Employer Self Service (ESS)
User Guide

V10

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Contact Information

Employer Services

Phone: 1-800-451-9800 x 3200

Email: employer@mainpers.org

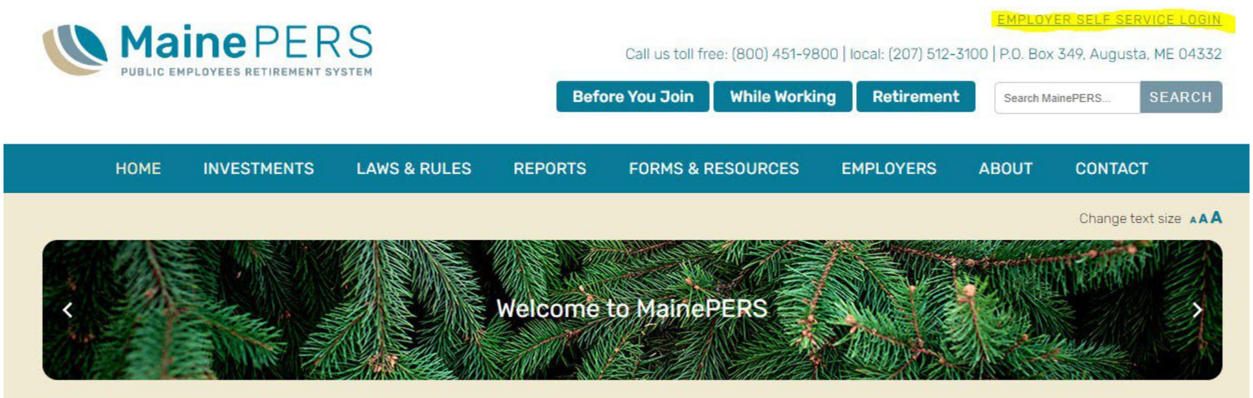
Employer Self-Service

Note An email will be sent to all registered users to advise them of any changes made to their account.

ACCESSING EMPLOYER SELF SERVICE (ESS)

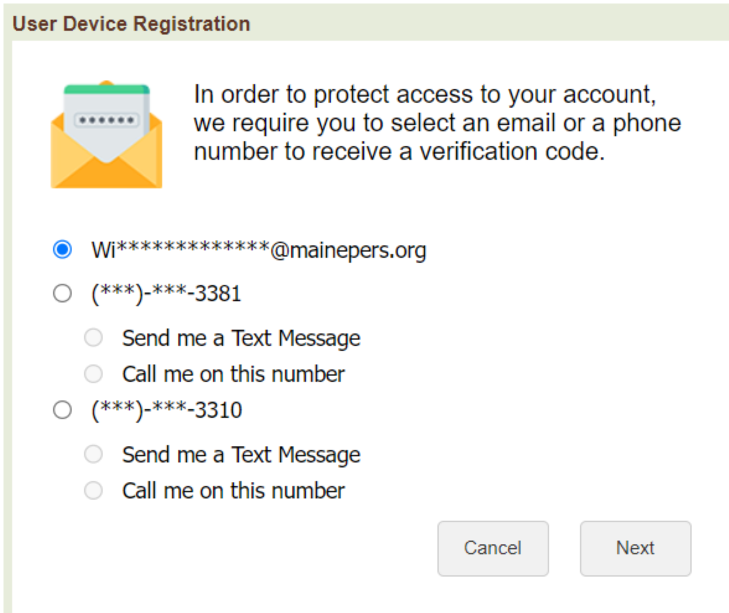
LOGGING INTO ESS

1. From the MainePERS website, www.mainepers.org, Click on the **Employer Self Service Login** link in the upper right hand corner of the page.



2. Enter your login credentials.
3. Click **Log In**.

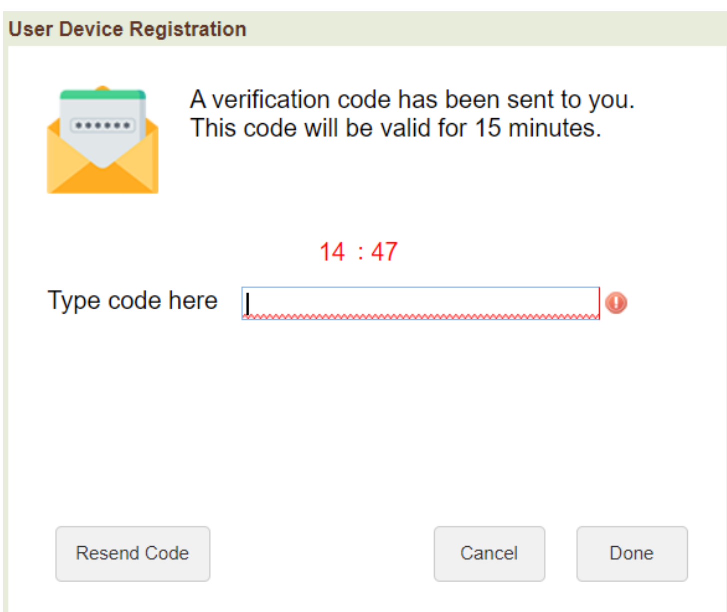
4. The Multi Factor Authentication (MFA) screen will populate. Here the User will request their **verification code** by selecting one of the presented contact methods.



Depending on your User Profile setup, you may see up to 2 email addresses and 3 phone number fields. *To add an additional MFA email address or phone number(s) to your profile, please contact your Employer's ESS Security Administrator.*

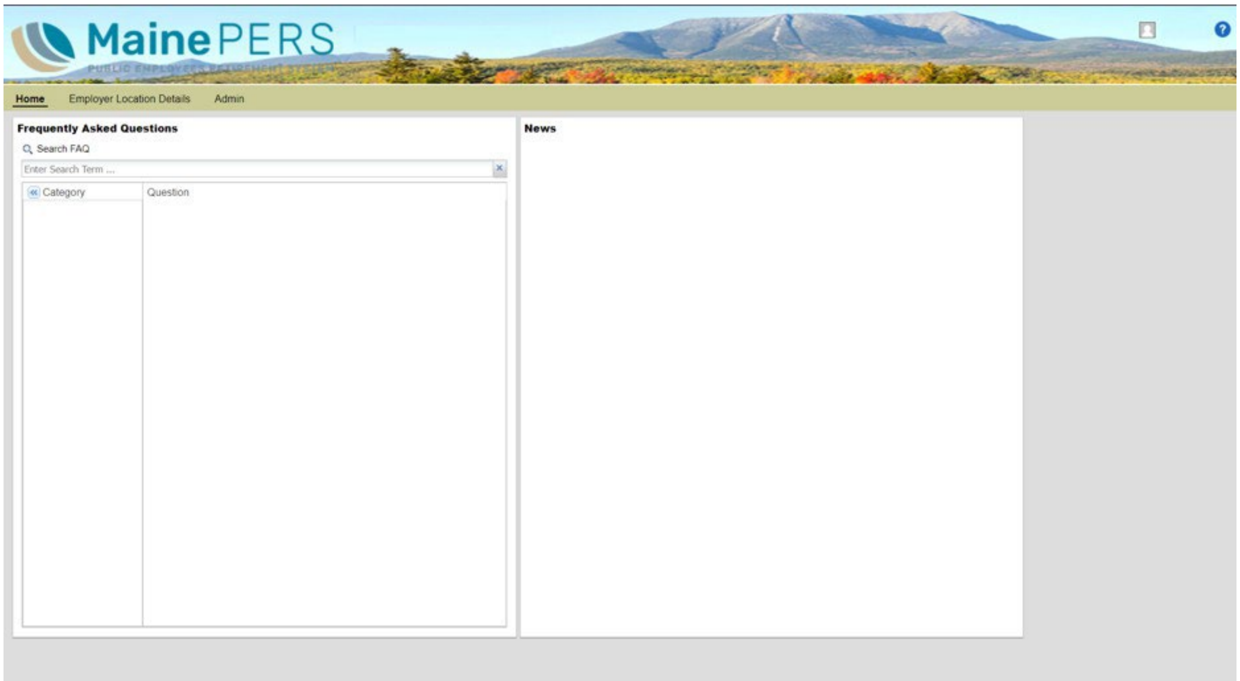
5. Select the method of your choice to receive your 6 digit verification code and click **Next**. If you are requesting to receive your verification code via Text Message, please ensure your selected phone number is SMS compatible.

6. Enter the **verification code** you received either by Phone, Text or Email within the 15 minutes validation period and click **Done**.



NOTE: If you are registering for the first time, you will be asked to change your password; otherwise you will be directed to the *ESS Home Page*.

The *ESS Home Page* tab looks like this:



LOGGING OUT OF ESS

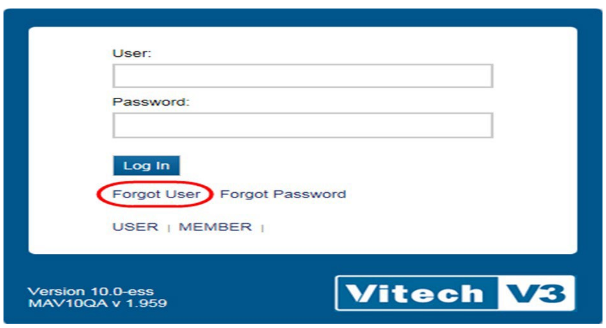
Click the **Profile Image**  icon next to your username (top right).

1. Select **Logout**.

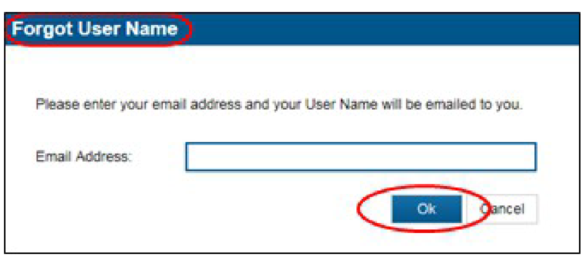
RETRIEVING A FORGOTTEN USER NAME

The steps to retrieve a forgotten user name are as follows:

1. Click **Forgot User** on the *ESS Login* window.



The *Forgot User Name* pop-up displays.

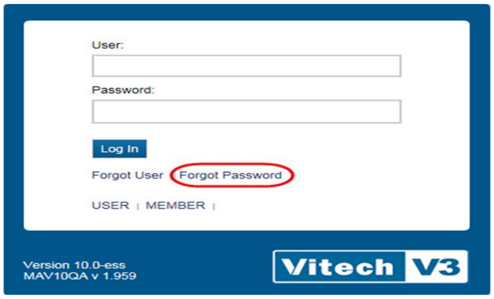


2. Enter your email address (ensure it is the one that you used to create your username in ESS) and click **OK**.
3. You will receive an email with your login user name.

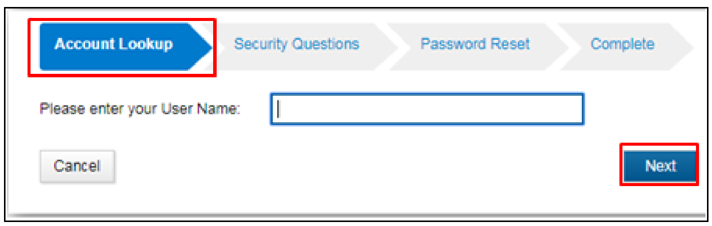
RETRIEVING A FORGOTTEN PASSWORD

The steps to retrieve a forgotten password are as follows:

1. Click **Forgot Password** on the *ESS Login* window.



A pop-up displays, with the *Account Lookup* tab highlighted by default.



2. Enter your **User Name**.
3. Click **Next**.

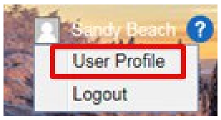
The *Security Questions* tab displays.

4. Complete the security questions presented.
5. Click **Next**. The *Password Reset* tab displays.
6. Enter your new password (follow the rules displayed on the tab) in the **Password** field.
7. Re-enter the password in the **Confirm Password** field.
8. Click **Confirm**.

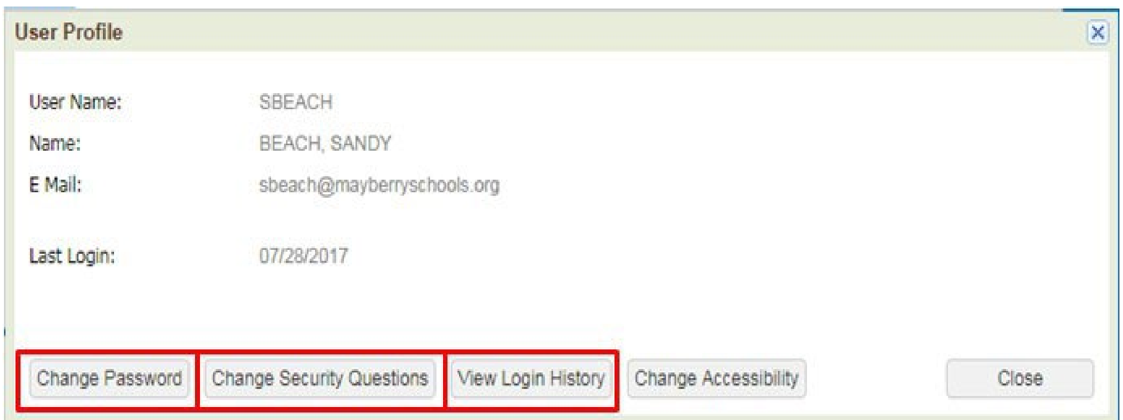
The *Password Reset* tab displays. And, you are sent an email confirming that your password has been changed.

ACCESSING THE USER PROFILE

1. Click the **Profile Image**  icon next to your username (top right).
2. Select **User Profile**.



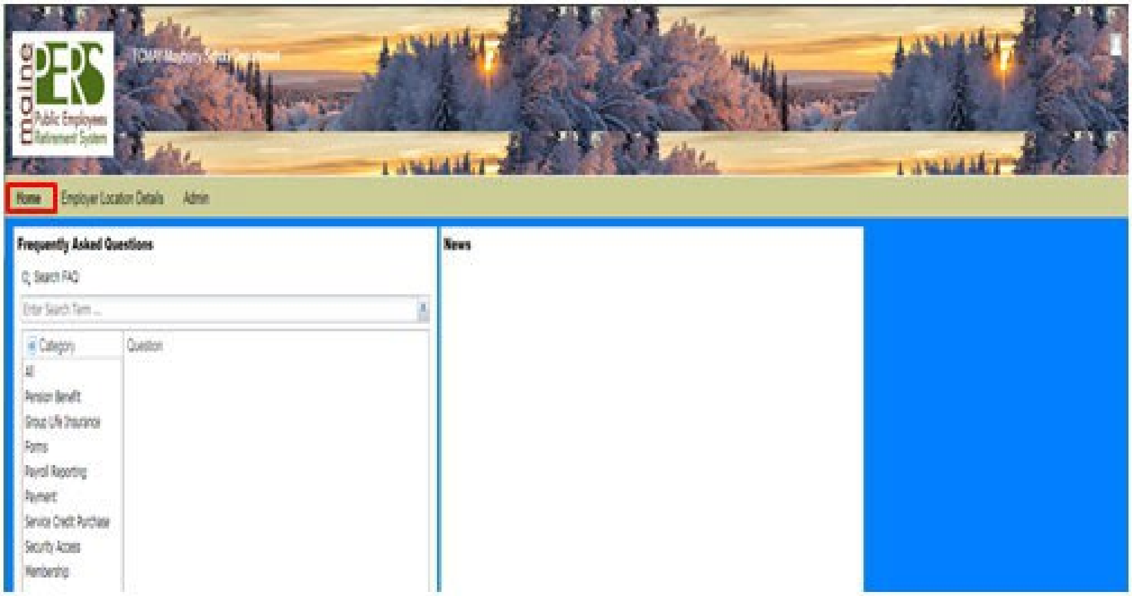
Changing a Password/Changing Security Questions/View Login History

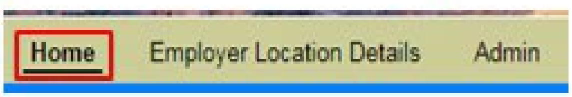


1. Click the **Profile Image**  icon next to the username (top right).
2. Select **User Profile**.
3. Click either: **Change Password, Change Security Questions** or **View Login History** based on your need.
4. Follow the prompts for the topic you have selected.

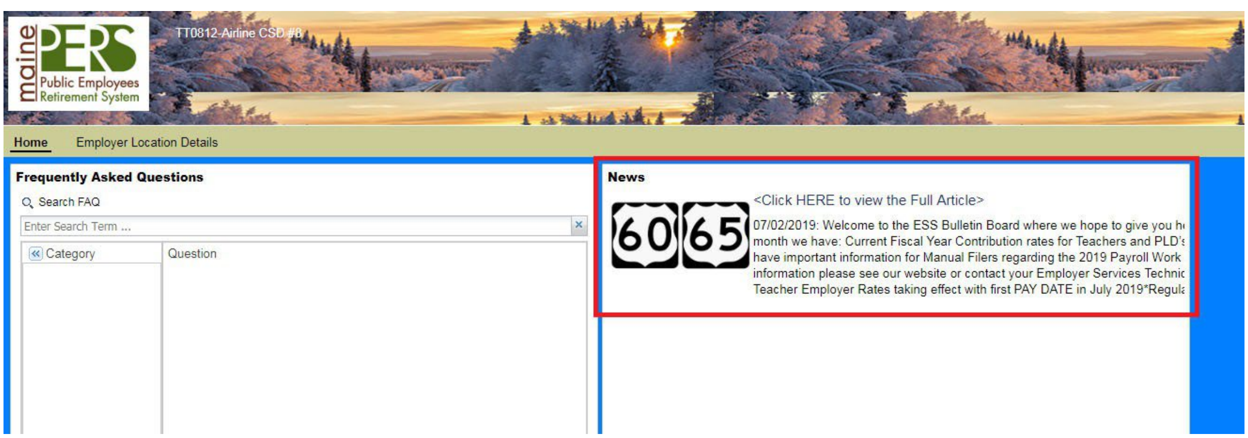
HOME TAB

- View *Frequently Asked Questions*



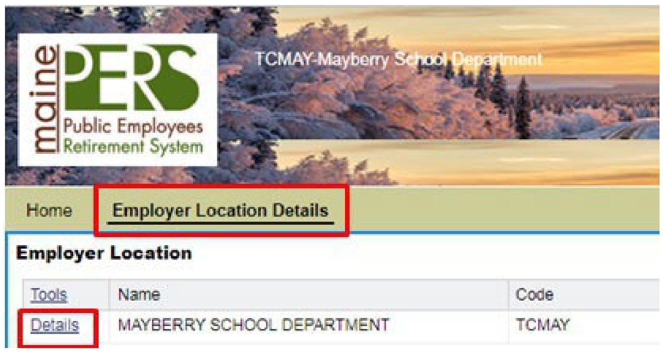


- View *News*
    - Check here regularly for important information and updates from MainePERS

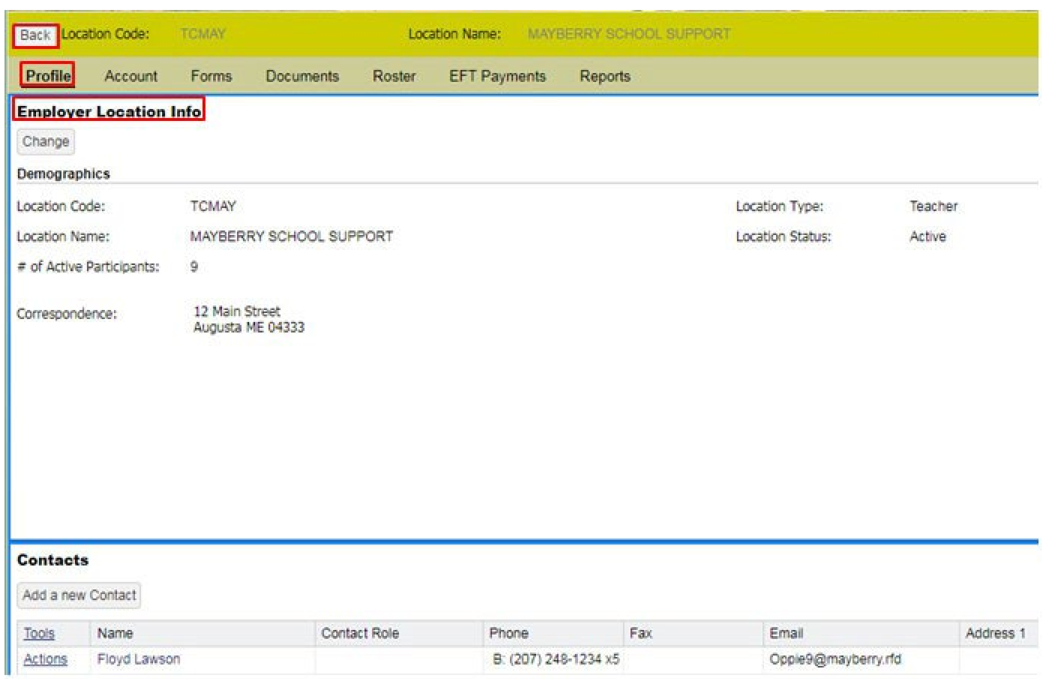


EMPLOYER LOCATION DETAILS TAB

The *Employer Location Details* tab displays the location available for you to view, depending on your setup and security settings. The Employer Location **Name** and **Code** are displayed.



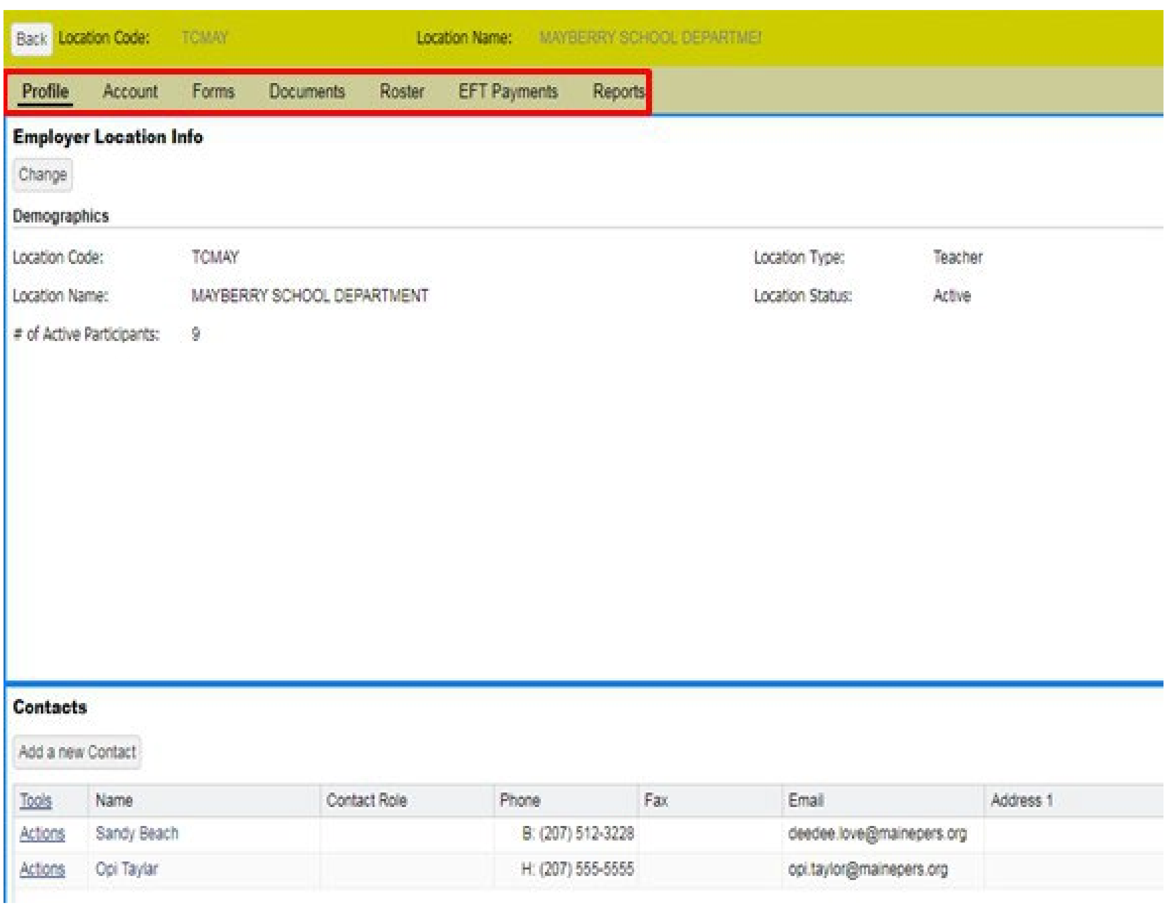
1. Click the **Details** link to view the Employer Location Info. The *Profile* tab displays for the employer location by default.



2. The **Back** button enables you to return to the *Employers Location Details* tab and, if you press it again, to the *Home* tab.

The following tabs are available:

- Profile Tab – displays Employer Location demographics information and lists Contacts
- Account Tab – lists work reports, where you go to upload and process payroll files, see account balances and make electronic payments
- Forms Tab – displays the list of forms available to submit through ESS and forms already submitted
- Documents Tab – displays a list of Employer Statements of Account and Annual Statements of Cost (formerly known as "green/white sheets" for PLDs) and Monthly GLI Invoice
- Roster Tab – provides you with a list of employees, active and terminated for your employer only
- EFT Payments Tab – where you set up account information to be used for Electronic Funds Transfers (EFTs)
- Reports Tab – provides you with the Employer Remittance Report and ESS GLI Level Report



PROFILE TAB

The *Profile* tab contains basic demographic and contact information for the Employer Location.

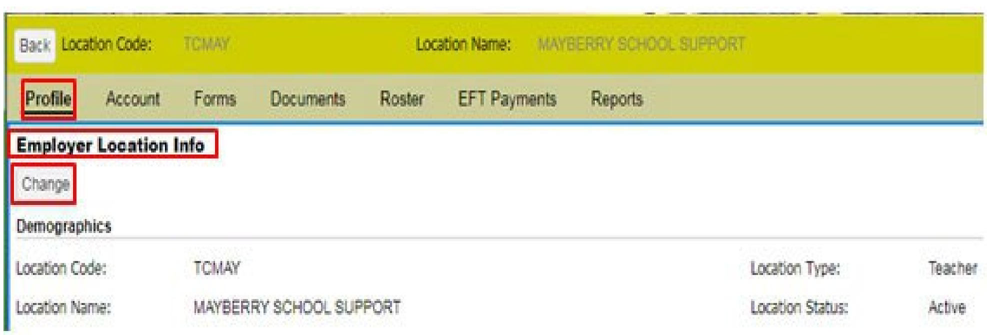
Updating Employer Location Demographics

You can update the demographics of your employer by navigating to the **Employer Location Details** section by clicking on the **Details** link. Then, at the *Profile* tab click **Change**, which generates an editable Employer Location Info window.

1. Click the **Details** link for the appropriate employer location.

The *Employer Location Profile* tab displays by default.

