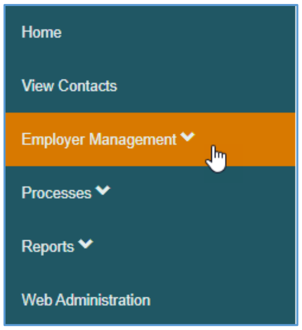
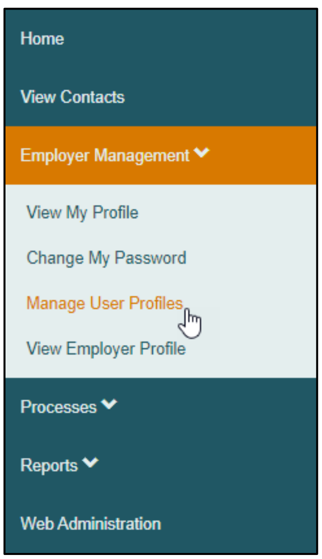
How to Create and Edit Employer Contacts

Use this tutorial to learn how to create and edit a new contact in the Employer Reporting Application.

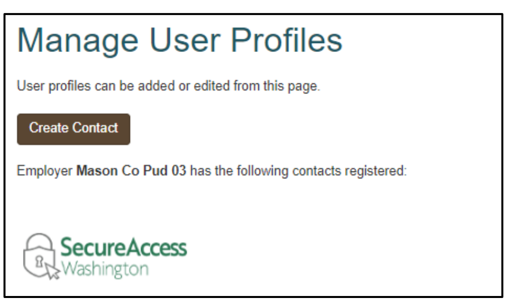
1. Open "Employer Management" from the Process Menu and select Processes



