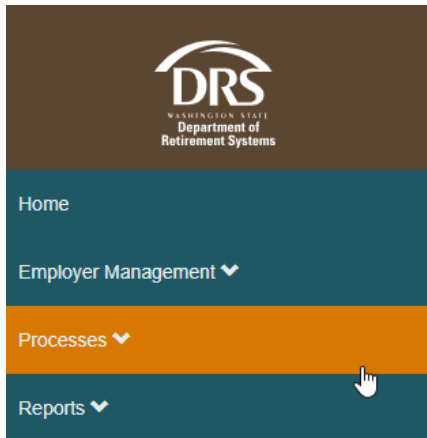


Add a new member

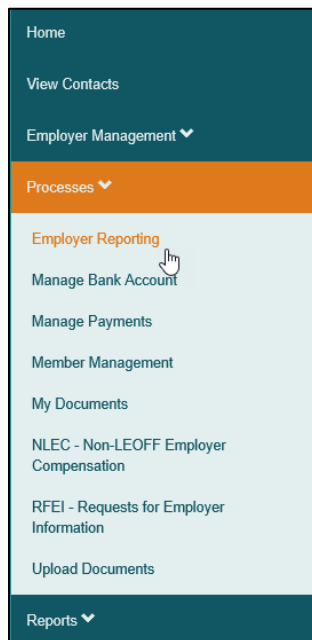
Follow these steps to add a new member to a report.

1. Open the Process “Employer Reporting” to start a regular report or a correction report. The example below is for a correction report.

In the Process menu, select “Processes”



Select “Employer Reporting”



Select the "Start" button



Employer Reporting Process

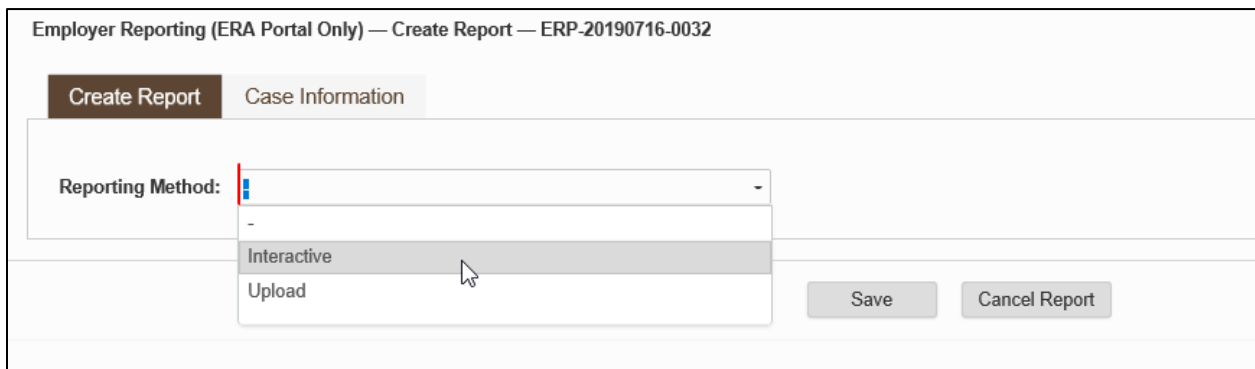
Select **Start** to submit a new report, or to run a simulation.

The Employer Reporting Process provides access to:

- Submit Earning Reports
- Submit member information
- Submit Correction Reports

Start

Select "Reporting Method" and then "Interactive" from the drop-down list



Employer Reporting (ERA Portal Only) — Create Report — ERP-20190716-0032

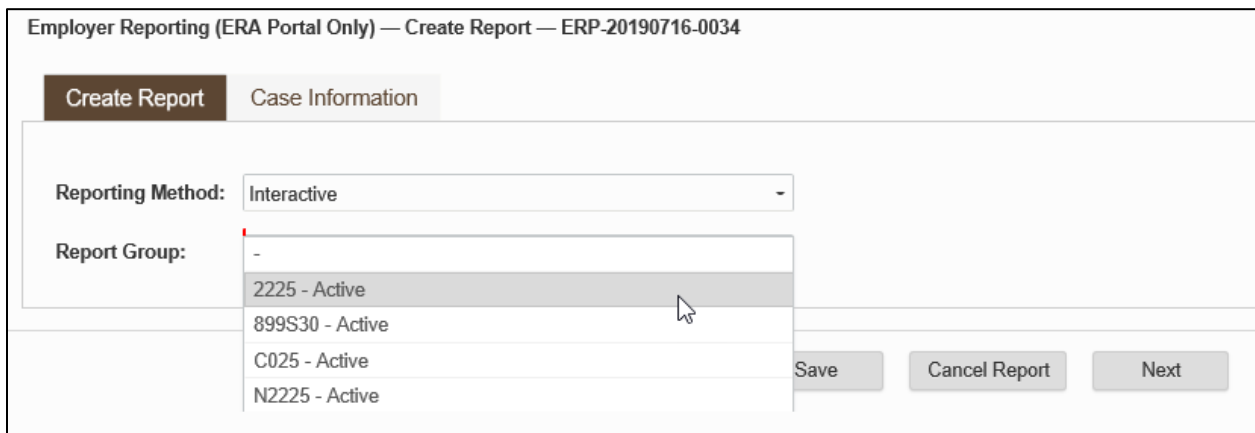
Create Report Case Information

Reporting Method: -

- Interactive
- Upload

Save Cancel Report

Select the "Reporting Group" the member belongs to from the drop-down list



Employer Reporting (ERA Portal Only) — Create Report — ERP-20190716-0034

Create Report Case Information

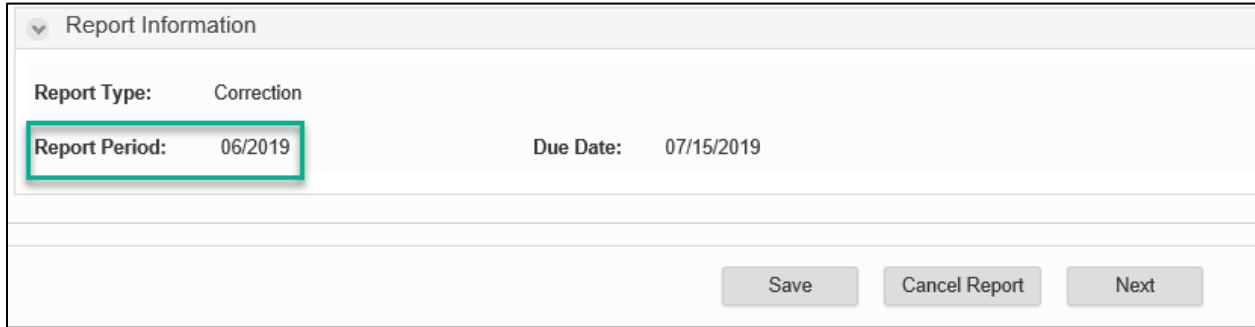
Reporting Method: Interactive

Report Group: -

- 2225 - Active
- 899S30 - Active
- C025 - Active
- N2225 - Active

Save Cancel Report Next

The correction will post to the Report Period associated with your most recent regular report as shown in the example below. Select “Next” to open a blank correction.



Report Information

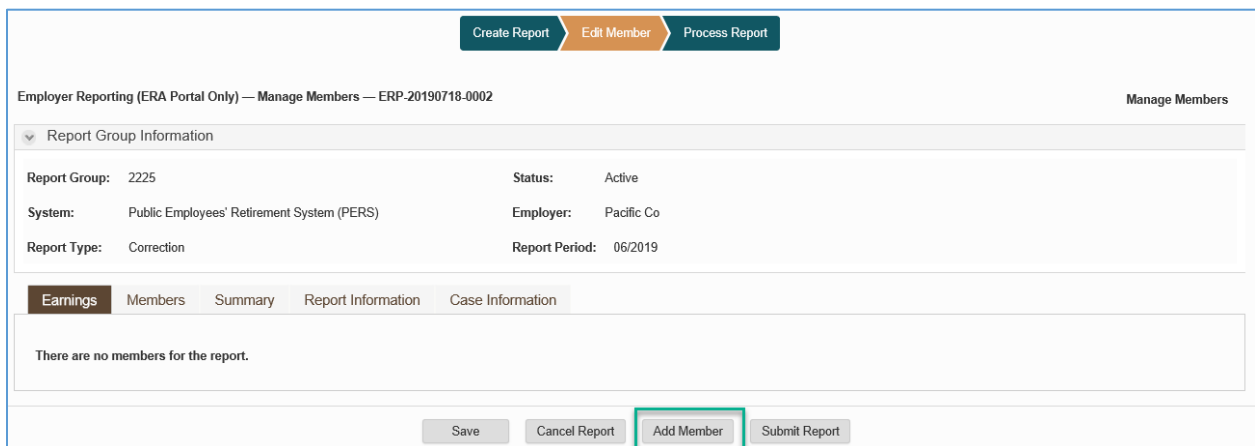
Report Type: Correction

Report Period: 06/2019 Due Date: 07/15/2019

Save Cancel Report Next

2. Fill out a correction report for adding a member

The correction report is blank. To add a new member to your report, select “Add Member.”



