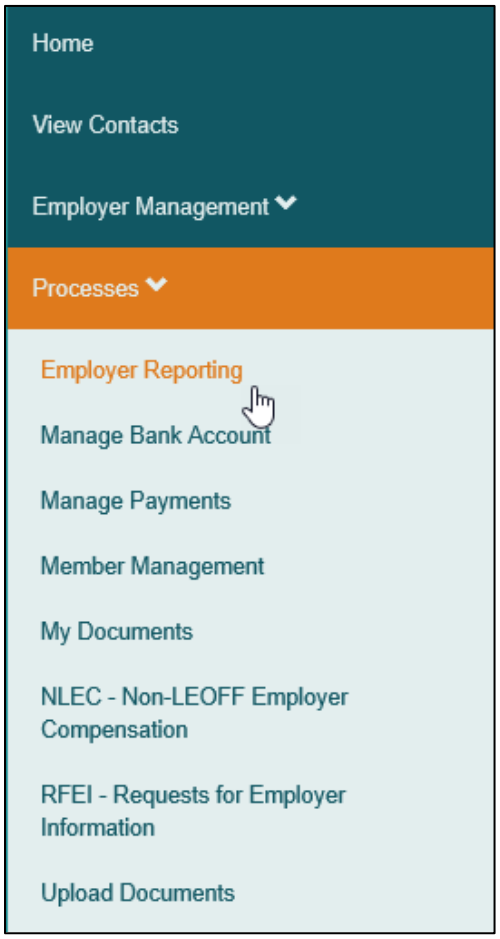
Add plan choice

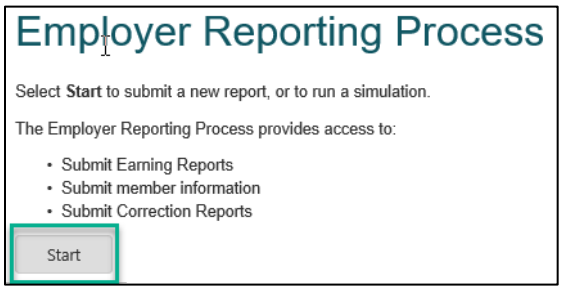
These instructions walk you through adding plan choice for a member.

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

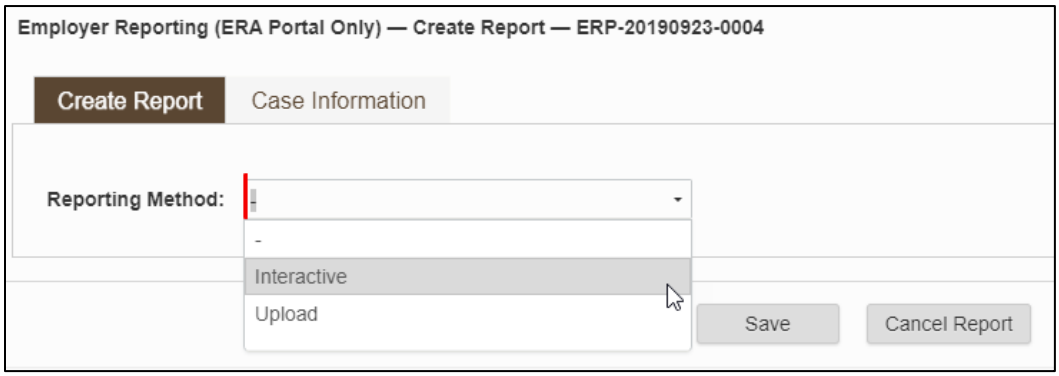
1. **Under the "Processes" menu, you can choose "Employer Reporting" to start a regular report. And you can also start a correction report at this point. The example below shows you how to do a correction report. Select "Employer Reporting."**



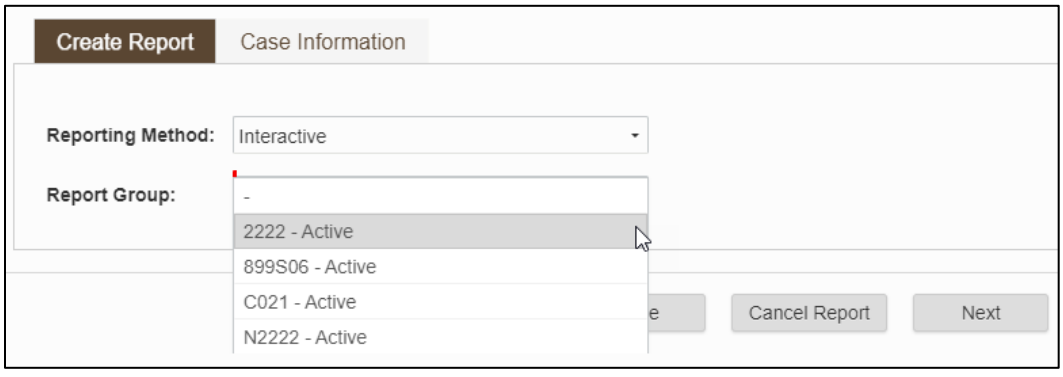
2. Select “Start”



