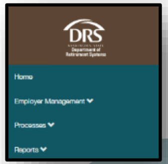


Learn the Basics: Process Menu*

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.

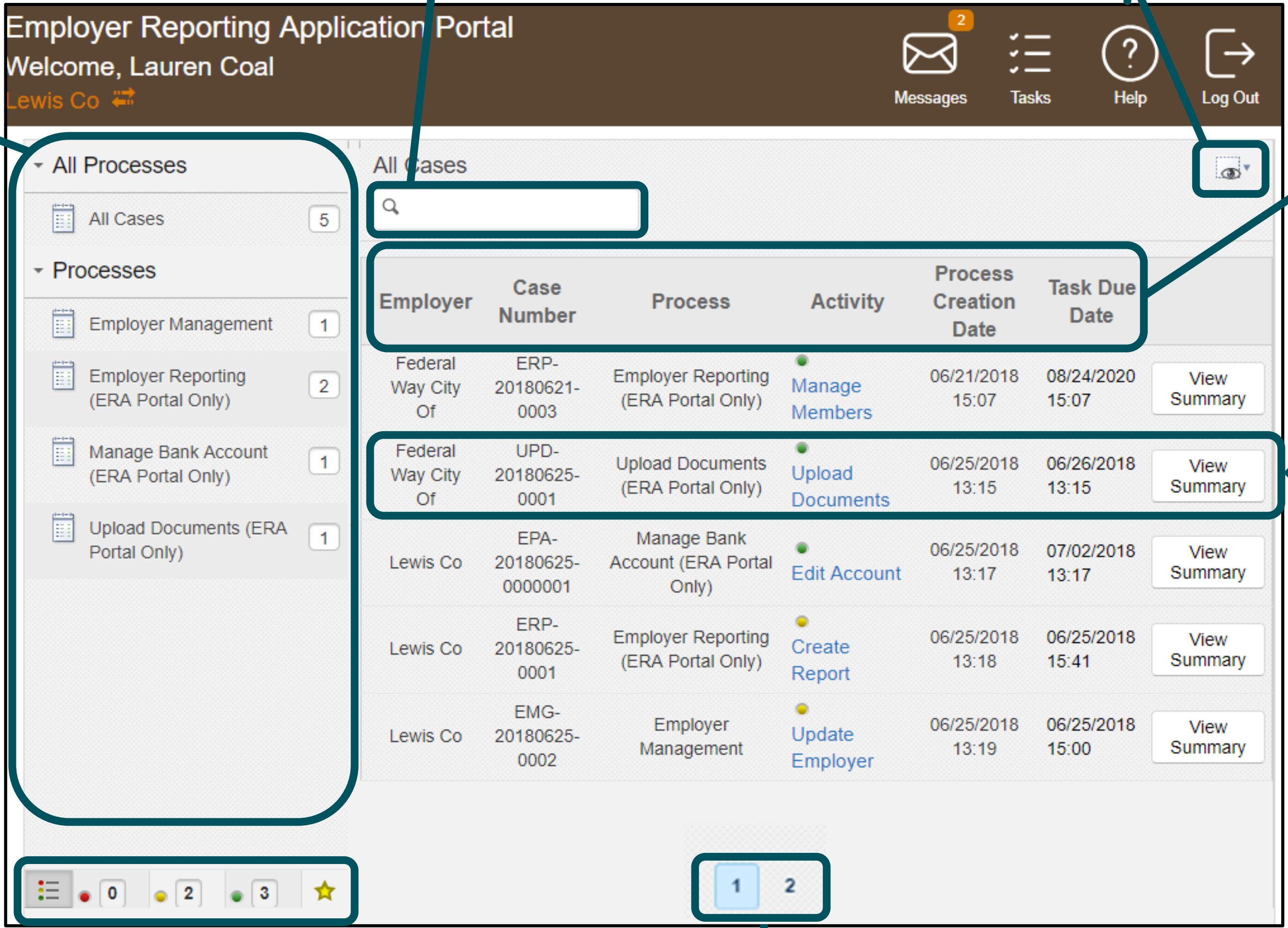
What are Tasks?

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.



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.

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.