2. Select "Manage User Profiles"



3. Select "Create Contact"

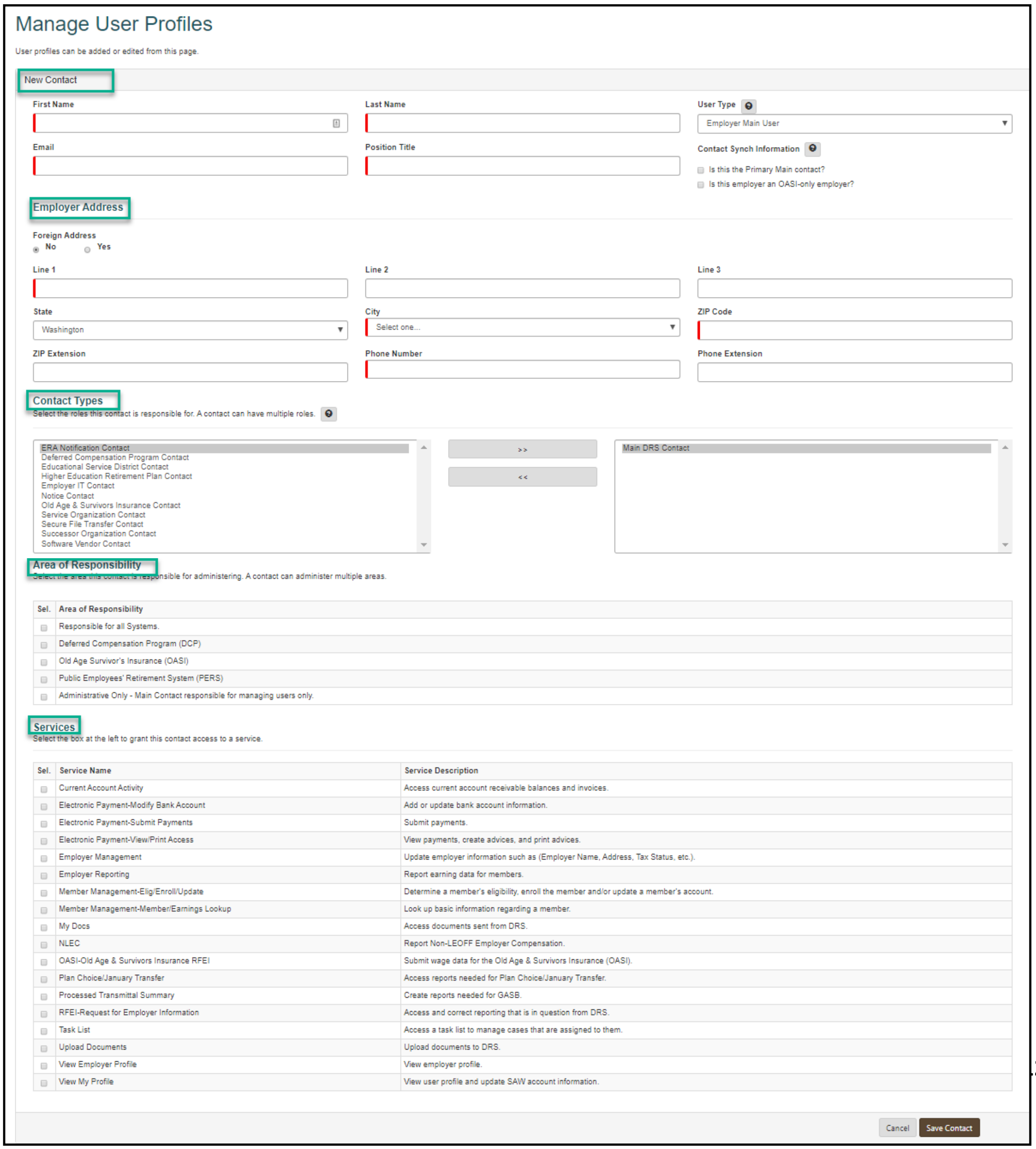


WASHINGTON STATE Department of Retirement Systems

Instructions for completing each section of “Manage User Profiles”

The “Manage User Profiles” screen displays mandatory fields shown with a red line. The screen is divided into five sections:

- New Contact
- Employer Address
- Contact Types
- Area of Responsibility
- Services



Manage User Profiles

User profiles can be added or edited from this page.

New Contact

First Name | Last Name | User Type

Employer Main User

Email | Position Title | Contact Synch Information

Is this the Primary Main contact?

Is this employer an OASI-only employer?

Employer Address

Foreign Address

No Yes

Line 1 | Line 2 | Line 3

State | City | ZIP Code

Washington | Select one...

ZIP Extension | Phone Number | Phone Extension

Contact Types

Select the roles this contact is responsible for. A contact can have multiple roles.

ERA Notification Contact
Deferred Compensation Program Contact
Educational Service District Contact
Higher Education Retirement Plan Contact
Employer IT Contact
Notice Contact
Old Age & Survivors Insurance Contact
Service Organization Contact
Secure File Transfer Contact
Successor Organization Contact
Software Vendor Contact

>>

<<

Main DRS Contact

Area of Responsibility

Select the area this contact is responsible for administering. A contact can administer multiple areas.

Sel.	Area of Responsibility
	Responsible for all Systems.
	Deferred Compensation Program (DCP)
	Old Age Survivor's Insurance (OASI)
	Public Employees' Retirement System (PERS)
	Administrative Only - Main Contact responsible for managing users only.

Services

Select the box at the left to grant this contact access to a service.

Sel.	Service Name	Service Description
	Current Account Activity	Access current account receivable balances and invoices.
	Electronic Payment-Modify Bank Account	Add or update bank account information.
	Electronic Payment-Submit Payments	Submit payments.
	Electronic Payment-View/Print Access	View payments, create advices, and print advices.
	Employer Management	Update employer information such as (Employer Name, Address, Tax Status, etc.).
	Employer Reporting	Report earning data for members.
	Member Management-Elig/Enroll/Update	Determine a member's eligibility, enroll the member and/or update a member's account.
	Member Management-Member/Earnings Lookup	Look up basic information regarding a member.
	My Docs	Access documents sent from DRS.
	NLEC	Report Non-LEOFF Employer Compensation.
	OASI-Old Age & Survivors Insurance RFEI	Submit wage data for the Old Age & Survivors Insurance (OASI).
	Plan Choice/January Transfer	Access reports needed for Plan Choice/January Transfer.
	Processed Transmittal Summary	Create reports needed for GASB.
	RFEI-Request for Employer Information	Access and correct reporting that is in question from DRS.
	Task List	Access a task list to manage cases that are assigned to them.
	Upload Documents	Upload documents to DRS.
	View Employer Profile	View employer profile.
	View My Profile	View user profile and update SAW account information.

