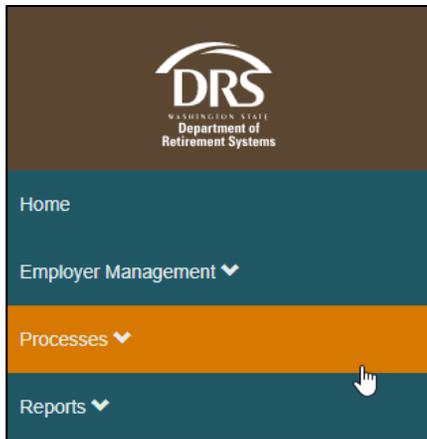




## Upload documents

How do I use the process “Upload Documents to DRS?”

1. Open the Process menu and select “Upload Documents”



## 2. Select “Start”

### Upload Documents

Select **Start** to begin a new Upload Documents Case.

The Upload Documents Process provides access to upload Member and Employer Documents.

Start



## Employer documents

### 3. From Document Type chose “Employer”

Upload Documents (ERA Portal Only) — Upload Documents — UPD-20210720-0182 Upload Documents - In Progress

Upload Documents
Case Information

Document Type

Document Type:  Employer  Member [?]

Add Document Clear Document Data

Documents

No records

Cancel Save Submit

### 4. Select the type of employer document you want to upload under “Document Information” next to “Document Description”

Upload Documents (ERA Portal Only) — Upload Documents — UPD-20210720-0182 Upload Documents - In Progress

Upload Documents
Case Information

Document Type

Document Type:  Employer  Member [?]

Document Information

Document Description:

- Bargaining Agreements

- Credit Redistribution Form

- ePay User Authorization

- Financial Institution Authorization for ePay

- Higher Education Retirement Plan (HERP) Payment Advice

Document:

No files uploaded [?]

Clear Document Data

Documents

No records

Cancel Save Submit



## Member documents

5. Under Document Type choose “Member,” enter the member’s SSN and select “Search”

Upload Documents (ERA Portal Only) — Upload Documents — UPD-20210721-0186 Upload Documents - In Progress

**Upload Documents** Case Information

Document Type

Document Type:  Employer  Member

Member Information

SSN:  Search

Document Information

Document Description:  Document:

DRS Review Required:

Add Document Clear Document Data

Documents

No records

Cancel Save Submit

The Member Profile is displayed.

6. Select the system and plan related to the member’s document

Member Profile

SSN: 000-01-0000

Title:

First Name: MICHAEL Middle Name:

Last Name: WHEELER

Extension: Suffix:

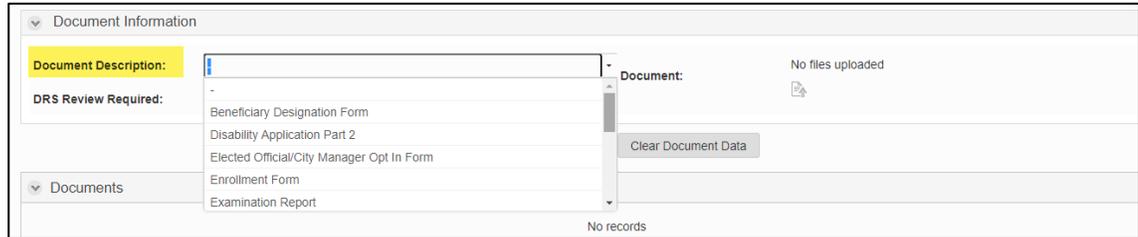
Gender: Male

Birth Date: 07/04/1971

System/Plans

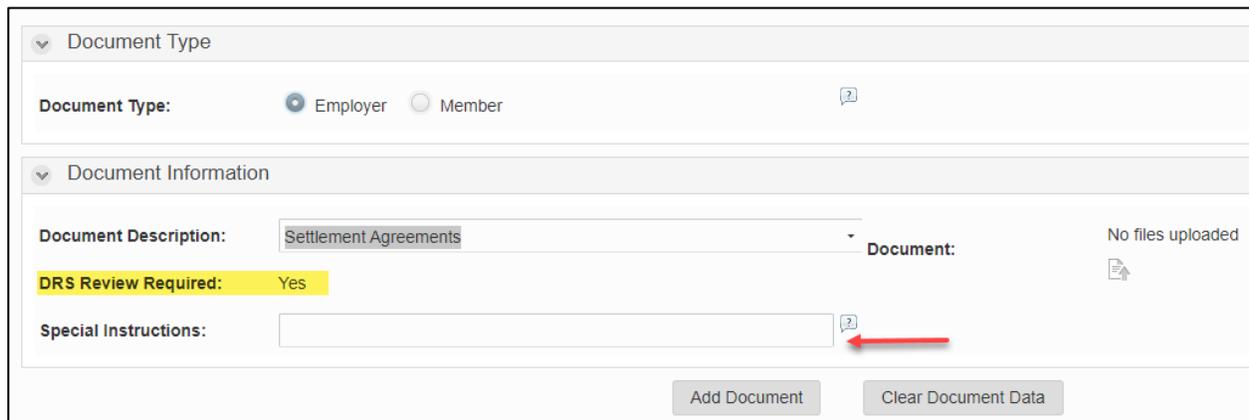
System Plan	Retirement Date	Selected
TRS Plan 2		<input type="checkbox"/>
PERS Plan 2		<input type="checkbox"/>
PERS Plan 3		<input checked="" type="checkbox"/>