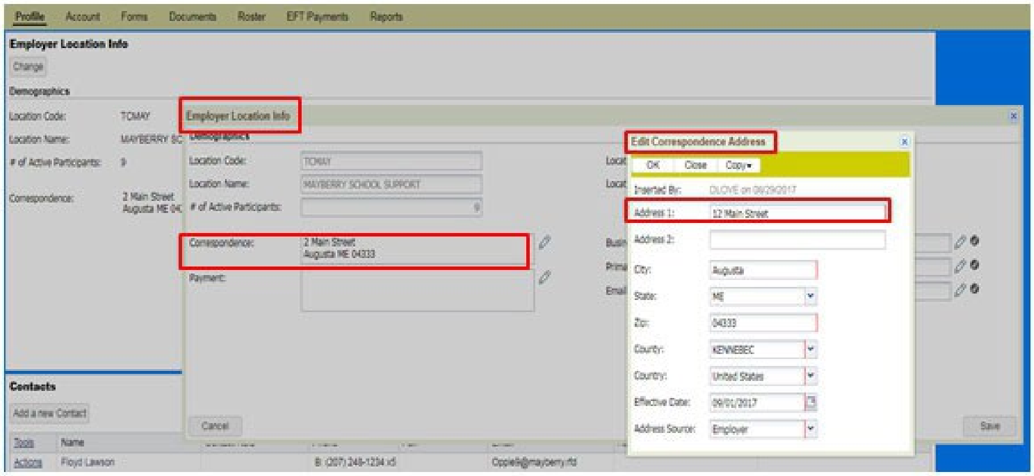
2. Click **Change** to enter edit mode.



The *Employer Location Info* pop-up displays.

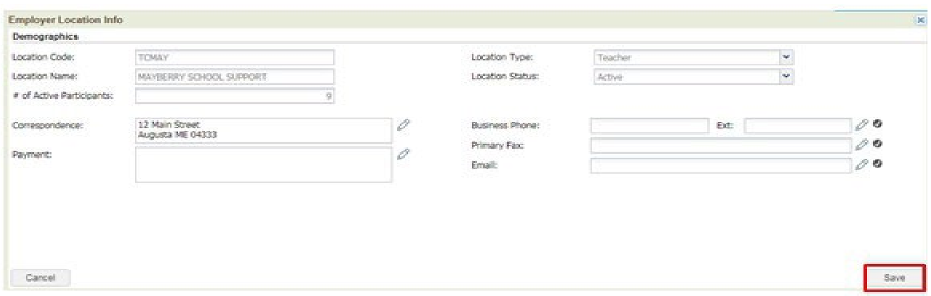
3. Click in the field you wish to update.

The *Edit Correspondence Address* pop-up displays.

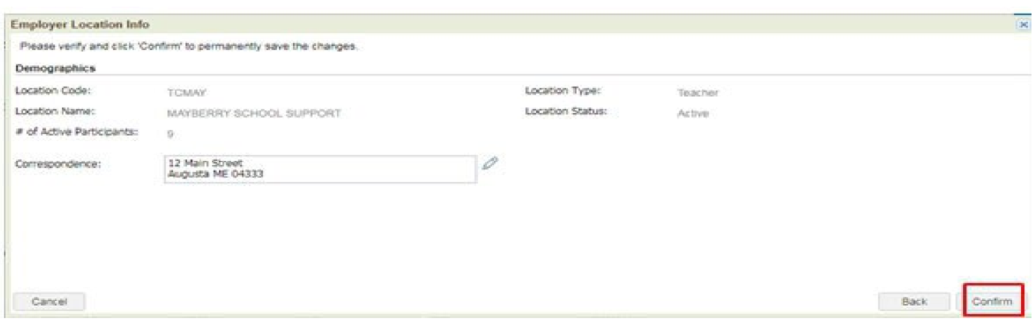


4. Make the necessary edits to the address.
5. Click **OK** to close the *Edit Correspondence Address* pop-up.

6. Click **Save**.



7. Click **Confirm** to close the *Employer Info* pop-up.



You have successfully updated your employer's address.

ADDING AND UPDATING EXISTING EMPLOYER CONTACTS

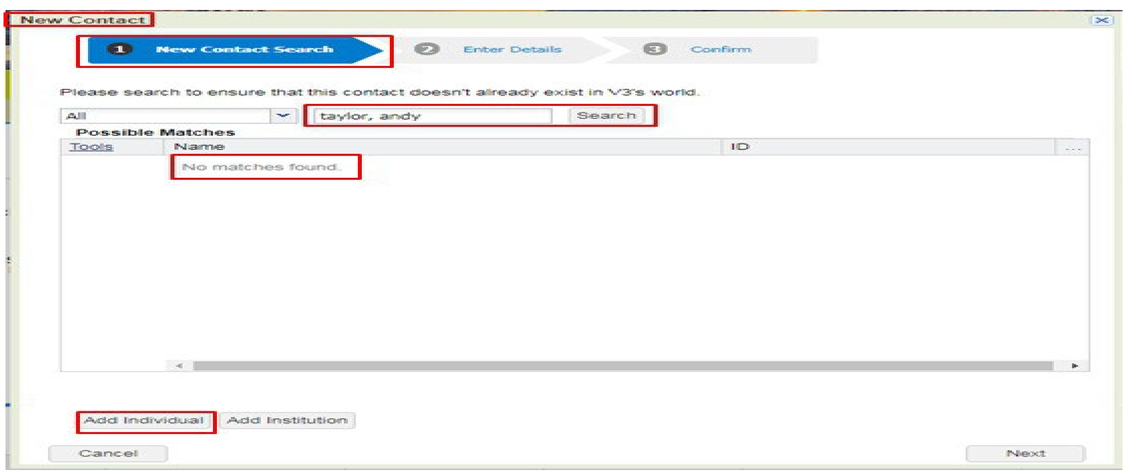
Based on your security role, you can add a contact or update existing contact information.

Adding a Contact (Adding/Updating ESS Users see page**)**

Based on your security role, you can create a contact in ESS.

1. Click the **Add a new Contact** button in the Contacts section.

The *New Contact* wizard displays, showing the *New Contact Search* subtab by default.



2. Enter the last name, first name in the search criteria

   (e.g., the name of the person you are adding as a Contact – Smith, John T).

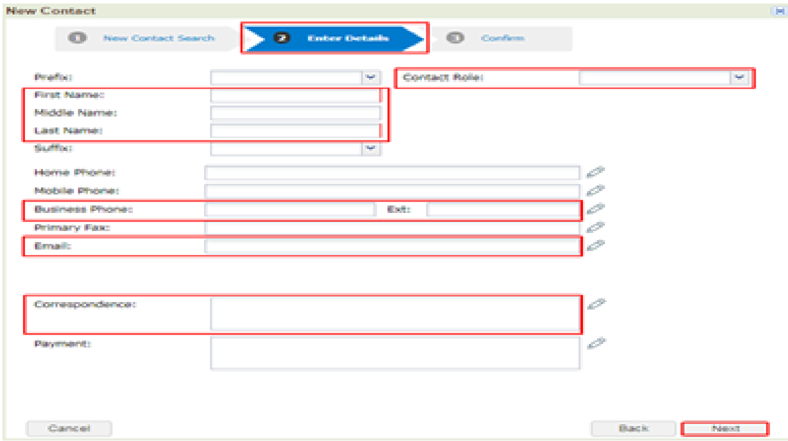
3. Click **Search**.

4. If the search returns a member for which you want to create a contact, click on that person's name.

5. If the search does not return the name of the person you wish to add, select the **Add Individual** button.

The Enter Details sub-tab displays. If you chose a person, some information is already completed.

The *New Contact* sub-tab displays.



6. Complete the fields as needed (note that some fields are required).

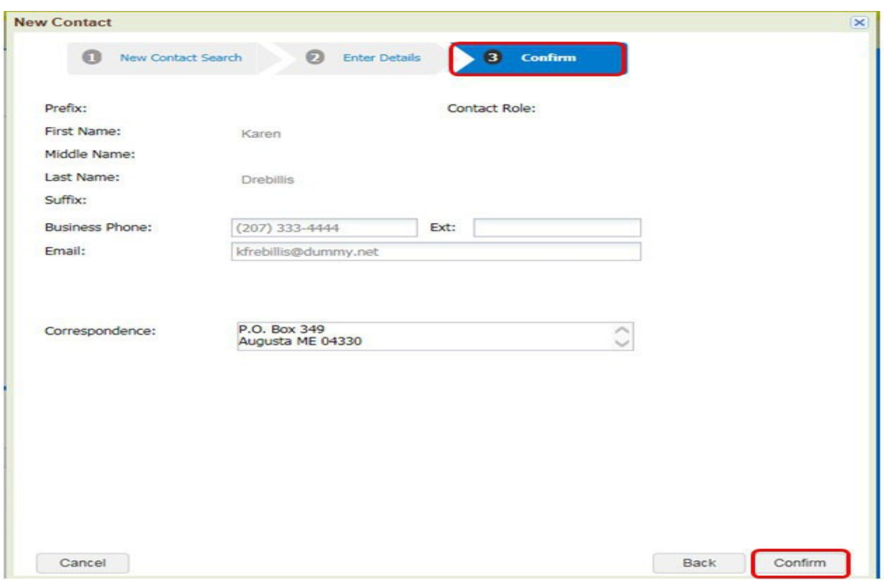
7. Please refrain from using all CAPITAL or all lower case letters when updating or adding contacts.

Correct Example: John D. Smith, 123 Maine St., Augusta, ME 04330

Incorrect Example: JOHN D> SMITH, 123 main st., augusta, me 04330

8. Click **Next**.

The *Confirm* subtab displays.



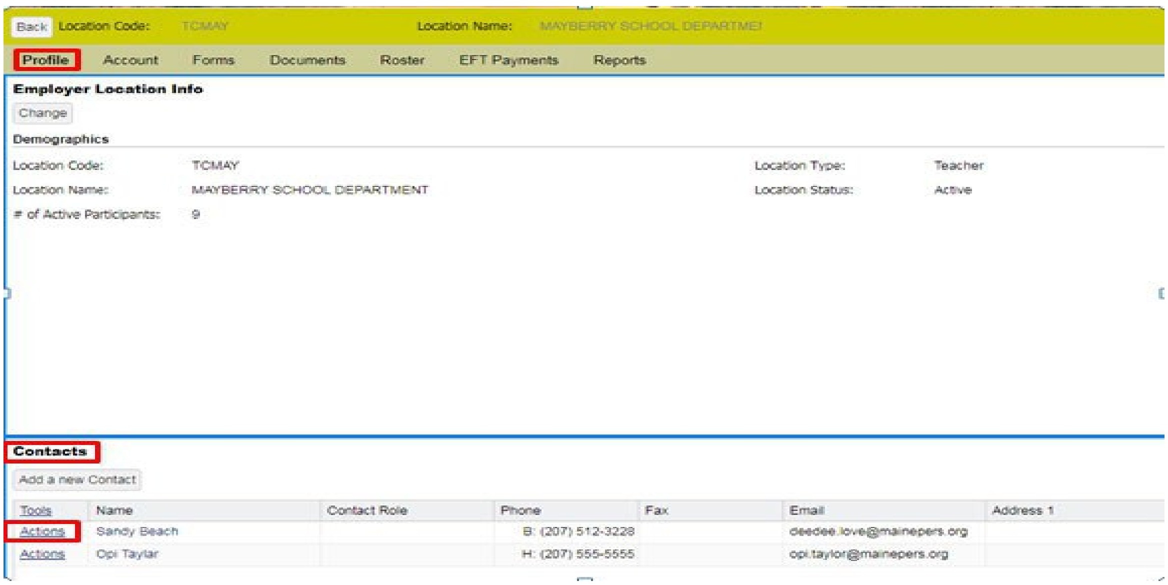
9. Review the information and, if everything is accurate, click **Confirm**.

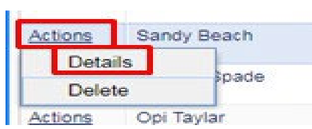
10. The new contact has been created.

Editing Existing Contact Information

To edit existing contact information for an employer location contact:

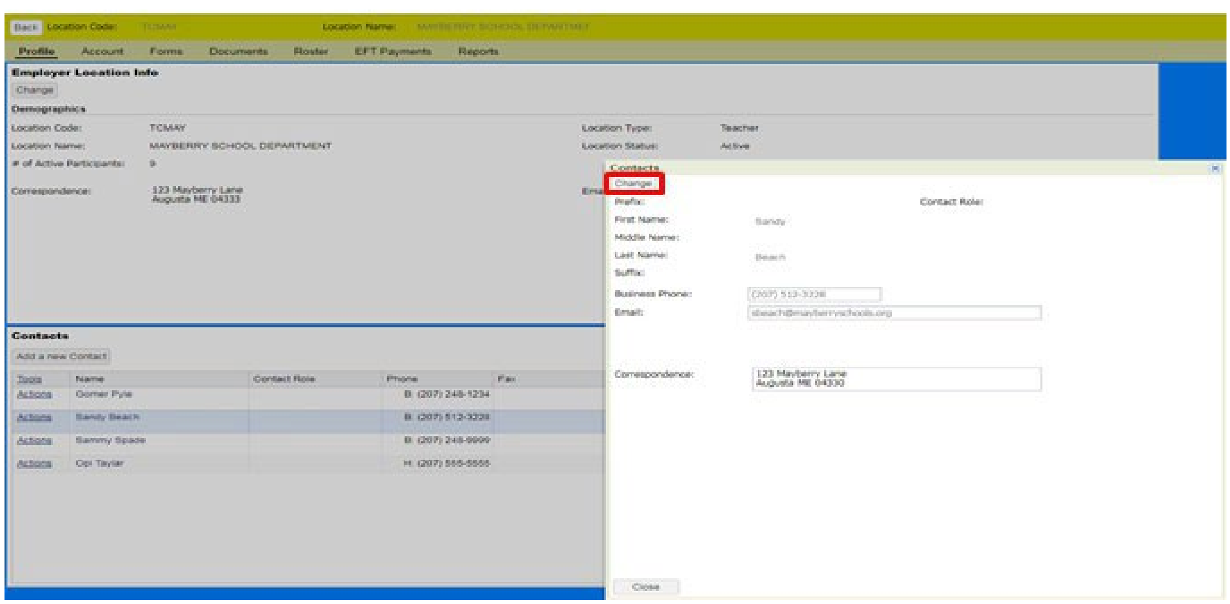
1. From the *Profile* tab, click on **Actions** and then **Details** of the name of the person you wish to edit.





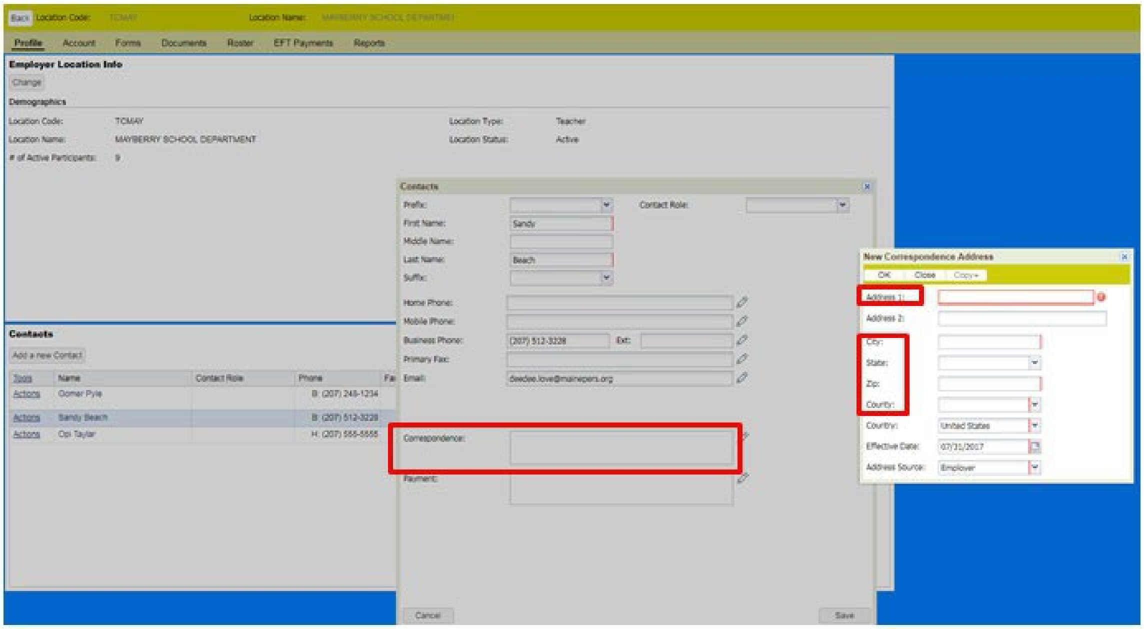
The appropriate pop-up displays.

2. Then click the **Change** button in the upper left corner of the pop-up.

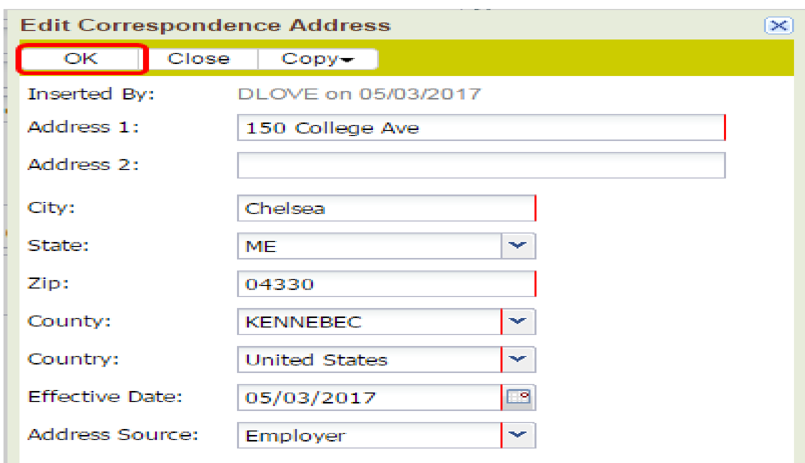


3. Click in the field you wish to update.

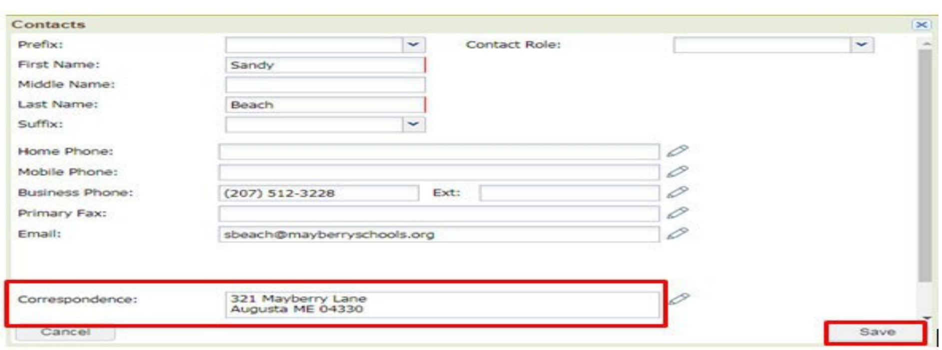
   The appropriate pop-up displays.



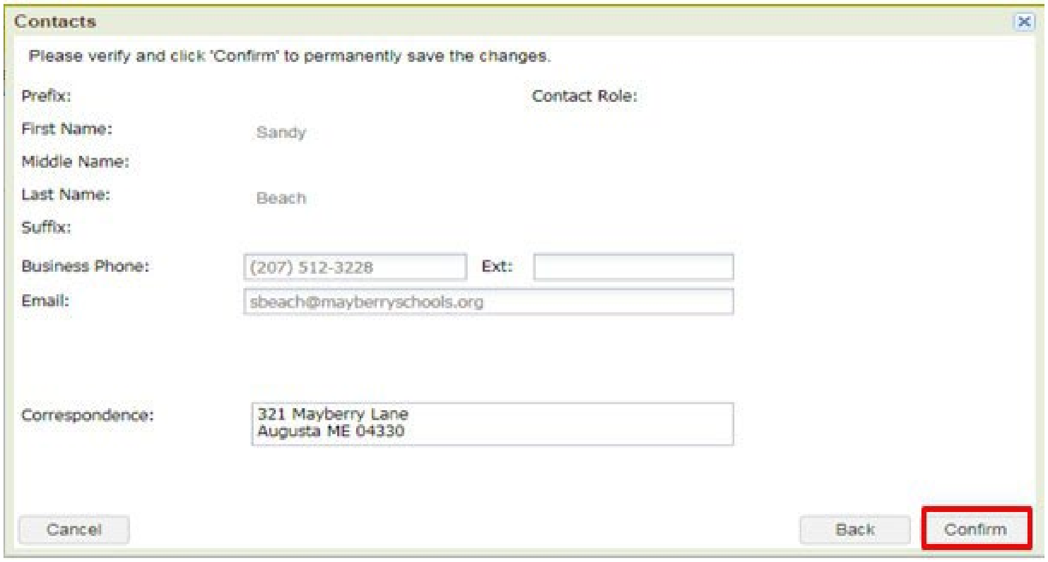
4. Make the necessary updates and click **OK**.



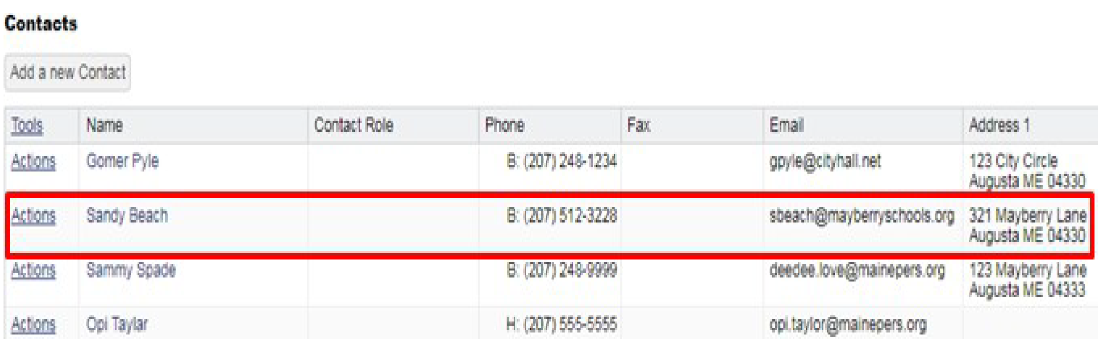
5. Click **Save**



6. Click **Confirm** to commit the changes.



Updated contact information

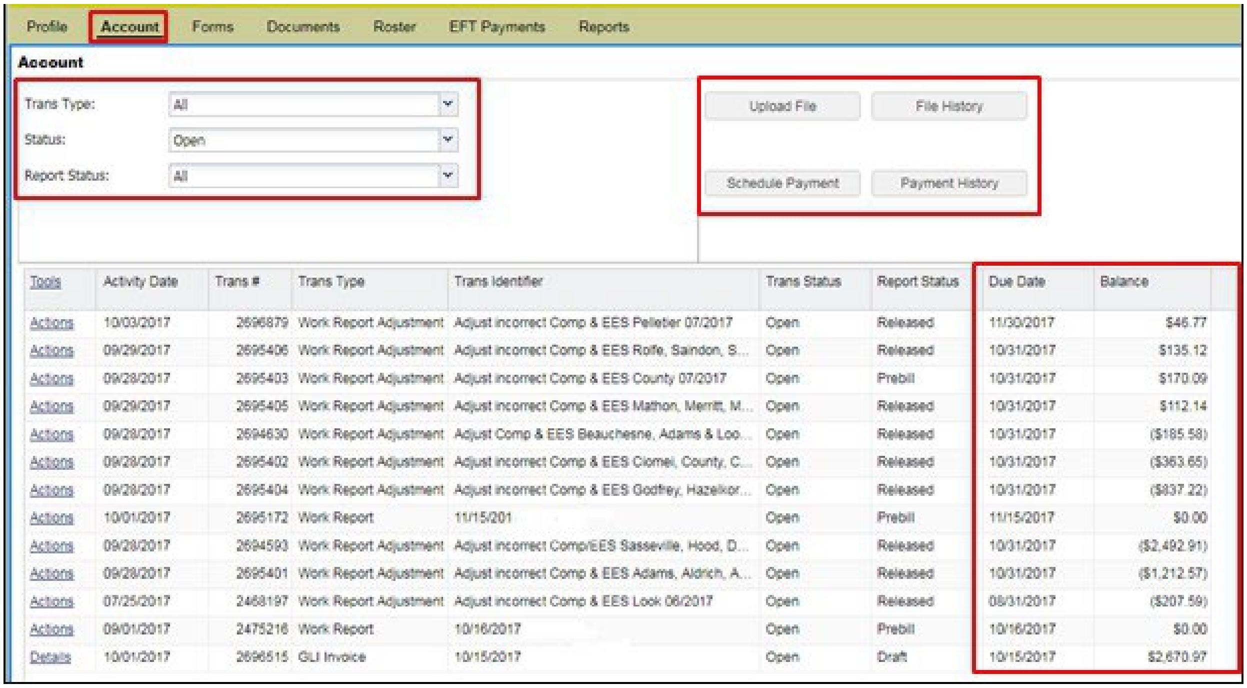


Contacts

Add a new Contact

Tools	Name	Contact Role	Phone	Fax	Email	Address 1
Actions	Gomer Pyle		B: (207) 248-1234		gpyle@cityhall.net	123 City Circle Augusta ME 04330
Actions	Sandy Beach		B: (207) 512-3228		sbeach@mayberryschools.org	321 Mayberry Lane Augusta ME 04330
Actions	Sammy Spade		B: (207) 248-9999		deedee.love@mainepers.org	123 Mayberry Lane Augusta ME 04333
Actions	Opi Taylar		H: (207) 555-5555		opi.taylor@mainepers.org	

ACCOUNT TAB



Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance
Actions	10/03/2017	2696879	Work Report Adjustment	Adjust incorrect Comp & EES Pelletier 07/2017	Open	Released	11/30/2017	$46.77
Actions	09/29/2017	2695406	Work Report Adjustment	Adjust incorrect Comp & EES Rolfe, Saindon, S...	Open	Released	10/31/2017	$135.12
Actions	09/28/2017	2695403	Work Report Adjustment	Adjust incorrect Comp & EES County 07/2017	Open	Prebill	10/31/2017	$170.09
Actions	09/29/2017	2695405	Work Report Adjustment	Adjust incorrect Comp & EES Mathon, Merritt, M...	Open	Released	10/31/2017	$112.14
Actions	09/28/2017	2694630	Work Report Adjustment	Adjust Comp & EES Beauchesne, Adams & Loo...	Open	Released	10/31/2017	($185.58)
Actions	09/28/2017	2695402	Work Report Adjustment	Adjust incorrect Comp & EES Ciomei, County, C...	Open	Released	10/31/2017	($363.65)
Actions	09/28/2017	2695404	Work Report Adjustment	Adjust incorrect Comp & EES Godfrey, Hazelkor...	Open	Released	10/31/2017	($837.22)
Actions	10/01/2017	2695172	Work Report	11/15/201	Open	Prebill	11/15/2017	$0.00
Actions	09/28/2017	2694593	Work Report Adjustment	Adjust incorrect Comp/EES Sasseville, Hood, D...	Open	Released	10/31/2017	($2,492.91)
Actions	09/28/2017	2695401	Work Report Adjustment	Adjust incorrect Comp & EES Adams, Aldrich, A...	Open	Released	10/31/2017	($1,212.57)
Actions	07/25/2017	2468197	Work Report Adjustment	Adjust incorrect Comp & EES Look 06/2017	Open	Released	08/31/2017	($207.59)
Actions	09/01/2017	2475216	Work Report	10/16/2017	Open	Prebill	10/16/2017	$0.00
Details	10/01/2017	2696515	GLI Invoice	10/15/2017	Open	Draft	10/15/2017	$2,670.97

(Employer Account Balances will show on this tab – To Refresh this screen: Back - Details)

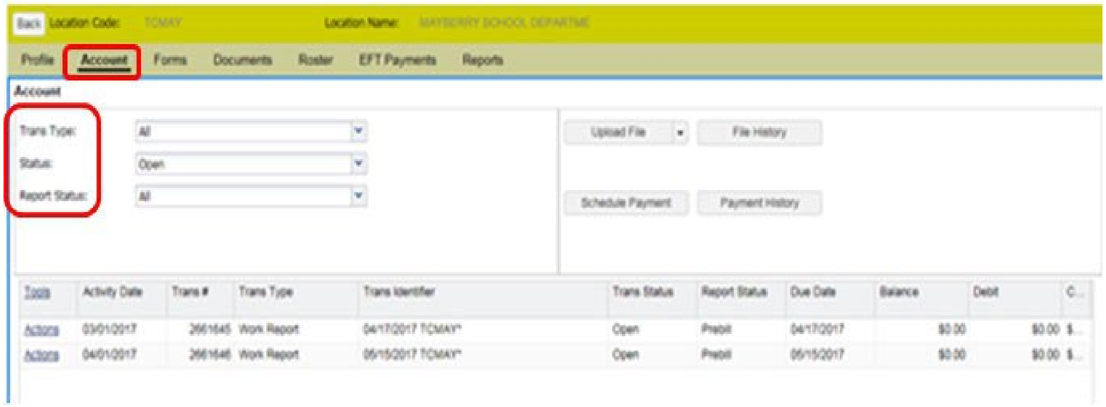
From the Account Tab, you may:

- View and filter transactions
- Upload an EPF Contribution File
- Manually Submit a Payroll through ESS
- Uploading a Defined Contribution File
- Uploading a GLI Level File
- Viewing File History
- Scheduling a EFT payment
- Viewing Payment History
- Account Balances - debits & (credits)

Viewing and Filtering Transactions

The Filter section on the *Account* tab lets you define filter criteria based on what you need to see.