Create Report Edit Member Process Report

Employer Reporting (ERA Portal Only) — Manage Members — ERP-20190718-0002 Manage Members

Report Group Information

Report Group: 2225 Status: Active

System: Public Employees' Retirement System (PERS) Employer: Pacific Co

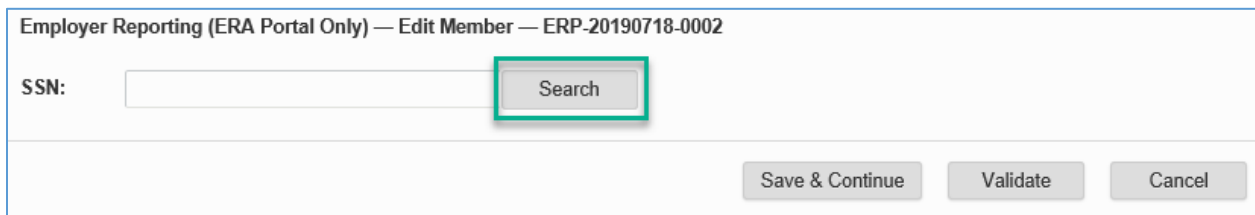
Report Type: Correction Report Period: 06/2019

Earnings Members Summary Report Information Case Information

There are no members for the report.

Save Cancel Report Add Member Submit Report

In the SSN field, enter the member’s Social Security number and select “Search”



Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190718-0002

SSN: Search

Save & Continue Validate Cancel



If the member has history with Department of Retirement Systems (DRS), you'll see their name in the Member Reporting Information section.

If there is no record of the member's history with DRS, under the Member Reporting Information section, Member Name will be blank.

Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190718-0002 Edit Member

Member Reporting Information

SSN:	222-33-7777	Report Group:	2225	Status:	Active
Member Name:		System:	Public Employees' Retirement System (PERS)	Employer:	Pacific Co
Report Period:	06/2019	Report Type:	Correction	Due Date:	07/15/2019

Records Member Profile Summary Report Information Case Information

- Member Profile
- Employment Information
- Earning Detail
- Plan Choice

Save & Continue Validate Remove Save & Return

The next section displays all the records you can fill out for this member

Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190718-0002 Edit Member

Member Reporting Information

SSN:	222-33-7777	Report Group:	2225	Status:	Active
Member Name:		System:	Public Employees' Retirement System (PERS)	Employer:	Pacific Co
Report Period:	06/2019	Report Type:	Correction	Due Date:	07/15/2019

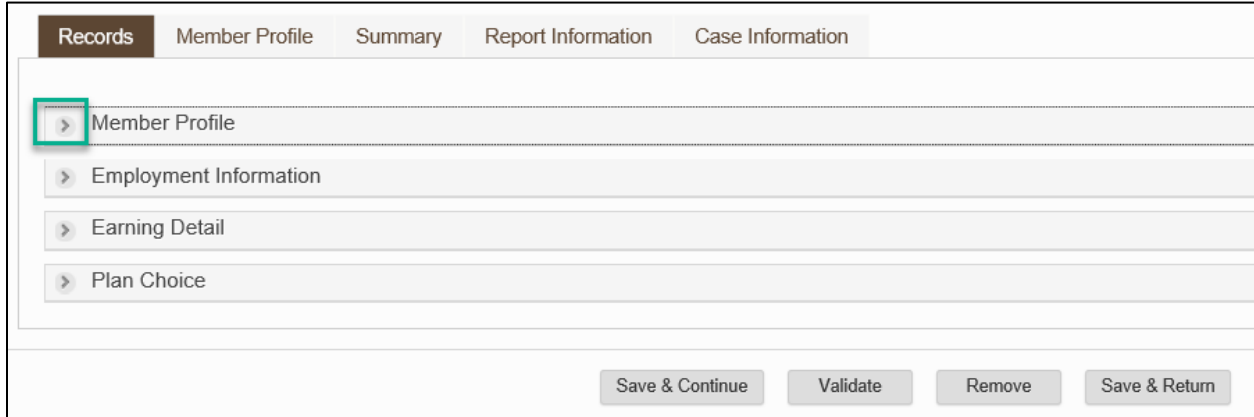
Records Member Profile Summary Report Information Case Information

