

# Welcome to PERA

#### **PERA** is a Pension

A retirement plan paid into while working that provides future monthly lifetime income calculated on a formula.

- Governed by MN law §353 & §356
- · Mandatory participation for local government and schools
- Reporting requirements for participating employers

# Employer Reporting and Information System (ERIS) Platform Overview

- Enroll and update members' employment or personal data
- Send salary and contribution data by paid date
- Administrators can create and update staff as Representatives with their own ERIS access
- Complete **reports** that PERA generates to collect or validate member data

#### User Roles

**ERIS System Administrator -** Two per agency with access to all features and reports. Create and set security level for ERIS Representatives.

**ERIS Representative** - There is no account limit of ERIS Representatives. Account access based on security settings.

# **PERA** Reporting

#### **Contribution Reporting**



**Direct data entry** - Input data directly into ERIS. System validates data and allows you to save and print a copy.

**Upload Computer Files -** Alternative to data entry. Internal or contracted programmers create a file that meets the requirements described in <u>Chapter 9 - File Format</u>. Contact PERA for testing before electronic submissions begin.

### **Enter Contribution Data in ERIS**

Within the **Detail Tab**, you will find a list that contains all active employees of your agency. Enter eligible earnings, and overtime earnings, select **Save** periodically, and ERIS will calculate the member contributions for you to audit against your payroll register. The button '**Add Member**' could be selected to add a newly enrolled member to the report, or a second line of data for an active member on your list.

### How does PERA Calculate a Pension?

PERA calculates pensions based on information provided by employers every payroll period:



- based on member's reported salary
- service credits earned every month of public service
- the age at which the member retires

#### **Register for ERIS System Administrator Access**

Visit <u>mnpera.org/employers</u> and click on **Online Services**. Click on **Access ERIS**. Below the log in, click on **Request Access**. Enter your employer unit ID. Need help finding your employer ID? Access <u>Employer Lookup</u>. Complete the registration page. We will send a confirmation email and mail a registration packet. Please review, sign the registration agreement, and have a board member sign to approve your access. When PERA receives the signed form, we will send you a temporary password via email to log into ERIS.

#### **Create ERIS Representative Access**

In ERIS, click **Employer Contacts.** Click on **Add New Contacts.** Complete registration and set security access. The ERIS Representative will receive an email from PERA with a temporary password and instructions to create the account.

### Summary/Submit Tab

This tab provides the calculation of all member and employer contributions for you to audit. If the amount does not equal your payroll register, select **Detail** tab to review your entries. If there are credits to be used or invoices to be paid, please enter the amount and **Save**. These changes will provide you with the **Grand Total**.

### **Transmit File**

If your government unit **produces a computer file through software**, you will need to upload the file using ERIS. Click on **Transmit File** and select your generated .sdr file from your local computer browser.

### Update a Termination Date in an SDR

Click on a name in your SDR, and select the **New Status** and enter the **New Date**. **Submit**. The update will be made so that member will not be included in future reports.





### **PERA** Reporting (continued)

#### **EFT Payments**

After the data has been sent in to PERA, the grand total of contributions can be paid through EFT on our website. Go back to <u>mnpera.org/employers</u> and make your way back to **Online Services**, you will find the link to the EFT portal.

#### Contribution Data & Salary are Submitted

- SDR matched with payment data
- System flags discrepancies
- Transactions are posted to account



# Pending Report

A report generated asking for clarification, or more information.

# Eligibility

#### Pending Report - Missing Enrollments

Contributions are received for an employee, but they have not been enrolled into PERA. The report will generate to remedy the situation. Click **Update Enrollment** to complete.

# Pending Report - Higher Than Normal Salary

Contributions are received for an employee, and the salary reported has significantly increased. You will need to note what caused this spike in earnings. Were the earnings reported incorrectly? If so, be sure to provide details of the error in the report to remedy. Is this a change to note for the next payroll cycle? Fill out the report. It is very rare that we have to follow up once you provide an answer and details.

**Pension Eligibility** - Membership is mandatory for public employees whose positions are expected to earn more than the annual threshold. Once salary threshold is met, membership to PERA becomes valid until the member is terminated from your employment.

**Membership Salary Threshold** - Effective July 1, 2023, PERA's membership salary threshold is a monthly amount of \$425. Current members who qualified for membership under the previous rules are not affected and will retain their membership until termination.

**Coordinated Plan -** §353.01, subd. 2a Full or part-time permanent public employees, including non-certified employees.

**Police & Fire Plan - §353.64** Not earning credit in other retirement plans for same service. Default plan for P&F is General if no resolution provided. PT P&F can be enrolled with a signed resolution from governing board (blanket or single)

**Correctional Plan -** §353E.02 For correctional guards or officers, a joint jailer/dispatcher, or a supervisor of these positions working in a county, regional adult or juvenile correctional facility. Not a member of the P&F fund.

**Defined Contribution Plan (DCP)** - Available for elected local government officials, ambulance drivers, city managers and physicians. These positions are excluded from paying into PERA's pension plans. Appointed officials are eligible for coverage when earnings are too low for Coordinated Plan membership. Previously elected but now appointed positions are eligible to resume coverage under DCP. Participation is voluntary and there is no minimum salary requirement. Performance based plan, similar to a 401k, 403b, IRA or deferred comp where a member pays into the account and the money is invested as directed by the member.

### **Excluded Classes of Employees**

Certain classes of employees are excluded from joining a PERA Pension Plan. All employers who have employees excluded are required to submit an annual report.

Exclusion references in <u>Chapter 3</u> of the <u>Employer Manual</u>-Exclusions and related section of law - <u>Pg 8 - 13</u> Full list of exclusions and their codes - <u>Pg 40 - 41</u>

### Enrollment

In ERIS, click **New Enrollment**. Choose your employee's plan and enter their Social Security number. Complete their enrollment, ensuring all data is accurate. If employee has been excluded from PERA up to this point, be sure to note their hire date, eligibility date and exclusion code.

### **Update Member Employment Status in ERIS**

In ERIS, click **Employee** under heading **SEARCH**. Use the search filters to find employee(s). Once pulled up, employers can update member info and employment status.