








Enroll a Member




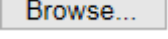

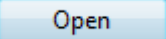
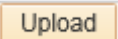
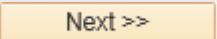
This quick guide shows you (as a personnel contact for a participating employer) how to enroll a member. To begin the enrollment, use the information provided on the completed membership application. For optional members, you will also need to upload the application to *Retirement Online*. Only applications in Portable Document Formats (PDFs) already saved on your device can be uploaded to *Retirement Online* at time of enrollment.

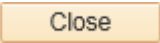
| Step | Action |
|------|---|
| 1 | On your <i>Retirement Online Account Homepage</i> , click the Access Enrollment Dashboard button.  |
| 2 | The <i>Enter Employer Details</i> page will appear. |
| 3 | Next to the Location Code field, click the Look Up Location Code icon.  |
| 4 | The Look Up Location Code pop-up will appear. |
| 5 | Click the appropriate Location Code link. |
| 6 | The <i>Enter Employer Details</i> page will appear. |
| 7 | Click the Look Up Retirement System icon next to the Retirement System field.  |
| 8 | The Look Up Retirement System pop-up will appear. You will have a choice between ERS (Employees' Retirement System) and PFRS (Police and Fire Retirement System). |
| 9 | Click the appropriate Business Unit link. |
| 10 | The <i>Enter Employer Details</i> page will appear. |
| 11 | Click the Next button.  |
| 12 | The <i>Enter Personal Information</i> page will appear. |
| 13 | If applicable, select the Name Prefix drop-down to choose the employee's name prefix.  |
| 14 | Select an option from the list. |

| Step | Action |
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| 15 | Click in the First Name field. <input data-bbox="646 180 963 216" type="text"/> |
| 16 | Enter the employee's first name. |
| 17 | Click in the Last Name field. <input data-bbox="646 390 963 426" type="text"/> |
| 18 | Enter the employee's last name. |
| 19 | Click in the Date of Birth field. <input data-bbox="670 600 987 636" type="text"/> |
| 20 | Enter the employee's date of birth. Please use the format MM/DD/YYYY. |
| 21 | Use the Sex drop-down to select the employee's sex. <input data-bbox="943 810 1260 846" type="text" value="Unknown"/> |
| 22 | Select an option from the list. |
| 23 | Click in the SSN field. <input data-bbox="557 1020 873 1056" type="text"/> |
| 24 | Enter the employee's Social Security number. |
| 25 | Click in the Address Line 1 field. <input data-bbox="695 1230 1011 1266" type="text"/> |
| 26 | Enter the employee's address listed on the application. |
| 27 | Click in the City field. <input data-bbox="557 1440 873 1476" type="text"/> |
| 28 | Enter the employee's city. |
| 29 | Click in the State field. <input data-bbox="573 1650 889 1686" type="text"/> |
| 30 | Enter the employee's state. Please use the two-letter state abbreviation. |
| 31 | Click in the Postal Code field. <input data-bbox="662 1860 979 1896" type="text"/> |

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| 32 | Enter the employee's ZIP Code. Within <i>Retirement Online</i> , Postal Code refers to your ZIP Code for US addresses. |
| 33 | Click the Next button.  |
| 34 | A Message pop-up will appear. It will present the address in the format used by the United States Postal Service (USPS) for your approval. If you click Yes , <i>Retirement Online</i> will update the address to the suggested USPS version. If you click No , the address will stay as entered. Either selection will bring you to the next step. |
| 35 | Click an option. |
| 36 | The <i>Enter Job Information</i> page will appear. |
| 37 | Click in the Hire Date field. <input data-bbox="623 793 943 831" type="text"/> |
| 38 | Enter the employee's hire date. This is the date the employee began their employment. Please use the format MM/DD/YYYY. |
| 39 | For optional members, the Date of Full-Time Permanent Appointment field will be left blank. (This field will only display for ERS members.) |
| 40 | Click the Look Up Job Code icon next to the Job Code field.  |
| 41 | The Look Up Job Code pop-up will appear. All job codes associated with the Retirement System that you selected earlier — in this example, ERS — will appear. Scroll Down if you need to, and click the Job Code link associated with the employee's position. |
| 42 | Click the Job Code link. |
| 43 | Select the Regular/Temporary drop-down to choose the employee's type of work. <input data-bbox="289 1524 613 1562" type="text"/> |
| 44 | Select an option from the list. |
| 45 | Select the Full/Part Time drop-down field to choose the employee's schedule type. <input data-bbox="289 1759 613 1797" type="text"/> |
| 46 | Select an option from the list. |

| Step | Action |
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| 47 | Employee Classification refers to the length and/or duration of the employee's work year. Select the Employee Classification drop-down field to choose the employee's classification. <input data-bbox="289 247 623 285" type="text"/> |
| 48 | Select an option from the list. |
| 49 | Select the Payroll Frequency drop-down to choose the frequency of payment. <input data-bbox="289 489 623 527" type="text"/> |
| 50 | Select an option from the list. |
| 51 | Click in the Standard Work Day field. <input data-bbox="756 690 1075 728" type="text"/> |
| 52 | Enter the employee's standard work day. |
| 53 | Click in the Projected Annualized Wage field. <input data-bbox="865 900 1183 938" type="text"/> |
| 54 | Enter the employee's projected annualized wage. |
| 55 | Click in the Annual Compensation Rate field. <input data-bbox="865 1110 1183 1148" type="text"/> (This field will only display for PFRS members.) |
| 56 | Enter the employee's annual compensation rate. |
| 57 | Once you've completed the required fields, click the Next button. <input data-bbox="1081 1346 1297 1383" type="button" value="Next"/> |
| 58 | The <i>Review Membership Details</i> page will appear. |
| 59 | Review the information. Scroll down until you see the Submit button. |
| 60 | If all the information shown is correct, click the Submit button. For Optional Members, continue with step 66. <input data-bbox="849 1688 1086 1726" type="button" value="Submit"/> |
| 61 | The <i>Enrollment Results</i> page will appear. The member's information will be processed. |
| 62 | An Enrollment Confirmation message will appear. This message contains enrollment information for the new member. Be sure to retain this information for your records. |

| Step | Action |
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| 63 | If you have no other employees to enroll, click the Close button.  |
| <i>For Optional Members</i> | |
| 64 | <p>The Optional Membership message will appear.</p> <p>To enroll an optional member, you must upload and submit the completed membership application at this time. To proceed, click Enroll-Upload Form.</p> <p>To hire an employee for reporting purposes only, click Hire Optional. This will take you directly to the Confirmation page.</p> |
| 65 | Click the Enroll – Upload Form button.  |
| 66 | The Upload Membership Form message will appear. |
| 67 | Click the Browse... button.  |
| 68 | The File Attachment pop-up box will appear. |
| 69 | Click the Browse... button to search your device for the membership application file.  |
| 70 | The Choose File to Upload window will appear. |
| 71 | <p>Locate the file on your device to upload. Click the file name of the document.</p> <p> Membership Application.pdf</p> |
| 72 | Click Open .  |
| 73 | You will return to the File Attachment pop-up. |
| 74 | Click the Upload button to upload the document.  |
| 75 | You will return to the Upload Membership Form message. |
| 76 | Click the Next >> button to continue.  |
| 77 | The <i>Enrollment Results</i> page will appear. The member's information will be processed. |

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| 78 | An Enrollment Confirmation message will appear. This message contains enrollment information for the new member. Be sure to retain this information for your records. |
| 79 | If you have no other employees to enroll, click the Close button.  |
| 80 | You have successfully completed enrolling an optional member. <i>End of Procedure.</i> |