3. Select “Interactive” from the drop down list

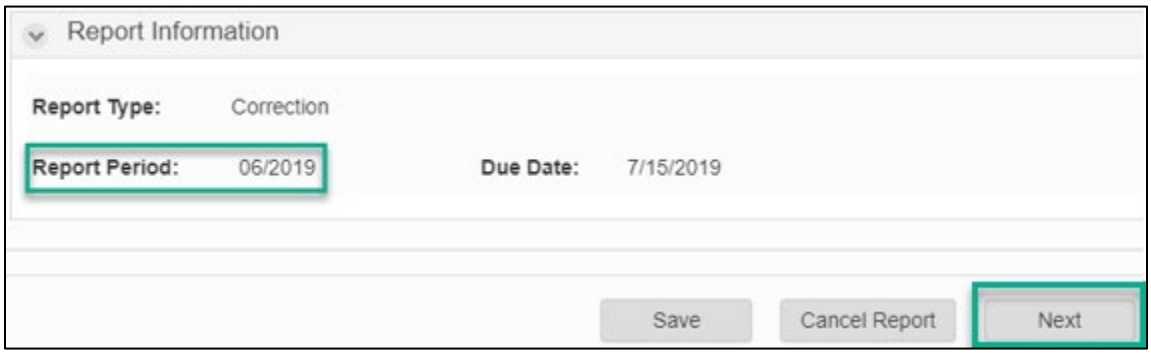


4. Select the member’s “Report Group” from the drop down list

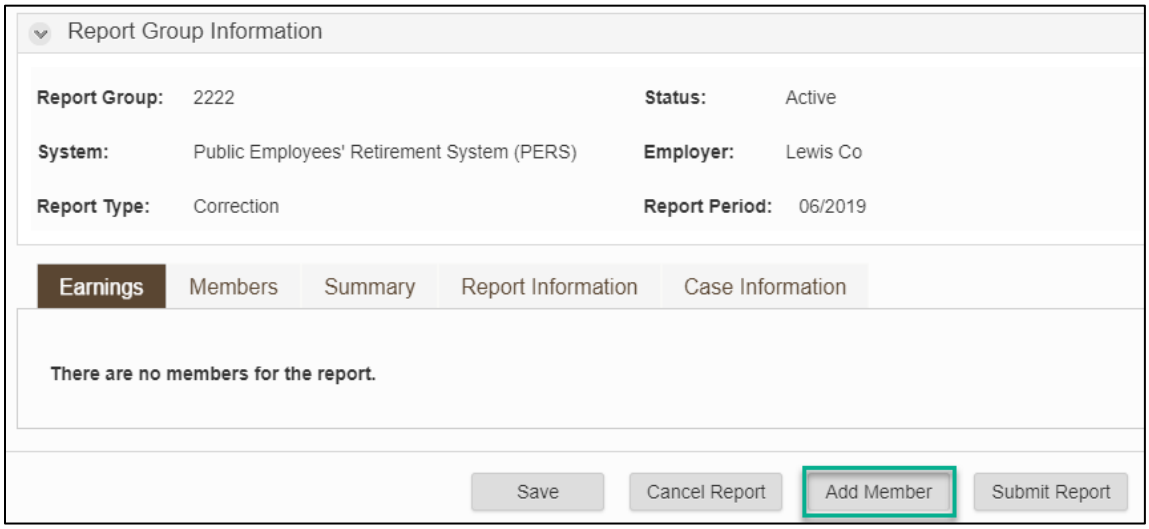


The correction will post to the reporting period 06/2019 in this example.

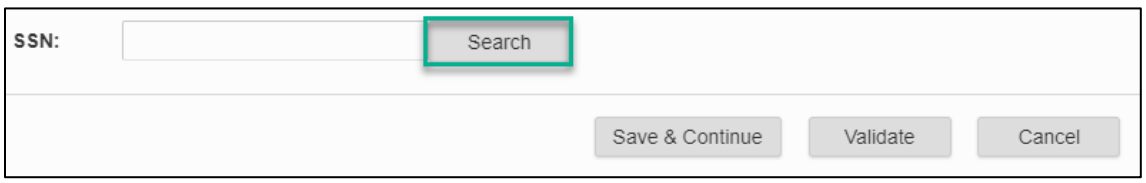
5. Select "Next" to open a blank correction



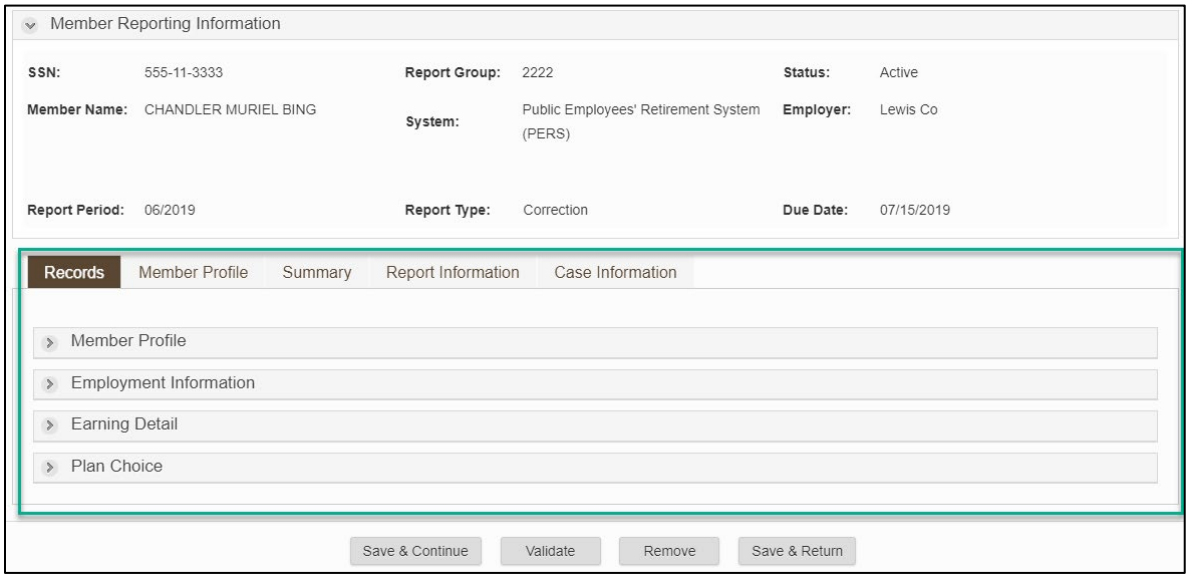
6. Select "Add Member"



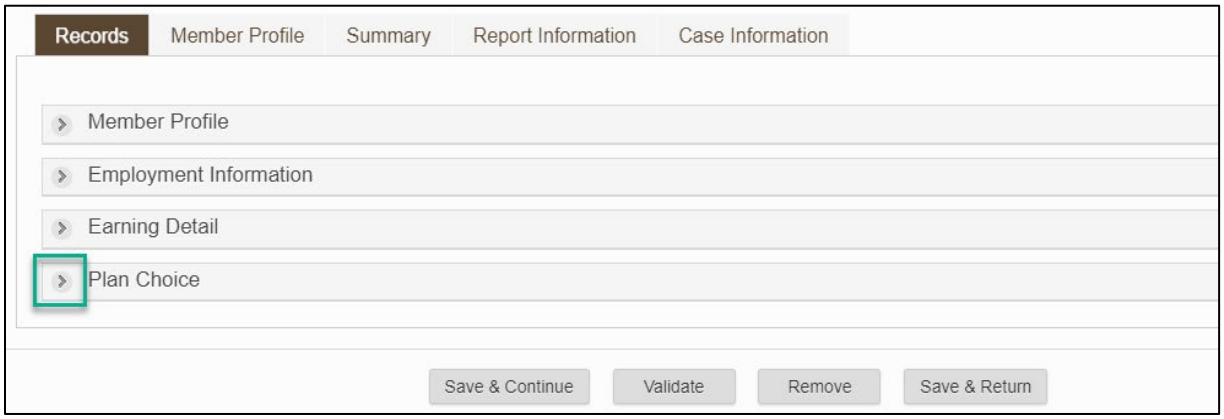
7. In the SSN field, enter the member's Social Security number and select "Search"