1. Navigate to the *Account* tab.

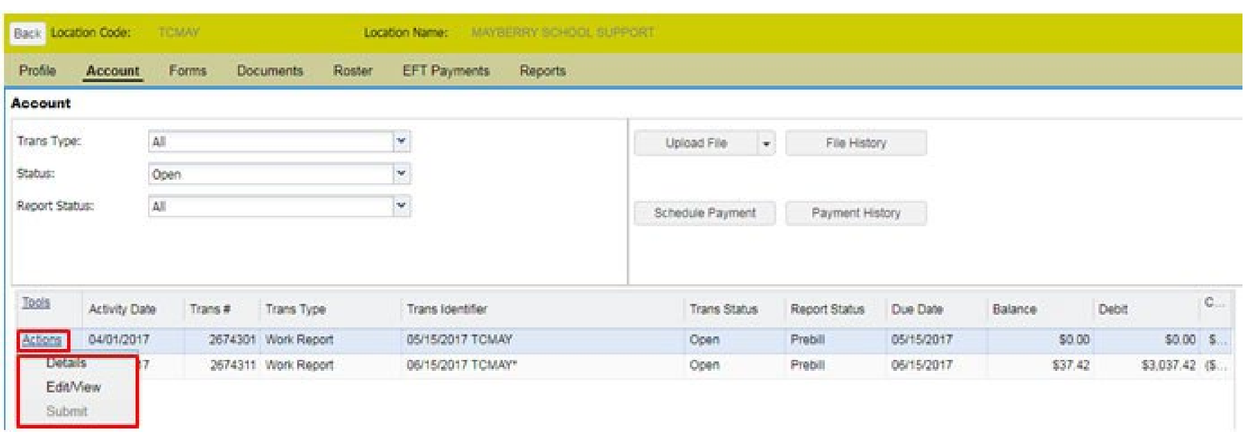


2. The ability to Filter the Account Detail screen below can be done within these three topics below:

- **Trans Type –** Filter by the Type Column on the transaction: Payment or Work Report
- **Status –** Filter by the Status Column on the transaction: Open, Closed or All
- **Report Status –** Filter by the Report Status Column on the transaction: Prebill, Released or Initial

The Actions Button Options

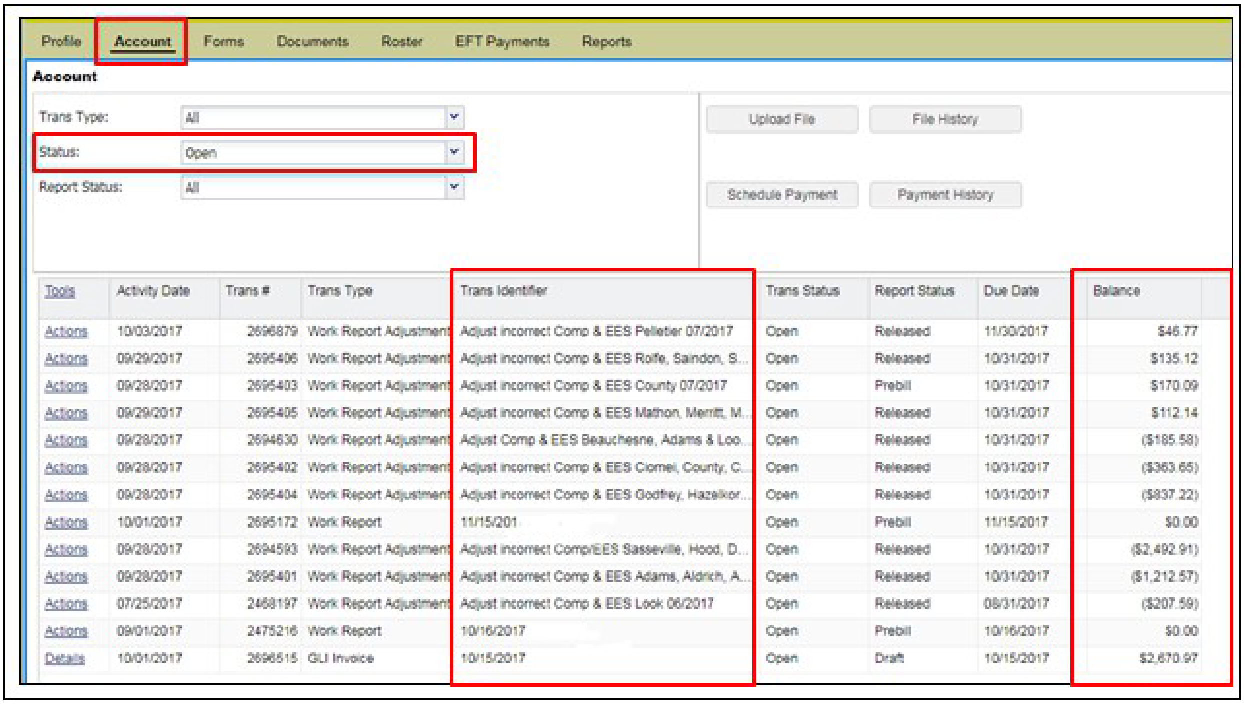
Certain types of transactions have an **Actions** link.



The following actions are available for transactions:

- **Details**: Displays transaction summary details on the *Transaction Summary* pop-up. This is available for all transaction types. See "The Details Button Options" section, below, for additional information.
- **Edit/View**: Generates the *Work Report Editor* pop-up. The report will only be editable if it is in **Initial** status.
- **Submit**: Sends the work report to MainePERS and is available for manual filers, only.

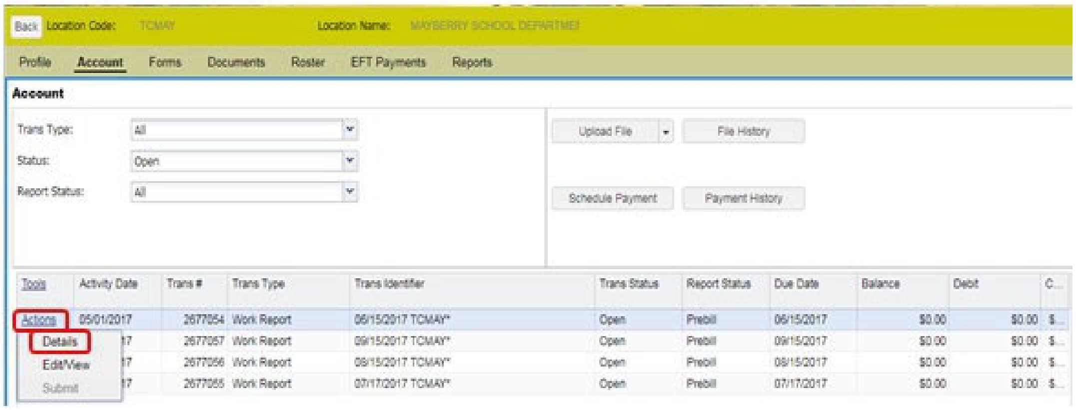
Balance(s) For Your Employer



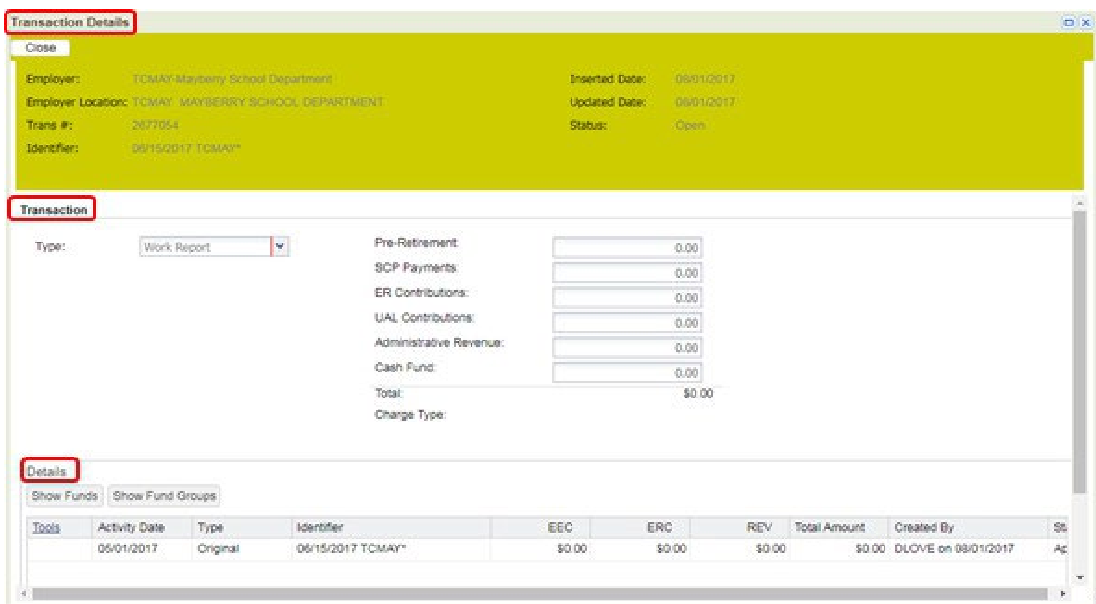
Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance
Actions	10/03/2017	2696879	Work Report Adjustment	Adjust incorrect Comp & EES Pelletier 07/2017	Open	Released	11/30/2017	$46.77
Actions	09/29/2017	2695406	Work Report Adjustment	Adjust incorrect Comp & EES Rolfe, Saindon, S...	Open	Released	10/31/2017	$135.12
Actions	09/28/2017	2695403	Work Report Adjustment	Adjust incorrect Comp & EES County 07/2017	Open	Prebill	10/31/2017	$170.09
Actions	09/29/2017	2695405	Work Report Adjustment	Adjust incorrect Comp & EES Mathon, Merritt, M...	Open	Released	10/31/2017	$112.14
Actions	09/28/2017	2694630	Work Report Adjustment	Adjust Comp & EES Beauchesne, Adams & Loo...	Open	Released	10/31/2017	($185.58)
Actions	09/28/2017	2695402	Work Report Adjustment	Adjust incorrect Comp & EES Ciomei, County, C...	Open	Released	10/31/2017	($363.65)
Actions	09/28/2017	2695404	Work Report Adjustment	Adjust incorrect Comp & EES Godfrey, Hazelkor...	Open	Released	10/31/2017	($837.22)
Actions	10/01/2017	2695172	Work Report	11/15/201	Open	Prebill	11/15/2017	$0.00
Actions	09/28/2017	2694593	Work Report Adjustment	Adjust incorrect Comp/EES Sasseville, Hood, D...	Open	Released	10/31/2017	($2,492.91)
Actions	09/28/2017	2695401	Work Report Adjustment	Adjust incorrect Comp & EES Adams, Aldrich, A...	Open	Released	10/31/2017	($1,212.57)
Actions	07/25/2017	2468197	Work Report Adjustment	Adjust incorrect Comp & EES Look 06/2017	Open	Released	08/31/2017	($207.59)
Actions	09/01/2017	2475216	Work Report	10/16/2017	Open	Prebill	10/16/2017	$0.00
Details	10/01/2017	2696515	GLI Invoice	10/15/2017	Open	Draft	10/15/2017	$2,670.97

The Details Button Options

Certain types of transactions have a **Details** link. The Details link can only be viewed. You cannot edit information from here.



When you click the **Details** link, the *Transaction Details* pop-up displays:



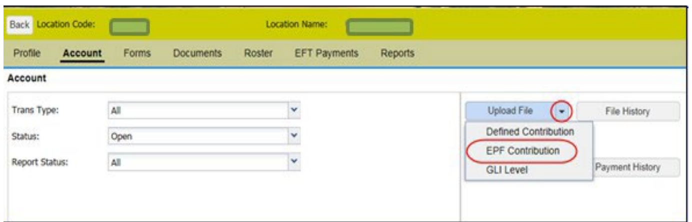
- **Transaction Section**: Shows information about that transaction in its current state, including the **Type** of transaction, the payment type (Pre-Retirement contributions, ER contributions), **Identifier** information, and the **Due Date**.
- **Details Section**: Shows the history of the transaction
- **Actions – Detail** = this will show you the audit trail for the transaction you are looking at.

UPLOADING AN EPF CONTRIBUTION FILE

Through ESS, employers upload necessary payroll data of the employees participating in MainePERS plans.

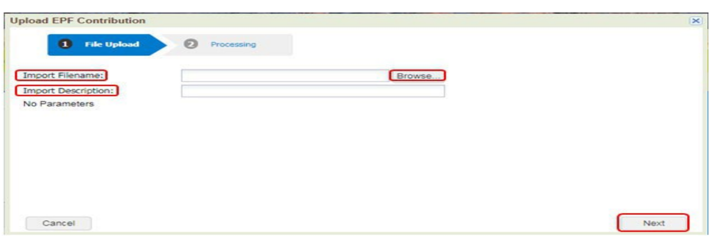
To upload an EPF Contribution File:

1. Navigate to the ***Account*** tab.
2. Click **Upload File** dropdown.
3. Select **EPF Contribution**.



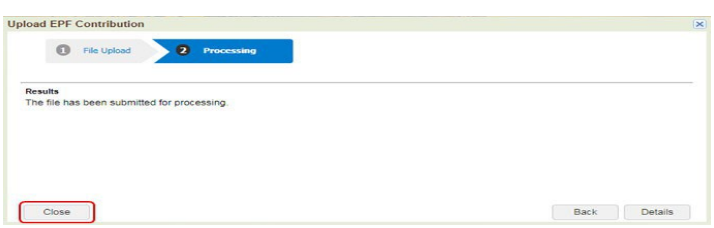
The *Upload EPF Contribution* pop-up displays.

4. Complete the following fields:
   - **Import Filename**: Browse for the appropriate file, click on your file and click *Open*.
   - **Import Description**: Examples: **TCMAY 06/2017 Payroll**
5. Click **Next**.

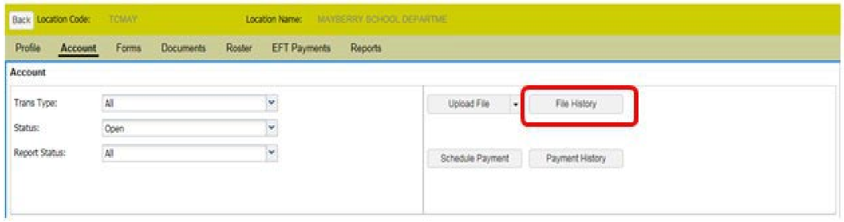


The *Upload EPF Contribution* pop-up updates with the results that the file has been submitted for processing.

6. **Close** the Upload EPF Contribution pop-up.



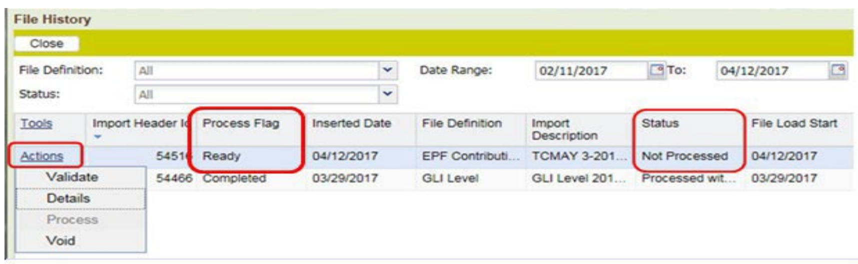
7. To review the uploaded file, click **File History**.



The *File History* window displays with a **Process Flag** of *Ready* for the EPF Contribution file just uploaded.

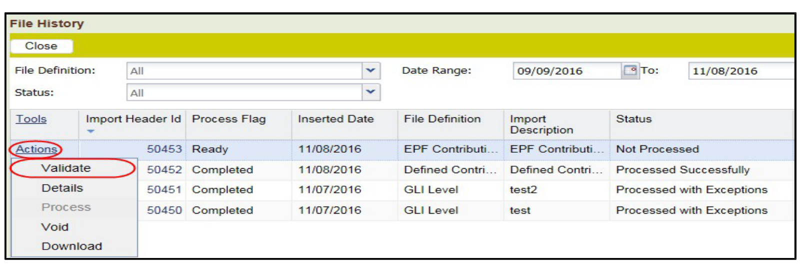
NOTE: If a **Status** of *Loaded with Errors* appears, the file must be reviewed for formatting issues and, once corrected, the file must be uploaded again.

8. Click on the row created for the file you just uploaded **(Status will indicate *Not Processed*)**.



9. Click the **Actions** link for the EPF Contribution file you just uploaded.

10. Select **Validate**.



Note: *Refresh* functionality no longer exists. Look for changes to **Process Flag** and **Status**.

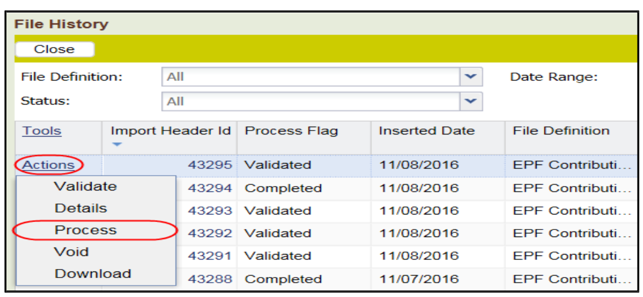
11. Check **Process Flag** and **Status** columns. The **Process Flag** should indicate *Validated* when the validation process is complete. The **Status** message indicates whether

Errors and/or Exceptions exist within the file or whether the file is ready for processing. If no Errors or Exceptions are indicated, proceed to Step 14, below. If you do have Errors or Exceptions, proceed to Correcting Errors and Exceptions, page 23.

12. Review Exceptions and correct **ALL** Errors if indicated. (See next section page 23 to correct Exceptions and Errors.)

13. Re-**Validate** and repeat until no more action is necessary (all Errors have been resolved and Exceptions reviewed). Look for the **Status** to change to *Validated Successfully*.

14. Once Errors are no longer indicated, click **Actions** and then **Process** for the EPF Contribution file you are working on.



15. The **Process Flag** column updates to a status of **Completed** and the **Status** column updates to **Processed Successfully.**

- **Close** the *File History* window.

16. Continue to the Reports Tab for your Remittance Report, page 62.

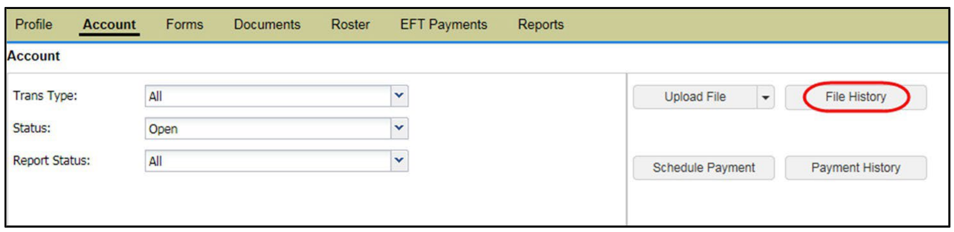
Note: To Update the Account Tab for the current balance: click 'Back' – Details, this will refresh the Account Tab.

CORRECTING ERRORS AND EXCEPTIONS

RETRIEVING THE STANDARD IMPORT REPORT

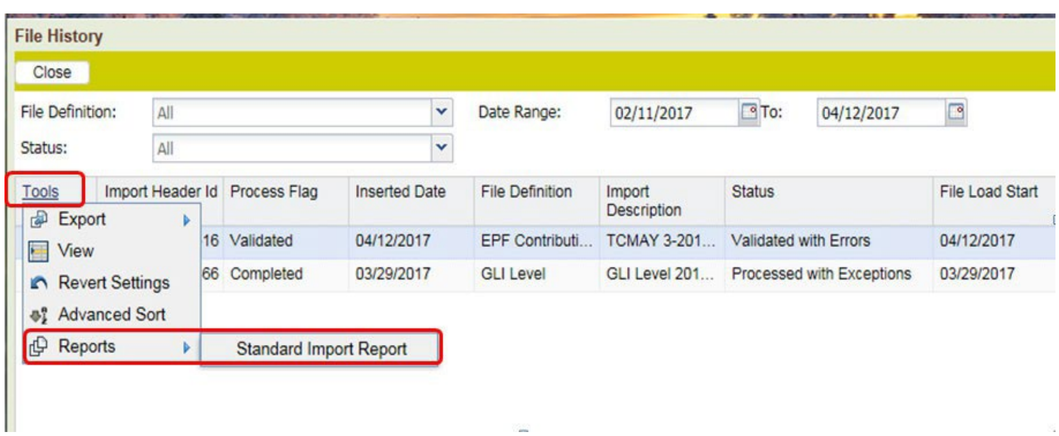
If you have **Errors** or **Exceptions** in your **EPF** file, the entry in the **Status Column** indicates **Validated with Errors** or **Validated with Exceptions**. The steps to correct file issues are as follows:

1. Click **File History**.



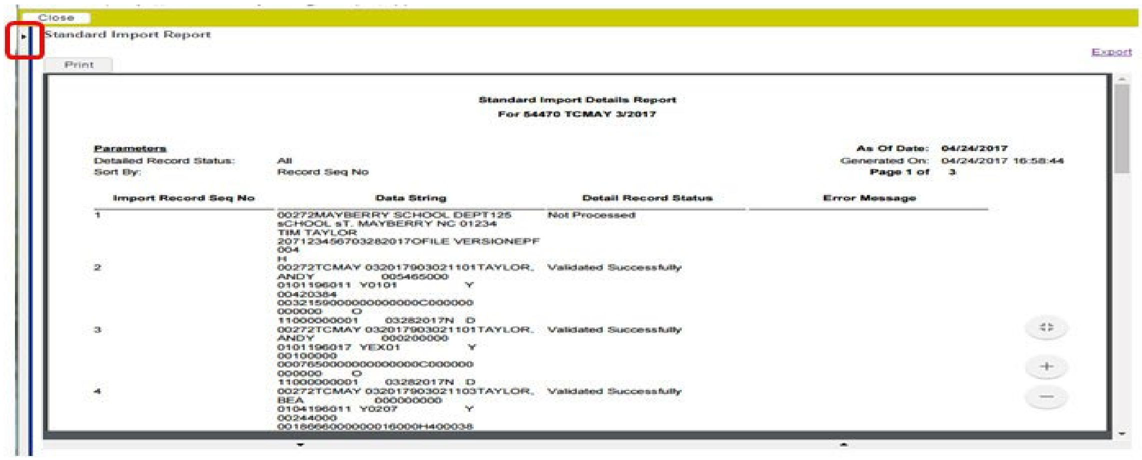
The *File History* screen displays.

2. Click on the line of the file requiring corrections. Then, click **Tools – Reports – Standard Import Report**

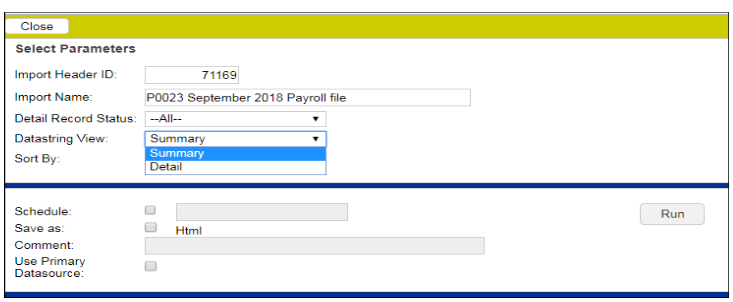


3. The **Standard Import Report** can be sorted by ***All, Validated with Errors, Validated with Exceptions*, etc**.

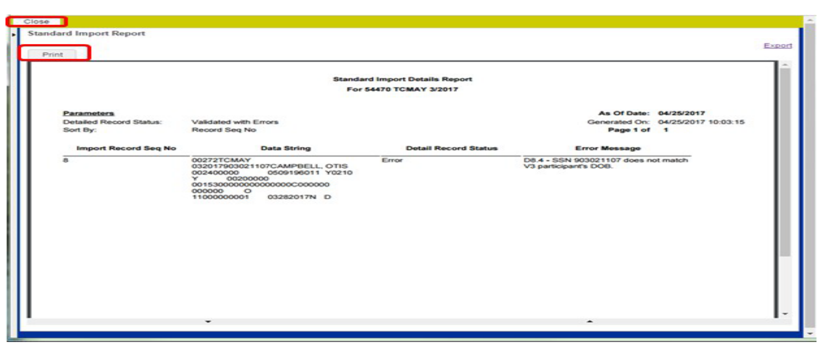
4. Click the arrow in the upper left corner to expand your split screen. 