**7. Under “Document Information” select the type of member document you want to upload in the “Document Description” section**



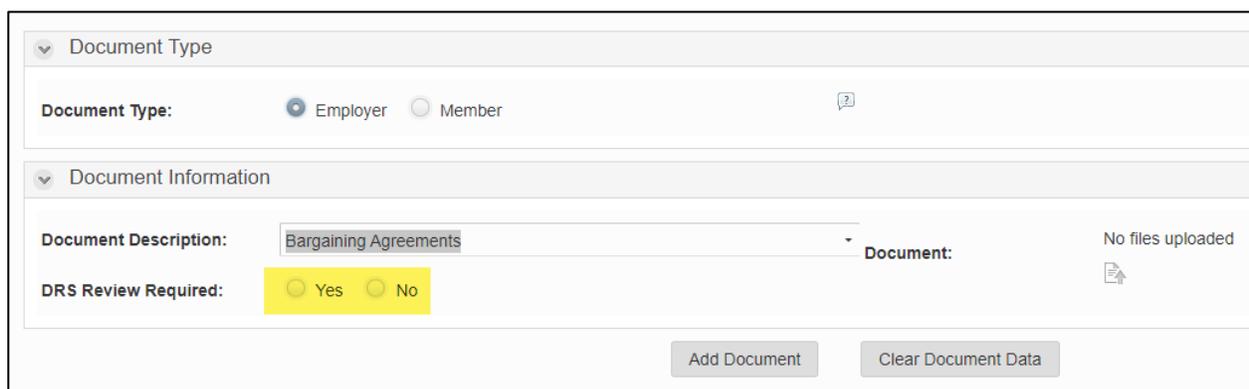
Some documents require a DRS review. If the document chosen doesn't have a “yes” next to “DRS Review Required,” the user can still choose to have DRS review the documents.

**Example of DRS Review Required**

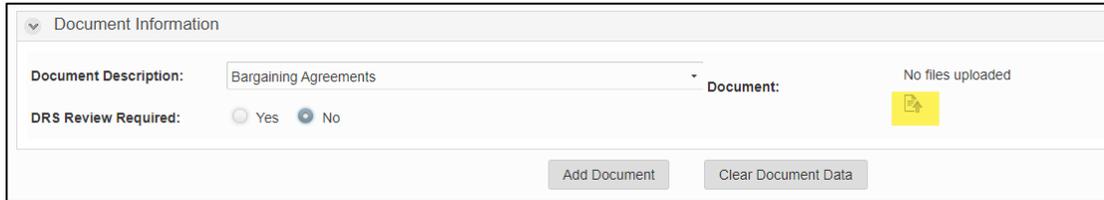


If the user has any questions, concerns or special instructions regarding the uploaded documents, you can add them to the “special instructions” field. You are limited to 50 characters.