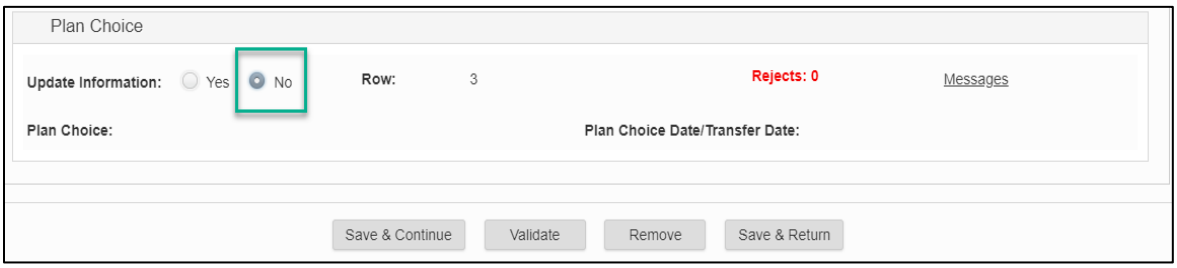
There are four records you can complete for this member in this ERA training aid. The screen shot below shows a list of the four records. We'll start with Plan Choice.



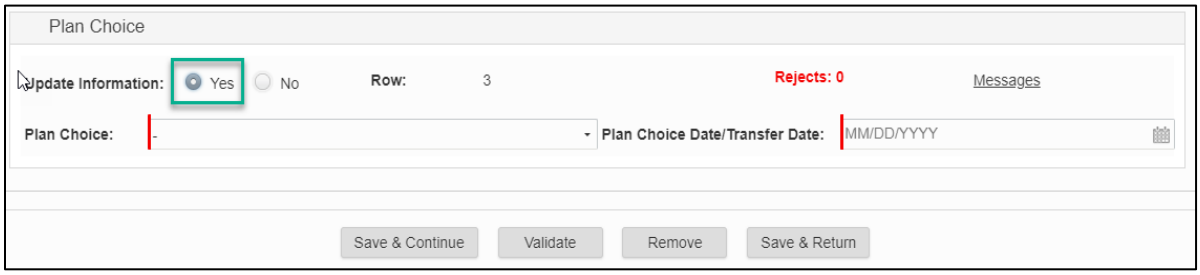
1. Select the right-facing arrow to open "Plan Choice"



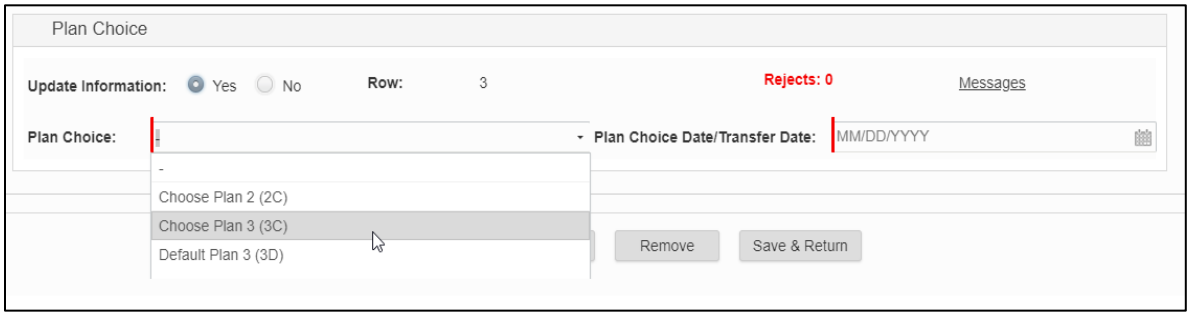
When "Plan Choice" opens, you'll see that "Update Information" is defaulted to "No."



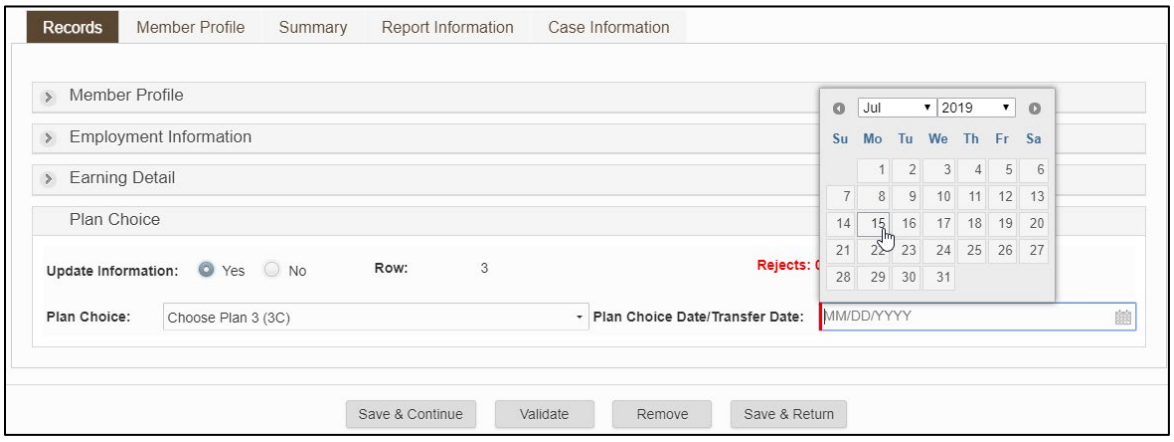
2. Select "Yes," and the Plan Choice and Plan Choice Date/Transfer Date fields become editable