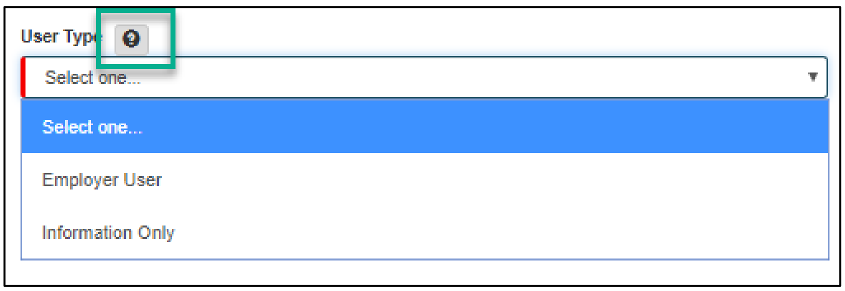
Cancel | Save Contact

New Contact

Follow these steps to enter information for:

- First Name
- Last Name
- User Type
- Email
- Position Title

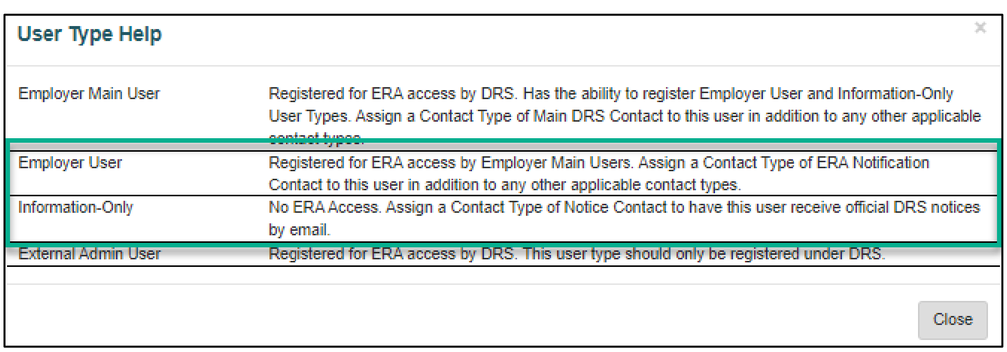
1. Select a "User Type" from the drop down List. If you're not sure which "User Type" to choose, select the question mark icon to display definitions for each type.



As an "Employer Main User" for your organization only, the following selections will display:

Employer User – This user type is registered by the "Employer Main Contact." The Employer Main Contact has access to the ERA Portal. Access to services varies by user and is granted by the "Main User" at the time of registration. This user will get a registration link and a registration code to enable them to register with Secure Access Washington (SAW).

Information Only – This user type is registered by the Employer Main Contact. It is for DRS' informational purposes only. This user type does not have access to log in to ERA.



User Type Help

Employer Main User	Registered for ERA access by DRS. Has the ability to register Employer User and Information-Only User Types. Assign a Contact Type of Main DRS Contact to this user in addition to any other applicable contact types.
Employer User	Registered for ERA access by Employer Main Users. Assign a Contact Type of ERA Notification Contact to this user in addition to any other applicable contact types.
Information-Only	No ERA Access. Assign a Contact Type of Notice Contact to have this user receive official DRS notices by email.
External Admin User	Registered for ERA access by DRS. This user type should only be registered under DRS.