- Member Profile
- Employment Information
- Earning Detail
- Plan Choice

Save & Continue Validate Remove Save & Return

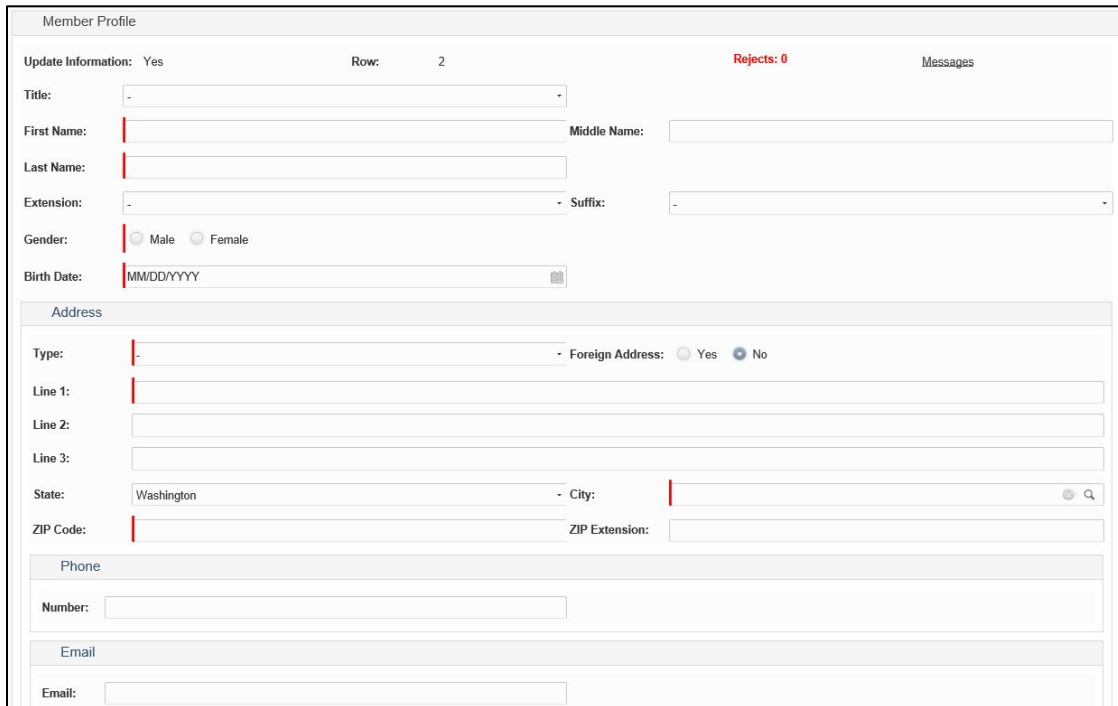
3. Fill out the Member Profile

This member has no history on file, so you'll start with the Member Profile. Select the right-facing arrow on the "Member Profile."



The screenshot shows a navigation menu with the following tabs: Records, Member Profile, Summary, Report Information, and Case Information. Below the tabs, there is a list of menu items: Member Profile, Employment Information, Earning Detail, and Plan Choice. The 'Member Profile' item is highlighted with a red box. At the bottom of the menu, there are four buttons: Save & Continue, Validate, Remove, and Save & Return.

All the member fields are editable in the Member Profile section. A red line in a field means it's mandatory and cannot be left blank.



The screenshot shows the 'Member Profile' form. At the top, it says 'Update Information: Yes' and 'Row: 2'. There are also 'Rejects: 0' and 'Messages' links. The form contains the following fields:

- Title: - (dropdown)
- First Name: (text input with red line)
- Middle Name: (text input)
- Last Name: (text input with red line)
- Extension: - (dropdown)
- Suffix: - (dropdown)
- Gender: Male Female
- Birth Date: MM/DD/YYYY (text input with calendar icon)
- Address section:
 - Type: - (dropdown)
 - Foreign Address: Yes No
 - Line 1: (text input with red line)
 - Line 2: (text input)
 - Line 3: (text input)
 - State: Washington (dropdown)
 - City: (text input with red line and search icon)
 - ZIP Code: (text input with red line)
 - ZIP Extension: (text input)
- Phone section:
 - Number: (text input)
- Email section:
 - Email: (text input)

Enter all the Member Profile information. Select the type of address from the “Type” drop down. A mailing address is required.