5. Select the **Detail Record Status** drop down, choose the option you want to see (Validated with Errors or Validated with Exceptions) and click **Run**.
6. Select the **Data string View** drop down: change the option to **Detail** and click **Run**

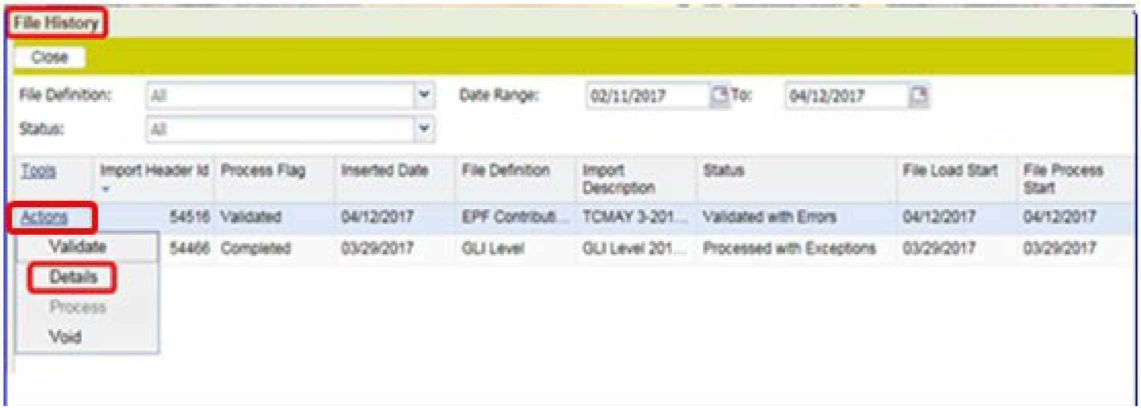


7. Click **Print,** then **Close**

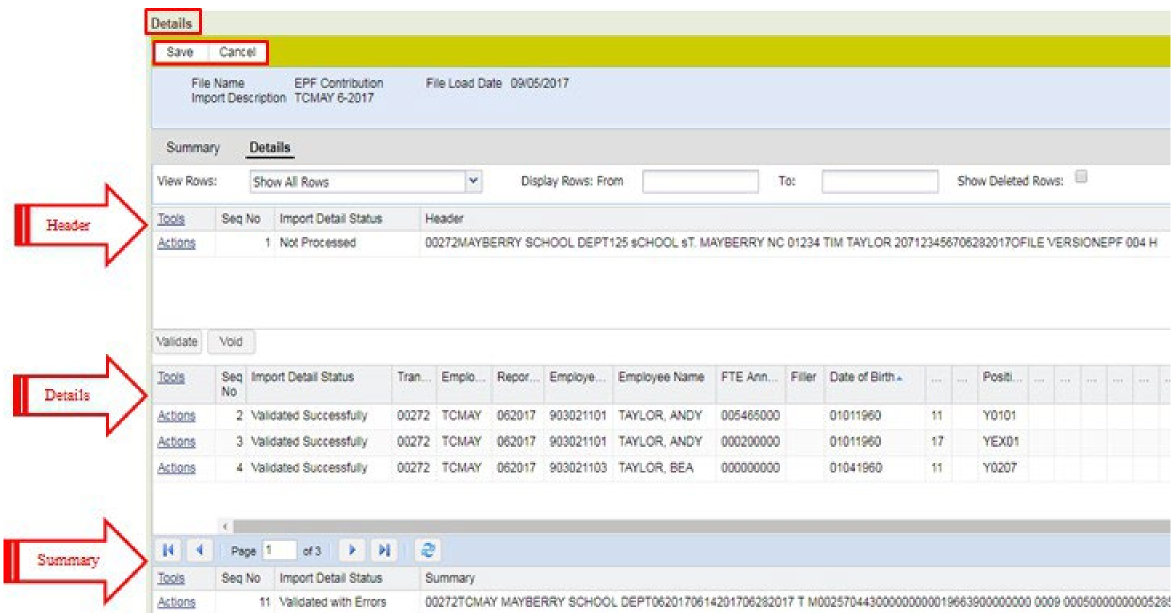


The **Import Record Seq. No** column indicates the line of the file with the error. The **Error Message** column describes the issue, and all errors and exceptions are described in the *ESS Validation Guide for Electronic Payroll Filing*, available on the MainePERS website.

8. Back at the *File History* screen, click **Actions** then **Details**.



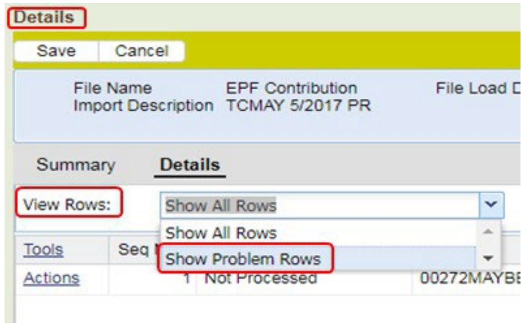
9. You are now in a mode allowing you to edit data (see that *Save* and *Cancel* are the only options available while in edit mode).



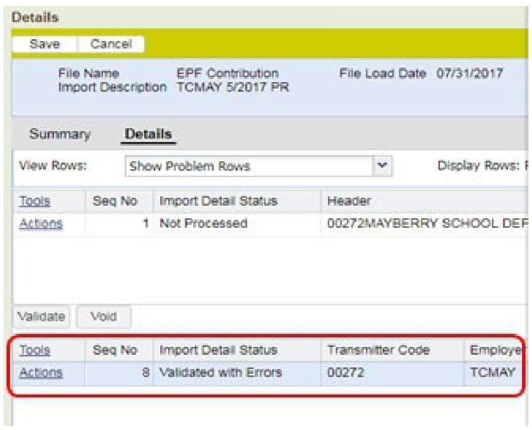
Note: three sections to this Details Screen:

Header Section – Detail Section – Summary Section

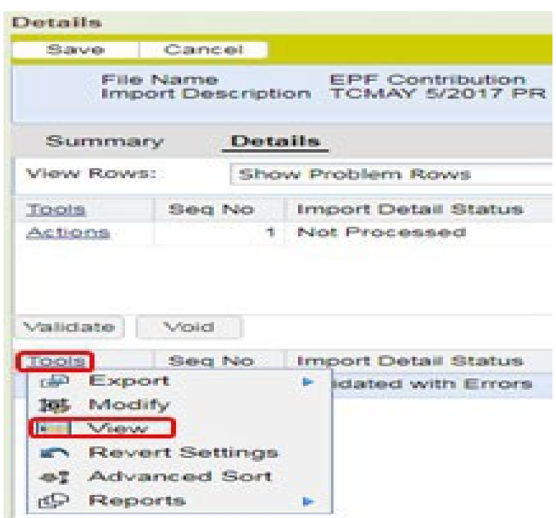
10. To show only problem rows, click on the *View Rows* dropdown arrow and select



11. Highlight the row needing to be corrected.

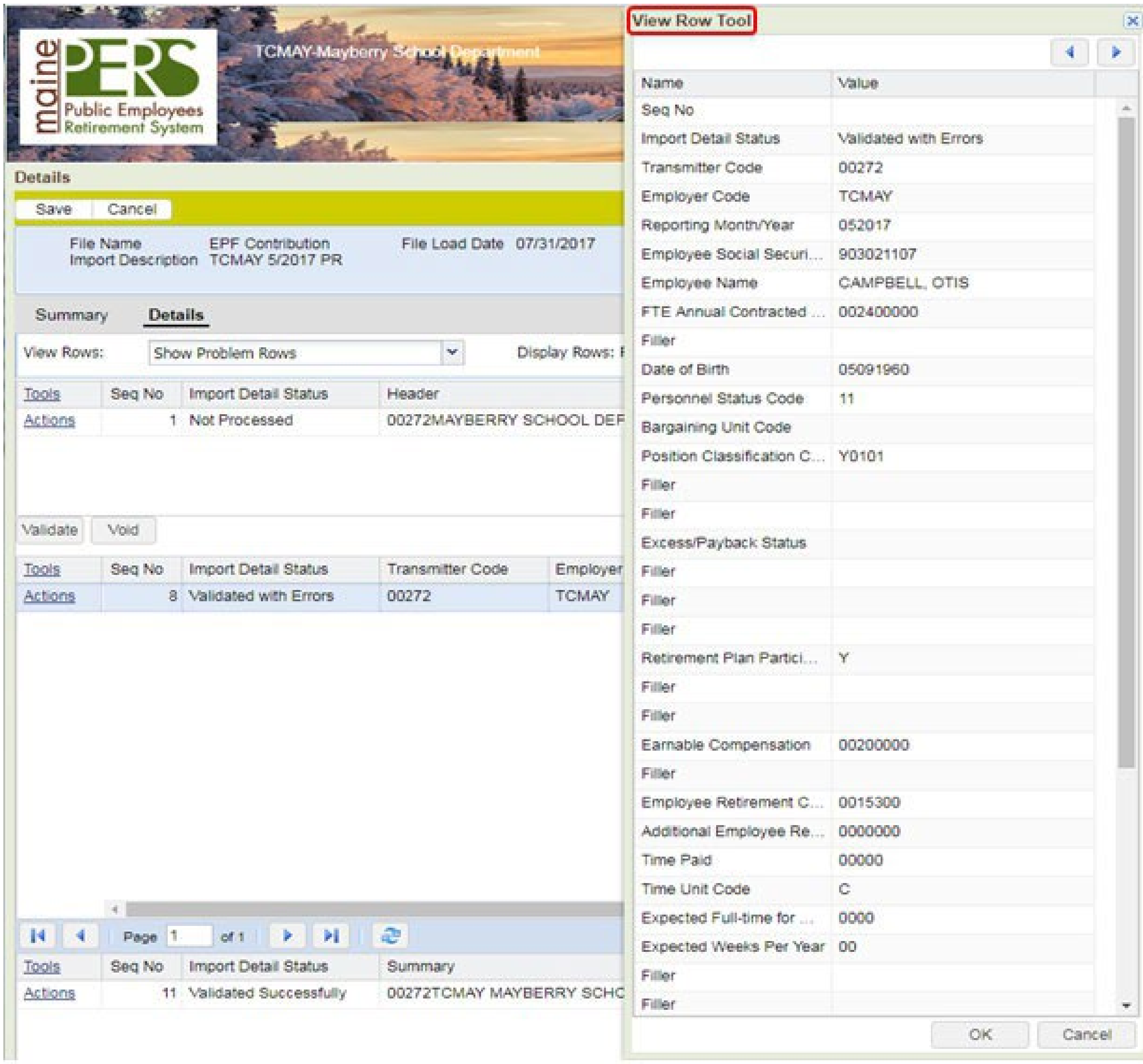


12. Click **Tools** then **View.**



13. You can stretch this window out by clicking on the top of the *View Row Tool* screen. Hold and drag up to the top of the screen.

14. Click and drag the bottom edge of the *View Row Tool* window to lengthen it.



15. Go to the data element that the edit indicates is incorrect. In this example, *Date of Birth*.

Import Record Seq No	Data String	Detail Record Status	Error Message
8	00272TCMAY 062017903021107CAMPBELL, OTIS 002400000 05041960 1 Y0101 Y 00200000 0015300000000000000C000000 000000 O 11000000001 06282017N D	Error	D8.4 - SSN 903021107 does not match V3 participant's DOB.

View Row Tool

Name	Value
Seq No	
Import Detail Status	Validated with Errors
Transmitter Code	00272
Employer Code	TCMAY
Reporting Month/Year	062017
Employee Social Securi...	903021107
Employee Name	CAMPBELL, OTIS
FTE Annual Contracted ...	002400000
Filler	
Date of Birth	05041960
Personnel Status Code	11
Bargaining Unit Code	
Position Classification C...	Y0101

16. Correct the data element by double clicking in the Value box, make the change.

View Row Tool

Name	Value
Seq No	
Import Detail Status	Validated with Errors
Transmitter Code	00272
Employer Code	TCMAY
Reporting Month/Year	062017
Employee Social Securi...	903021107
Employee Name	CAMPBELL, OTIS
FTE Annual Contracted ...	002400000
Filler	
Date of Birth	05091960
Personnel Status Code	11
Bargaining Unit Code	
Position Classification C...	Y0101

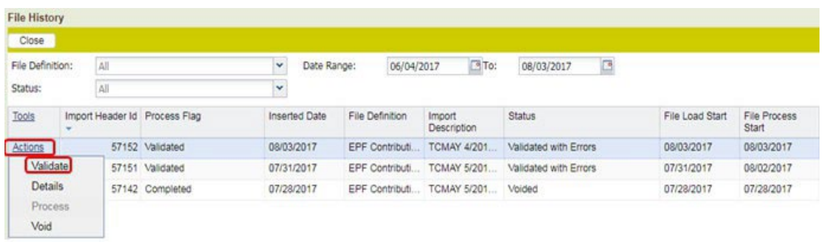
17. Click **OK.**

18. Continue correcting all errors and review/correct any exceptions.

19. Click **Save** (often) and **Close.**

You are back at the **File History** tab

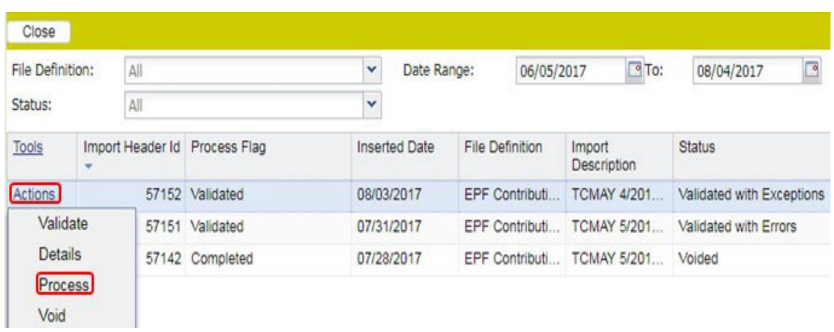
20. Validate the file again (Actions/Validate)



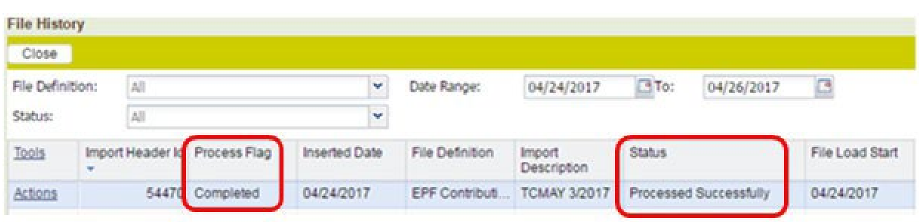
Repeat steps (1 – 16) as needed until all Errors are resolved and Exceptions are reviewed.

21. Once the file is correct, proceed to **Process** the file**.**

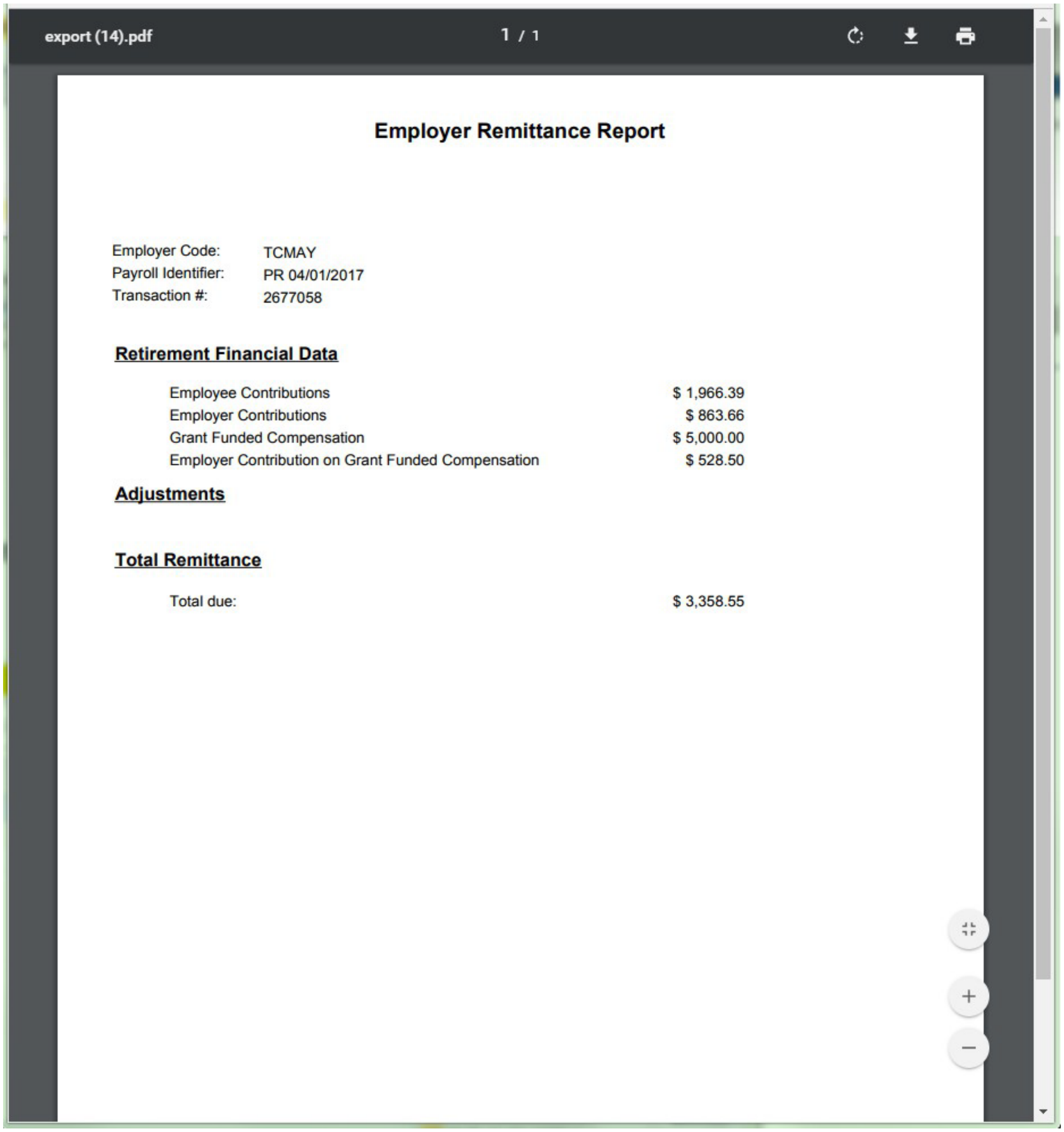
22. Click **Actions**, then **Process.**



23. Your file has now been processed, and is with MainePERS. At this time, the file can no longer be edited by you.



24. You now can print your Remittance Report. See page 69 for instructions to print Remittance Report. **Always send a copy of the Remittance Report with your payment.**



Employer Remittance Report

Employer Code: TCMAY
Payroll Identifier: PR 04/01/2017
Transaction #: 2677058

Retirement Financial Data

Employee Contributions	$ 1,966.39
Employer Contributions	$ 863.66
Grant Funded Compensation	$ 5,000.00
Employer Contribution on Grant Funded Compensation	$ 528.50

Adjustments

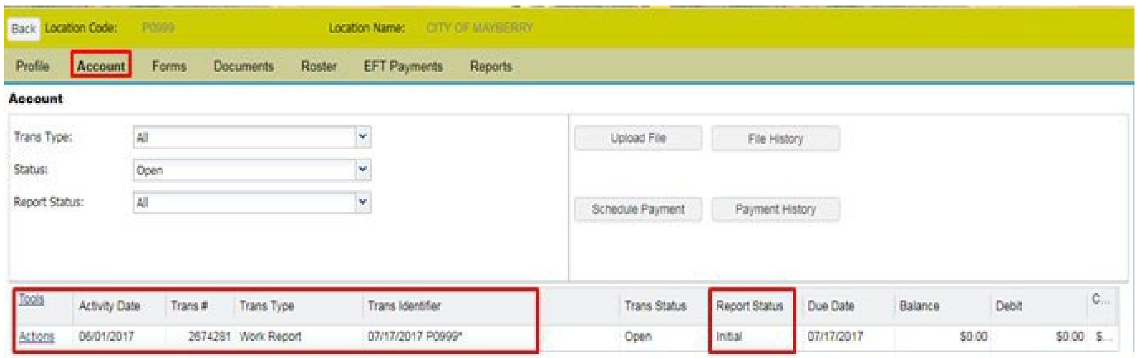
Total Remittance

Total due:	$ 3,358.55

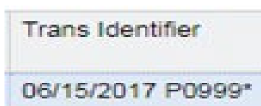
MANUALLY SUBMITTING A PAYROLL THROUGH ESS

Through the *Account* tab in ESS, you can enter, edit, save and submit a payroll report by manually entering data. Only reports with a **Report Status** of **Initial** can be edited and submitted. The steps are as follows:

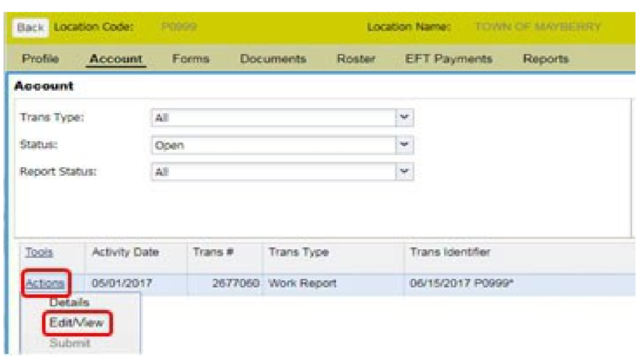
1. Navigate to the *Account* tab.



2. Click on the row of the file you wish to edit and submit. The *Trans Identifier* field will reflect the due date of your payroll. (ex: May payroll due 6/15/2017)

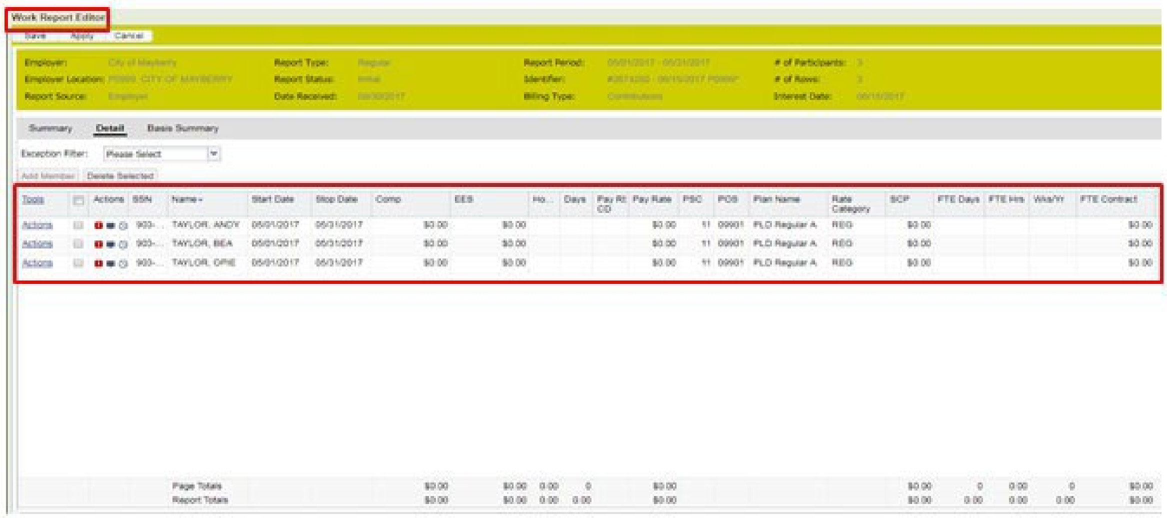


3. Click **Actions,** then **Edit/View.**



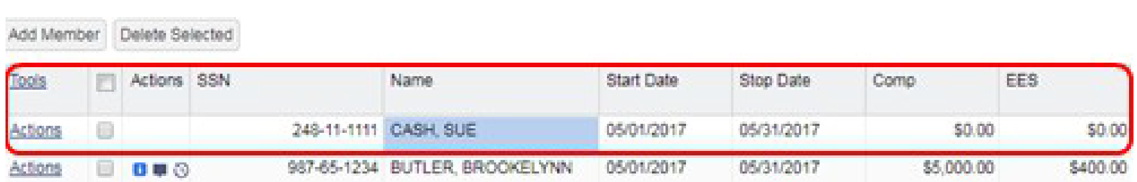
4. A list of current members appears in the *Work Report Editor*.

5. Enter each member's data into appropriate fields. *A list of acronyms is provided for you on the MainePERS website.*

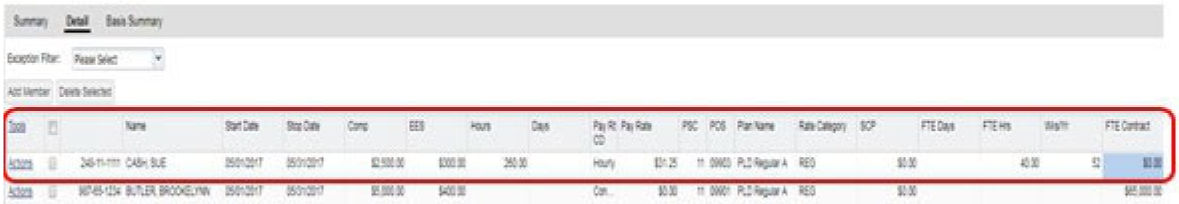


6. If a member is not included in the list of members, you may add the missing member by clicking '*Add Member*'.

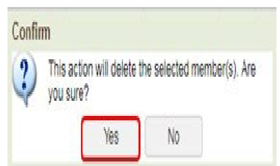
7. Add the member's *SSN in the Name field*, click *Enter.*

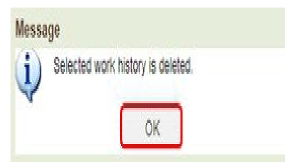


8. Complete the New Member's monthly payroll information. Click *Apply.*

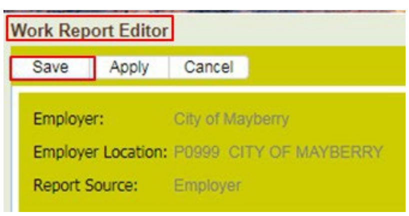


9. If a member should be removed from this list, check the box at beginning of row and click on *Delete Selected*. Confirm pop-up displays; click '*Yes*' then '*OK*'.



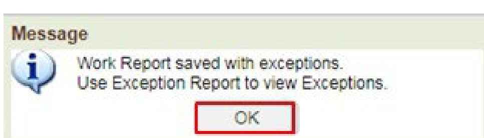


10. Once you have completed all data entry or wish to save data entered, click on the *Save* button.



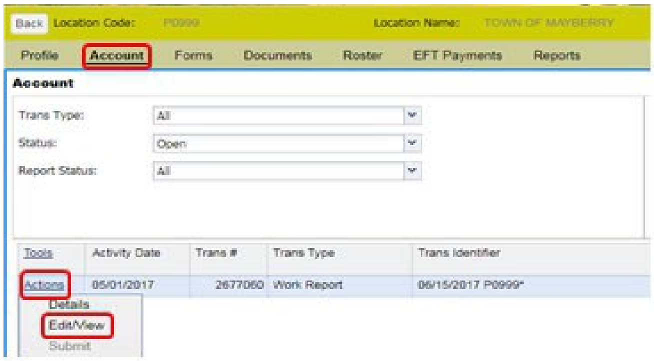
Note: The *Apply* function is also available to you. *Apply* will save your entered data without exiting from the *Edit* mode.

11. A pop-up may show you the status of your data whether or not errors or exceptions exist.

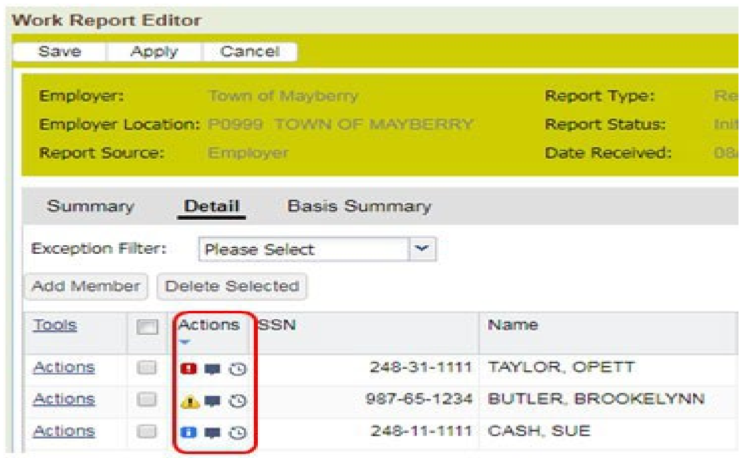


12. If errors exist, errors must be resolved. If exceptions exist, exceptions must be reviewed for accuracy and resolved if necessary.