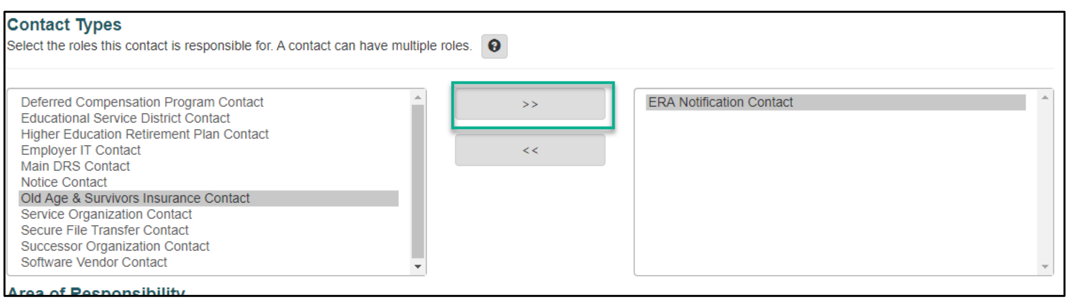
Close

Employer Address

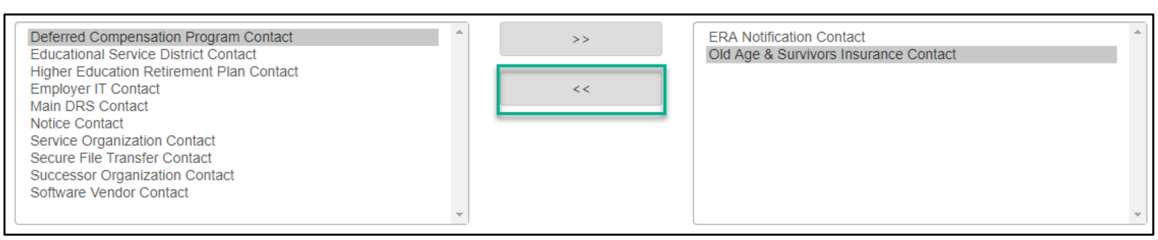
2. **Enter employer's address and phone number. You can type the name of the city, or select it from the drop down list.**

Contact Types – Informational only for Department of Retirement Systems. Contact types don't restrict access.

3. **From the list of roles, select the role this contact is responsible for and then select the right-facing arrow to add the role to the field on the right. A contact can have multiple roles. The role of "ERA Notification Contact" will be added as a default.**



4. **To remove a contact type, select it and then select the left-facing arrow to move it back to the list.**



5. **For Contact Type definitions select the ? button in the Contact Types section to display definitions for each type.**

Contact Types Help

ERA Notification Contact	Assign to User Type of Employer User.
Deferred Compensation Program Contact	Responsible for reporting deferred compensation data to DRS.
Educational Service District Contact	Person from the Educational Service District that supports a School District.
Higher Education Retirement Plan Contact	Responsible for the Higher Education Retirement Plan at an institute of higher education.
Employer IT Contact	Responsible for assisting DRS with technical issues related to reporting.
Main DRS Contact	Assign to User Type of Employer Main User.
Notice Contact	Assign to User Type of Information-Only. Will receive official DRS notices by email.
Old Age & Survivors Insurance Contact	Responsible for OASI (voluntary Social Security coverage) administration and billing.
Service Organization Contact	If your organization has another entity managing reporting to DRS, assign this contact type to the responsible individual.
Secure File Transfer Contact	Responsible for managing SFT reporting to DRS.
Successor Organization Contact	Person DRS can contact with questions regarding an employer that no longer exists.
Software Vendor Contact	Person at a software company responsible for the software used to report to DRS.

Close

All DRS Email Notices will be sent to:

- **Main DRS Contacts**
- **ERA Notification Contacts**
- **Notice Contact**

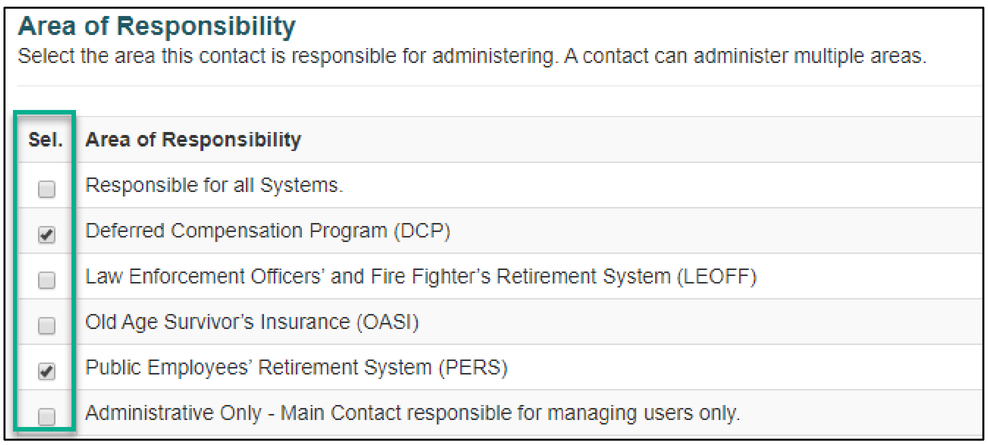
All **ERA Notification Contacts** will receive DRS notices by email.