Type:	Mailing Address
Line 1:	Mailing Address
Line 2:	Physical Address

If you wish to collapse the Member Profile record (you’ll be able to open it again), select the words “Member Profile”

Member Profile

Update Information: Yes Row: 2 Rejects: 0 Messages

Title: -

First Name: Ellison Middle Name: Elizabeth

Last Name: Bell

Extension: - Suffix: -

Gender: Male Female

Birth Date: 01/01/1998

Address

Type: Mailing Address Foreign Address: Yes No

Line 1: 111 Any Street

Line 2:

Line 3:

State: Washington City: Tumwater

ZIP Code: 98501 ZIP Extension:

Phone

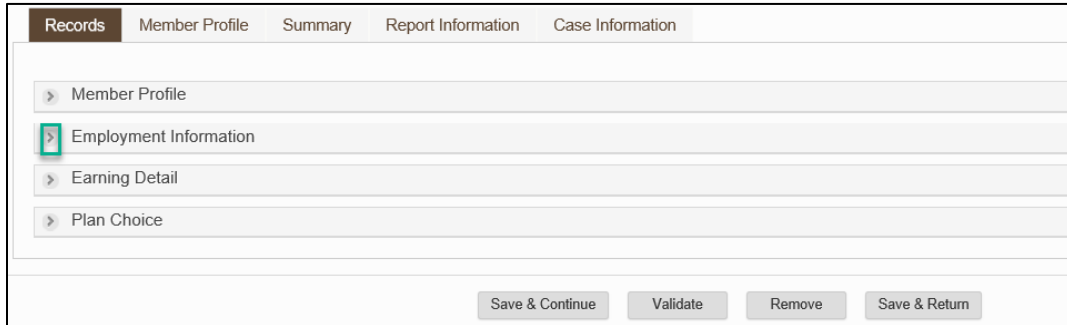
Number: 3606647107

Email

Email: debbie.callar@drs.wa.gov

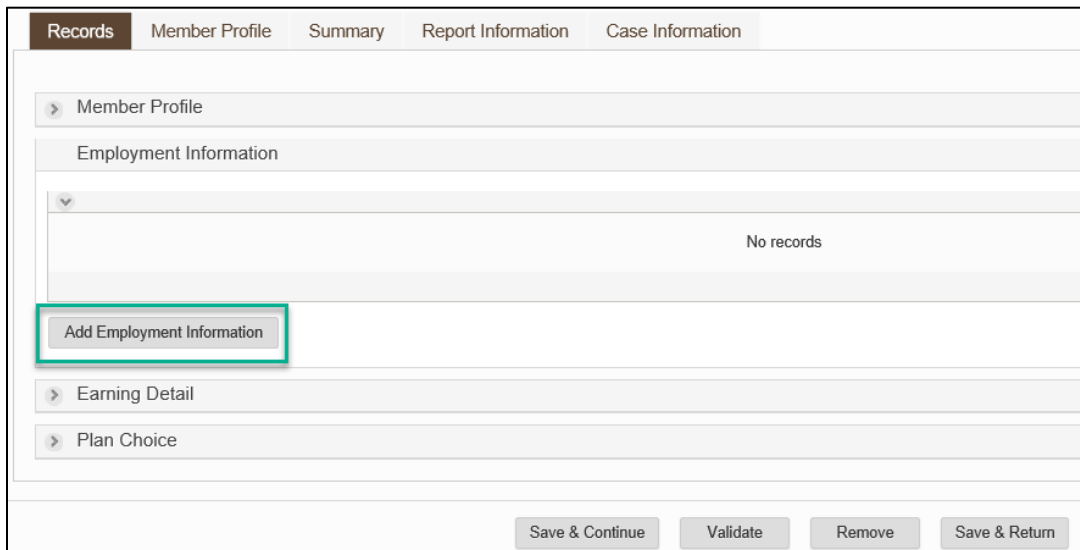
4. Fill out the Employment Information

Select the right-facing arrow next to “Employment Information”




The screenshot shows a web interface with a top navigation bar containing tabs: 'Records' (selected), 'Member Profile', 'Summary', 'Report Information', and 'Case Information'. Below the tabs is a list of menu items: 'Member Profile', 'Employment Information' (highlighted with a green box and a right-facing arrow), 'Earning Detail', and 'Plan Choice'. At the bottom of the interface are four buttons: 'Save & Continue', 'Validate', 'Remove', and 'Save & Return'.