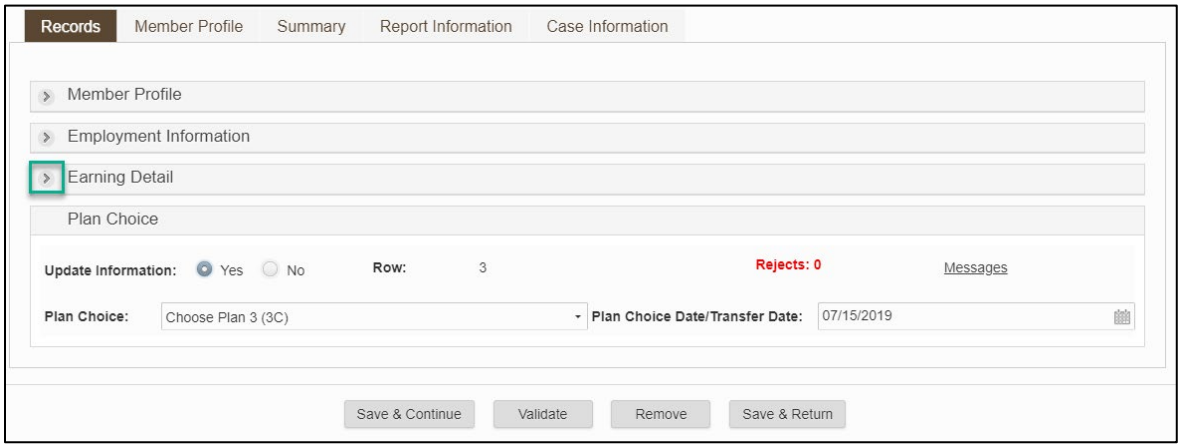
3. Enter the member's "Plan Choice" from the drop-down list, and enter the "Plan Choice/Transfer Date" by typing it directly into the field,



