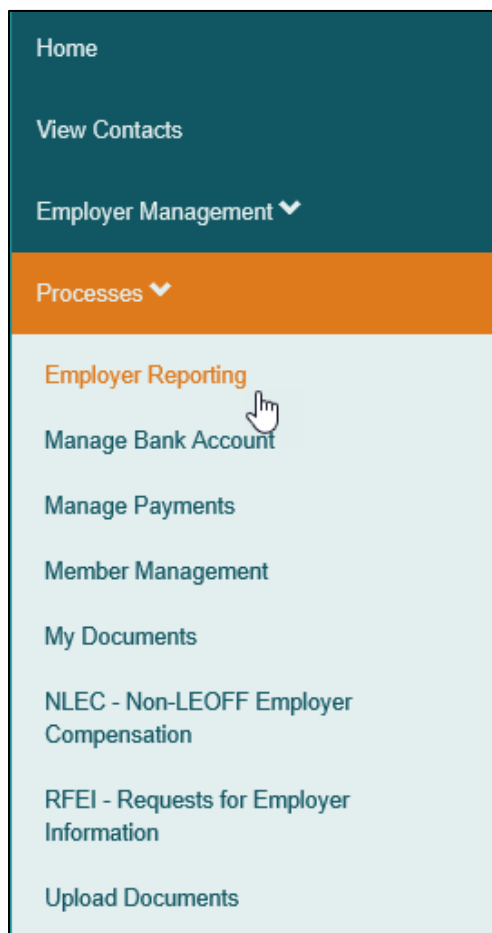


## Add plan choice

These instructions walk you through adding plan choice for a member.

To add a plan choice record for a plan 3 member you must also add an earning record as well.

1. Under the “Processes” menu, you can choose “Employer Reporting” to start a regular report. And you can also start a correction report at this point. The example below shows you how to do a correction report. Select “Employer Reporting.”



## 2. Select “Start”

### 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

## 3. Select “Interactive” from the drop down list

### Employer Reporting (ERA Portal Only) — Create Report — ERP-20190923-0004

Create Report Case Information

Reporting Method: 

-  
-  
Interactive  
Upload

Save Cancel Report

## 4. Select the member’s “Report Group” from the drop down list

Create Report Case Information

Reporting Method: Interactive

Report Group: 

-  
2222 - Active  
899S06 - Active  
C021 - Active  
N2222 - Active

Cancel Report Next

The correction will post to the reporting period 06/2019 in this example.

5. Select “Next” to open a blank correction

Report Information

Report Type:

Correction

Report Period:

06/2019

Due Date:

7/15/2019

Save

Cancel Report

Next

6. Select “Add Member”

Report Group Information

Report Group:

2222

Status:

Active

System:

Public Employees' Retirement System (PERS)

Employer:

Lewis 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

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

SSN:

Search

Save & Continue

Validate

Cancel

There are four records you can complete for this member in this ERA training aid. The screen shot below shows a list of the four records. We'll start with Plan Choice.

Member Reporting Information

SSN: 555-11-3333

Report Group: 2222

Status: Active

Member Name: CHANDLER MURIEL BING

System: Public Employees' Retirement System (PERS)

Employer: Lewis 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

### 1. Select the right-facing arrow to open "Plan Choice"

Records

Member Profile

Summary

Report Information

Case Information

> Member Profile

> Employment Information

> Earning Detail

> Plan Choice

Save & Continue

Validate

Remove

Save & Return

When "Plan Choice" opens, you'll see that "Update Information" is defaulted to "No."

Plan Choice

Update Information: ☐ Yes ☒ No

Row: 3

Rejects: 0

[Messages](#)

Plan Choice:

Plan Choice Date/Transfer Date:

Save & Continue

Validate

Remove

Save & Return

## 2. Select “Yes,” and the Plan Choice and Plan Choice Date/Transfer Date fields become editable

The screenshot shows the 'Plan Choice' form. In the 'Update Information' section, the 'Yes' radio button is selected and highlighted with a green box. The 'Row' is set to 3, and 'Rejects' is 0. The 'Plan Choice' field is a dropdown menu, and the 'Plan Choice Date/Transfer Date' field is a date input field with a calendar icon. At the bottom, there are buttons for 'Save & Continue', 'Validate', 'Remove', and 'Save & Return'.

