

# Enrolling Your New Employee

## Overview of Enrollment

If you don't have a file to upload for enrollments there are two ways you can enroll a new employee manually.

- You can create a new enrollment and a new Employer Reporting Summary record; or
- You can add a new enrollment to an existing, (**non posted**) Employer Reporting Summary.

When you enroll someone as a new employee you will enter their basic information such as their name, SSN, and address. You will also enter the system, job classification, and their first day of employment (can be past or future).

As soon as the Enrollment of the member is complete, MPERA will send out all appropriate documentation and forms to the member. This is based on the System and Job Classification reflected in the Enrollment, as well as any other current or prior employment history that would effect their membership options.

# MPERA Job Classifications

Job Classifications	System	Plan	Job Code	Comments
<b>PERS Member</b>	PERS	DB/DC	PERS	Contributing
Any retiree returning to work within the same retirement system - PERS	PERS	NCE	PEWR	Working Retiree
Appointed Members of Board paid by per diem	PERS	NCE	EPBM	Excluded
Appointees of Governor	PERS	NCE	OEGV	Optional
Carve outs under Political Subdivision contracts	PERS	NCE	ECPS	Excluded
Chief Administrative Officer of any CO or CI	PERS	NCE	OECA	Optional
County Superintendent of Schools	PERS	NCE	EEEE	Excluded
Court Commissioners paid by per diem	PERS	NCE	EPCC	Excluded
Current active members of other retirement systems	PERS	NCE	ECFD	Excluded
Elected Official-House Legislator	PERS	NCE	OPHO	Optional
Elected Officials for Local Governments	PERS	NCE	OPLE	Optional
Elected Officials paid by per diem	PERS	NCE	EPEO	Excluded
Elected Official-Senate Legislator	PERS	NCE	OPEO	Optional
Election Judge Employee	PERS	NCE	EEJE	Excluded
Employee under 960 hours	PERS	NCE	OEUH	Optional
Employees of School district/University employed in a position not eligible for PERS	PERS	NCE	ETRS	Excluded
Full time students attending and working at the same elementary or high school	PERS	NCE	EFSE	Excluded
Full time students attending and working at the same school of higher education (I.e., University)	PERS	NCE	EFSU	Excluded
Inmates & residents of state institutions	PERS	NCE	EINM	Excluded
Legislative Branch	PERS	NCE	OELB	Optional
MUS-RP elected position	PERS	NCE	EORP	Excluded
Rest home or county hospital employees	PERS	NCE	OERH	Optional
Special Exclusion	PERS	NCE	EOCE	Excluded
Trainer employees in state institutions	PERS	NCE	EITS	Excluded
University Temporary Employees	PERS	NCE	EUTE	Excluded

# MPERA Job Classifications cont.

<b>Job Classifications</b>	<b>System</b>	<b>Plan</b>	<b>Job Code</b>	<b>Comments</b>
<b>Sheriff</b>	SRS	DB	SRSS	Contributing
Under Sheriff	SRS	DB	SRUS	Contributing
Deputy Sheriff	SRS	DB	SRDS	Contributing
Detention Officer	SRS	DB	SRDO	Contributing
Gambling or Criminal Investigator	SRS	DB	SRGC	Contributing
Any retiree returning to work within the same retirement system - SRS	SRS	NCE	SRWR	Working Retiree
<b>Game Warden</b>	GWPORS	DB	GWRS	Contributing
Stock Detective	GWPORS	DB	GWSD	Contributing
Motor Detective Inspector	GWPORS	DB	GWMD	Contributing
Stock Inspector	GWPORS	DB	GWSI	Contributing
Motor Carrier Officer	GWPORS	DB	GWMC	Contributing
Campus Security Officer	GWPORS	DB	GWCS	Contributing
Prison Warden or Deputy	GWPORS	DB	GWPW	Contributing
Drill Instructor	GWPORS	DB	GWDI	Contributing
Correction Officer	GWPORS	DB	GWCO	Contributing
Probation Officer	GWPORS	DB	GWPO	Contributing
Parole Officer	GWPORS	DB	GWPA	Contributing
<b>Full Paid Firefighter</b>	FURS	DB	FUFP	Contributing
Part Paid Firefighter	FURS	DB/ NCE	FUPP	Contributing/NCE
Any retiree returning to work within the same retirement system - FURS	FURS	NCE	FUWR	Working Retiree
<b>Volunteer Firefighter</b>	VFCA	VFCA		
<b>JRS Member</b>	JRS	DB	JRSM	Contributing
Associate Water Judge	JRS	DB	AWJ	
Chief Water Judge	JRS	DB	CWJ	
District Judge	JRS	DB	DJ	
Supreme Court Chief Justice	JRS	DB	SCCJ	
Supreme Court Justice	JRS	DB	SCJ	
Any retiree returning to work within the same retirement system - JRS	JRS	NCE	JRWR	Working Retiree
<b>HPORS Member</b>	HPORS	DB	HPOM	Contributing
<b>MPORS Member</b>	MPORS	DB	MPOM	Contributing