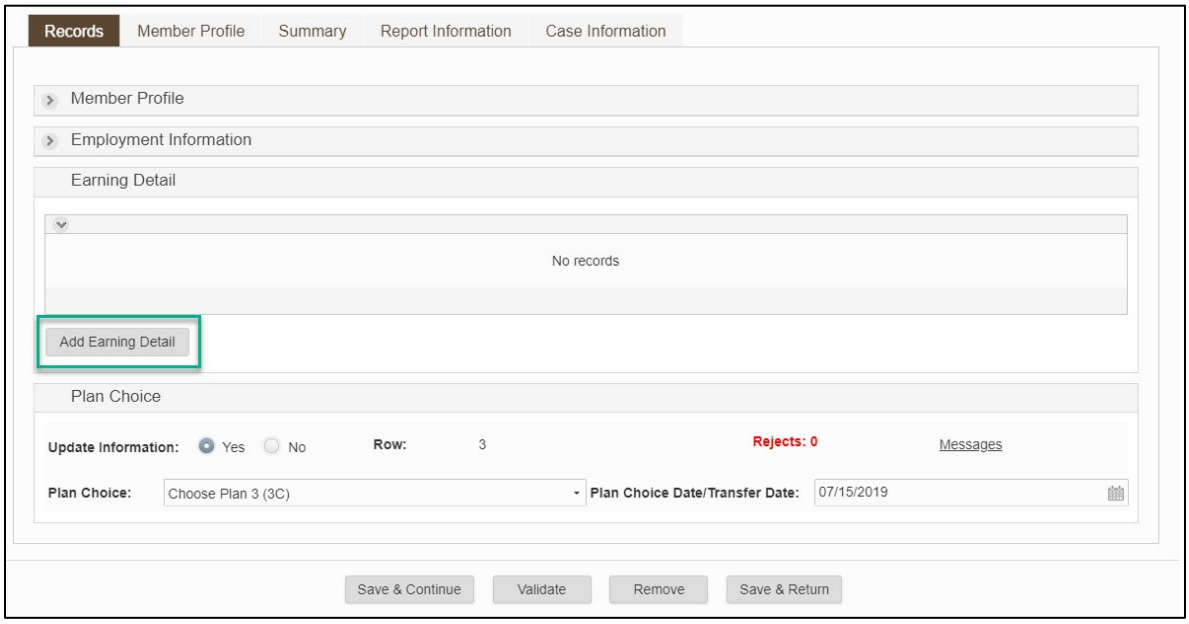
Or by using the calendar



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

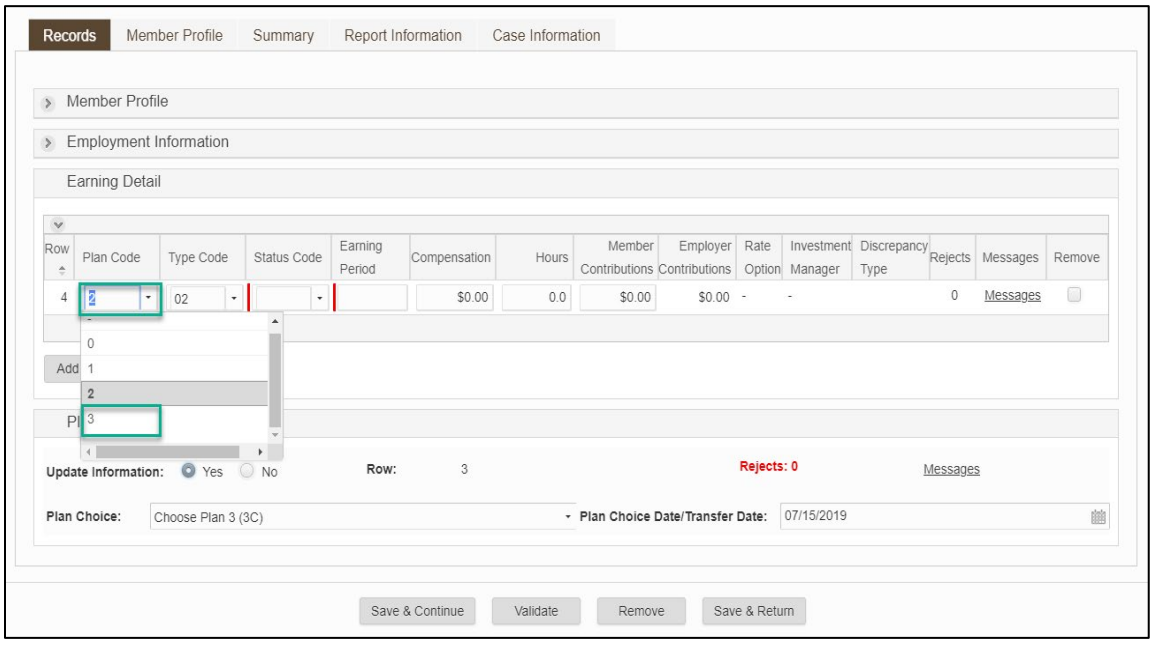


5. Select “Add Earning Detail”



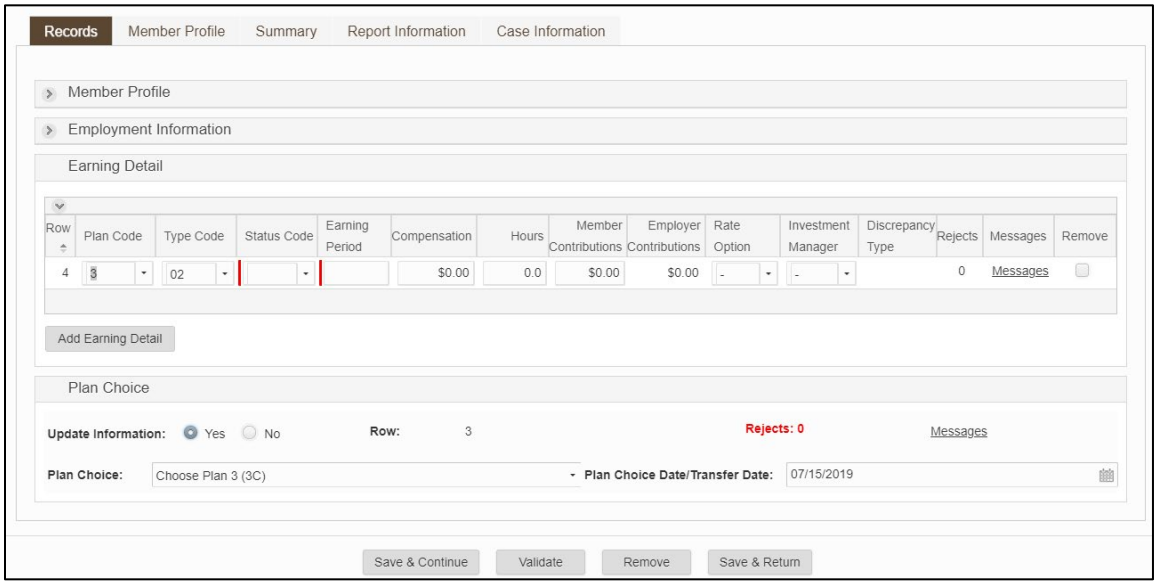
Now it's time to review the Plan Code. In this example, the member was added with a begin date on a prior report. They were entered as PERS Plan 2 because they didn't make a plan choice. On this correction, the member is choosing PERS Plan 3.

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



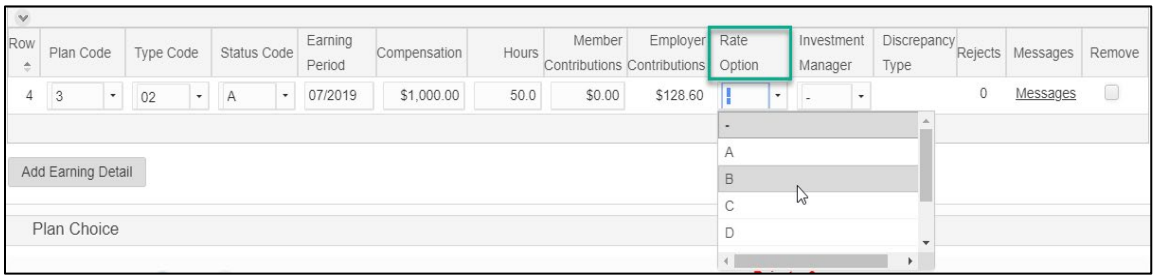
2. Fill in the mandatory fields:

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



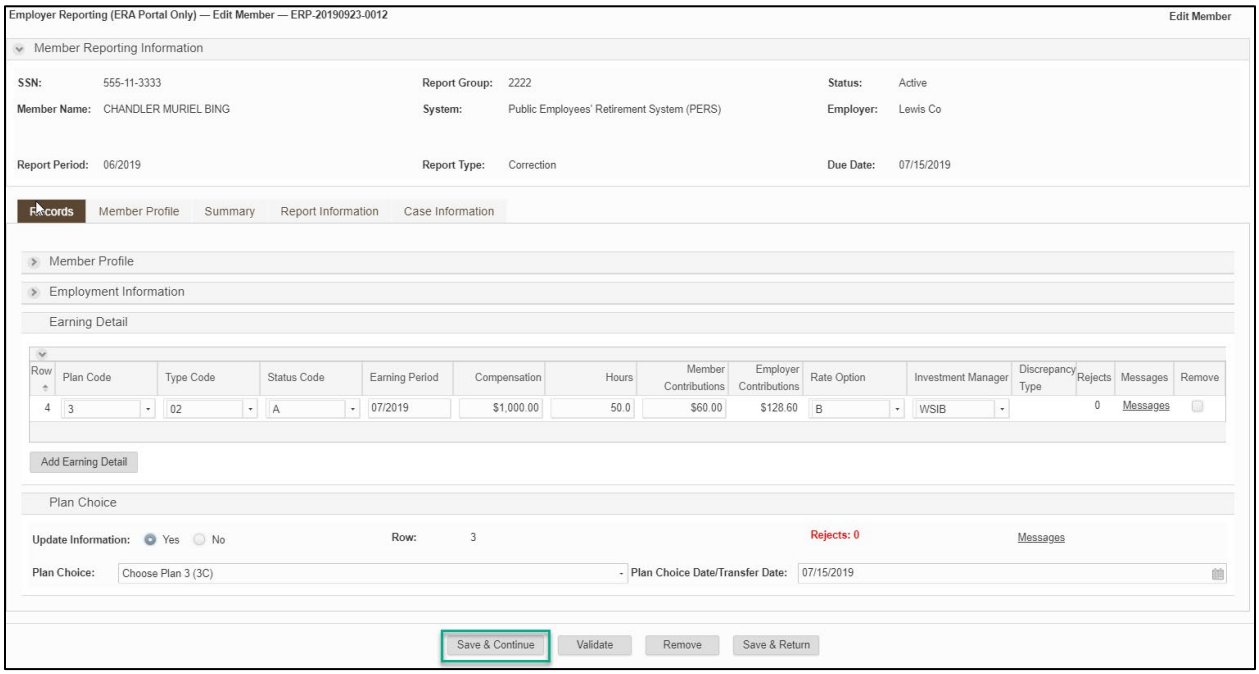
3. Enter the "Compensation" and "Hours"