## 3. Enter the member’s “Plan Choice” from the drop-down list, and enter the “Plan Choice/Transfer Date” by typing it directly into the field,

The screenshot shows the 'Plan Choice' form with the dropdown menu open. The options are 'Choose Plan 2 (2C)', 'Choose Plan 3 (3C)' (which is highlighted), and 'Default Plan 3 (3D)'. The 'Update Information' section shows 'Yes' selected. The 'Plan Choice Date/Transfer Date' field is empty. At the bottom, there are buttons for 'Remove' and 'Save & Return'.

## Or by using the calendar

The screenshot shows the 'Plan Choice' form with the calendar date picker open. The calendar is for July 2019, and the date 15 is selected. The 'Update Information' section shows 'Yes' selected. The 'Plan Choice' field is set to 'Choose Plan 3 (3C)'. The 'Plan Choice Date/Transfer Date' field is empty. At the bottom, there are buttons for 'Save & Continue', 'Validate', 'Remove', and 'Save & Return'.

#### 4. Select the right-facing arrow to complete the “Earning Detail”

Records Member Profile Summary Report Information Case Information

> Member Profile

> Employment Information

> Earning Detail

Plan Choice

Update Information: ☒ Yes ☐ No Row: 3 Rejects: 0 Messages

Plan Choice: Choose Plan 3 (3C) Plan Choice Date/Transfer Date: 07/15/2019

Save & Continue Validate Remove Save & Return

#### 5. Select “Add Earning Detail”

Records Member Profile Summary Report Information Case Information

> Member Profile

> Employment Information

Earning Detail

No records

Add Earning Detail

Plan Choice

Update Information: ☒ Yes ☐ No Row: 3 Rejects: 0 Messages

Plan Choice: Choose Plan 3 (3C) Plan Choice Date/Transfer Date: 07/15/2019

Save & Continue Validate Remove Save & Return

Now it's time to review the Plan Code. In this example, the member was added with a begin date on a prior report. They were entered as PERS Plan 2 because they didn't make a plan choice. On this correction, the member is choosing PERS Plan 3.

**1. To add the "Earning Detail," select "3" from the drop-down list under "Plan Code"**

Records
Member Profile
Summary
Report Information
Case Information

Member Profile
Employment Information

Earning Detail

| Row | Plan Code | Type Code | Status Code | Earning Period | Compensation | Hours | Member Contributions | Employer Contributions | Rate Option | Investment Manager | Discrepancy Type | Rejects | Messages | Remove |
|-----|-----------|-----------|-------------|----------------|--------------|-------|----------------------|------------------------|-------------|--------------------|------------------|---------|----------|--------|
| 4   | 2         | 02        |             |                | \$0.00       | 0.0   | \$0.00               | \$0.00                 | -           | -                  |                  | 0       | Messages |        |

Add
1
2
3

Update Information: ☒ Yes ☐ No
Row: 3
Rejects: 0
Messages

Plan Choice: Choose Plan 3 (3C)
Plan Choice Date/Transfer Date: 07/15/2019

Save & Continue
Validate
Remove
Save & Return

## 2. Fill in the mandatory fields:

- “Status Code”: select the status code from the drop-down list
- “Earning Period”: enter the earning period (mmyyyy)

**Records** Member Profile Summary Report Information Case Information

Member Profile

Employment Information

Earning Detail

| Row | Plan Code | Type Code | Status Code | Earning Period | Compensation | Hours | Member Contributions | Employer Contributions | Rate Option | Investment Manager | Discrepancy Type | Rejects | Messages | Remove |
|-----|-----------|-----------|-------------|----------------|--------------|-------|----------------------|------------------------|-------------|--------------------|------------------|---------|----------|--------|
| 4   | 3         | 02        |             |                | \$0.00       | 0.0   | \$0.00               | \$0.00                 | -           | -                  |                  | 0       | Messages |        |

Add Earning Detail

Plan Choice

Update Information: ☒ Yes ☐ No Row: 3 Rejects: 0 Messages

Plan Choice: Choose Plan 3 (3C) Plan Choice Date/Transfer Date: 07/15/2019

Save & Continue Validate Remove Save & Return

## 3. Enter the “Compensation” and “Hours”

Select a “Rate Option” and “Investment Manager” from the drop-down lists

Row Plan Code Type Code Status Code Earning Period Compensation Hours Member Contributions Employer Contributions Rate Option Investment Manager Discrepancy Type Rejects Messages Remove

4 3 02 A 07/2019 \$1,000.00 50.0 \$0.00 \$128.60

Add Earning Detail

Plan Choice

Rate Option dropdown: A, B, C, D

Investment Manager dropdown: SELF, WSIB



#### 4. Select one of these four buttons at the bottom of the screen:

Save & Continue
Validate
Remove
Save & Return

“Save & Continue” Save & Continue will save this information and take you back to the “Edit Member” screen to continue entering information for this same member.

Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190923-0012
Edit Member

Member Reporting Information
▼

**SSN:** 555-11-3333  
**Member Name:** CHANDLER MURIEL BING

**Report Group:** 2222  
**System:** Public Employees' Retirement System (PERS)

**Status:** Active  
**Employer:** Lewis 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
▶

| Row | Plan Code | Type Code | Status Code | Earning Period | Compensation | Hours | Member Contributions | Employer Contributions | Rate Option | Investment Manager | Discrepancy Type | Rejects | Messages                 | Remove |
|-----|-----------|-----------|-------------|----------------|--------------|-------|----------------------|------------------------|-------------|--------------------|------------------|---------|--------------------------|--------|
| 4   | 3         | 02        | A           | 07/2019        | \$1,000.00   | 50.0  | \$60.00              | \$128.60               | B           | WSIB               |                  | 0       | <a href="#">Messages</a> |        |

Add Earning Detail

Plan Choice
▶

**Update Information:** ☒ Yes ☐ No

**Row:** 3

**Rejects:** 0

[Messages](#)

**Plan Choice:** Choose Plan 3 (3C)

**Plan Choice Date/Transfer Date:** 07/15/2019

Save & Continue
Validate
Remove
Save & Return

Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190923-0012
Edit Member

Member Reporting Information
▼

**SSN:** 555-11-3333  
**Member Name:** CHANDLER MURIEL BING

**Report Group:** 2222  
**System:** Public Employees' Retirement System (PERS)

**Status:** Active  
**Employer:** Lewis 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



“Validate” **Validate** will edit the information you just entered against edits. They will be displayed on the current screen.

Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190923-0012 Edit Member

Member Reporting Information

SSN: 555-11-3333 Report Group: 2222 Status: Active  
Member Name: CHANDLER MURIEL BING System: Public Employees' Retirement System (PERS) Employer: Lewis 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

| Row | Plan Code | Type Code | Status Code | Earning Period | Compensation | Hours | Member Contributions | Employer Contributions | Rate Option | Investment Manager | Discrepancy Type | Rejects | Messages | Remove |
|-----|-----------|-----------|-------------|----------------|--------------|-------|----------------------|------------------------|-------------|--------------------|------------------|---------|----------|--------|
| 4   | 3         | 02        | A           | 07/2019        | \$1,000.00   | 50.0  | \$60.00              | \$128.60               | B           | WSIB               |                  | 0       | Messages |        |

Add Earning Detail

Plan Choice

Update Information: ☒ Yes ☐ No Row: 3 Rejects: 0 Messages

Plan Choice: Choose Plan 3 (3C) - Plan Choice Date/Transfer Date: 07/15/2019

Save & Continue **Validate** Remove Save & Return

Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190923-0012 Edit Member

Member Reporting Information

SSN: 555-11-3333 Report Group: 2222 Status: Active  
Member Name: CHANDLER MURIEL BING System: Public Employees' Retirement System (PERS) Employer: Lewis 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



**“Remove”** Remove will remove the information that was just entered and take you back to the Manage Members screen with a blank record. You can select the “Members” tab to see the record that will be removed upon “submit.” \*Unless you enter a separation date, these are the only records that will be removed from this report.

Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190923-0012 Edit Member

Member Reporting Information

SSN: 555-11-3333 Report Group: 2222 Status: Active  
Member Name: CHANDLER MURIEL BING System: Public Employees' Retirement System (PERS) Employer: Lewis 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

| Row | Plan Code | Type Code | Status Code | Earning Period | Compensation | Hours | Member Contributions | Employer Contributions | Rate Option | Investment Manager | Discrepancy Type | Rejects | Messages | Remove              |
|-----|-----------|-----------|-------------|----------------|--------------|-------|----------------------|------------------------|-------------|--------------------|------------------|---------|----------|---------------------|
| 4   | 3         | 02        | A           | 07/2019        | \$1,000.00   | 50.0  | \$60.00              | \$128.60               | B           | WSIB               |                  | 0       | Messages | <span>Remove</span> |

Add Earning Detail

Plan Choice

Update Information: ☒ Yes ☐ No Row: 3 Rejects: 0 Messages

Plan Choice: Choose Plan 3 (3C) Plan Choice Date/Transfer Date: 07/15/2019

Save & Continue Validate Remove Save & Return

Employer Reporting (ERA Portal Only) — Manage Members — ERP-20190923-0012 Manage Members