## Descriptions

Short Description	Long Description	Applicable Employers	Retirement System
Inmates & residents of state institutions	Section 45-2-101(31) defines "inmate" as "a person who is confined in a correctional institution." So "inmates of state institutions" would be persons confined in state correctional institutions. – INMATES ARE NOT CURRENTLY CAPTURED IN SABHRS & NOT REPORTABLE TO MPERA All other residents of state institutions that are performing work for that institution are reportable to MPERA- This has changed and residents of state institutions are also not reportable per management decision.	Corrections ; DPHHS	PERS
Trainer employees in state institutions	Persons in state institutions principally for the purpose of training but who receive compensation	DPHHS; Corrections; School for the Deaf & Blind	PERS
Current active members of other retirement systems (ie. the feds)	Funded by Feds - member cannot be receiving credit in two systems for the same service. Exceptions: If a bargaining unit agreement requires membership in the retirement systems If a person is a retiree of a different retirement plan and receiving a benefit.	All	PERS
Elected Officials paid by per diem	Those who serve the state or any contracting employer intermittently and who are paid on a per diem basis.	All	PERS
Appointed Members of Board paid by per diem	Those who serve the state or any contracting employer intermittently and who are paid on a per diem basis.	All	PERS
Full time students attending and working at the same elementary or high school	Is NOT eligible to purchase service. (A part time student would fall under the categories of optional or mandatory, depending on the circumstances.)	School for the Deaf & Blind; Dept. of Military Affairs	PERS
Employees of a school district/university employed in a position not eligible for PERS	Contributing and non-contributing employees working in a TRS position that is not eligible for PERS including TRS contributing employees, employees who are optional under TRS and TRS working retirees OR university system employees	CO, CP, SD, UN, HS, OA	PERS

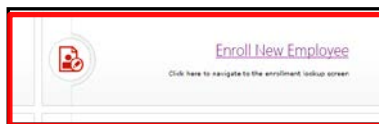
Short Description	Long Description	Applicable Employers	Retirement System
Elected Officials	Legislators	CP1104	PERS
EE under 960 hours	Employees have an election to belong, or not, if it is anticipated that the position is part time working less than 960 hours. At 961 hours it is mandatory for the employee to belong to the retirement plan and start making all required contributions.	All	PERS
Appointees of the Governor	Department heads, administrative staff, etc. The governor has a certain number of exempt positions that serve at the pleasure of the governor.	CP	PERS
Legislative Branch	Legislative staff has an election to belong, or not, if it is anticipated that the position will work for 10 months or less for work related to the legislative session. After 10 months, it is mandatory for the employee to belong to the retirement plan and start making all required contributions.	CP	PERS
Any retiree returning to work within the same retirement system.	Any retiree that returns to a PERS covered position that works under 960 hours. If they retired under the RIF they are limited to 600 hours if they go to work for another retirement system pursuant to 19-3-908(7), MCA.	All	PERS
	Reported as NCE and can work up to a total of 180 days. No pension offset.	Judiciary	JRS
	Any SRS retiree returning to work for up to 480 hours. Earnings limitation - lose \$1 for each \$3 earned in excess of \$5,000.	Dept. of Justice	SRS
	Any FURS retiree returning to work for up to 480 hours. No pension offset.	Military Affairs	FURS

