

Enrolling A New Employee

We recommend enrolling new employees immediately to avoid possible payroll adjustments. To do this, follow the steps below.

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" with a search icon, "System : PERS" with a dropdown arrow, "Last Name : Duck", "First Name : Daisy", "Enrollment Status : All" with a dropdown arrow, "Enrollment Submitted : All" with a dropdown arrow, "Reporting Source : All" with a dropdown arrow, "Employer Reporting Summary ID :", "Employment Start Date From :", "Employment Start Date To :", and "Employer Reporting". 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. A red arrow points from the "New" button back to the "SSN" input field. 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 S". Below the header, it says "No records to display".

Enrolling a New Employee 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 **Errors** tab at the bottom 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 : *First Name : John Middle Name : z
*Last Name : Mcnroe *Date Of Birth : 06/11/1985 *Gender : Male
Name Suffix : International : Suppress Warnings :
Marital Status : Married 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. **Failure to POST an enrollment will prevent payroll reporting.**



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.

Enrolling a New Employee With The Payroll Report

Before you submit your payroll, you can add a new employee to the payroll report. <Payroll Reporting Here>

1. Navigate to the Employer Reporting link.



2. ERIC displays the Employer Report Summary Lookup screen.

Employer Report Summary Lookup

[Previous Page Displayed.]

Criteria

Received Date From:

Posted Date From:

Reporting Source: All ▼

Create Invoice: All ▼

Employer Reporting Summary Status: All ▼

*Paycycle Frequency: All ▼

Receivable Status: All ▼

Summary Submitted: All ▼

Employer Reporting Summary ID:

Search **Reset** **Store Search**

Search Results

New **Open** Export To Excel Copy Forward

1 2 3 4 5 6

	Employer Reporting Summary ID	Total Enrollments	Total Demographic Changes	Total Payroll Detail Records	Pre-Tax EE Contribution
<input type="checkbox"/>	5086				\$0.00
<input checked="" type="checkbox"/>	5085	1		1	\$1,168.58

3. Search for existing Employer Report Summary.

4. ERIC displays the search results, select the desired record and click the Open button or click on the Employer Reporting Summary ID (link).

Enrollment - Employer Reporting Summary cont.

5.

Click on the New Enrollment Header tab.

Employer Reporting Summary Maintenance

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

Save Refresh Void Submit

Employer Reporting Summary Information

Reporting Source : File Upload Posted Date : File Name : Enrollment File.csv
 Employer Reporting Summary ID : 5079 Create Invoice :
 No Payroll : ☐ Summary Submitted : ☐
 Submitted Date : Paycycle Frequency : Monthly Employer Reporting Summary Status : Valid
 Received Date : 04/07/2015 Comments :

Enrollment/Demographic Information

Total Enrollment Detail Records : 1 Enrollment Header Status : Valid

Open Void **New Enrollment Header**

Enrollment Header ID	Header Type	Header Status	Total Enrollments
5066	PERS	Valid	1

Payroll Summary Information

Payroll Summary Status : ER Contributions : \$3.00
 Pre-Tax EE Contributions : \$0.00 Total Contributions : \$0.00
 Post-Tax EE Contributions : \$0.00

Open Void **New Payroll Header**

Payroll Header ID	Header Type	Payroll Header Status	Total Earnings	Total Hours	Pre-Tax EE Contributions	Post-Tax EE Contributions	ER Contributions	Total Contributions
No records to display.								

6.

ERIC displays the Enrollment Header Maintenance screen click **NEW** in the enrollment details tab to add the enrollment.

Enrollment Header Maintenance

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

Save Refresh Void **New Detail Record**

Main Section

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

Other Details

Enrollment Details Enrollment Details By Status Enrollment Details By Error \ Information

New Open Export To Excel

Enrollment ID	SSN	Last Name	First Name	Employment Start Date	Job Classification	Enrollment Detail Status
5062	100-20-3113	Mcnoe	John	07/01/2014	PERS Member	Valid

7.

ERIC displays the Enrollment Maintenance screen, enter enrollment information and click **SAVE**. Once the **POST** button appears, click it.

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 BIRMINGHAM Enrollment Status : valid
 SSN : 100-20-3113 Name Prefix :
 Last Name : Mcnoe First Name : John Middle Name :
 Name Suffix : Date of Birth : 05/13/1963 Gender : Male
 Marital Status : Married International : ☐ Suppress W-2s : ☐
 Address Line 1 : 323 Center Ave Address Line 2 : Address Line 3 :
 City : Helena State : Montana Zip Code/Plus 4 : 59600
 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

Failure to Post will result in Your Payroll Not Posting