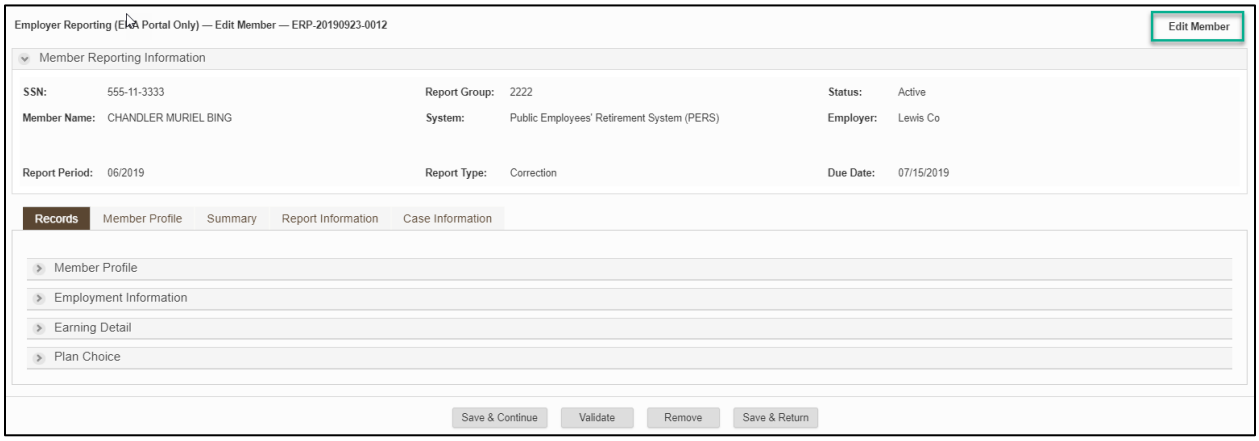
Select a "Rate Option" and "Investment Manager" from the drop-down lists



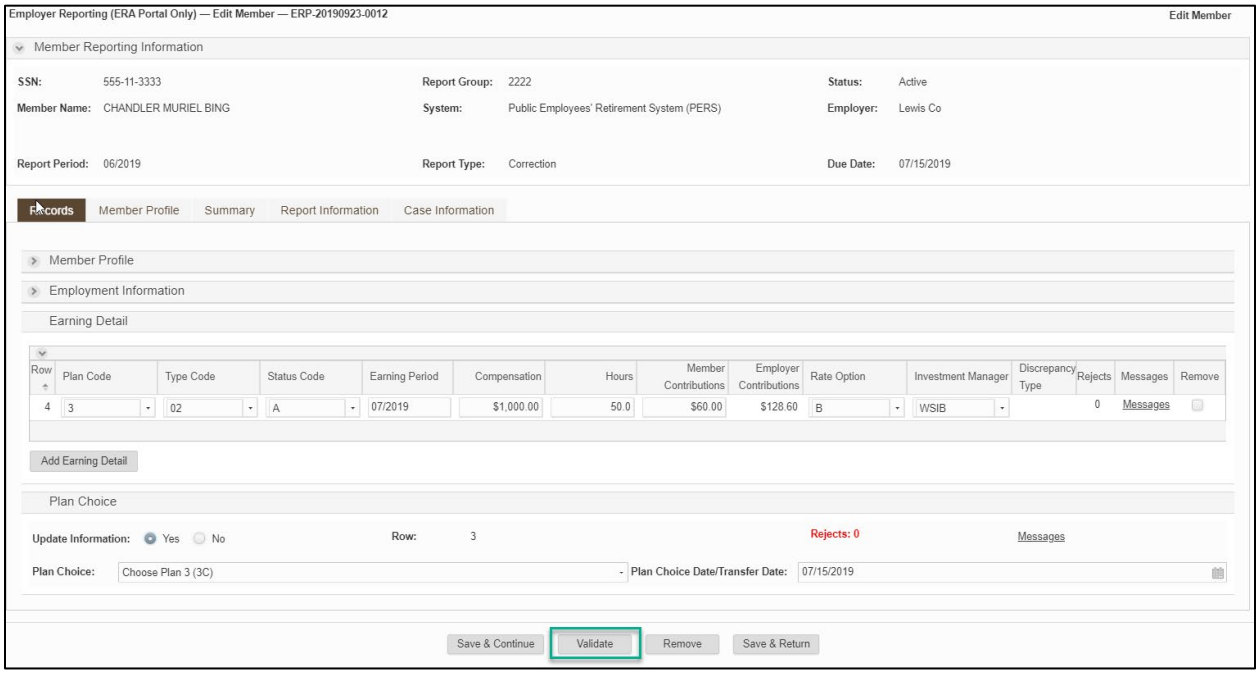
4. **Select one of these four buttons at the bottom of the screen:**

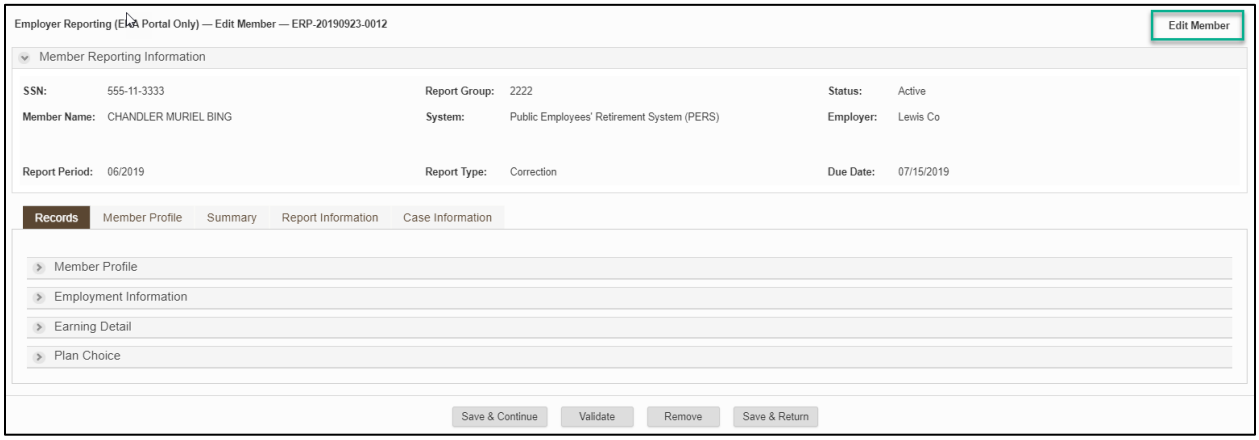
"Save & Continue" Save & Continue will save this information and take you back to the "Edit Member" screen to continue entering information for this same member.