Report Group Information

Report Group: 2222 Status: Active  
System: Public Employees' Retirement System (PERS) Employer: Lewis Co  
Report Type: Correction Report Period: 06/2019

**Earnings** Members Summary Report Information Case Information

Earning Detail

| Row | SSN *       | Last Name | First Name | Plan Code | Type Code | Status Code | Earning Period | Compensation | Hours | Member Contributions | Employer Contributions | Rate Option | Investment Manager | Discrepancy Type | Remove                     | Detail |
|-----|-------------|-----------|------------|-----------|-----------|-------------|----------------|--------------|-------|----------------------|------------------------|-------------|--------------------|------------------|----------------------------|--------|
| 4   | 555-11-3333 | BING      | CHANDLER   | 3         | 02        | A           | 07/2019        | \$1,000.00   | 50.0  | \$60.00              | \$128.60               | B           | WSIB               |                  | <span>Remove</span><br>Yes | Detail |

Refresh Earnings

Add Multiple Earnings

Period:  Add Earnings

Save Cancel Report Add Member Submit Report



**“Save & Return”** [Save & Return](#) will save the information and return you to the Manage Members screen where you can add another member.

Employer Reporting (ERA Portal Only) — Edit Member — ERP-20190923-0012 Edit Member

Member Reporting Information

SSN: 555-11-3333 Report Group: 2222 Status: Active  
Member Name: CHANDLER MURIEL BING System: Public Employees' Retirement System (PERS) Employer: Lewis 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

| Row | Plan Code | Type Code | Status Code | Earning Period | Compensation | Hours | Member Contributions | Employer Contributions | Rate Option | Investment Manager | Discrepancy Type | Rejects | Messages                 | Remove                 |
|-----|-----------|-----------|-------------|----------------|--------------|-------|----------------------|------------------------|-------------|--------------------|------------------|---------|--------------------------|------------------------|
| 4   | 3         | 02        | A           | 07/2019        | \$1,000.00   | 50.0  | \$60.00              | \$128.60               | B           | WSIB               |                  | 0       | <a href="#">Messages</a> | <a href="#">Remove</a> |

[Add Earning Detail](#)

Plan Choice

Update Information: ☒ Yes ☐ No Row: 3 Rejects: 0 [Messages](#)

Plan Choice: Choose Plan 3 (3C) Plan Choice Date/Transfer Date: 07/15/2019

[Save & Continue](#) [Validate](#) [Remove](#) [Save & Return](#)

Employer Reporting (ERA Portal Only) — Manage Members — ERP-20190923-0012 Manage Members

Report Group Information

Report Group: 2222 Status: Active  
System: Public Employees' Retirement System (PERS) Employer: Lewis Co  
Report Type: Correction Report Period: 06/2019

**Earnings** Members Summary Report Information Case Information

Earning Detail

| Row | SSN         | Last Name | First Name | Plan Code | Type Code | Status Code | Earning Period | Compensation | Hours | Member Contributions | Employer Contributions | Rate Option | Investment Manager | Discrepancy Type | Remove                 | Detail                 |
|-----|-------------|-----------|------------|-----------|-----------|-------------|----------------|--------------|-------|----------------------|------------------------|-------------|--------------------|------------------|------------------------|------------------------|
| 4   | 555-11-3333 | BING      | CHANDLER   | 3         | 02        | A           | 07/2019        | \$1,000.00   | 50.0  | \$60.00              | \$128.60               | B           | WSIB               |                  | <a href="#">Remove</a> | <a href="#">Detail</a> |

[Refresh Earnings](#)