Select “Add Employment Information” to add a begin date for this member with your organization



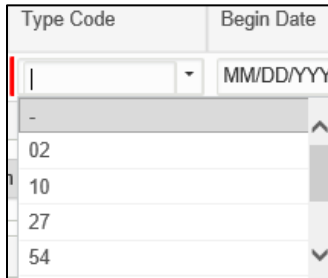
The screenshot shows the same web interface as above, but with the 'Employment Information' section expanded. It displays a dropdown menu with a downward arrow and the text 'No records'. Below this, the 'Add Employment Information' button is highlighted with a green box. The other menu items ('Member Profile', 'Earning Detail', 'Plan Choice') and the bottom buttons ('Save & Continue', 'Validate', 'Remove', 'Save & Return') remain visible.

Select a “Plan Code” from the drop-down list. *Make sure you check “Member Management” for plan placement. This member didn’t have any history so they would get a choice between PERS Plan 2 and PERS Plan 3. Until the member chooses a plan, place them in PERS Plan 2.



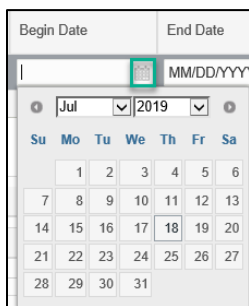
A screenshot of a web form showing a drop-down menu for "Plan Code". The menu is open, displaying a list of options: a hyphen (-), 0, 1, 2, and 3. The option "2" is highlighted, indicating it is the selected value.

Select the appropriate “Type Code” from the drop-down list



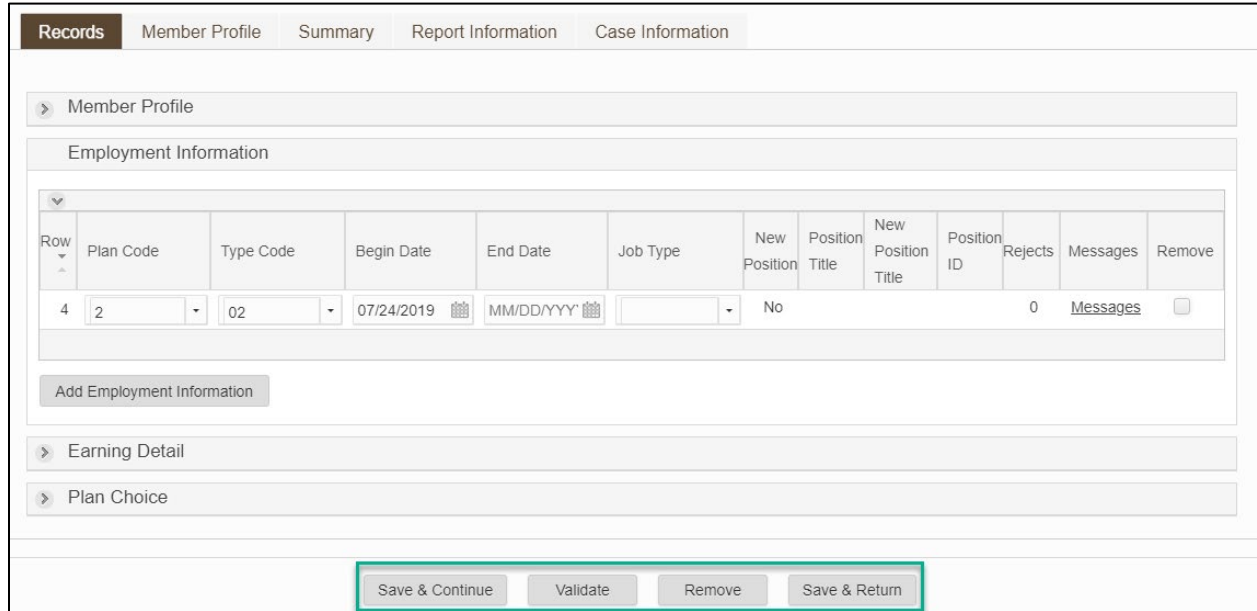
A screenshot of a web form showing a drop-down menu for "Type Code". The menu is open, displaying a list of options: a hyphen (-), 02, 10, 27, and 54. The option "02" is highlighted, indicating it is the selected value.