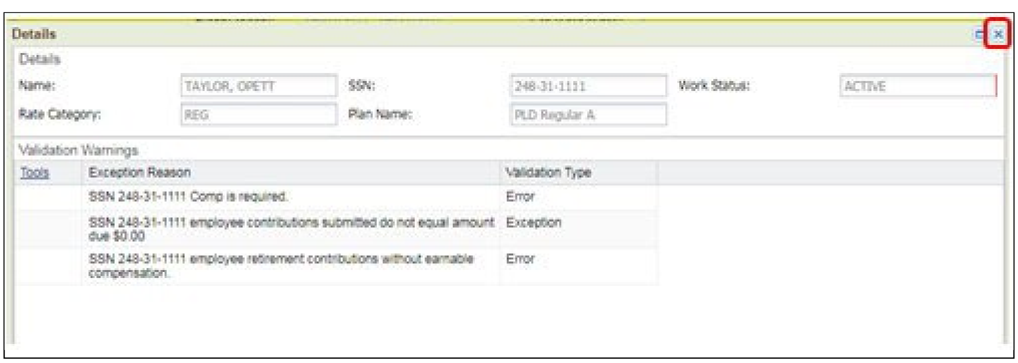
13. To determine what errors and exceptions need correction or review, go to *Actions* then *Edit View*, which opens the *Work Report Editor*.



14. **Red** indicates error, **yellow** indicates exception**, and blue** indicates no errors or exceptions.

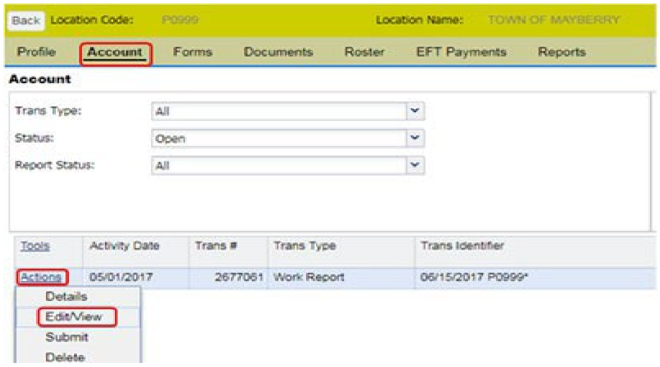


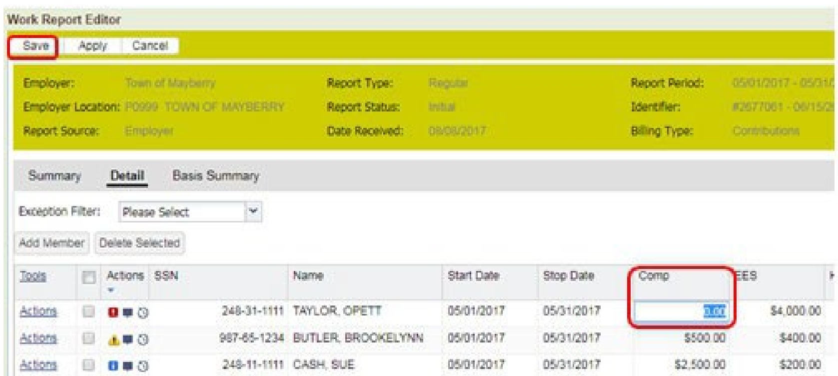
15. Click the colored symbol to display the errors or exceptions. This window can be closed or printed if you choose.



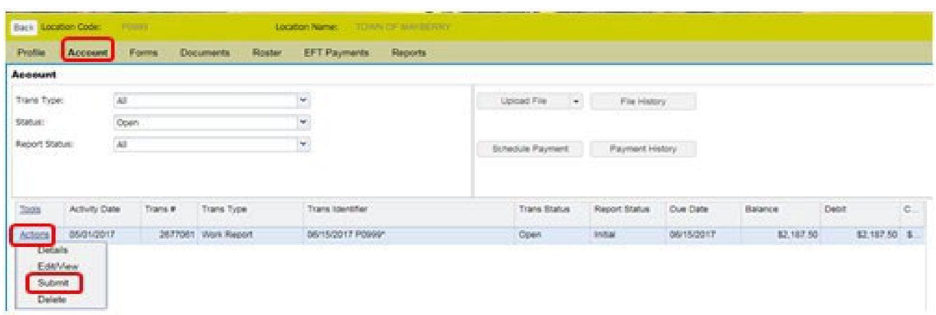
***If you have more than one edit - to list all edits for a manual file:**
Accounts – Edit/View – Tools – Reports – Exception Report – Print

16. To make necessary corrections to the data previously entered, you need to be in the *Work Report Editor* (*Actions*, then *Edit/View*), make necessary corrections to the data and '**Save**'.

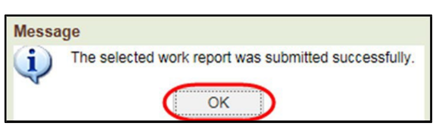




17. On the **Account** screen, click *Actions* and *Submit* to finalize your submission.

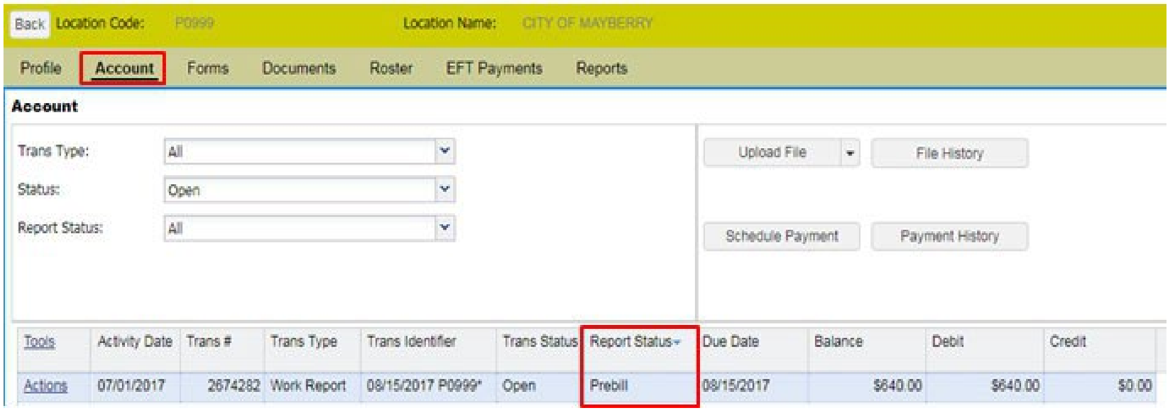


The following pop-up displays:



18. Select **OK**.

19. The **Report Status** changes from **Initial** to **Prebill**.



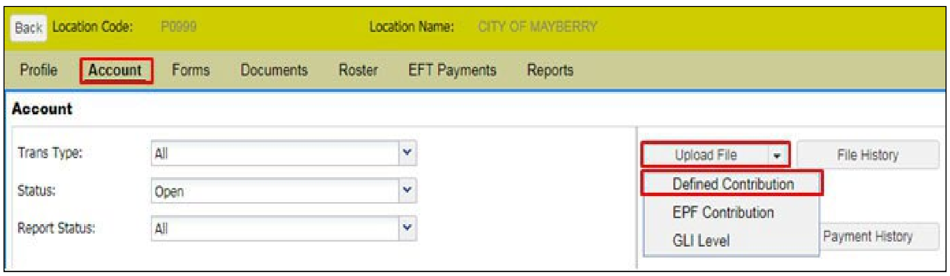
20. You now can print your Remittance Report. See page 69 for instructions to print Remittance Report. **Always send a copy of the Remittance Report with your payment.**

UPLOADING A DEFINED CONTRIBUTION FILE (DC)

You may also offer our MaineSTART Defined Contribution Plan. If you do offer our MaineSTART Defined Contribution Plan, use these import instructions to upload your MaineSTART file.

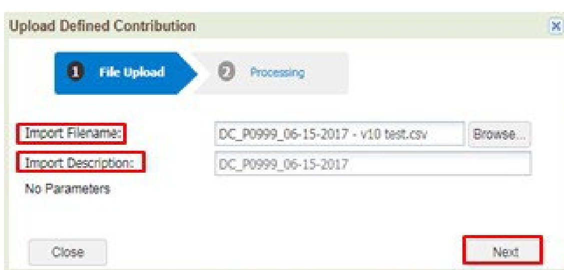
To upload a MaineSTART Defined Contribution File:

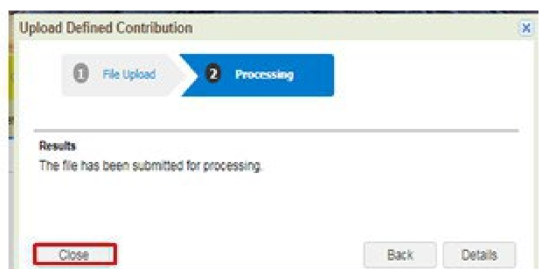
1. Navigate to the *Account* tab.
2. Click **Upload File**.
3. Select **Defined Contribution**.



The *Upload Defined Contribution* pop-up displays.

4. Complete the following fields:
   - **Import File Name**: Browse for the appropriate file
   - **Import Description**: DC_P0999_04-06-2017 (as an example)
5. Click **Next**.





The *Upload Defined Contribution* pop-up updates with the results that the file has been submitted for processing.

6. **Close** the Upload Defined Contribution pop-up.

Note: If an error is received, please check that the file you submitted is a CSV file.

- **Your MaineSTART Defined Contribution upload process is now complete.**
- **Do not Validate or Process this file, these steps are for MainePERS to complete. Thank you.**

UPLOADING A GLI LEVEL FILE

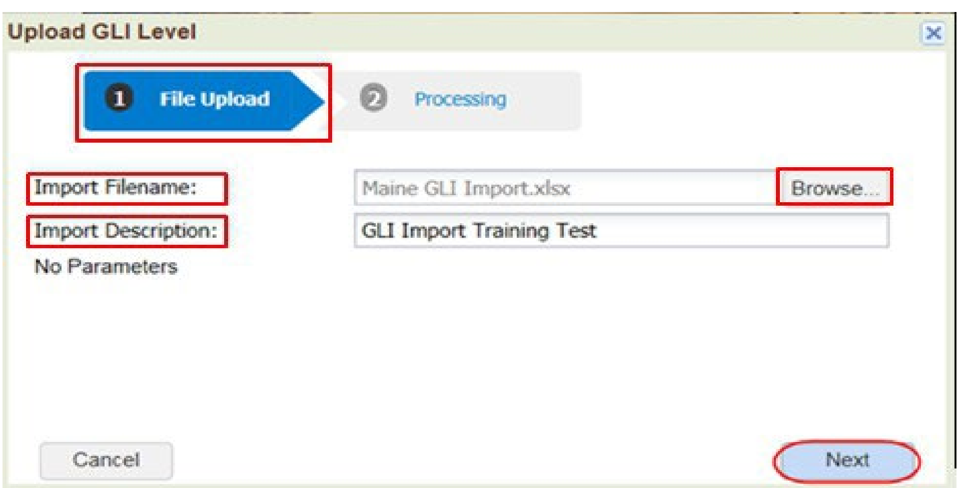
On an annual basis, employers upload the Annual compensation of the employees in their organization. Annual compensation is used in Group Life Insurance Premium calculation and to determine the value the member is insured at.

To upload a GLI Level File:

Navigate to the *Account* tab.

1. Click Upload File.
2. Select **GLI Level**.

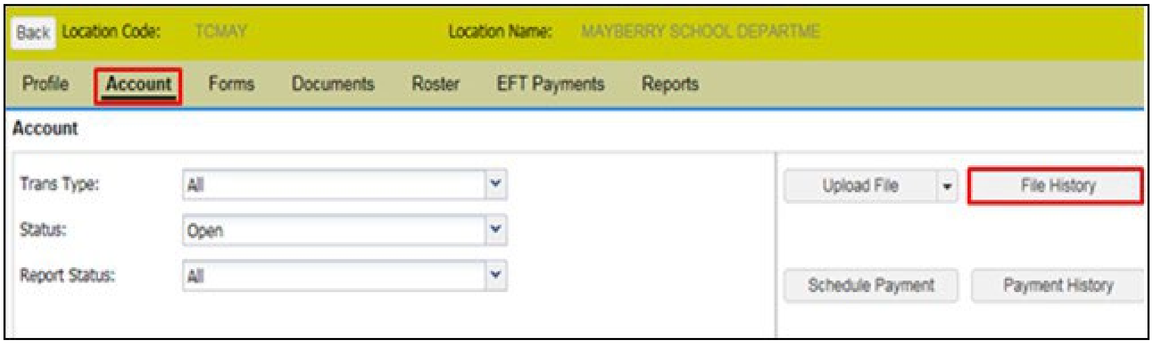
3. The *Upload GLI Level* pop-up displays.
4. Complete the following fields:
   - **File Name**: Browse for the appropriate file
   - **Import Description**: Enter an appropriate description for the import
5. Click **Next**.



The *Upload GLI Level* pop-up updates with the results that the file has been submitted for processing.

6. **Close** the *Upload GLI Level* pop-up.

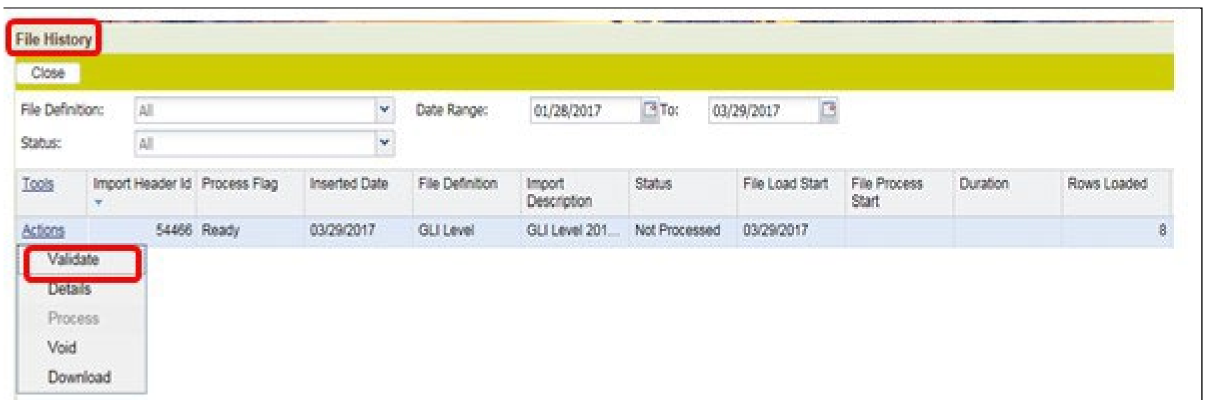
7. Click File History.



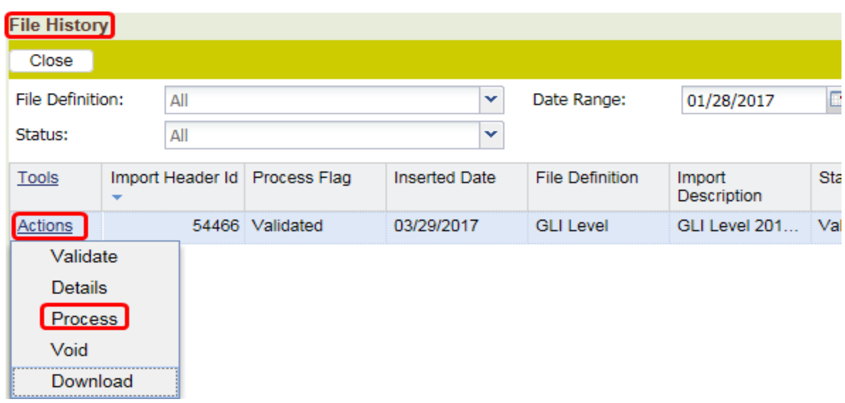
The *File History* window displays with a Ready status for the GLI Level file.

8. Click the **Actions** link for the GLI Level upload file.

9. Select **Validate**.



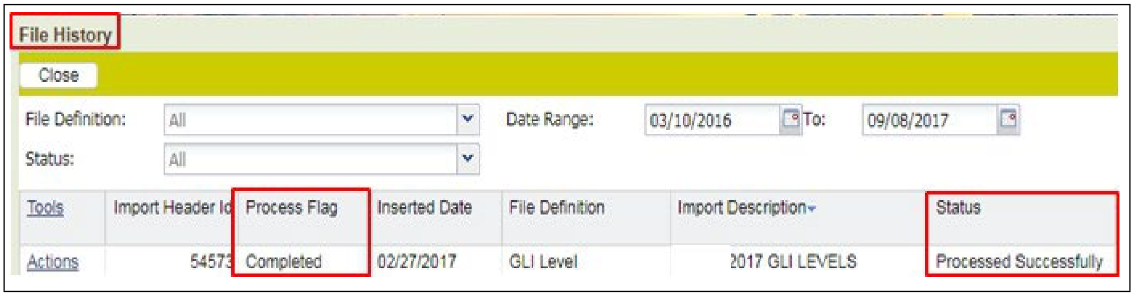
The Process Flag column updates with a status of Validated



10. Click the **Actions** link for the GLI Level upload file.

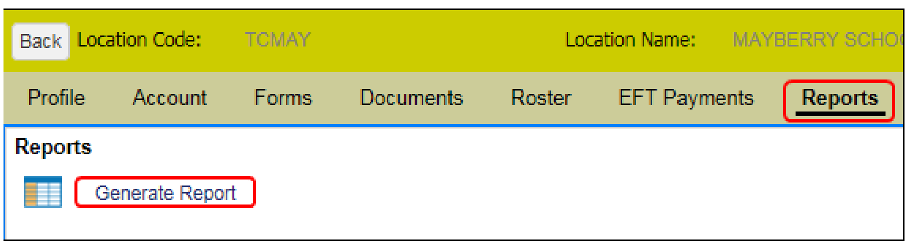
11. Select **Process**.

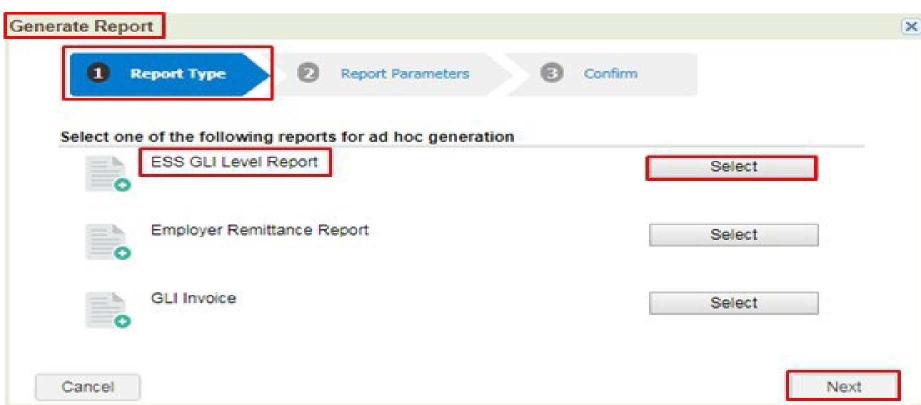
The **Process Flag** column updates to **Completed** and the **Status** column updates to **Processed Successfully**.



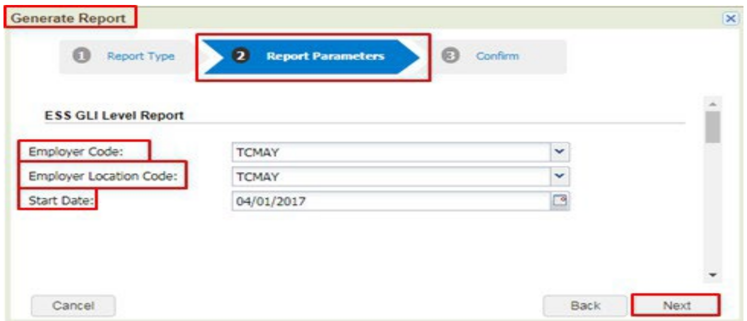
12. **Close** the *File History* window.

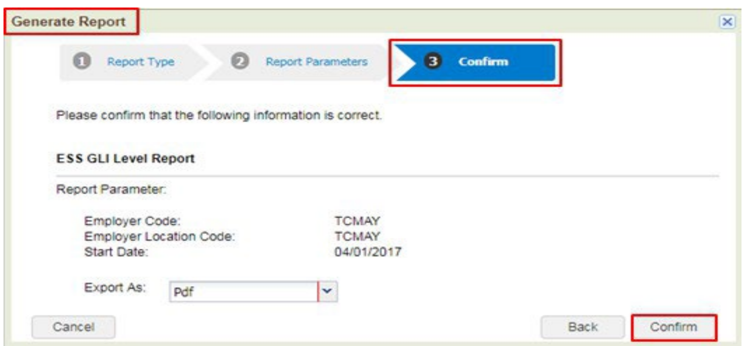
13. To verify that the file processed successfully, navigate to the **Reports** tab. Click on Generate Report



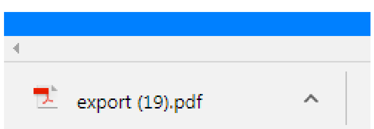


14. The *Generate Report – Report Type* pop-up tab displays, click on select for ESS GLI Level Report
15. The Report parameters pop up tab displays. Select Employer code from drop down box. Select Employer Location Code from drop down box. Click Next. Confirm.





16. Export PDF file pop up will display in the bottom left corner. Click to display report.



17. Verify information imported on the report is as expected.

maine PERS Public Employees Retirement System

GLI Level

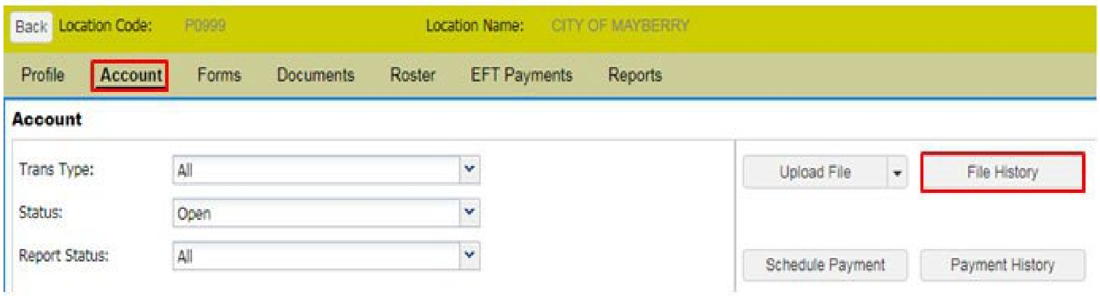
Start Date = 04/01/2017 for TCMAY TCMAY

ER Code	ER Location Code	SSN	Employee Name	Position Code	Type	Start Date	Stop Date	Level	Age
TCMAY	TCMAY	XXX-XX-1107	Campbell, Otis	G0001	Active	04/01/2017	03/31/2018	$16,000.00	57
TCMAY	TCMAY	XXX-XX-1106	Crump, Helen	G0001	Active	04/01/2017	03/31/2018	$18,000.00	57
TCMAY	TCMAY	XXX-XX-1104	Fife, Barney	G0001	Active	04/01/2017	03/31/2018	$17,000.00	57
TCMAY	TCMAY	XXX-XX-1109	Sprague, Howard	G0001	Active	04/01/2017	03/31/2018	$55,000.00	57
TCMAY	TCMAY	XXX-XX-1103	Taylor, Bea	G0001	Active	04/01/2017	03/31/2018	$20,000.00	57
TCMAY	TCMAY	XXX-XX-1101	Taylor, Andy	G0001	Active	04/01/2017	03/31/2018	$61,000.00	57

VIEWING FILE HISTORY

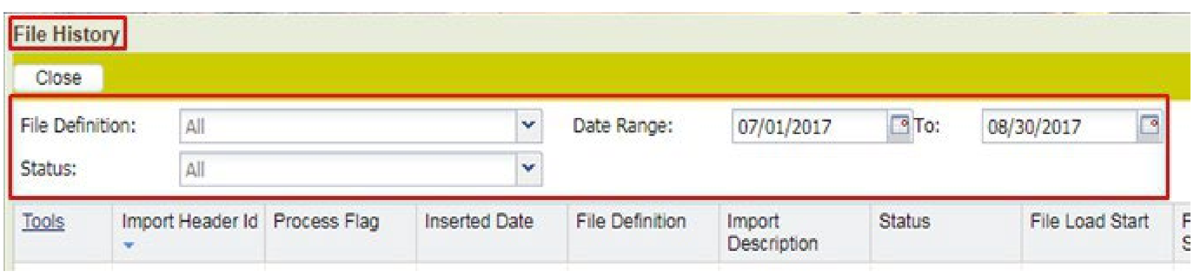
You can use **Viewing File History** to access previously imported files.

1. Navigate to the *Account* tab and click *File History*.



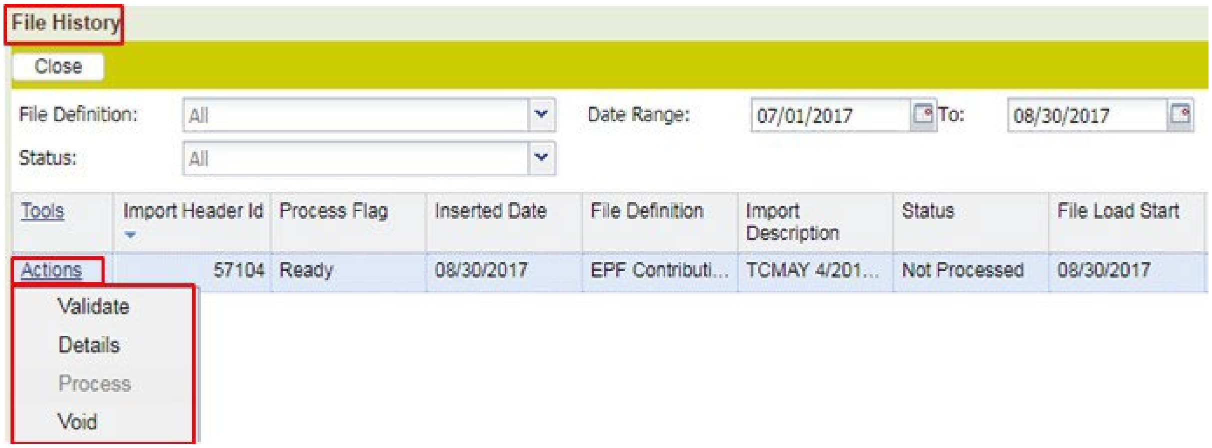
The *File History* pop-up displays.

2. Filter records by **File Definition** and **Status**.



'ACTIONS' OPTIONS IN THE FILE HISTORY POP-UP

For additional information, see pages 23-30 titled **Correcting Errors & Exceptions**.



Action	Description
■ Validate	Validates or revalidates an electronically uploaded payroll (EPF) file.
■ Details	Displays the details of an EPF file.
■ Process	Processes an EPF file.
■ Void	Voids an EPF file. This action is only available for files that have not been processed.