Notice Contacts will be a **User Type** for information only. **Notice Contacts** don't work in ERA and won't get a registration.

Contacts should not have BOTH **ERA Notification Contact** and **Notice Contact** User Types.

Area of Responsibility – Informational only for Department of Retirement Systems and they don't restrict access.

6. **Select the "Area of Responsibility" by checking the box next to each area this contact is reponsible for administering. A contact can administer multiple areas. If you select "Responsible for all Systems," the rest of the areas will be grayed out. If you want to remove the Area of Responsibility you've chosen, select the box with the check.**


Area of Responsibility

Select the area this contact is responsible for administering. A contact can administer multiple areas.

Sel.	Area of Responsibility
☐	Responsible for all Systems.
☑	Deferred Compensation Program (DCP)
☐	Law Enforcement Officers' and Fire Fighter's Retirement System (LEOFF)
☐	Old Age Survivor's Insurance (OASI)
☑	Public Employees' Retirement System (PERS)
☐	Administrative Only - Main Contact responsible for managing users only.

DRS
WASHINGTON STATE
Department of
Retirement Systems

Services

7. **Select the box to the left of a service to grant this contact access to a service. If a service is not selected the contact will not have access to this service in ERA. To remove a service, select the box with the check.**

Services
Select the box at the left to grant this contact access to a service.

Sel.	Service Name	Service Description
☑	Current Account Activity	Access current account receivable balances and invoices.
☐	Electronic Payment-Modify Bank Account	Add or update bank account information.
☐	Electronic Payment-Submit Payments	Submit payments.
☑	Electronic Payment-View/Print Access	View payments, create advices, and print advices.
☑	Employer Management	Update employer information such as (Employer Name, Address, Tax Status, etc.).
☑	Employer Reporting	Report earning data for members.
☑	Member Management-Elig/Enroll/Update	Determine a member's eligibility, enroll the member and/or update a member's account.
☑	Member Management-Member/Earnings Lookup	Look up basic information regarding a member.
☑	My Docs	Access documents sent from DRS.
☐	NLEC	Report Non-LEOFF Employer Compensation.
☐	OASI-Old Age & Survivors Insurance RFEI	Submit wage data for the Old Age & Survivors Insurance (OASI).
☑	Plan Choice/January Transfer	Access reports needed for Plan Choice/January Transfer.
☑	Processed Transmittal Summary	Create reports needed for GASB.
☑	RFEI-Request for Employer Information	Access and correct reporting that is in question from DRS.
☑	Task List	Access a task list to manage cases that are assigned to them.
☑	Upload Documents	Upload documents to DRS.
☑	View Employer Profile	View employer profile.
☑	View My Profile	View user profile and update SAW account information.

8. **Select Save Contact**

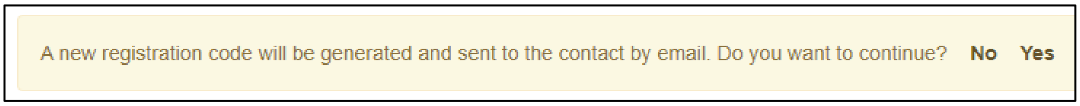
Cancel | Save Contact

The "Manage User Profiles" screen is displayed with the new contact. The registration code and link are emailed to the new contact. The code is only good for 24 hours.

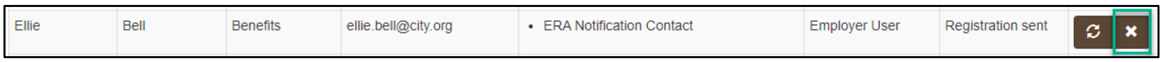
9. **To resend a new code select the "double arrows"**

Ellie	Bell	Benefits	ellie.bell@city.org	• ERA Notification Contact	Employer User	Registration sent	⟳ ✖

10. Select "Yes" to generate a new registration code email



11. To delete a new contact that has not registered select the "X"



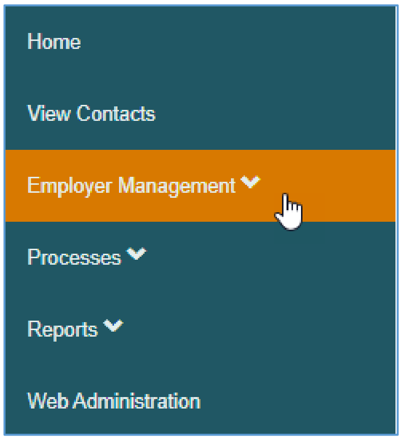
12. Select Yes to delete this new contact

Once a contact registers they cannot be deleted. You can change their status by editing the contact.