Enter the member’s “Begin Date.” You may enter the date or use the calendar by selecting the calendar icon within the field.



A screenshot of a web form showing a date selection field for "Begin Date". The field contains a calendar icon and the text "MM/DD/YYYY". Below the field, a calendar is displayed for the month of July 2019. The date "18" is highlighted in the calendar grid.

Select one of the four buttons at the bottom of the screen (descriptions of the buttons are beneath this screen shot)



Records Member Profile Summary Report Information Case Information

Member Profile

Employment Information

Row	Plan Code	Type Code	Begin Date	End Date	Job Type	New Position	Position Title	New Position Title	Position ID	Rejects	Messages	Remove
4	2	02	07/24/2019	MM/DD/YYYY		No				0	Messages	<input type="checkbox"/>

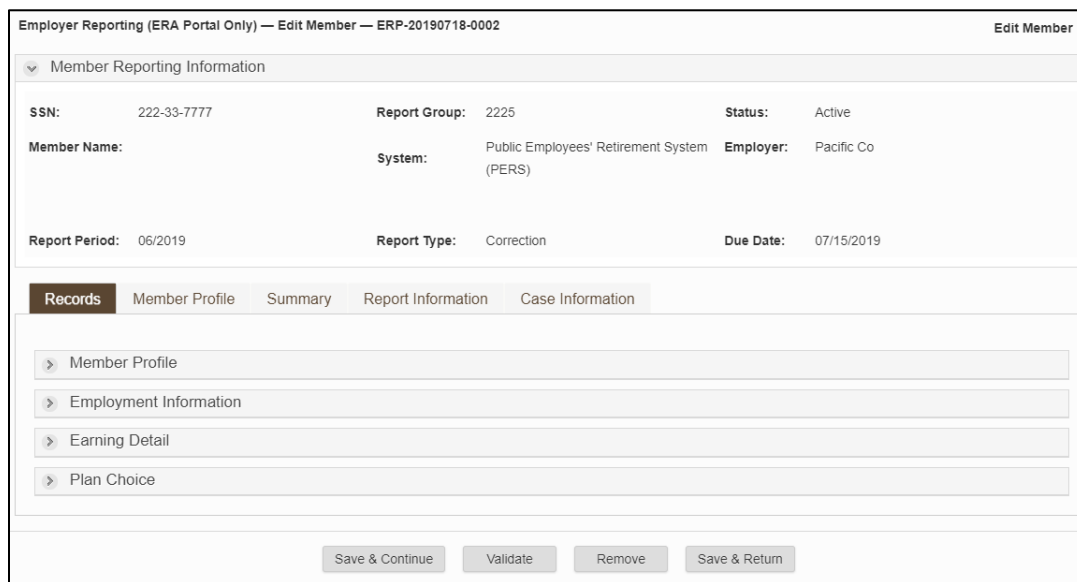
Add Employment Information

Earning Detail

Plan Choice

Save & Continue Validate Remove Save & Return

Save & Continue Save & Continue will save the information and take you to the Edit Member screen to continue entering information for the same member



Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190718-0002 Edit Member

Member Reporting Information

SSN: 222-33-7777 Report Group: 2225 Status: Active

Member Name: System: Public Employees' Retirement System (PERS) Employer: Pacific Co

Report Period: 06/2019 Report Type: Correction Due Date: 07/15/2019

Records Member Profile Summary Report Information Case Information

Member Profile

Employment Information

Earning Detail

Plan Choice

Save & Continue Validate Remove Save & Return

You'll notice that Member Name is still blank. The information is saved, but it will not display until you select "Validate" and it runs against the system edits.

Validate will edit the information you just entered against the system edits. It will display on the screen.

Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190718-0002 Edit Member

Member Reporting Information

SSN: 222-33-7777 Report Group: 2225 Status: Active

Member Name: ELLISON ELIZABETH BELL System: Public Employees' Retirement System (PERS) Employer: Pacific Co

Report Period: 06/2019 Report Type: Correction Due Date: 07/15/2019

Records Member Profile Summary Report Information Case Information

> Member Profile

> Employment Information

> Earning Detail

> Plan Choice

Remove will remove the information you entered and take you back to the Manage Member screen with a blank record. You can select the “Members” tab to see the record that will be removed when you select “Submit Record.” *These records will be removed from this report only, unless a separation date is entered.

