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WELCOME TO PERA

PERA IS A PENSION

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

» Governed by MN law §353 & §356

» Participation is mandatory for eligible local government and school employees

» Employer and member both contribute a percentage of each paycheck

HOW DOES PERA CALCULATE A PENSION?

PERA calculates pensions based on three factors:

1. Member's reported **salary**
2. **Service** credits earned each month
3. The **age** at which the member begins drawing their pension

BASIC PENSION ELIGIBILITY

Membership is mandatory for 1) MN public employees whose 2) monthly pay from a single employer exceeds the salary threshold ($425). Once the salary threshold is met, membership to PERA becomes valid until the member terminates from your employment.

NEW EMPLOYEE ENROLLMENT

TO ENROLL A NEW EMPLOYEE

» Open ERIS. Click **New Enrollment** from the **Enroll Member** module.

» Choose employee's plan, enter their Social Security number, and click **Submit**.

· Bolded information is required.

· If the hire date and eligibility dates are not the same, enter the exclusion code that previously excluded employee from PERA membership.

ADDITIONAL ENROLLMENT PAPERWORK

Part-time P&F Resolution
Certifies part-time employee's eligibility for P&F Plan coverage. Required for every new employee—even if there is a blanket resolution on file.

Membership Election Forms
Confirms an employee's decision to participate in DCP or Coordinated Plan.

Correctional Plan Certification
Certifies an employee's eligibility for Correctional Plan Coverage.

TO COMPLETE THE CORRECTIONAL PLAN CERTIFICATION ON ERIS:

» Open employee's account.

» Scroll to bottom and click **Submit Certification**.

» Review the employee's information. If correct, select **Authorize Submission** to complete certification.

UPDATING ACCOUNTS

TO OPEN AN EMPLOYEE'S ACCOUNT

» Click **Employee** from the **Search** module.

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

» Click on the employee's name to open their account.

TO UPDATE A MEMBER'S EMPLOYMENT STATUS

» Open employee's account. Scroll to the bottom.

» Select the employee's **New Status** from the drop-down menu and enter the effective date.

» Click **Submit** to save changes.

OTHER STATUS UPDATES

» Leave: don't report an employee's leave status on this page. Instead, report all leaves on your unit's *Annual Leave Report*.
» Death: report the death on this page. Additionally, email PERA to report the employee's death.

TERMINATION EVENT	TERMINATION INSTRUCTIONS
Employee terminates from your unit	» Open employee's account and scroll to the bottom. » Select **Terminated** from the **New Status** drop-down menu and enter the effective date of the termination. » Click **Submit** to save changes.
Employee switches from one PERA pension plan to another PERA pension plan	» After terminating employee from the first plan, complete a new enrollment for the employee under the new plan. » The hire date will be the employee's first day of work under the new plan.
Employee switches from a PERA pension plan to a different state pension plan (such as MSRS or TRA)	» The effective date of the termination will be the last day that the employee worked under their old plan.

PERIODIC REPORTS

ERIS regularly generates reports to collect or validate data. Some reports generate as needed while others generate on a routine basis. Most reports can be found in ERIS under **Pending Reports**.

REPORT	HOW TO COMPLETE IN ERIS
STATUS VERIFICATION Generates if your unit has employees who a) have gone eight months or longer without earnings, and b) are still listed as active or as on a leave.	» Select **Status Verification Report** from the **Pending Reports** module. » Update the employment status and effective date for each employee on the list. » If the employee's status has not changed, choose "No Change" and leave the date blank. » Once all three tabs are completed, select **Save – Submit to PERA**.
MISSING ENROLLMENTS Generates when PERA receives contributions for an employee whose enrollment is incomplete.	» Select **Missing Enrollments Report** from the **Pending Reports** module. » Select the blue **Update Enrollment** link next to the employee's name to open their account. » Complete the missing data, including bolded information. Click **Submit** to finalize enrollment.
POLICE & FIRE CERTIFICATION Generates every February for units who employ P&F members.	» Select **Police and Fire Certification** from the **Pending Reports** module. » Update the position title and class for each employee on the list. If an employee is no longer active, choose their most recent position class. If all data is correct, check the "No Changes" box. » Once finished, select **Save – Submit to PERA**.
VERIFICATION OF TERMINATION Verifications of Termination are needed only for individuals that wish to collect benefits or a refund within 30 days of their termination.	» The report can be accessed from the **Pending Reports** module, or by opening the employee's account. » Scroll to the employment section and select the gray "Retirement Form" button. » Complete the form and enter the employee's termination date. » Click **Next** to submit.
CONTRIBUTIONS AFTER TERMINATION Generates when PERA receives contributions after an employee's termination date.	» This report is not found in ERIS. » PERA will email employers with instructions on how to complete.
MEMBER DOB AND ADDRESS Generates twice a year and is sent to employers via mail. Lists any members whose accounts are missing DOB or mailing address.	» Select **Employee** from the **Search** module. » Click on the "Additional Search" drop-down menu to sort employees by **Missing DOB** or **Missing Address**. » Results appear at the bottom. Click on the employee's name to open their account. » Enter the missing information and click **Submit** to save changes.