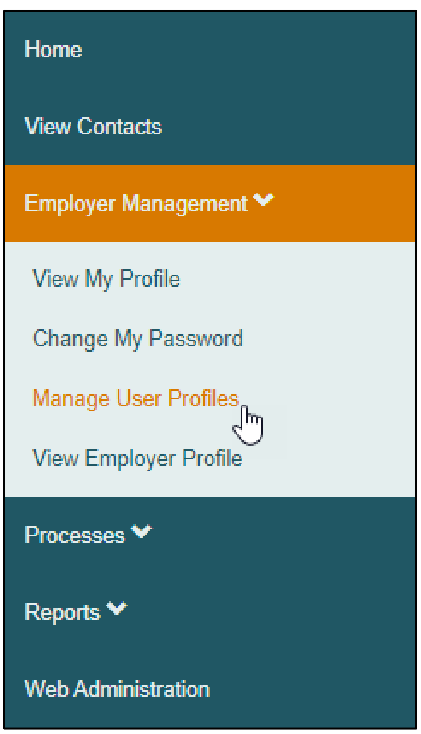
Editing Employer Contacts

Follow these instructions to learn how to edit your employer contacts.

1. Open “Employer Management” from the Process Menu and select “Processes”



2. Select “Manage User Profiles”



The Manage User Profiles screen is displayed with the organization’s contacts. There are three different sets of icons displayed under the question mark icon in the far right column.

Manage User Profiles

User profiles can be added or edited from this page.

Create Contact

Filter By Status: All

Employer **Retirement Systems Department Of** has the following contacts registered:

First Name	Last Name	Position Title	Email	Contact Types	User Type	Status	
All	All	All	All	All	All	All	
Ellison	Bell	Payroll	debbie.callar@gmail.com	• ERA Notification Contact • Old Age & Survivors Insurance Contact	Employer User	Registration sent	
Sally	Schaufler	Payroll	sally.schaufler@drs.wa.gov	• Main DRS Contact	Employer Main User	Active	
Lauren	Coal	HR Manager	debbie.callar@drs.wa.gov	• Main DRS Contact • Old Age & Survivors Insurance Contact	Employer Main User	Active	
Holly	London	Payroll	debbie.callar@drs.wa.gov	• ERA Notification Contact	Employer User	Active	

3. Select the to view “Icon Help”

Icon Help

	Edit a contact's profile information and permissions.
	Send a new registration code to a contact whose code has expired.
	Delete a contact who has failed to register.
	Reset a user’s password for the Employer Reporting Application.
	Reset a user’s multi-factor authentication information.

Close

The first set doesn't have an icon. This view is for the "User Type"called "Employer Main Users." DRS will set up the organization's "Main Contacts." There is no pencil icon to edit or lock icon to reset a password because Main Contacts can only be edited by DRS.

First Name	Last Name	Position Title	Email	Contact Types	User Type	Status	
All	All	All	All	All	All	All	
Ellison	Bell	Payroll	debbie.callar@gmail.com	• ERA Notification Contact • Old Age & Survivors Insurance Contact	Employer User	Registration sent	
Sally	Schaufler	Payroll	sally.schaufler@drs.wa.gov	• Main DRS Contact	Employer Main User	Active	
Lauren	Coal	HR Manager	debbie.callar@drs.wa.gov	• Main DRS Contact • Old Age & Survivors Insurance Contact	Employer Main User	Active	
Holly	London	Payroll	debbie.callar@drs.wa.gov	• ERA Notification Contact	Employer User	Active	

The second set of icons is for any User Type that has the status, "Registration Sent." These users haven't registered for Secure Access Washinton.