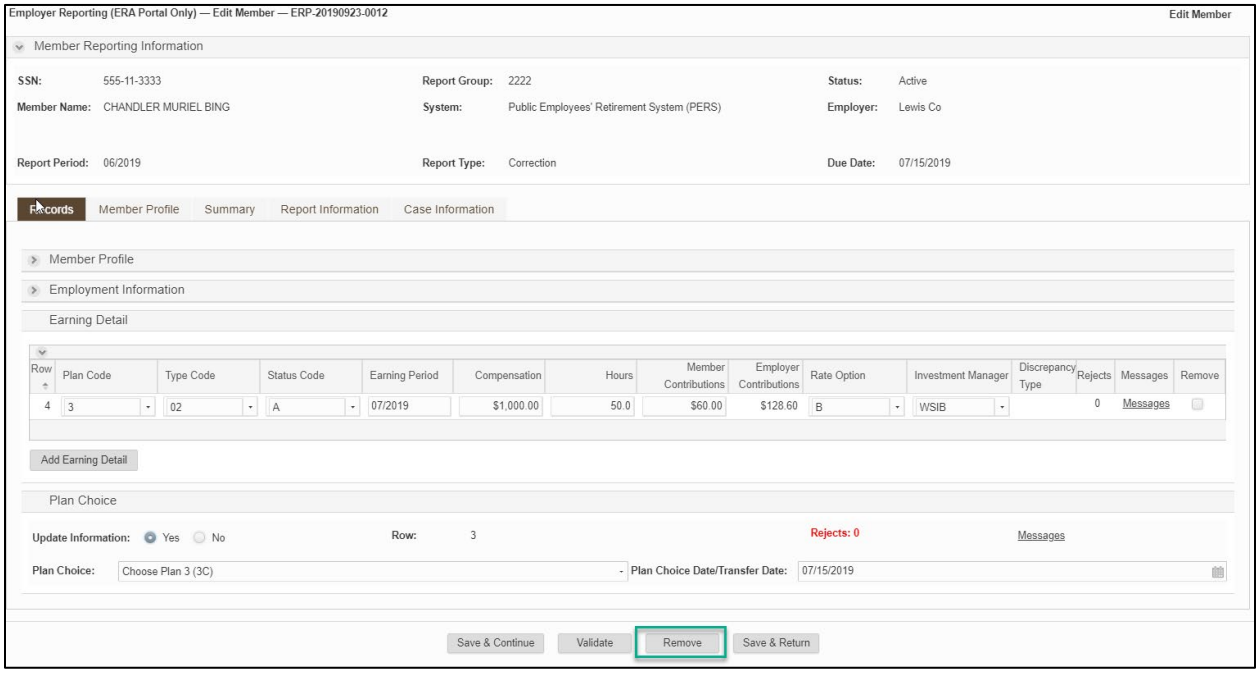


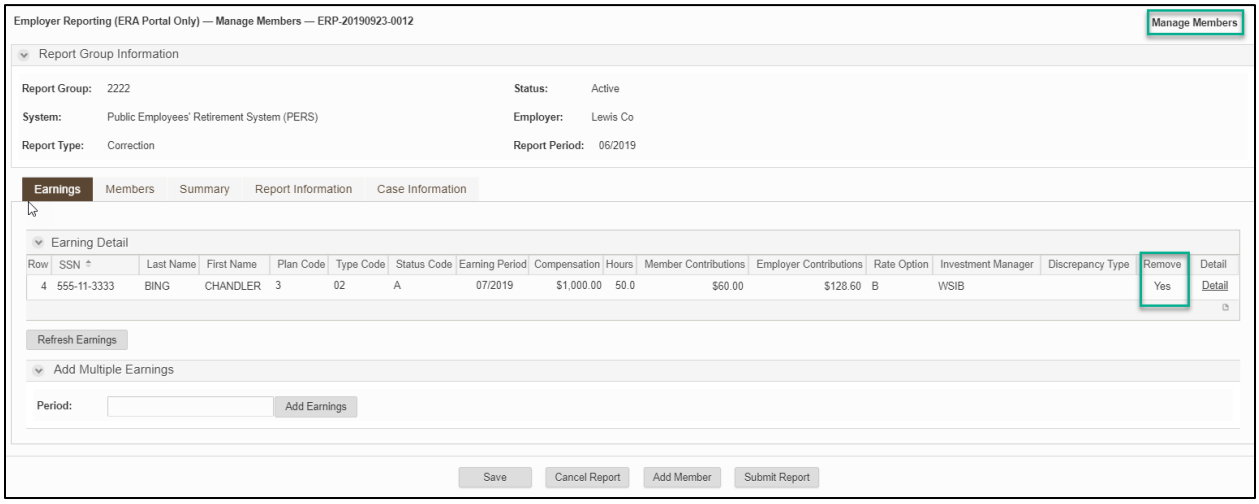
"Validate" Validate will edit the information you just entered against edits. They will be displayed on the current screen.



