

# Learn the Basics: Process Menu\*



## Processes ▼

### Employer Reporting

- Report a separation date
- Report a plan choice
- Submit a correction
- Remove a person from my report

### Member Management

- Look up member history
  - System/Plan
  - Earnings
  - Service credit
  - DCP limits
  - DCP future and current deferrals
  - DCP temporary suspensions
- Determine a person's eligibility in a position

### My Documents

- Find edit message reports
- Find DCP edit message reports
- Find documents I uploaded to DRS
- Find my DCP change report

### Manage Bank Account

- Manage the bank accounts used to make EFT payments

### Manage Payments

- Schedule a payment
- Modify a scheduled payment
- Print a payment advice

### Upload Documents

- Submit employer or member documents to DRS (in pdf format)

RFEI

OASI

NLEC

## Employer Management ▼

### Manage User Profiles

- See all users and their roles.

*Main Contacts can:*

- Manage user/contact profiles and permissions
- Reset passwords for users

### View Employer Profile

- See basics like the organization's address or report groups
- Find the reporting method
- Find the software vendor
- Update payroll calendar
- Review expected number of reports

### View My Profile

- Find my own user profile

### Change My Password

- Reset my own password

## Reports ▼

### Current Account Activity

Information about invoices and payments

### Plan Choice/ January Transfer

A list of members with an open plan choice or a January Transfer option

### Processed Transmittal Summary

GASB pension data

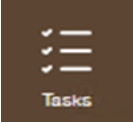
### Messages

- Find reminders or updates about important events in your case
- Find automated message when a transmittal finishes processing
- Brown = unread
- Each message will auto-delete after 90 days

### Tasks

- Search for a case with the case number
- Find pending cases I saved to finish later
- Fix Errors (if available)
- See if DRS sent me items that require me to take further action

\*Your process menu will display only what you have permissions to see.



# ERA Basics: Tasks

## Case Area

Cases organized by process. Select a process to filter the work area

## Case Search Bar

Enter a full case number – including dashes – to search for any open or closed case

## View

Select to toggle between grid and detail view

## Case Headers

Select a header title to sort by that column; select it again to reverse the order.  
**Employer:** All employers you support will be displayed at the same time.  
**Case Number:** Unique to each case  
**Process:** The process in which the case was created.  
**Activity:** The task pending in the case. There can be more than one option.  
**Task Due Date:** The recommended timeframe to complete the task.

## What are Tasks?

Each time a user starts a process in ERA, it's called a "case"

ERA creates a **Task** when:

- You save a case for later (on purpose or because you timed out)
- A case has been processed, and there is something else you need to do

Your Tasks will list only the incomplete cases currently assigned to you. Use the Case Search Bar to search for other cases – finished or not.

The screenshot shows the 'Employer Reporting Application Portal' interface. At the top, there's a navigation bar with 'Messages', 'Tasks', 'Help', and 'Log Out'. Below this is a sidebar with 'All Processes' and 'Processes' (Employer Management, Employer Reporting, Manage Bank Account, Upload Documents). The main area displays a table of tasks with columns: Employer, Case Number, Process, Activity, Process Creation Date, and Task Due Date. A search bar is located above the table. A 'View' icon is in the top right of the table area. At the bottom, there's a 'Case State Information' bar with colored dots and a 'Page Navigator' with page numbers 1 and 2.

Employer	Case Number	Process	Activity	Process Creation Date	Task Due Date	
Federal Way City Of	ERP-20180621-0003	Employer Reporting (ERA Portal Only)	Manage Members	06/21/2018 15:07	08/24/2020 15:07	View Summary
Federal Way City Of	UPD-20180625-0001	Upload Documents (ERA Portal Only)	Upload Documents	06/25/2018 13:15	06/26/2018 13:15	View Summary
Lewis Co	EPA-20180625-0000001	Manage Bank Account (ERA Portal Only)	Edit Account	06/25/2018 13:17	07/02/2018 13:17	View Summary
Lewis Co	ERP-20180625-0001	Employer Reporting (ERA Portal Only)	Create Report	06/25/2018 13:18	06/25/2018 15:41	View Summary
Lewis Co	EMG-20180625-0002	Employer Management	Update Employer	06/25/2018 13:19	06/25/2018 15:00	View Summary

## Case State Information

Sort by age of the case. Age is based on the Process Creation Date. Green are new, Yellow are aging, and Red are overdue.  
In the "Detail" view only, select the "star" to flag a case so you can quickly sort to it later.

## Page Navigator

Your tasks might not fit on one page. You'll see page numbers here if there are more tasks.

## Case

A "case" is a saved instance of a process. ERA assigns a unique case number to each of these instances, including the process, the date, and an incremental counter.

All cases assigned to you, that are not done, will appear here in your Tasks. Select the "Activity" to work on the case. Select "View Summary" to look at the case without editing it.