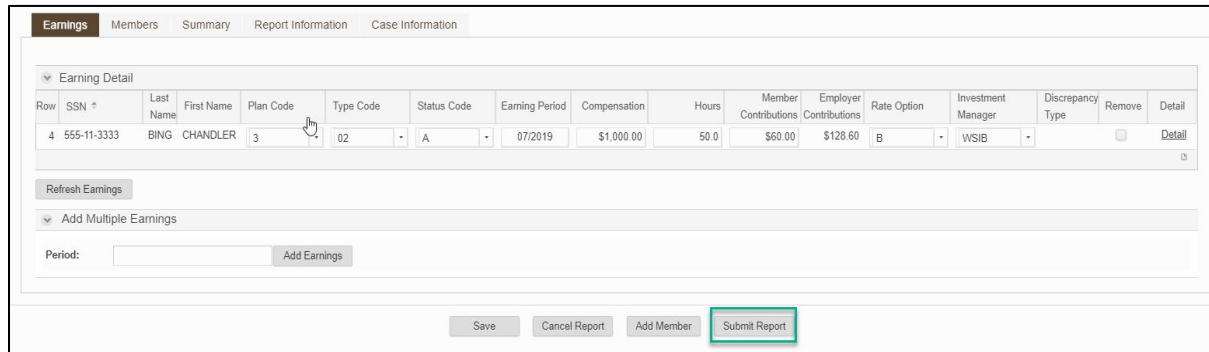
Add Multiple Earnings

Period:  [Add Earnings](#)

[Save](#) [Cancel Report](#) [Add Member](#) [Submit Report](#)

## 5. Submit Correction for processing

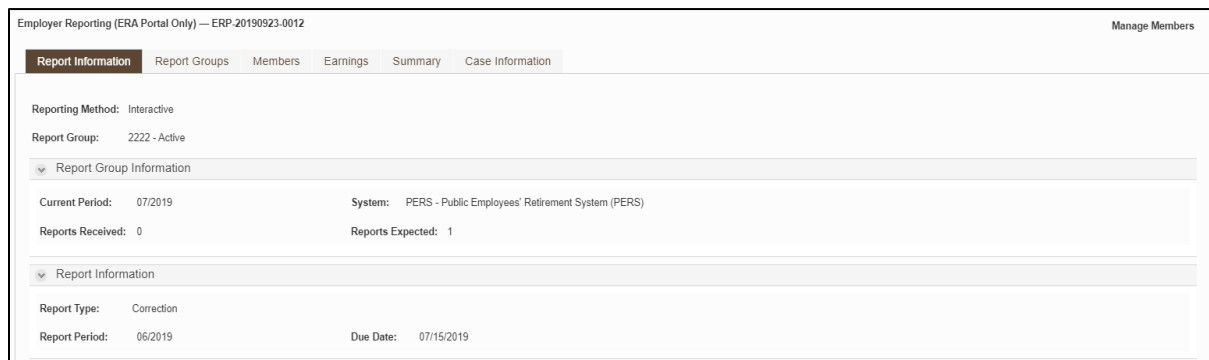
Select the “Submit Report” button to submit the correction report with the member’s plan choice.



The screenshot shows the 'Earnings' tab selected. Below the tabs is a table with the following data:

| Row | SSN         | Last Name | First Name | Plan Code | Type Code | Status Code | Earning Period | Compensation | Hours | Member Contributions | Employer Contributions | Rate Option | Investment Manager | Discrepancy Type | Remove                   | Detail                 |
|-----|-------------|-----------|------------|-----------|-----------|-------------|----------------|--------------|-------|----------------------|------------------------|-------------|--------------------|------------------|--------------------------|------------------------|
| 4   | 555-11-3333 | BING      | CHANDLER   | 3         | 02        | A           | 07/2019        | \$1,000.00   | 50.0  | \$60.00              | \$128.60               | B           | WSIB               |                  | <input type="checkbox"/> | <a href="#">Detail</a> |

Below the table is a 'Refresh Earnings' button and an 'Add Multiple Earnings' section with a 'Period:' input field and an 'Add Earnings' button. At the bottom, there are four buttons: 'Save', 'Cancel Report', 'Add Member', and 'Submit Report' (highlighted with a red box).

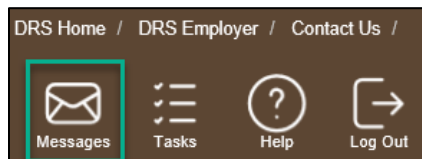


The screenshot shows the 'Employer Reporting (ERA Portal Only) — ERP-20190923-0012' page. The 'Report Information' tab is selected. The page displays the following information:

- Reporting Method: Interactive
- Report Group: 2222 - Active
- Report Group Information:
  - Current Period: 07/2019
  - System: PERS - Public Employees' Retirement System (PERS)
  - Reports Received: 0
  - Reports Expected: 1
- Report Information:
  - Report Type: Correction
  - Report Period: 06/2019
  - Due Date: 07/15/2019

At the top right, there is a 'Manage Members' link.

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



The screenshot shows a navigation bar with the following links: 'DRS Home / DRS Employer / Contact Us /'. Below the links are four buttons: 'Messages' (highlighted with a red box), 'Tasks', 'Help', and 'Log Out'.