- The **double arrows** refresh the registration code and send a new one to the contact
- **X** deletes the unregistered contact

First Name	Last Name	Position Title	Email	Contact Types	User Type	Status	
All	All	All	All	All	All	All	
Ellison	Bell	Payroll	debbie.callar@gmail.com	• ERA Notification Contact • Old Age & Survivors Insurance Contact	Employer User	Registration sent	
Sally	Schaufler	Payroll	sally.schaufler@drs.wa.gov	• Main DRS Contact	Employer Main User	Active	
Lauren	Coal	HR Manager	debbie.callar@drs.wa.gov	• Main DRS Contact • Old Age & Survivors Insurance Contact	Employer Main User	Active	
Holly	London	Payroll	debbie.callar@drs.wa.gov	• ERA Notification Contact	Employer User	Active	

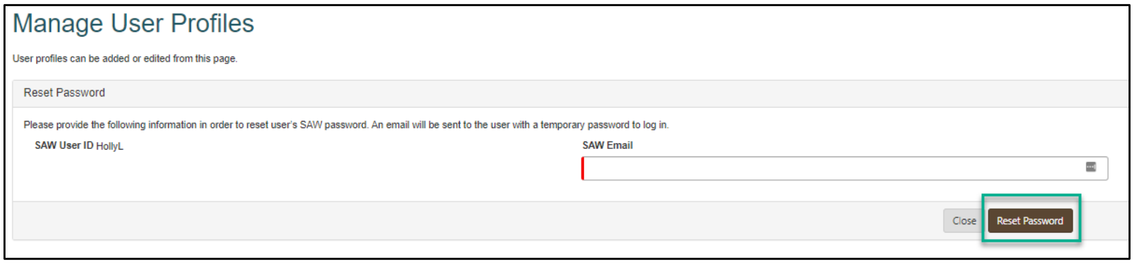
The third set of icons is for User Types, "Acitve." These users are set up by the organization's Main Contact and can be edited.

- The Pencil icon opens Manage User Profiles with editable fields
- The Lock icon opens Manage User Profiles with Reset Password option

First Name	Last Name	Position Title	Email	Contact Types	User Type	Status	
All	All	All	All	All	All	All	
Ellison	Bell	Payroll	debbie.callar@gmail.com	• ERA Notification Contact • Old Age & Survivors Insurance Contact	Employer User	Registration sent	
Sally	Schaufler	Payroll	sally.schaufler@drs.wa.gov	• Main DRS Contact	Employer Main User	Active	
Lauren	Coal	HR Manager	debbie.callar@drs.wa.gov	• Main DRS Contact • Old Age & Survivors Insurance Contact	Employer Main User	Active	
Holly	London	Payroll	debbie.callar@drs.wa.gov	• ERA Notification Contact	Employer User	Active	

4. **Select the lock to reset the contacts SAW password.**

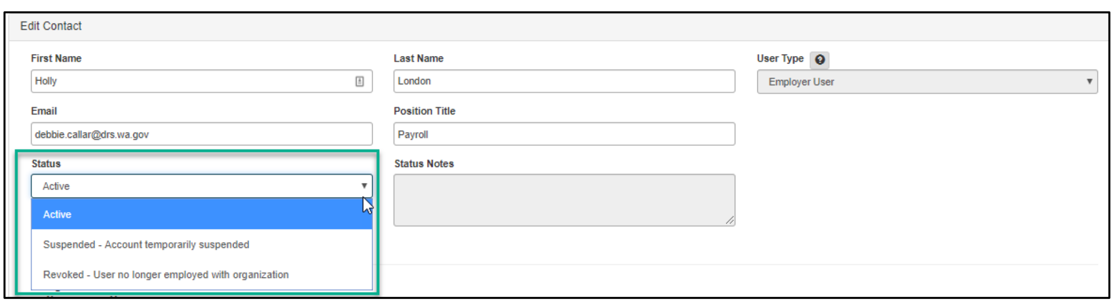
5. **Verify the SAW User ID and enter the contact's "SAW Email." Select "Reset Password."**



6. **Select the pencil to edit:**
   - Contact's information
   - Address and phone number
   - Contact Types
   - Area of Responsibility
   - Services

Once a contact has registered they may not be deleted. A contact can be suspended or revoked to limit their access to ERA.

7. **Select a status from the drop down list**
   - Suspended-Contacts account is temporarily suspended
   - Revoked-Contact is no longer employed with the organization



8. **When editing is complete, select "Save Contact"**