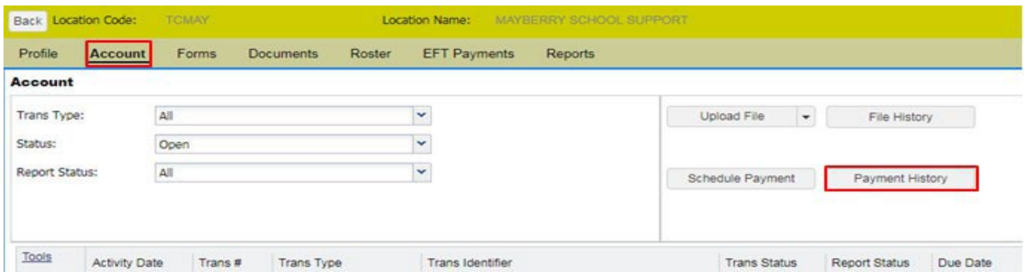
SCHEDULING AN ELECTRONIC FUNDS TRANSFER (EFT) PAYMENT

For assistance with scheduling an EFT payment, please refer to the Scheduling an Electronic Funds Transfer (EFT) Payment Guide located on the ESS portal or on MainePERS website at: https://mainepers.org/Employers/ESS-Guides.htm**.**

VIEWING PAYMENT HISTORY

To view payment history:

1. Navigate to the *Account* tab.
2. Click **Payment History**.

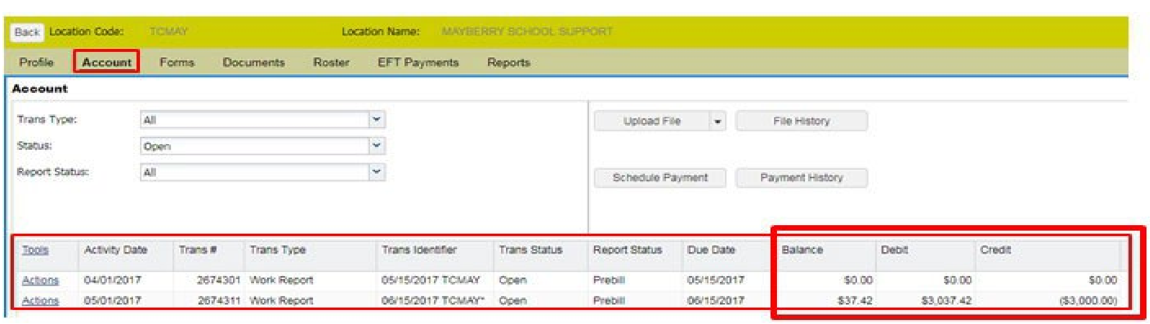


The *Payment History* pop-up displays.

3. **Schedules** tab lists all ACH payments waiting to be processed.

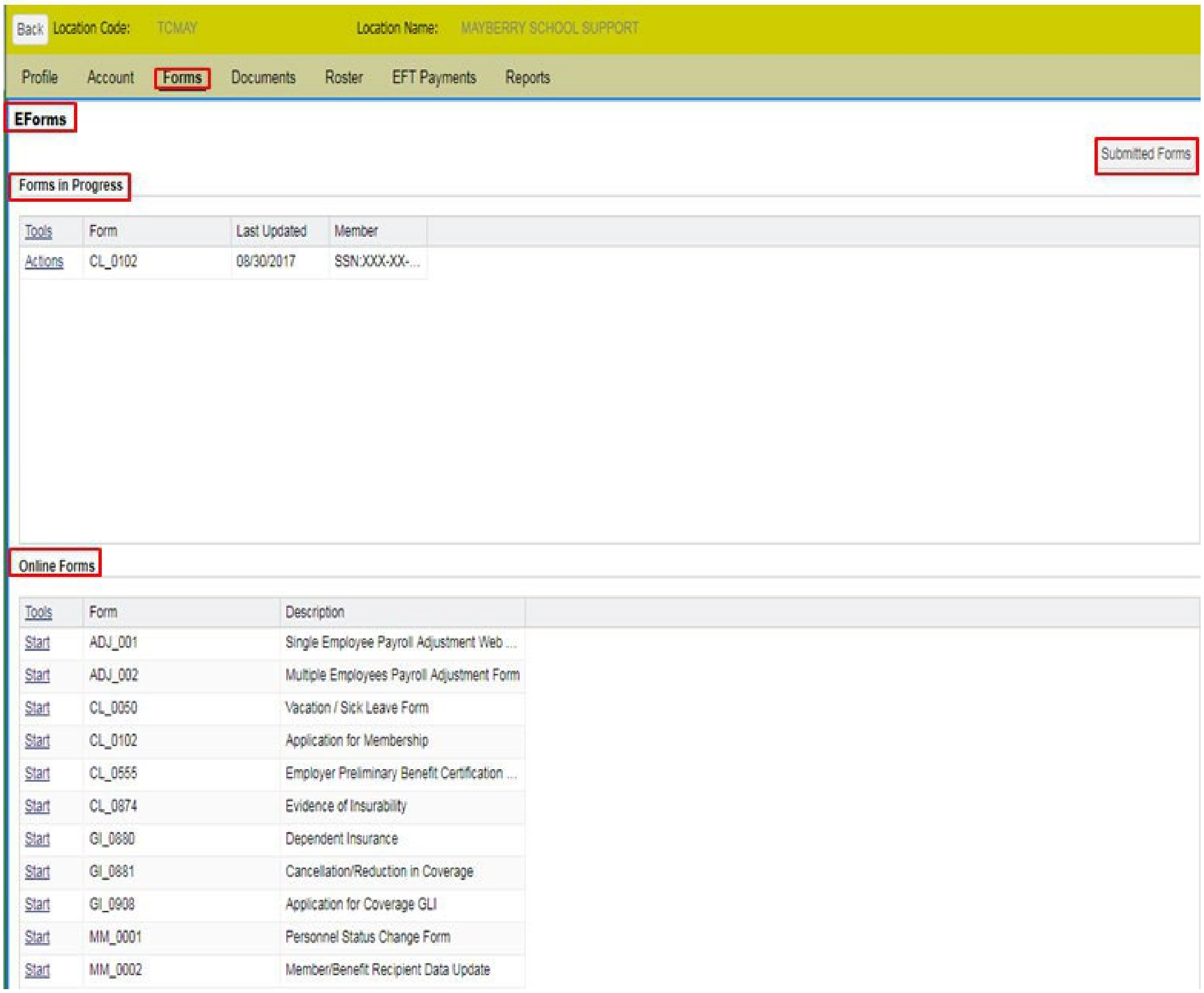
4. Click the **History** tab.

5. Select an '**As Of**' option from the drop-down, to select how far in the past you would like to see the payments made.
6. **Close** the *Payment History* pop-up.
7. Back at the Account Tab you will see the balance for your payroll.



FORMS TAB

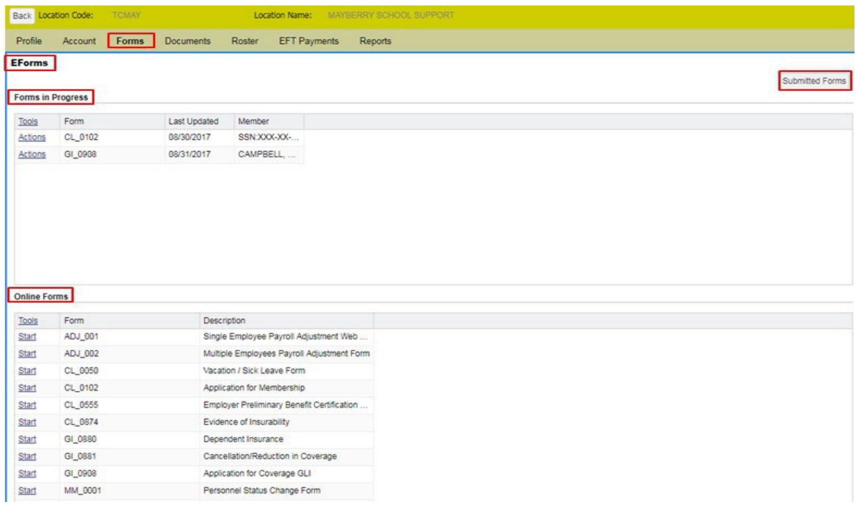
The *Forms* tab allows you to create and submit necessary forms.



SUBMITTING FORMS ON-LINE

The Online Forms section shows all of forms that are available to be edited and submitted to MainePERS.

Forms are used to update member data and submit information to MainePERS.



FORM #	FORM NAME	PURPOSE
ADJ_001	**Single Employee** Payroll Adjustment Web Form	Report whenever a single member payroll has been missed or submitted in error for one or more payroll indentifier months.
ADJ_002	**Multiple Employees** Payroll Adjustment Form	Report whenever a single member(s) payroll has been missed or submitted in error for one or more payroll indentifier months.
CL-0050	Vacation / Sick Leave Form	Report final pay and leave accrual information used in benefit calculation.
CL-0102	Application for Membership	Creates an active or decline member contract for the reporting employer location.
CL-0555	Employer Preliminary Benefit Certification Form	Certify employee termination and other relevant information in order to begin paying service or disability retirement benefits.
CL-0874	Evidence of Insurability	Request for Basic and/or additional life insurance coverage.
GI_0881	Dependent Insurance	Selection of dependent coverage if member had no dependents when first eligible for coverage and is now acquiring their first eligible dependent or previously had Dependent Plan A and is aquiring a spouse and would like to increase to Dependent Plan B.
GI_0881	Cancellation/Reduction in Coverage	Cancels/Reduces life insurance coverage of record.
GI_0908	Application for Coverage GLI	Submitted on behalf of a member in order to enroll them for life insurance coverage.
MM_0001	Personnel Status Change Form	Reports Member leaves of absence or member termination event.
MM_0002	Member/Benefit Recipient Data Update	Update's current member's / benefit recipient's name and/or address.

Note: CL-0102 **Application for Membership** – When to submit?

Member Employment (ESS Member Contract) consists of five data elements: Employer Location, Plan Class, Rate Schedule Number (RSN), Position, and Personnel Status Code (PSC). A chart is provided below to help you recognize when changes to a member's employment record will require a Membership Application prior to reporting the new data on payroll.

If this employment data is changing:	**Teacher**	**PLD**	**State**
Employer Location	required	required	not required for department transfer
Plan Class	required	required	required
RSN**	required	required	required
Position	not required (except special codes)*	required	not required
PSC	not required except PSC 53	required	not required except PSC 53

*Teacher Position Codes requiring update include grandfathered positions, authorized positions and positions requiring "basis" if the basis is not with the reporting employer location. For example, a member reported with the following codes for the first time under the reporting location would require submission of the membership application prior to payroll processing:
Y1001, Y0408, Y5555, Y0210, Y0209, Y0155, Y0104 and all YEX codes, unless the member has basis with the reporting employer location.

****PLD RSN codes for RRTW members will be a 53 for those hired prior to 10/02/18, and a 96 for anyone hired on or after 10/01/18.**

Note: **Employee Employment Termination**

If you are submitting any form to MainePERS reporting the date an employee is terminating employment, the form CANNOT be submitted to MainePERS until **on or after** the reported termination date. Any forms received before that date will be voided and a new form will be required to be submitted in ESS.

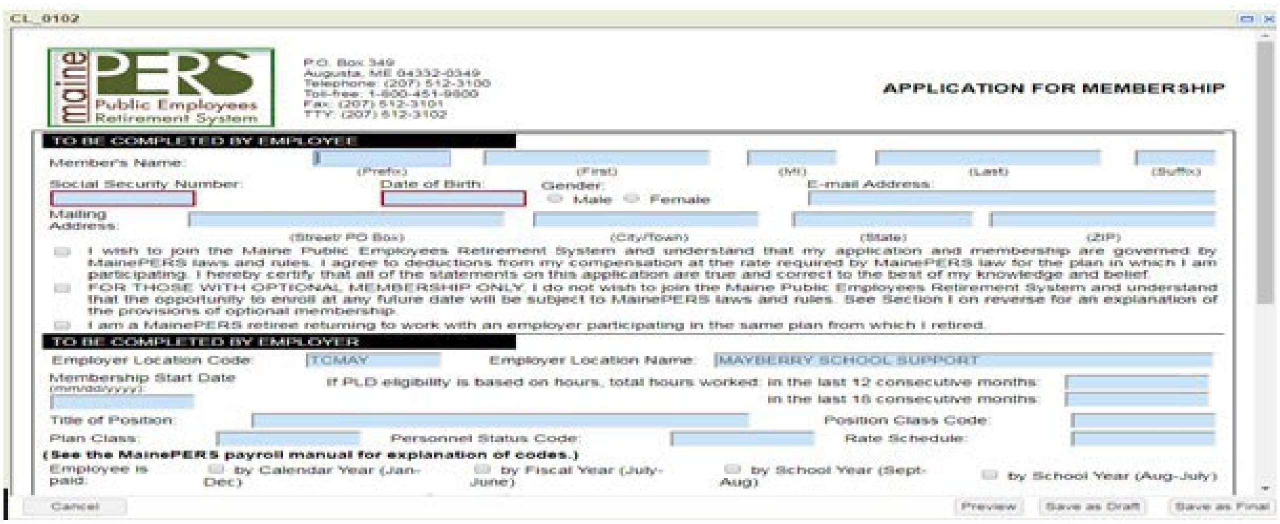
Forms: CL-0050 **Vacation/Sick Leave Form**
CL-0555 **Employer Preliminary Benefit Certification Form**
MM-0001 **Personnel Status Change Form**

1. Click the **Start** link.

Online Forms

Tools	Form	Description
Start	ADJ_001	Single Employee Payroll Adjustment Web ...
Start	ADJ_002	Multiple Employees Payroll Adjustment Form
Start	CL_0050	Vacation / Sick Leave Form
Start	CL_0102	Application for Membership
Start	CL_0555	Employer Preliminary Benefit Certification ...
Start	CL_0874	Evidence of Insurability
Start	GI_0880	Dependent Insurance
Start	GI_0881	Cancellation/Reduction in Coverage
Start	GI_0908	Application for Coverage GLI
Start	MM_0001	Personnel Status Change Form
Start	MM_0002	Member/Benefit Recipient Data Update

The form displays in a new window.



CL_0102

maine PERS Public Employees Retirement System

P.O. Box 349
Augusta, ME 04332-0349
Telephone: (207) 512-3100
Toll-free: 1-800-451-9800
Fax: (207) 512-3101
TTY: (207) 512-3102

APPLICATION FOR MEMBERSHIP

TO BE COMPLETED BY EMPLOYEE

Member's Name: (Prefix) (First) (MI) (Last) (Suffix)

Social Security Number: Date of Birth: Gender: Male Female E-mail Address:

Mailing Address: (Street/ PO Box) (City/Town) (State) (ZIP)

I wish to join the Maine Public Employees Retirement System and understand that my application and membership are governed by MainePERS laws and rules. I agree to deductions from my compensation at the rate required by MainePERS law for the plan in which I am participating. I hereby certify that all of the statements on this application are true and correct to the best of my knowledge and belief.

FOR THOSE WITH OPTIONAL MEMBERSHIP ONLY. I do not wish to join the Maine Public Employees Retirement System and understand that the opportunity to enroll at any future date will be subject to MainePERS laws and rules. See Section I on reverse for an explanation of the provisions of optional membership.

I am a MainePERS retiree returning to work with an employer participating in the same plan from which I retired.

TO BE COMPLETED BY EMPLOYER

Employer Location Code: TCMAY Employer Location Name: MAYBERRY SCHOOL SUPPORT

Membership Start Date (mm/dd/yyyy): If PLD eligibility is based on hours, total hours worked: in the last 12 consecutive months: in the last 18 consecutive months:

Title of Position: Position Class Code:

Plan Class: Personnel Status Code: Rate Schedule:

(See the MainePERS payroll manual for explanation of codes.)

Employee is paid: by Calendar Year (Jan-Dec) by Fiscal Year (July-June) by School Year (Sept-Aug) by School Year (Aug-July)

Cancel Preview Save as Draft Save as Final

2. Complete the form as needed.

- **Employee Section – Demographics (Capitalize each word – do not use all CAPS or all lower case)**

    i. Prefix, First, Middle Initial, Last, and Suffix

    ii. Social Security Number, Date of Birth (mm/dd/yyyy), Gender, E-mail Address (personal e-mail preferred)

    iii. Mailing Address – Use State abbreviation

    iv. Choose the correct election box (Join, Decline, Retiree Return to Work)

- **Employer Section:**

    i. Employer Location Code – Prepopulates once the employer opens the form

ii. *Employer Location Name - Prepopulates once the employer opens the form*

iii. *Membership Start Date – first date that the employee becomes eligible*

iv. **PLD Base Hours?**

v. *Title of Position*

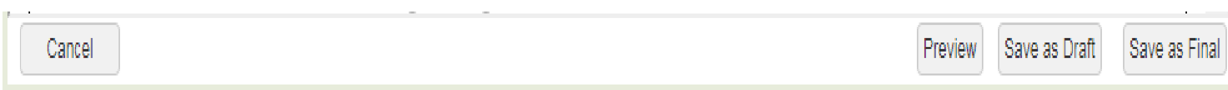
vi. *Position Class Code, Plan Class, Personnel Status Code, and Rate Schedule: See ESS EPF Filing Manual*

vii. *Employee is paid (Calendar, Fiscal, or School)*

viii. *Election to enroll (Yes/No) – If "Yes" check off appropriate letter (a-i)*

ix. *Certifying Official Signature, Date, Print/Type Name, Phone, and E-mail - Prepopulates once the employer opens the form (if it doesn't fill in manually)*

3. When you are finished, select one of the following options at the bottom of the form:
   - **Cancel**: closes the form without saving any updates.
   - **Preview**: saves the form as a draft but doesn't close the form. The *Preview* function is used to prepopulate demographic information on a member already set up in the MainePERS system.
   - **Save as Draft**: saves the form as a draft, which can be accessed to finalize at a later time/date, and closes it. *This is a new feature.*
   - **Save as Final**: saves and delivers the form to MainePERS.

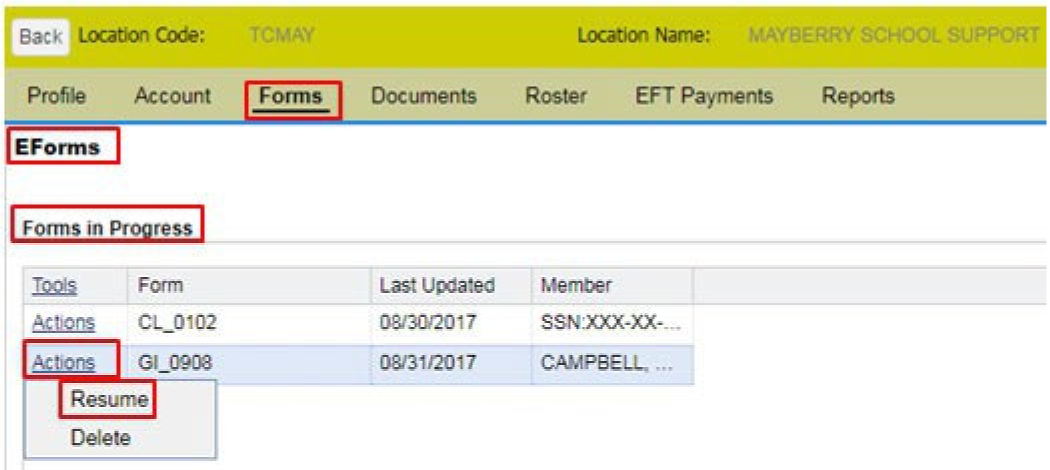


FINISHING FORMS IN PROGRESS (THOSE SAVED AS DRAFT)

The Forms in Progress section shows all forms that have been started but not yet completed. You can resume editing them or delete them.

To resume editing:

1. Click the **Actions** link and select **Resume** from the drop-down.

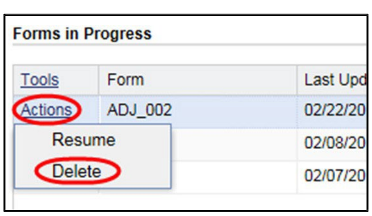


The partially-completed form displays.

2. Make updates as needed.
3. When you are finished, select one of the following options at the bottom of the form:
   - **Cancel**: close the form without saving any updates
   - **Save**: save the form as a draft and close it
   - **Save as Final**: deliver the form

To delete a form:

1. Click the **Actions** link and select **Delete** from the drop-down.



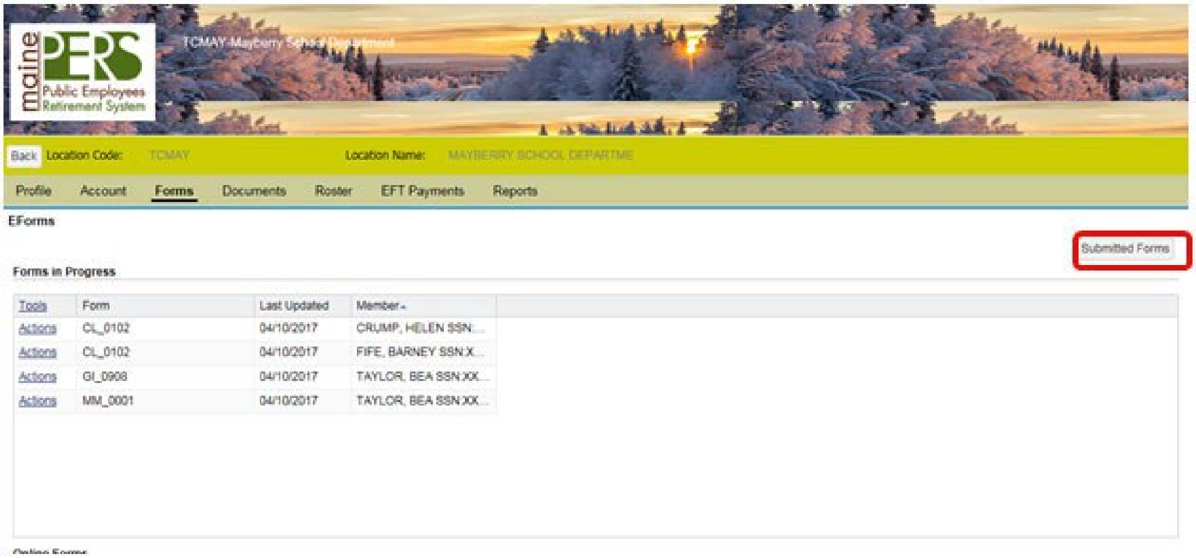
The **Delete Confirmation** pop-up displays.

2. Click **Yes**.

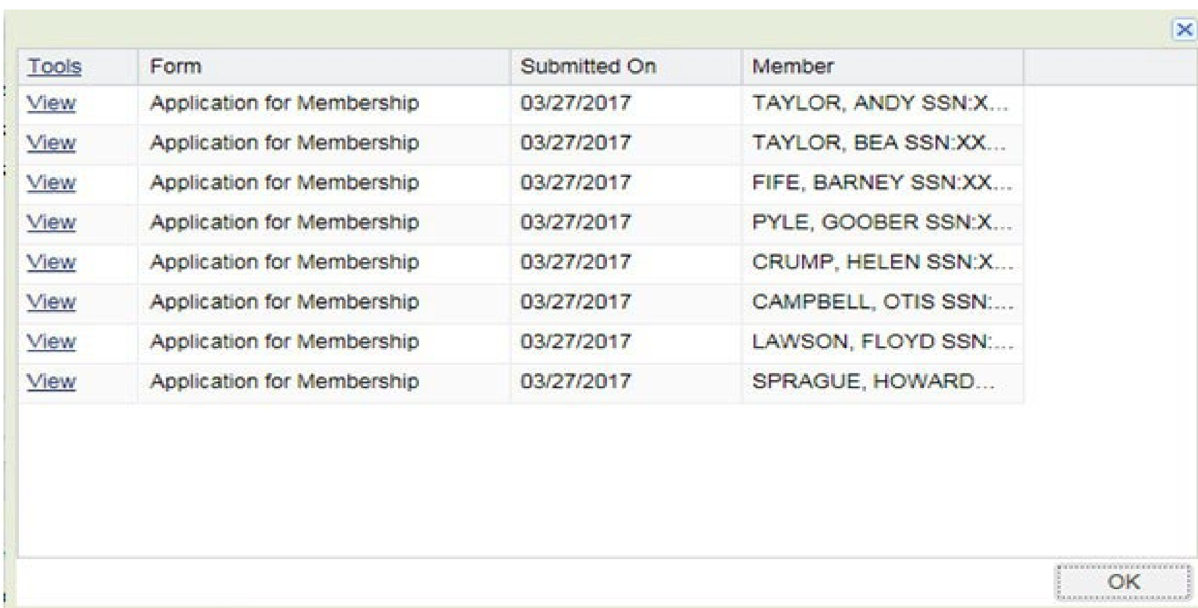
That form is no longer listed in the Forms in Progress section.

VIEWING SUBMITTED FORMS

The **Submitted Forms** button shows all forms that have been submitted to MainePERS.



The list of submitted forms displays in a pop-up.



Click **View** to see the details of any form listed. The form displays in a document viewer. You cannot edit a form from this list.

DOCUMENTS TAB

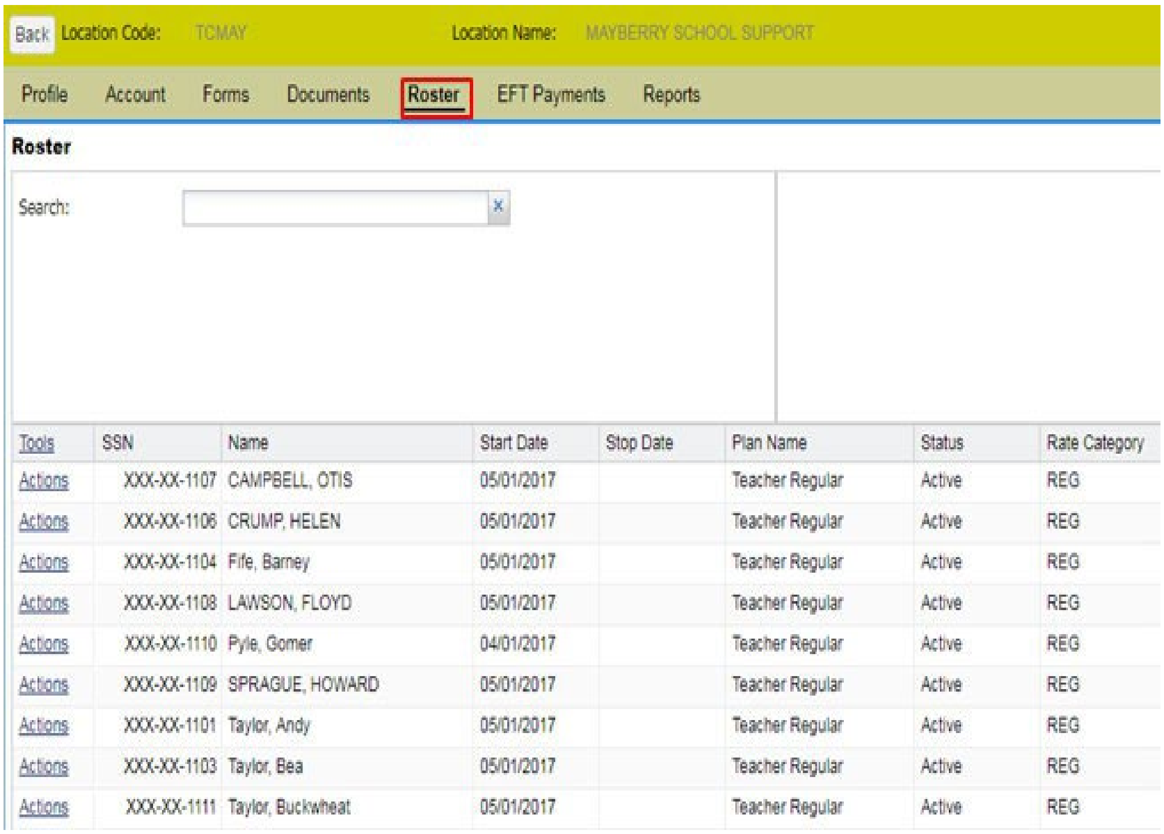
The documents tab lists all the documents that were created for you by MainePERS. All Employer Location specific documents will be available to you for viewing. Types of Documents to be found here are:

- GLI Invoice (Group Life Insurance monthly bill – *new location for this document*)
- Employer Statement of Account (not processed at this time)
- Annual Statement of Cost (formerly known as "green sheets")

ROSTER TAB

The *Roster* tab allows you to view a roster of your employees. Active employees as well as those terminated appear here.