# Determining Your Employee's Eligibility/Create an Enrollment Manually

**Option #1** Create new enrollment detail for a new employee. **State agencies** can enroll working retirees following these steps.

## [Video- Manual Enrollment](#)

1. On the home page click on *Enroll New Employee*.



2. ERIC displays the Enrollment Lookup screen.

3. For a new enrollment, enter **SSN** and choose the retirement system from the dropdown, then click the **NEW** button.

A screenshot of the "Enrollment Lookup" web application. The page has a header "Enrollment Lookup" and a message "Msg ID : 5 [ Please enter search criteria and press SEARCH. ]". Below this is a "Criteria" section with several input fields: "SSN : 123-45-6789", "System : PERS", "Last Name : Duck", "First Name : Daisy", "Enrollment Status : All", "Enrollment Submitted : All", "Reporting Source : All", "Employer Reporting Summary ID :", "Employment Start Date From :", and "Employment Start Date To :". There are "Search", "Reset", and "Store Search" buttons. Below the criteria is a "Search Results" section with "New", "Open", and "Export To Excel" buttons. The "New" button is circled in red. Below the buttons is a table header with columns: "SSN", "First Name", "Middle Name", "Last Name", "Employment Start Date", "Job Classification", "Enrollment Status", "Enrollment Submitted", and "Reporting Source". Below the table header, it says "No records to display". A red arrow points from the "NEW" button to the "System" dropdown menu.

You can also use the search filters to locate a member in ERIC.

# Create an Enrollment Manually cont.

4.

ERIC displays the Enrollment Maintenance screen.

5.

Enter required information as indicated by a red asterisk (\*) (next to each box).

6.

Click **SAVE** and the **POST** button will appear, click **POST**. If you do not see a POST button, go to the **VALIDATION** Info tab and address any errors/warnings.

Enrollment Maintenance

Msg ID : 7 [ Record displayed. Please make changes and press SAVE. ]

**Save** Refresh Post Void

**Enrollment Header Information**

Enrollment Header ID : 5066 Received Date : 04/07/2015 Posted Date :  
Enrollment Header Type : PERS Enrollment Header Status : Valid File Name : Enrollment File.csv  
Total Detail Records : 1 Employer Reporting Summary ID : 5079

**Enrollment Information**

Organization Name : CITY OF BIG TIMBER Enrollment Status : Valid Posted Date :  
\*SSN : 100-20-3113 Name Prefix :  
\*Last Name : Mcnroe \*First Name : John Middle Name : z  
Name Suffix : \*Date Of Birth : 06/11/1985 \*Gender : Male  
Marital Status : Married International :  Suppress Warnings :   
\*Address Line 1 : 123 Custer Ave Address Line 2 : Address Line 3 :  
\*City : Helena \*State : Montana \*Zip Code/Plus 4 : 66510  
Country : United States of America  
Phone Number : Phone Type :  
Email Address : Email Type : Reporting Source : File Upload

**Enrollment Details**

\*System : PERS \*Job Classification : PERS Member  
\*Employment Start Date : 07/01/2014

**Other Details**

Message ID	Message	Severity
9308	Membership is mandatory. Contributions are required. Enroll as a PERS member.	Error

7.

Once you have addressed errors/warnings, click **SAVE** and the **POST** button will appear so you can POST the record.



**Errors** must be addressed to POST the record. An error example may be when an employee declines membership but membership is mandatory. **Warnings** can be suppressed however, ensure you read and address the warning if required to do so. A warning example may be, the DOB is under age 16.