts. Administrators have full access to all modules and can create and set security levels for ERIS representative accounts.

2. **ERIS Representative:** Agencies have unlimited representative accounts. Representative account access is established by an administrator.

3. **Contracted Payroll Provider:** There is one payroll provider account per person, even if that person works for multiple agencies. Payroll provider initial access is limited; providers must request access rights from the agency to use all modules.

ERIS users are responsible for keeping their usernames and passwords confidential.

CREATING ACCOUNTS

ERIS ADMINISTRATOR ACCOUNT

1. Visit mnpera.org. Hover your mouse over **Employers** in the top menu bar, then click **ERIS Login**.

2. Click **Request Access** below ERIS login.

3. Enter your name and employer unit ID. If you don't know your employer ID, you can find it using the **Employer Lookup**.

4. Complete the registration page, then click **Submit**. PERA will send you a confirmation email and registration packet.

5. Review and sign the registration packet. An authorized user must also sign the registration packet to approve your access.

6. Email the signed form to PERA. PERA will email you a temporary password to log into ERIS.

ERIS REPRESENTATIVE ACCOUNT

1. Open ERIS. Click **Employer** Contacts from the **Maintain Employer** module. Click the **Add New Contact** button.

2. Complete the registration page and click the **Add ERIS Access** button. Choose the representative's security access to each module, then click **Submit**.

3. Record the ERIS-generated username that appears in a pop-up message. Share the username with the new representative.

4. Activate the new account using the temporary password and instructions PERA will email to the ERIS representative.

PERA

EXPLORING THE ERIS MENU

MODULE NAME	MODULE FUNCTION
Member Account	Access a member's account by entering their Social Security number.
Search	**Employee:** Search PERA's records for employees at your agency by various search filters.
	Benefit Recipient: Search PERA's database to see if a particular employee is drawing benefits from PERA.
Enroll Member	Enroll employees into a PERA pension plan.
Maintain Employer	Add and manage ERIS representatives.
Transmit File	Submit data files to PERA.
Transmit Test File	Test data files to ensure that they are properly formatted.
SDR Reporting	**New SDR:** Complete the SDR via manual input.
	SDR History: View SDRs from two years ago to today.
	SDR Summary Report: View contribution reports from two years ago to today.
Pending Reports	Automatic reports generated by ERIS to obtain data on members. If PERA needs you to complete a specific report, it will be listed in this section.
Annual Leave Report	**Enter Report Data:** Complete the *Annual Leave Report* via manual input.
	Transmit Data File: Complete the *Annual Leave Report* via a data file.
	Amend Report Data: Edit data on a previously-submitted *Annual Leave Report*.

ENROLL & UPDATE

TO ENROLL A NEW MEMBER

1. Open ERIS. Click **New Enrollment** from the **Enroll Member** module. Choose your employee's plan name, enter their Social Security number, and click **Submit**.

2. Complete the enrollment page, ensuring all data is accurate, and click **submit**. Be sure to note the hire date, eligibility date, and exclusion code:

   » The **hire date** is the date the individual became an employee.
   » The **eligibility date** is the date the employee became eligible for PERA.
   » The **exclusion code** is a three-digit number that identifies why an employee is or was excluded from PERA. If your employee's hire date and eligibility date are the same, leave the exclusion code as **No Selection**. If the hire and eligibility dates are different, enter the exclusion code that previously prevented your employee from PERA membership.

TO UPDATE A MEMBER'S EMPLOYMENT STATUS

1. Open ERIS. Click **Employee** from the **Search** module.

2. Use the search filters to find your employee, then click **Search**. Search results will appear at the bottom of the screen.

3. Click the employee's name to open their account. Scroll to the bottom.

4. Click the employee's **New Status** from the drop-down menu and enter the **New Status Date**. Click **Submit** to save changes.