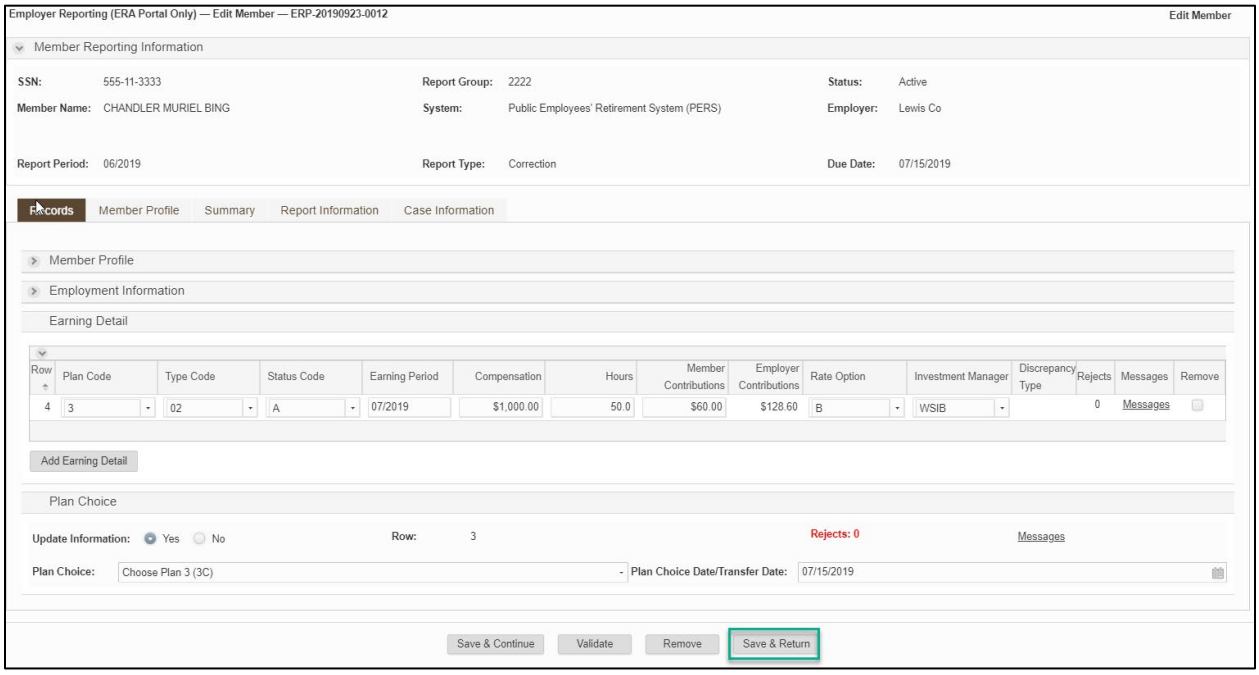


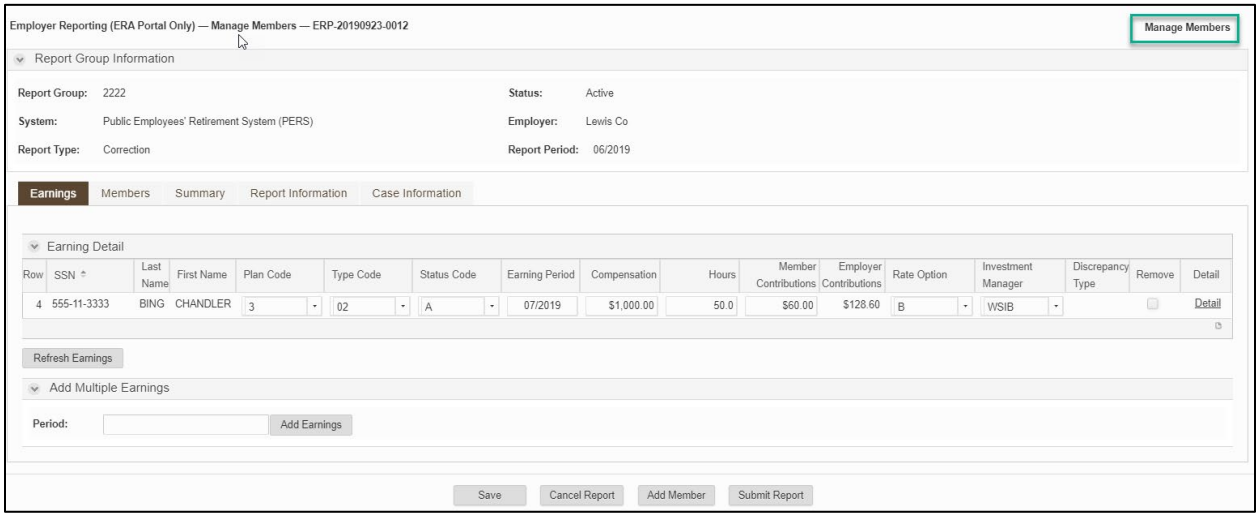
"Remove" Remove will remove the information that was just entered and take you back to the Manage Members screen with a blank record. You can select the "Members" tab to see the record that will be removed upon "submit." *Unless you enter a separation date, these are the only records that will be removed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





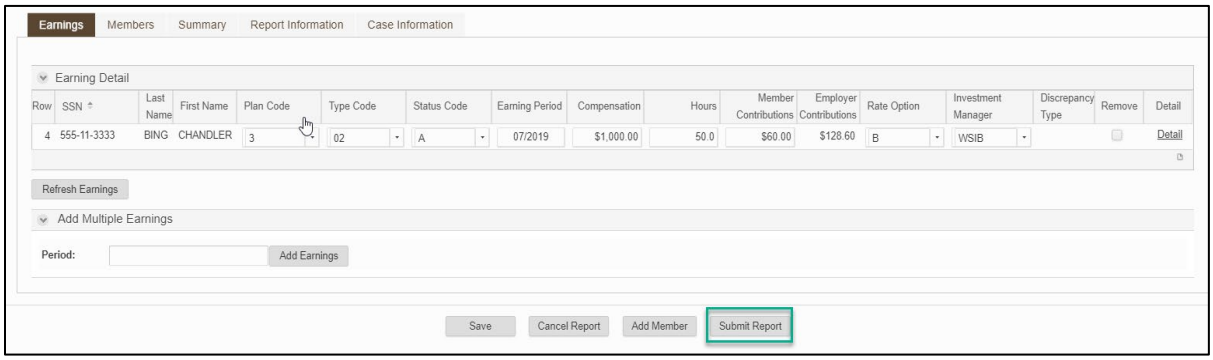
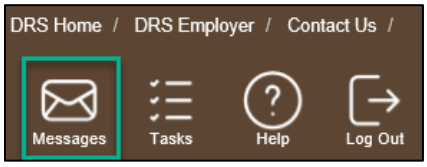
"Save & Return" Save & Return will save the information and return you to the Manage Members screen where you can add another member.





5. Submit Correction for processing

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



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