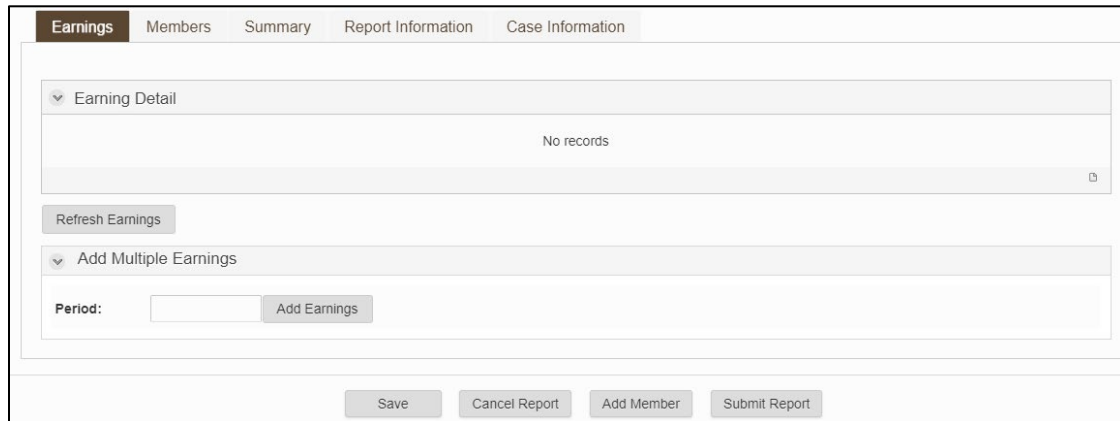
Earnings **Members** Summary Report Information Case Information

Members

SSN	Last Name	First Name	Middle Name	Records	Rejects	Status	Remove	Detail	Edit
222-33-7777	BELL	ELLISON	ELIZABETH	0	0	Ready to send	<input checked="" type="checkbox"/>	Detail	Edit

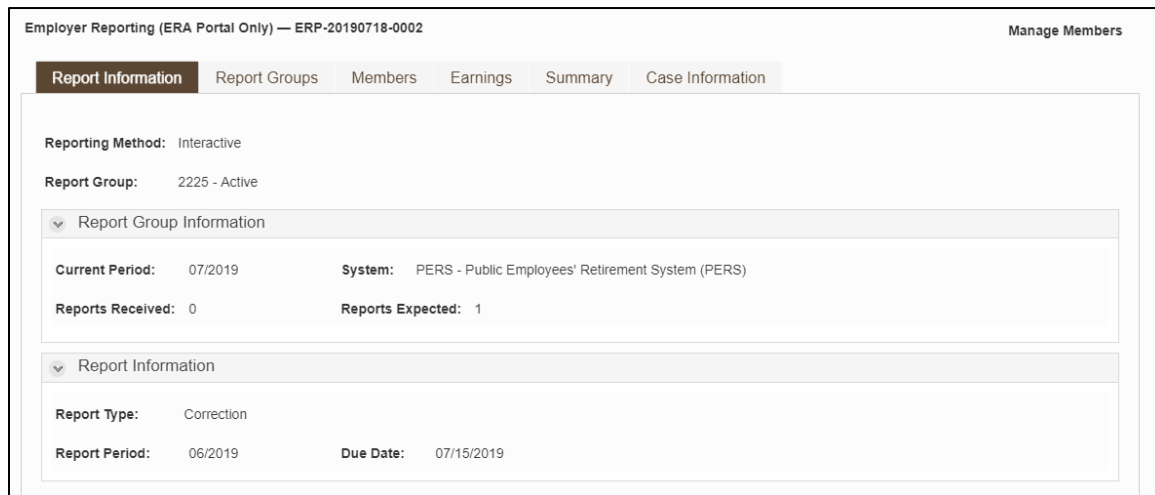
Refresh Earnings

Save & Return [Save & Return](#) will save and validate the information you just entered for this new member and return you to the “Manage Member” screen, ready for you to add another member



5. Submit correction for processing

Select the “Submit Report” button to submit the correction report with the member’s begin date



Check your Messages for a confirmation that your correction report processed.