**Example of document not requiring review**

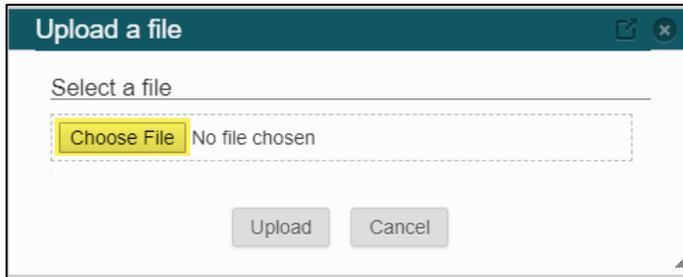


8. Select Yes or No under “DRS Review Required” and select the paper/arrow icon to upload a document



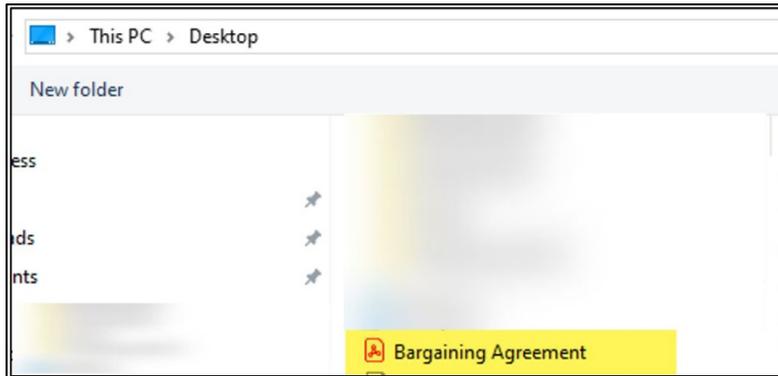
The screenshot shows a form titled "Document Information". It contains a "Document Description" dropdown menu with "Bargaining Agreements" selected. Below it, "DRS Review Required" has radio buttons for "Yes" and "No", with "No" selected. To the right, there is a "Document:" label, a "No files uploaded" status, and a yellow icon of a document with an arrow pointing to it. At the bottom, there are two buttons: "Add Document" and "Clear Document Data".

9. Select “Choose File”



The screenshot shows a dialog box titled "Upload a file". It has a "Select a file" text field. Below the field is a yellow "Choose File" button and the text "No file chosen". At the bottom of the dialog are "Upload" and "Cancel" buttons.

10. Select the document you want to upload



The file displays in the “File name” field.

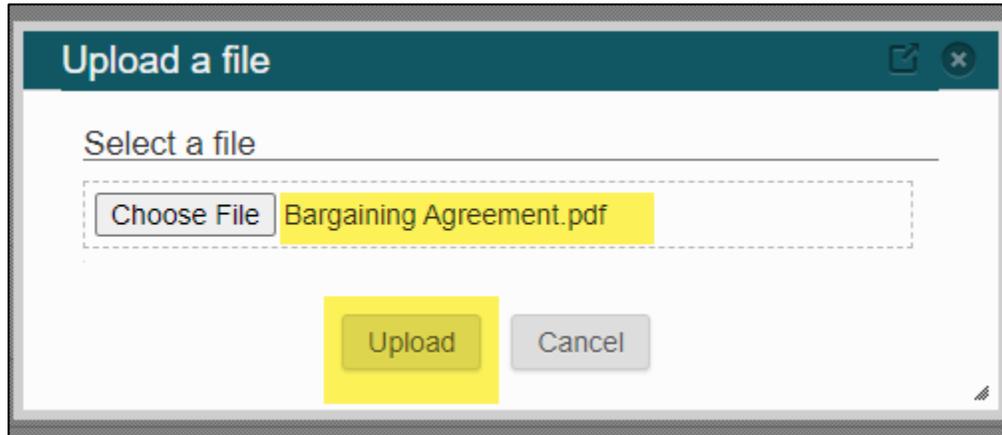
11. Select Open



The screenshot shows a file selection dialog. The "File name" field contains "Bargaining Agreement" and is highlighted in yellow. To the right, there is a dropdown menu showing "Adobe Acrobat Document". At the bottom right, there are "Open" and "Cancel" buttons, with "Open" highlighted in yellow.

The file will be displayed under “Upload a file” next to the choose file button.

## 12. Select Upload



The file will display next to “Document.”

Document Type	
Document Type:	<input checked="" type="radio"/> Employer <input type="radio"/> Member <span>?</span>
Document Information	
Document Description:	Bargaining Agreements
Document:	Bargaining Agreement.pdf
DRS Review Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Add Document"/> <input type="button" value="Clear Document Data"/>	
Documents	
No records	

### 13. Select “Add Document” to add it to the Documents section

To remove the document from the Documents section, select the garbage can icon in the corner. Additional documents can be added by following these steps.

**Important:** If multiple documents are listed and at least one has a review required or requested, it could hold up all the documents.

### 14. Select Submit to upload the documents

Document Upload is now complete and documents have been uploaded to DRS.

If a review was mandatory or requested, you will get notification once the document is either rejected or accepted.

Upload Documents (ERA Portal Only) — UPD-20210720-0184 Document Upload Completed

Upload Documents Case Information

Documents									
Document Type	SSN	Document Description	Document	Review Role	Review Complete	Reject	Reject Reason	Upload Date	
Employer		Bargaining Agreements	<a href="#">Bargaining Agreement.pdf</a>	ESS		No		07/20/2021	