This is a read-only tab. Changes to employee information must be submitted to MainePERS via Forms.

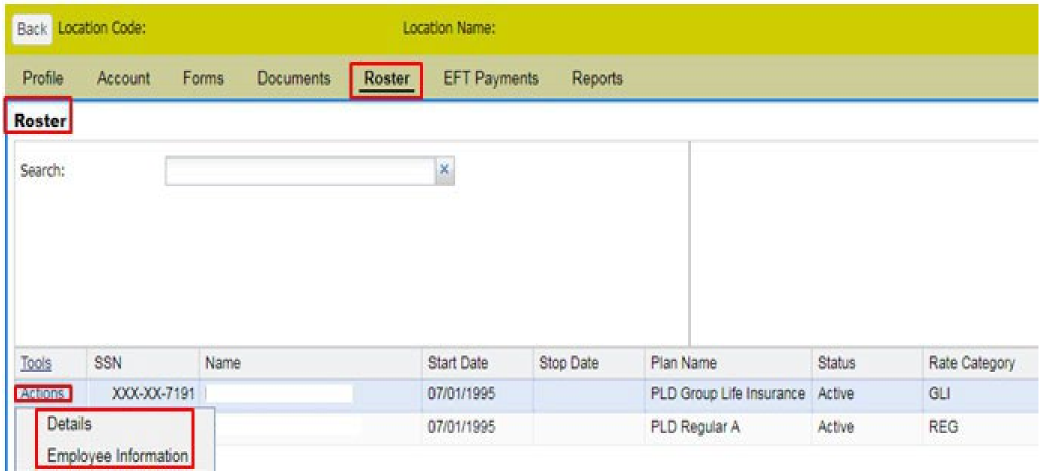


Tools	SSN	Name	Start Date	Stop Date	Plan Name	Status	Rate Category
Actions	XXX-XX-1107	CAMPBELL, OTIS	05/01/2017		Teacher Regular	Active	REG
Actions	XXX-XX-1106	CRUMP, HELEN	05/01/2017		Teacher Regular	Active	REG
Actions	XXX-XX-1104	Fife, Barney	05/01/2017		Teacher Regular	Active	REG
Actions	XXX-XX-1108	LAWSON, FLOYD	05/01/2017		Teacher Regular	Active	REG
Actions	XXX-XX-1110	Pyle, Gomer	04/01/2017		Teacher Regular	Active	REG
Actions	XXX-XX-1109	SPRAGUE, HOWARD	05/01/2017		Teacher Regular	Active	REG
Actions	XXX-XX-1101	Taylor, Andy	05/01/2017		Teacher Regular	Active	REG
Actions	XXX-XX-1103	Taylor, Bea	05/01/2017		Teacher Regular	Active	REG
Actions	XXX-XX-1111	Taylor, Buckwheat	05/01/2017		Teacher Regular	Active	REG

The Actions Button Options

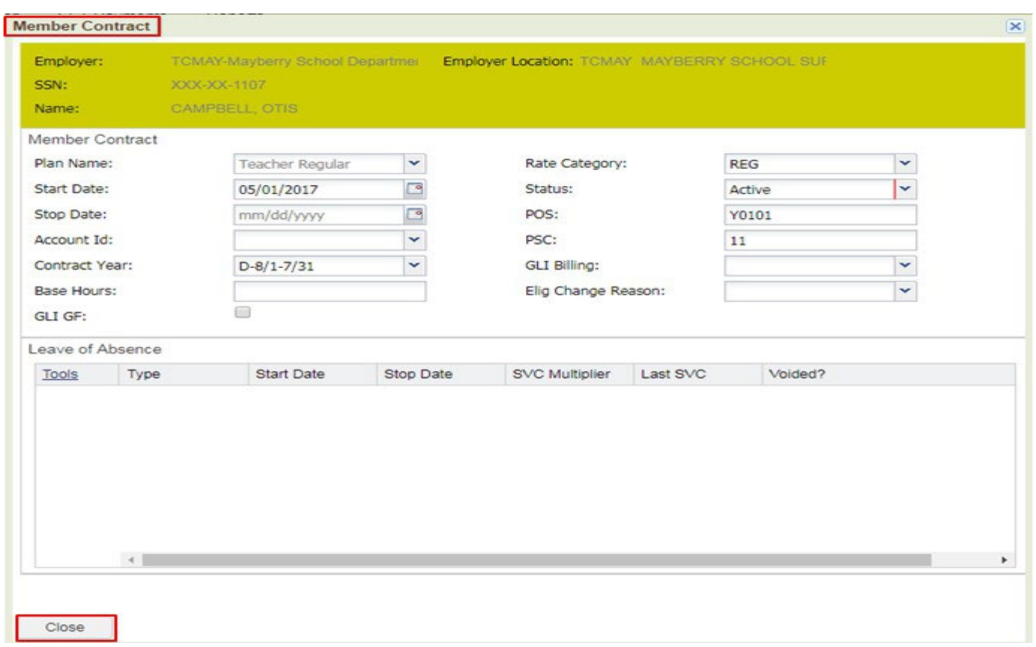
The following actions are available on the **Roster** listing.

- Details
- Employee Information



Details

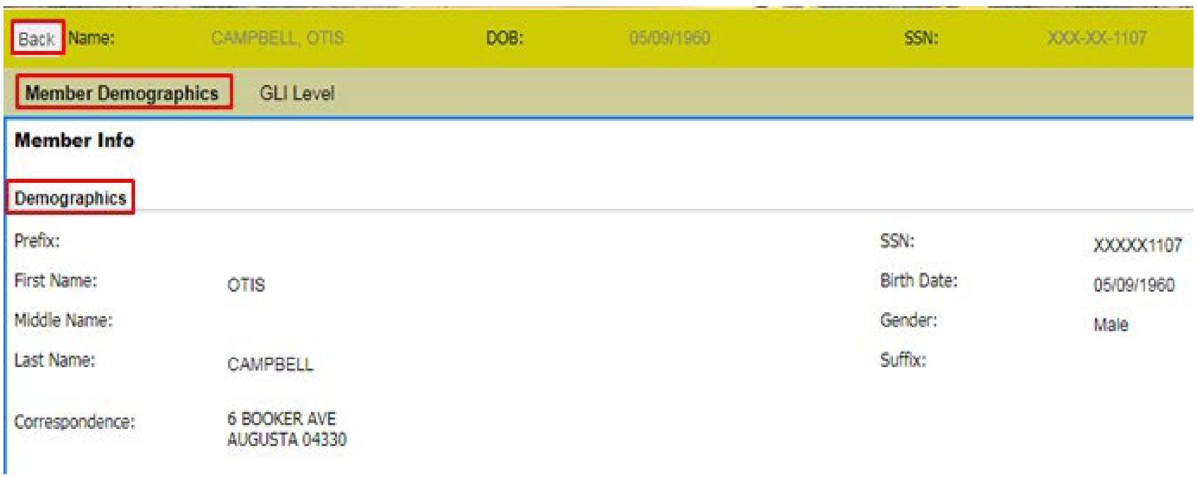
Selecting this button generates the *Member Contract* pop-up window. This is an informational only page. No changes to employees can be made from here.

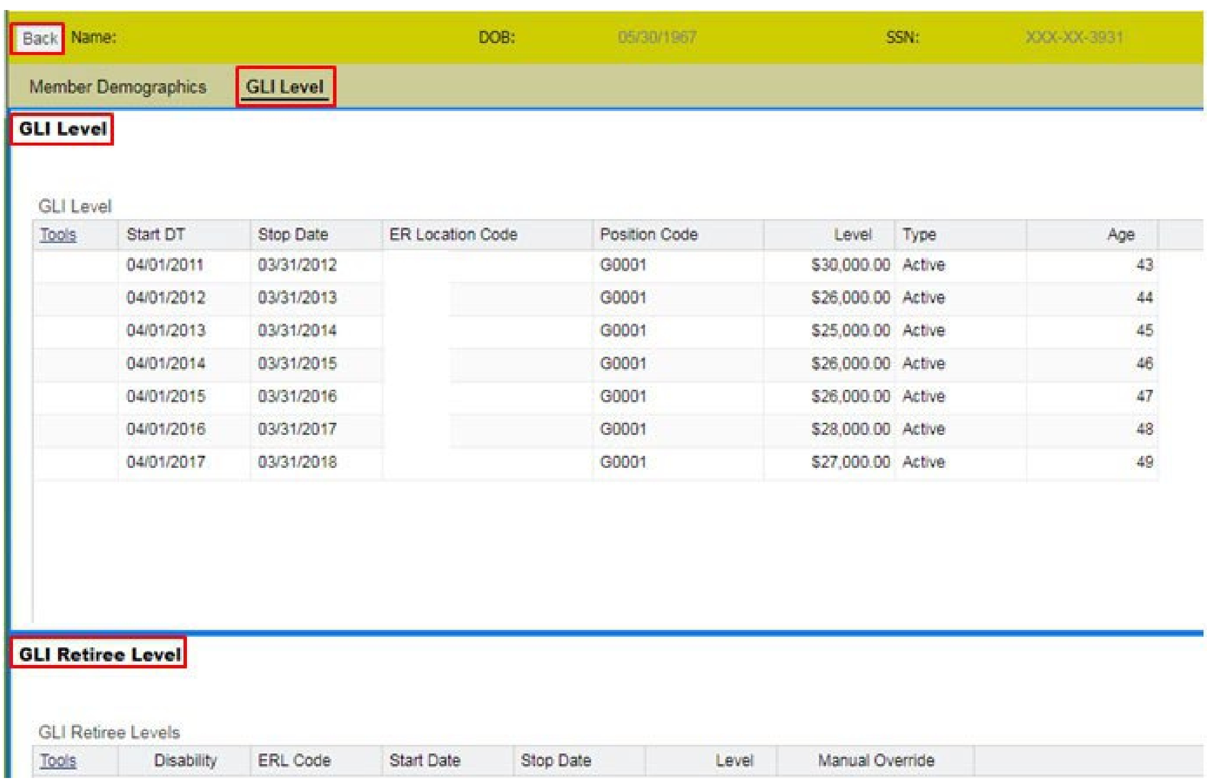


Employee Information

Selecting this option generates a new window with two tabs:

- Member Demographics (top screen)
- Member GLI Level (bottom screen)





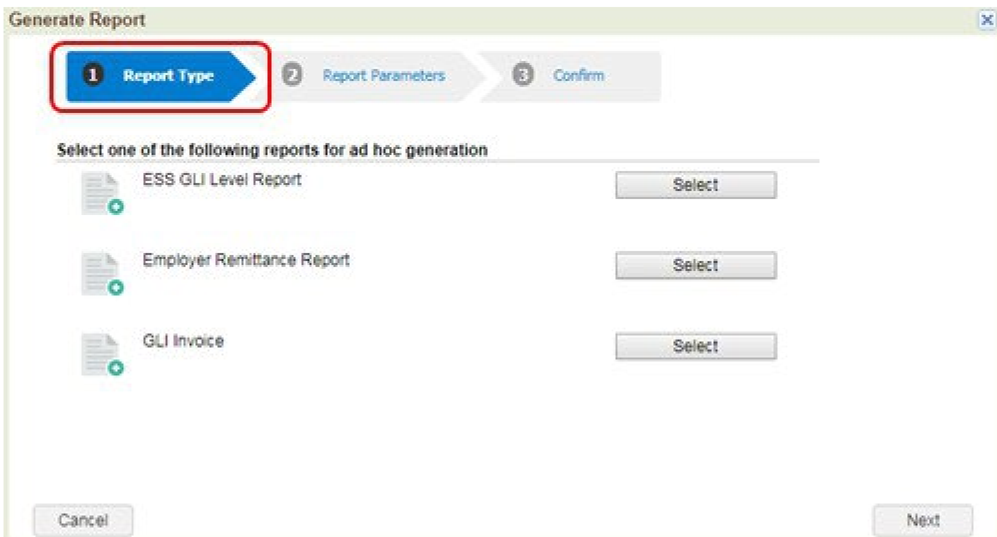
You can use the **Back** button to return to the *Roster* tab (making the other tabs visible as well).

EFT PAYMENTS TAB

For assistance with setting up an EFT payment account, please refer to the Scheduling an Electronic Funds Transfer (EFT) Payment Guide located on the ESS portal or on MainePERS website at: https://mainepers.org/Employers/ESS-Guides.htm.

REPORTS TAB

You can view reports by navigating to the *Reports* tab and clicking *Generate Report*.



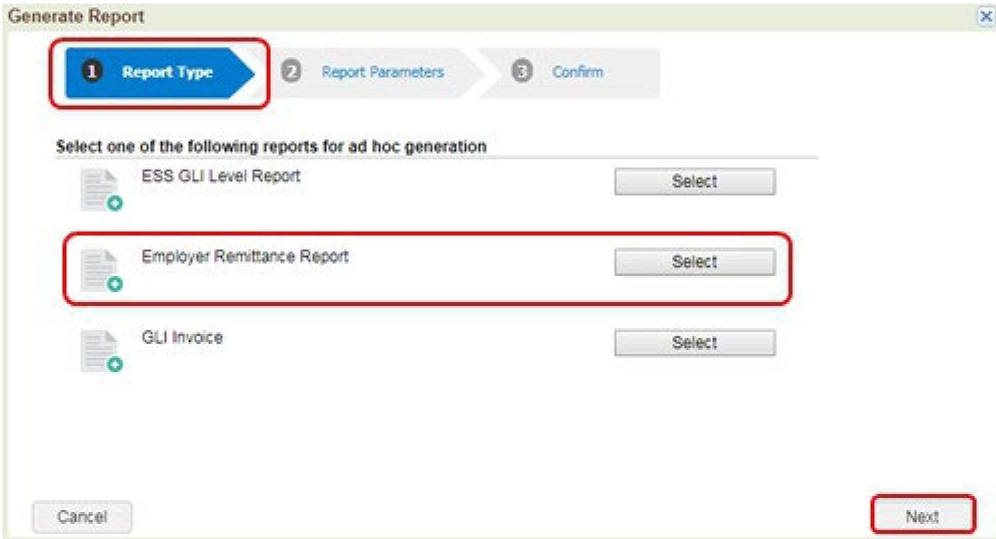
The following reports are available in ESS:

- **ESS GLI Level Report**: This report provides you with a record of GLI levels which have been uploaded to MainePERS.

- **Employer Remittance Report**: The Employer Remittance Report provides you with the allocation of amounts due as a result of submitting your payroll file information.

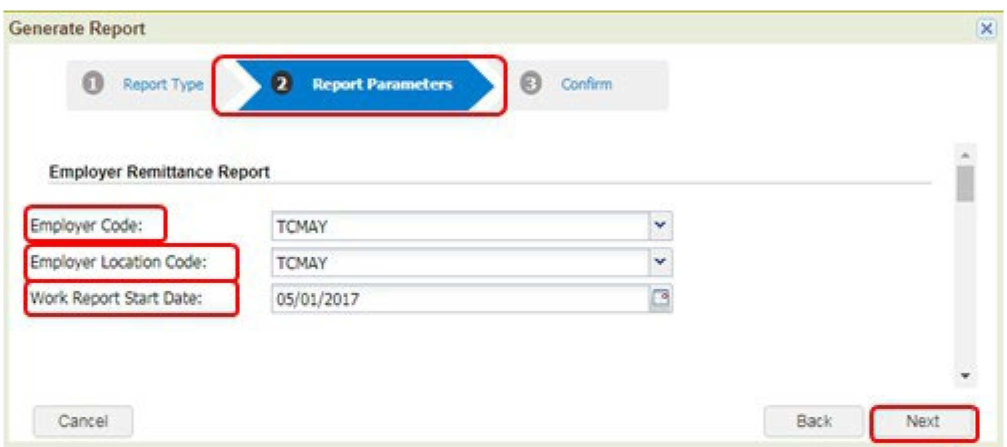
- **GLI Invoice**: GLI bills produced before October 1, 2017 are available from this location. **See the Documents Tab, page 55, to find your monthly GLI bills posted after October 1, 2017 (September 2017 invoice)**

1) Click **Select** for the report requesting

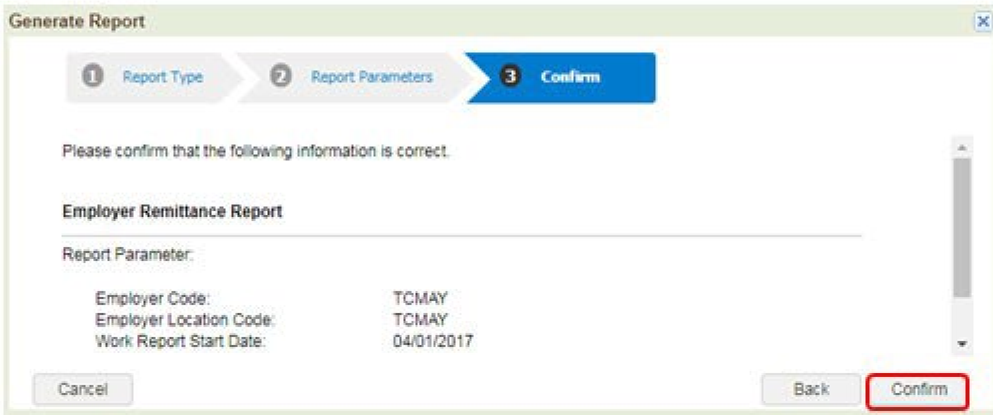


2) Enter required data
   a. Employer Code
   b. Employer Location Code
   c. Work Report Start Date

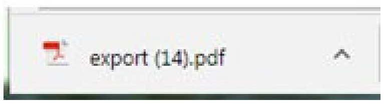
3) Click **Next**



4) Click **Confirm**

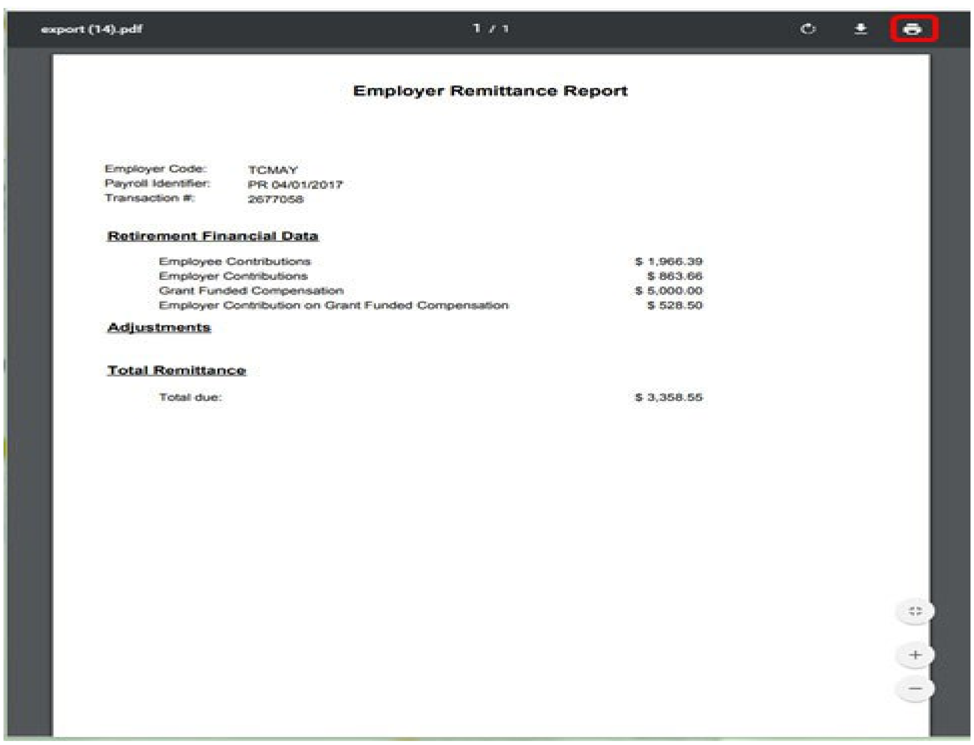


5) This will open a screen requiring you to click on it to get your PDF Report



If you are not seeing this it may involve your Popup Blocker.

6) **Print** your Report



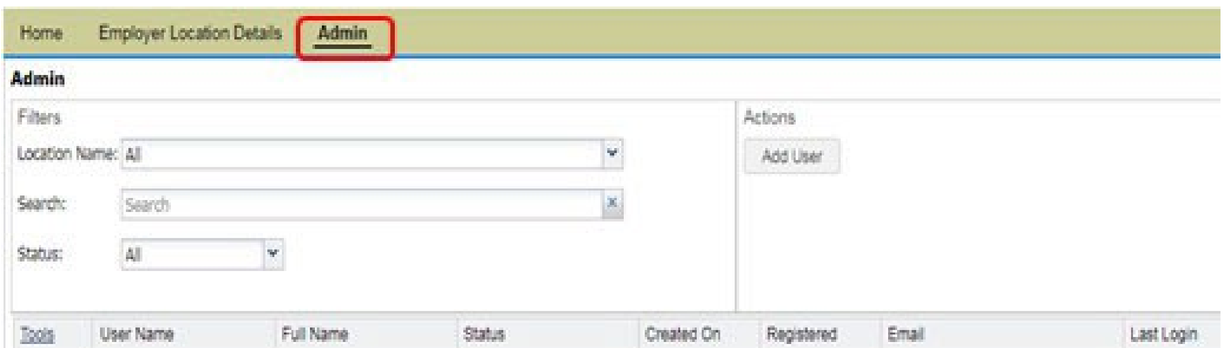
7) X out of the PDF window.

8) Submit a copy of the Remittance report with your payment.

ADMIN TAB

The *Admin* tab is used by your employer's ESS Security Administrator to establish other users in ESS.

On the *Admin* tab, only your employer's ESS Security Administrator can perform the following tasks:



- User Pre-Defined Groups
- Creating an ESS USER Account
- Registering as a USER for ESS
  (You cannot 'fix' a User until they complete the registration process)
- Maintaining a USER Account

Pre-Defined Groups

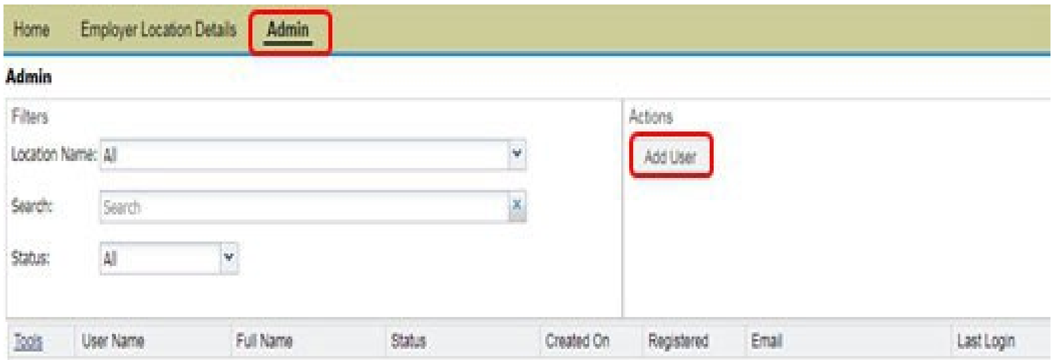
R=Read Only **W**=Writable

	ESS Admin	HR only	Payroll only	HR and Payroll	Read only
Profile					
Demographics	W	W	R	W	R
Contacts	W	W	R	W	R
Account					
Upload File	W	R	W	W	R
File History	W	R	W	W	R
Schedule Payment	W	R	W	W	R
Payment History	R	R	R	R	R
Work Report Editor	W	W	W	W	R
Forms					
Start	W	W	W	W	W
Submitted Forms	R	R	R	R	R
Documents	R	R	R	R	R
Roster	R	R	R	R	R
EFT Payments					
Add Payment	W	R	W	W	R
Reports	R	R	R	R	R

CREATING AN ESS USER ACCOUNT

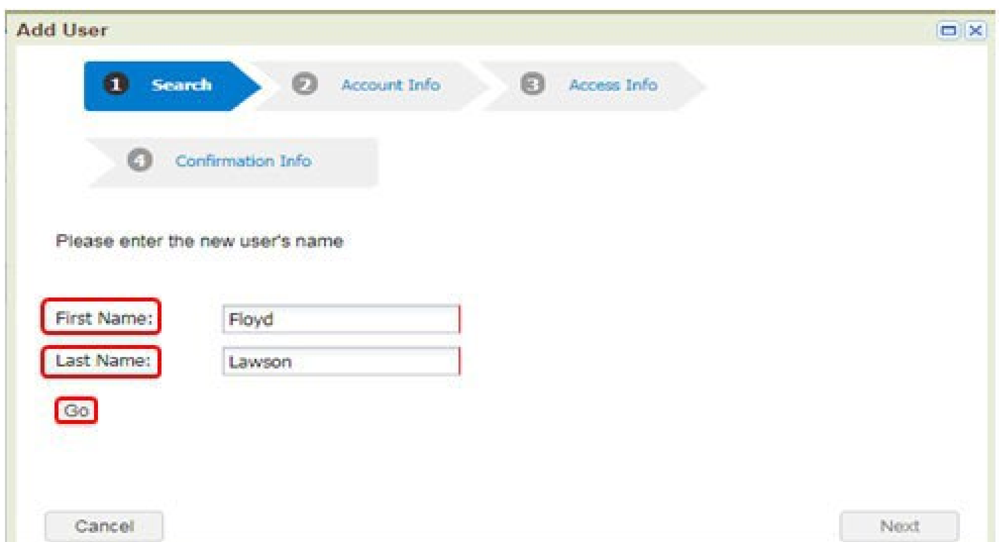
To create an ESS user account, from your *Admin* tab:

1. Click **Add User.**

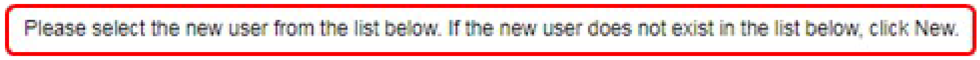


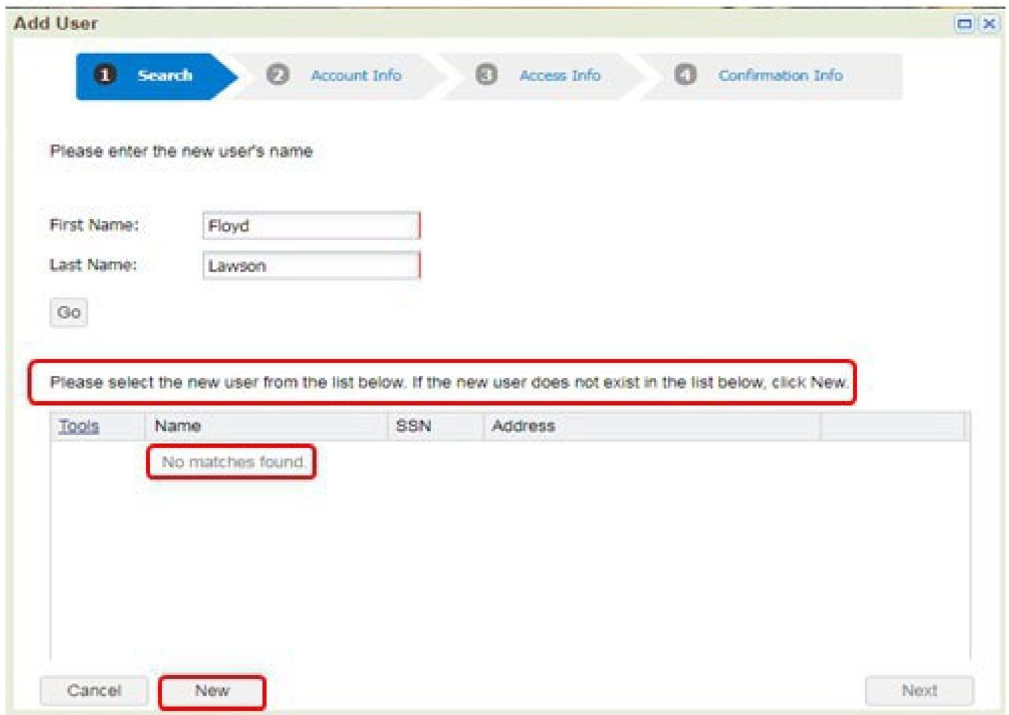
The *Add User* wizard displays.

2. Enter the user's **First Name** and **Last Name**.
3. Click **Go**.



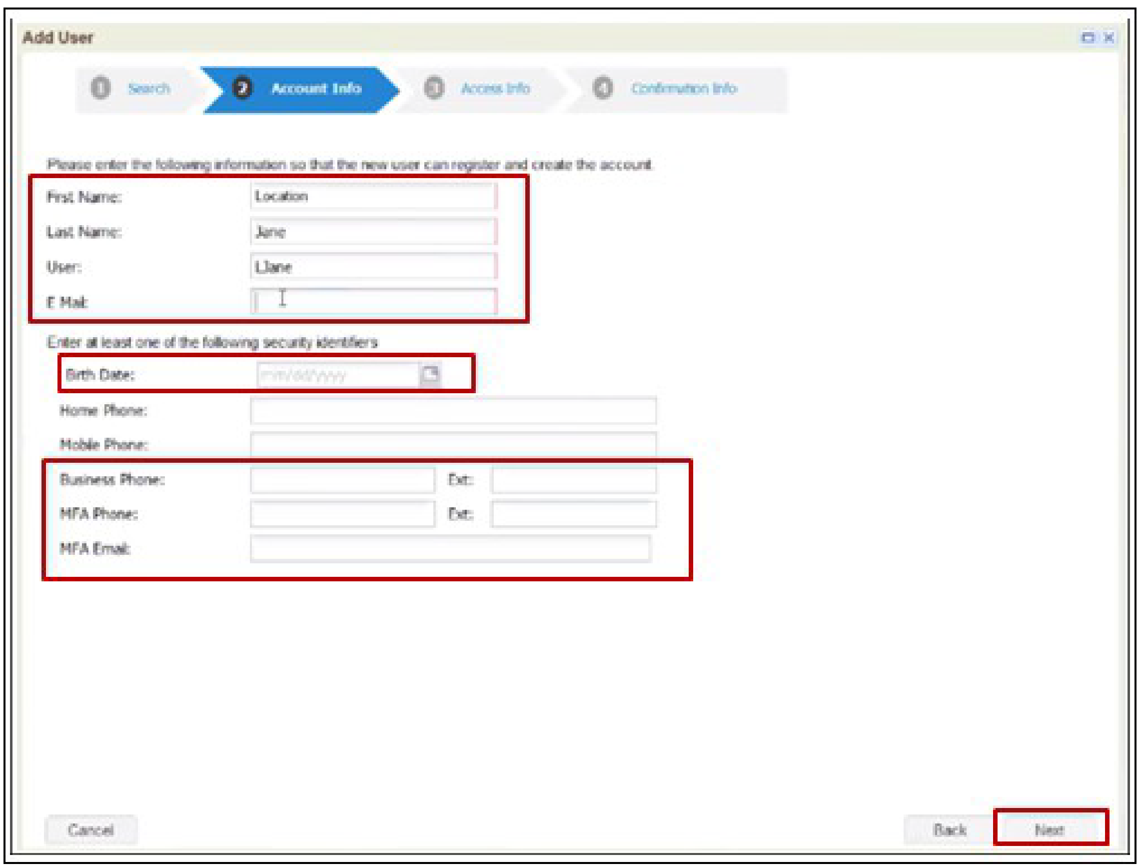
4. Search results display:





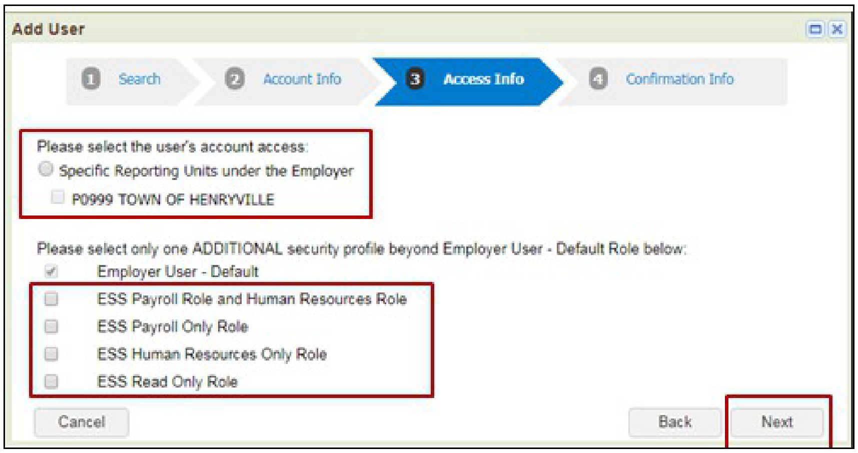
5. Create a new person by clicking **New**. The *Add User* wizard displays the *Account Info* tab, which is prepopulated with the new user's name. A *User name* is automatically assigned to the new User.

6. Complete the Account Info section * required information, the information will be used for verification during the User Registration process, inform the USER.
   - **First Name**: Verify/enter the user's first name
   - **Last Name**: Verify/enter the user's last name
   - **User Name**: Verify/update the user name
   - **E Mail**: Enter the user's work email address
   - **Birth Date**: Enter the user's date of birth (this field is mandatory) MM/DD/YYYY
   - **Mobile Phone:** This should be a direct phone number to the ESS USER; not mandatory unless there is no direct business phone available. **This number is only to ring you for you to press 1.
   - **Business Phone**: Enter the user's business phone number
   - **MFA Phone:** enter a **direct phone # to the User** (same number can be entered for both business phone and MFA phone numbers)
   - **MFA Email:** not a required field
7. Click **Next**.



The wizard displays the *Access Info* tab.

8. Select the appropriate Employer Location Code(s) to be associated with the User being set up.
9. Select the appropriate account access and security roles for the user. *Please refer to page 73, (Pre-defined Group Descriptions) for specific information about each role.*

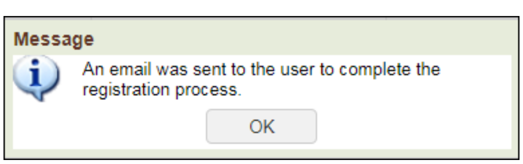


10. Click **Next**.

The wizard displays the *Confirmation Info* tab.

11. Verify the information.
12. Click **Confirm**.
13. Click **OK**

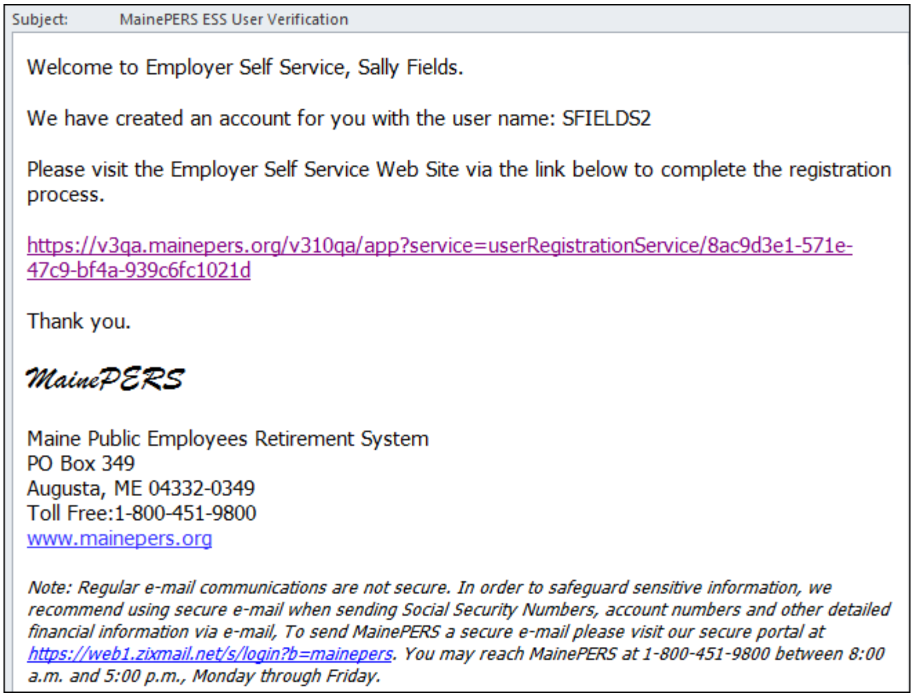
The new User receives an email inviting him or her to complete the registration process.



REGISTERING AS A USER FOR ESS

As a new user, they must register for ESS access upon receipt of their invitation email which contains a link directing you to the *Registration* wizard in ESS.

1. Copy and paste the URL provided, in the email, into your browser.



Subject: MainePERS ESS User Verification

Welcome to Employer Self Service, Sally Fields.

We have created an account for you with the user name: SFIELDS2

Please visit the Employer Self Service Web Site via the link below to complete the registration process.

https://v3qa.mainepers.org/v310qa/app?service=userRegistrationService/8ac9d3e1-571e-47c9-bf4a-939c6fc1021d

Thank you.

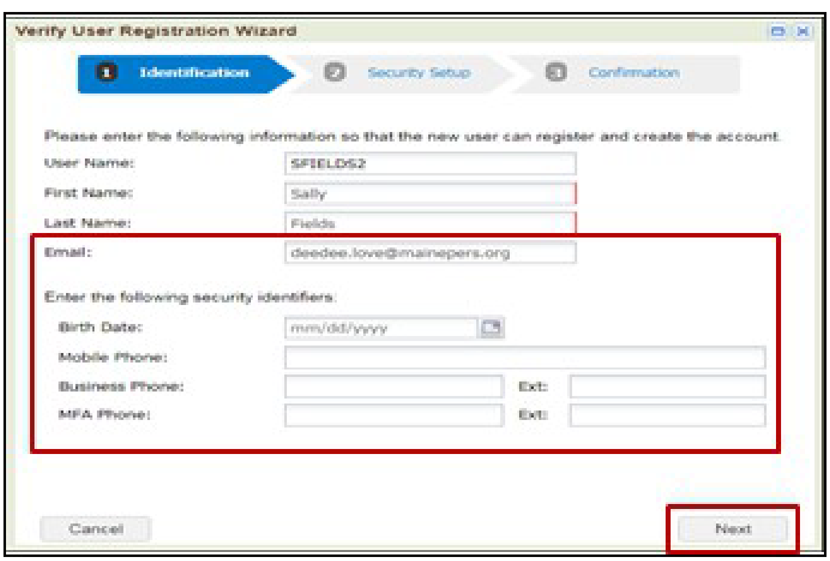
MainePERS

Maine Public Employees Retirement System
PO Box 349
Augusta, ME 04332-0349
Toll Free:1-800-451-9800
www.mainepers.org

Note: Regular e-mail communications are not secure. In order to safeguard sensitive information, we recommend using secure e-mail when sending Social Security Numbers, account numbers and other detailed financial information via e-mail, To send MainePERS a secure e-mail please visit our secure portal at https://web1.zixmail.net/s/login?b=mainepers. You may reach MainePERS at 1-800-451-9800 between 8:00 a.m. and 5:00 p.m., Monday through Friday.

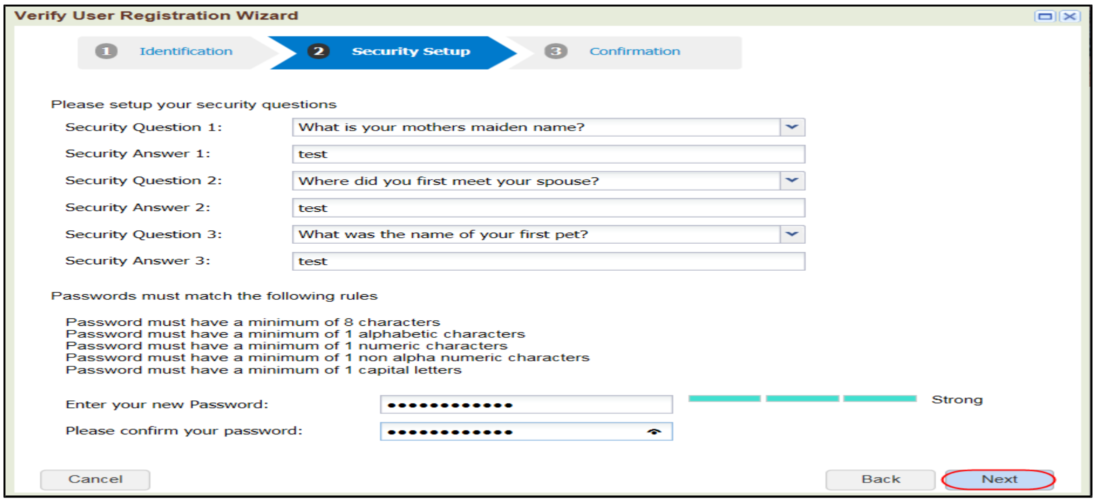
The browser opens the first step of the ***Verify User Registration*** wizard in ESS.

2. Complete the fields that are displayed. ****Must match exactly to the SA setup**
3. Click **Next**.



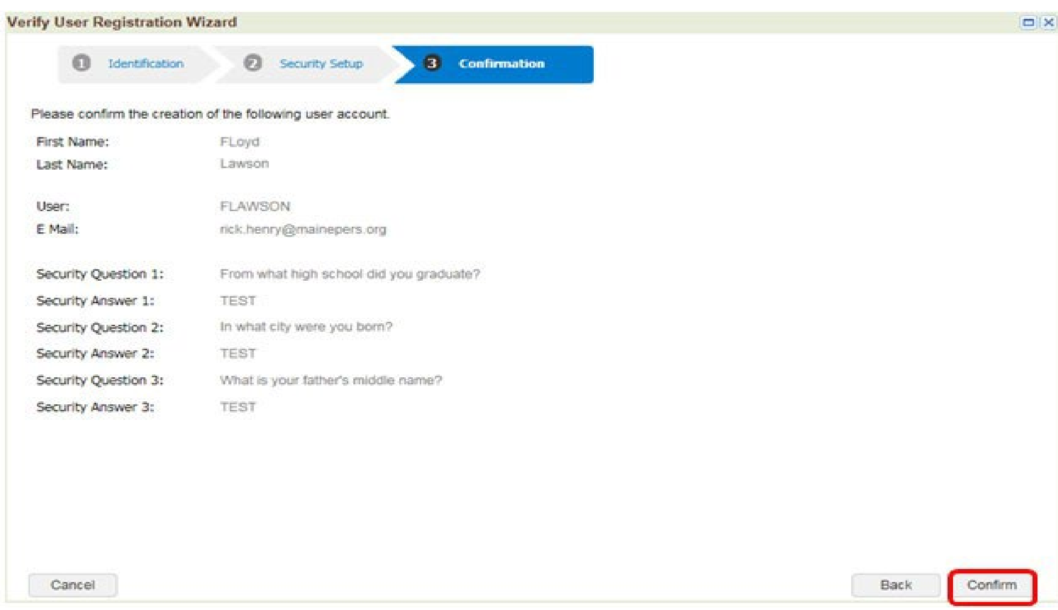
The second step of the wizard generates.

4. Select and enter three security questions and answers.
5. Enter and confirm your new password.
6. Click **Next**.



The third step of the wizard generates.

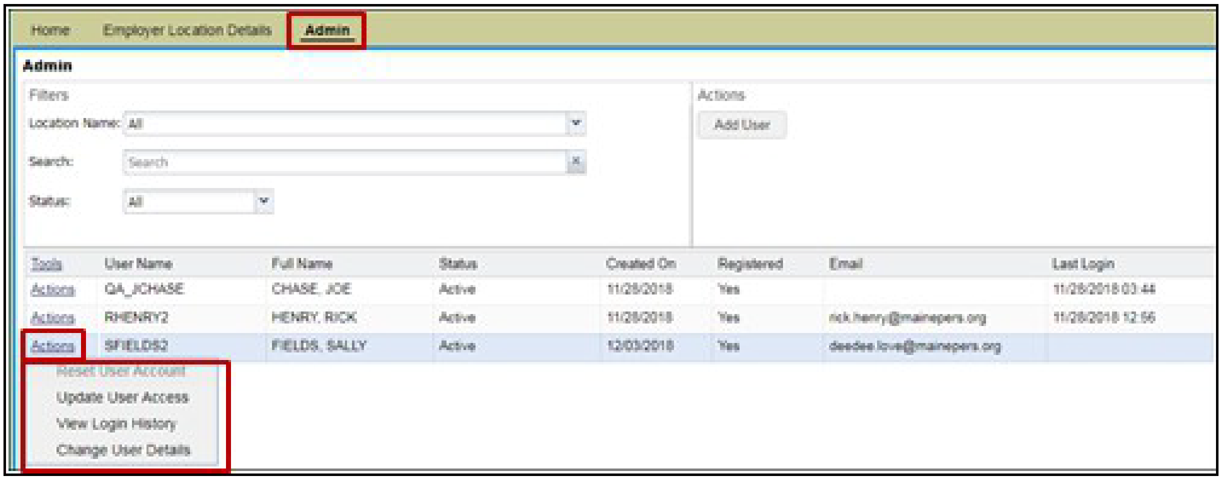
7. Verify the information.
8. Click **Confirm**.



You have completed the *Registration Wizard***.**

MAINTAINING A USER ACCOUNT

After navigating to the *Admin* tab, only ESS Security Administrators can perform the following actions on existing user accounts:



Note: If you are the ESS Security Administrator and require assistance with your own account, please call Employer Services at 1-800-451-9800 or email employer@mainepers.org .

- Reset User Account – only available ***before*** USER has registered
- Update User Access -
- View Login History
- Change User Details -

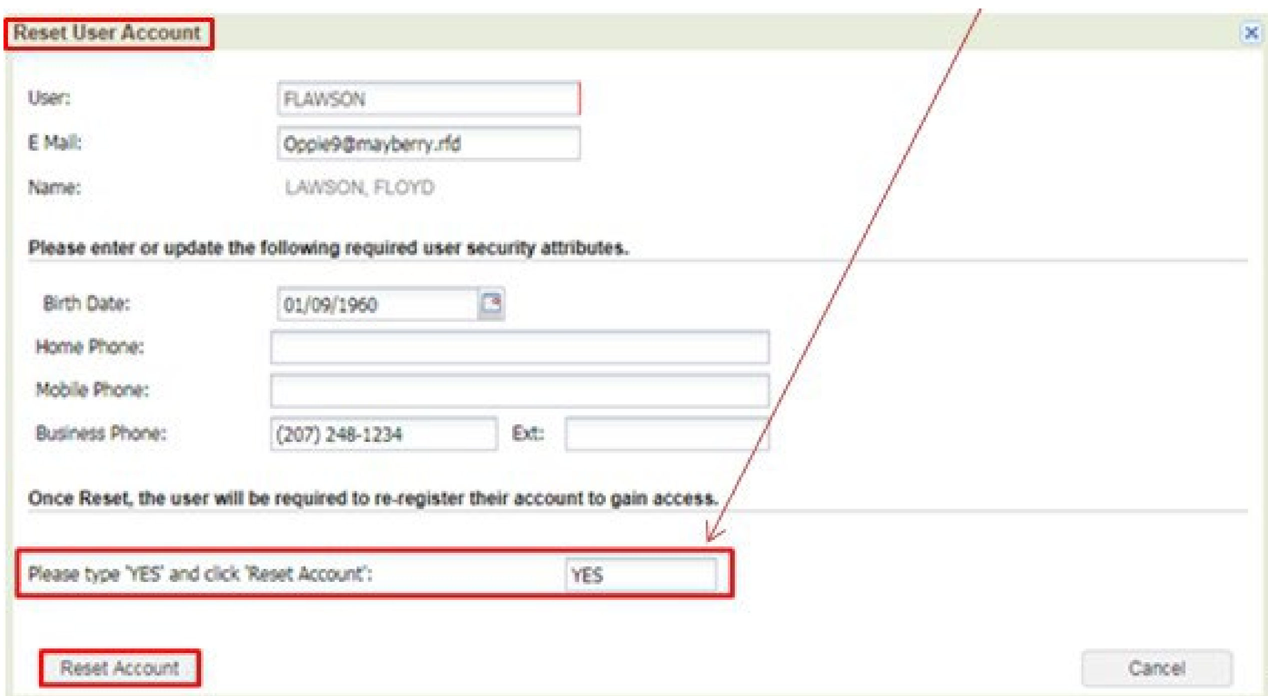
RESETTING A USER ACCOUNT

Option is only available to use *before* the USER completes the registration process.

Selecting this action generates the *Reset User Account* pop-up, which the ESS Security Administrator uses to resend a registration email to an existing user.

1. To resend a registration email to a user the ESS Security Administrator must type "**YES**" (all letters must be uppercase) in the confirmation box.
2. **Make sure the Extension numbers are visible, if applicable, if they are not re-enter the Ext #, this will need to be done each time you reset the account.**
3. Click **Reset Account**.

Note Resetting a User Account is only available if the user types "YES" in the **Please type 'YES' in all capital letters and click 'Reset Account'** field.



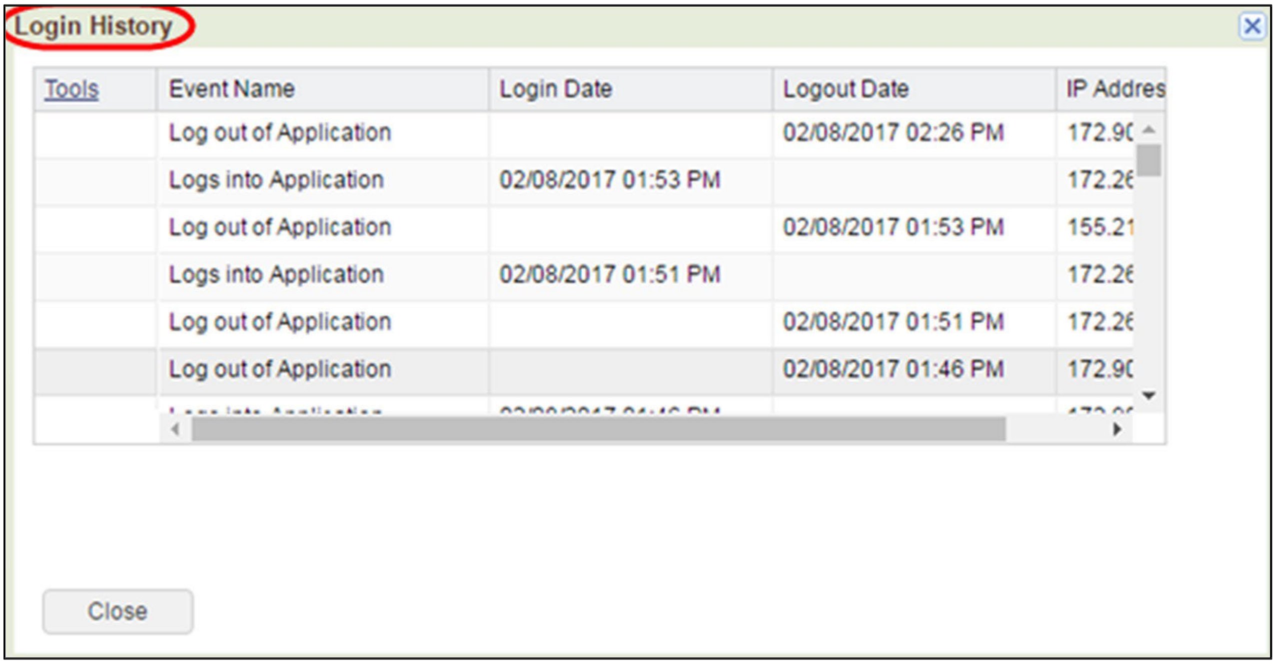
UPDATING USER ACCESS

Selecting this action generates the *Update Security Profile* pop-up, which the ESS Security Administrator uses to modify the user's access level or security role. *See page 66 for descriptions of the Pre-defined Roles.* The ESS Security Administrator must select new values, and click **OK** to make any changes to the user's security profile.

Admin users may also deactivate an account from this location if desired.

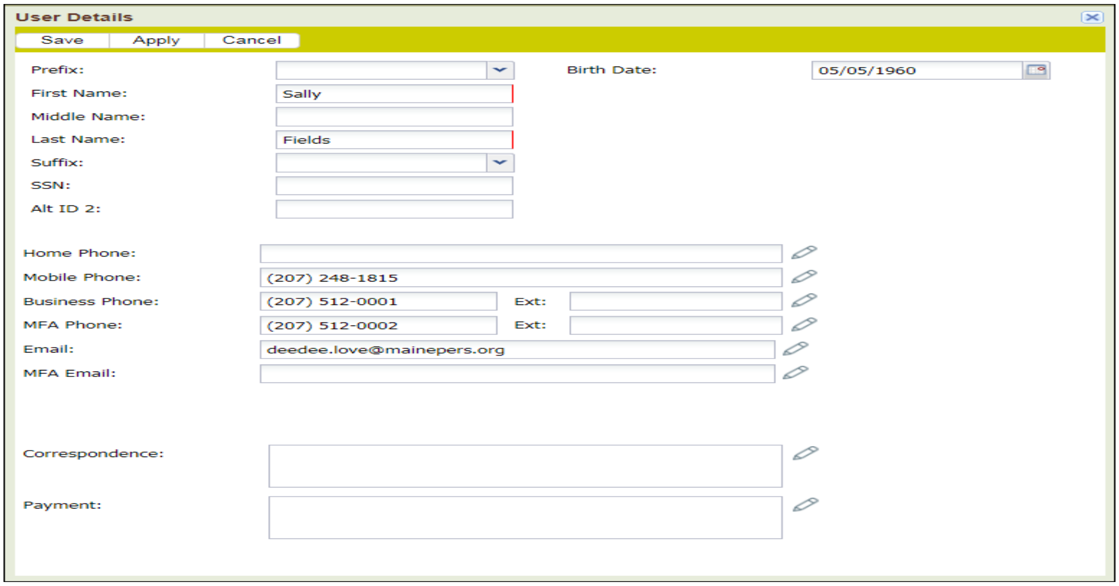
VIEWING LOGIN HISTORY

Selecting this action generates the *Login History* pop-up, which the administrator uses to view a user's login history.



CHANGE USER DETAILS

Selecting this action allows the Security Administrator to change any of the information necessary to keep the USER information up to date. An additional MFA – Multi Factor Authentication phone number can be added at this time.



1. Click the **Pencil** to edit the field you want.

2. Click **Add**