



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

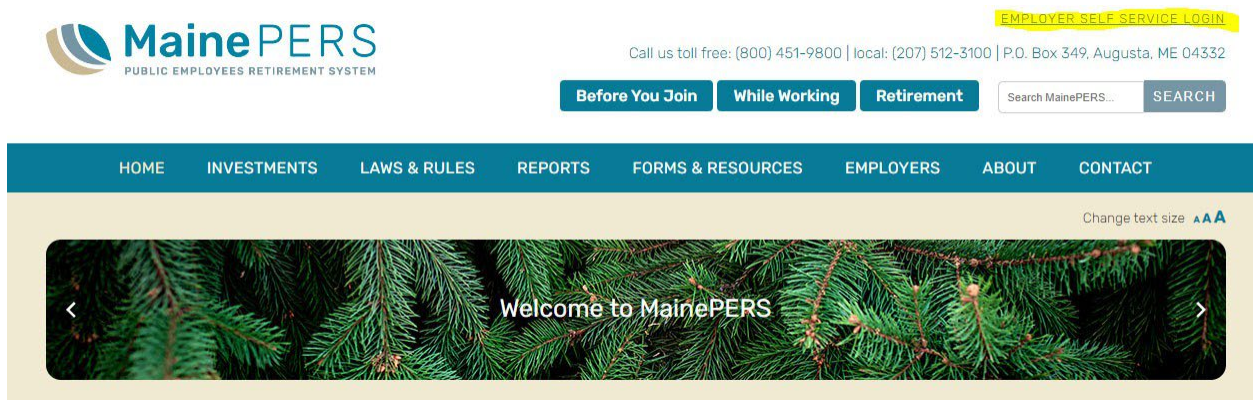
Employer Self-Service

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.mainebers.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**.

A screenshot of the Employer Self-Service Login form. The form is set against a blue background. It contains two input fields: 'User:' with the text 'TC999_MAnderson' and 'Password:' with masked characters. Below the password field is a red-bordered 'Log In' button. At the bottom of the form, there are links for 'Forgot User' and 'Forgot Password'. The footer of the form displays 'Version 10.0-ess QA v 0.36' and the 'Vitech V3' logo.

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.

User Device Registration

 In order to protect access to your account, we require you to select an email or a phone number to receive a verification code.

☒ Wi*****@mainepers.org

☐ (***)-***-3381

☐ Send me a Text Message

☐ Call me on this number

☐ (***)-***-3310


☐ Send me a Text Message

☐ Call me on this number

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**.

User Device Registration

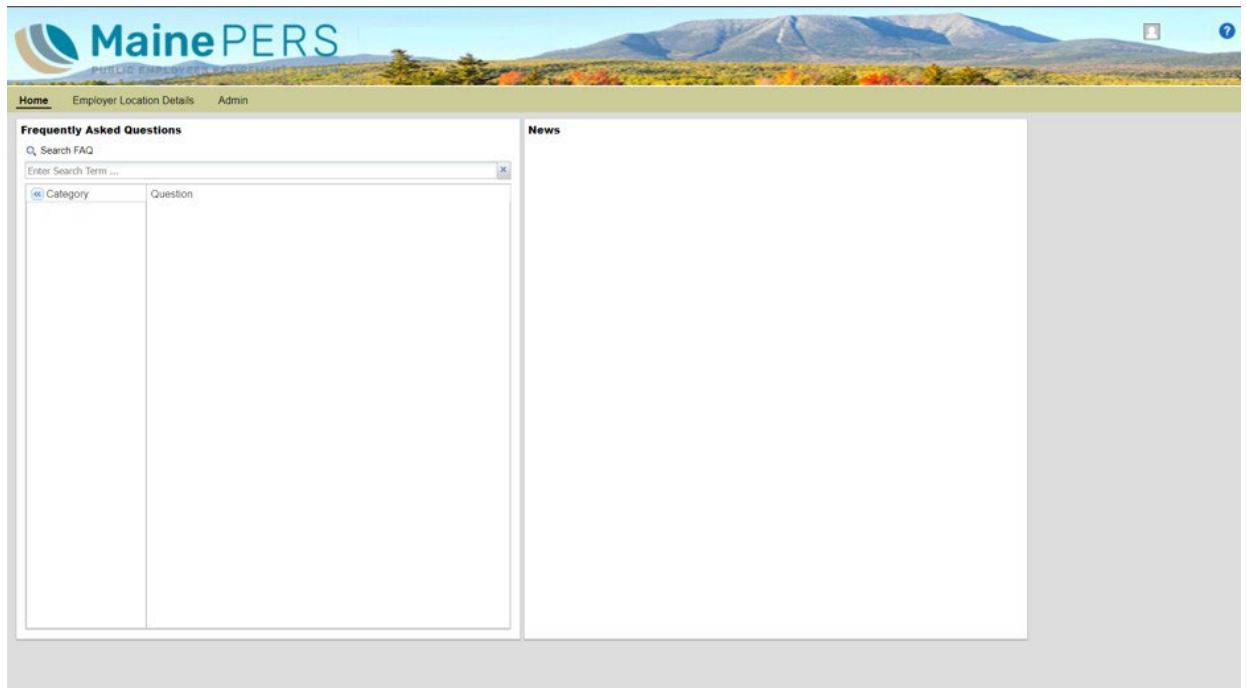
 A verification code has been sent to you. This code will be valid for 15 minutes.

14 : 47

Type code here

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).

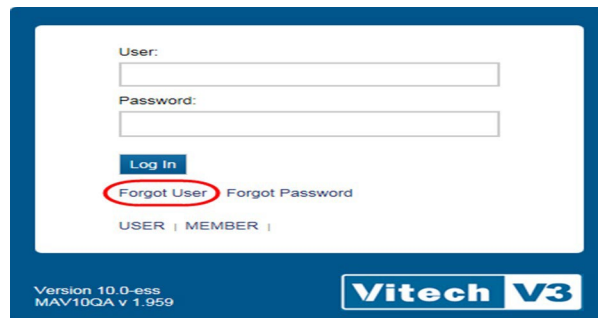
1. Select **Logout**.



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.

A screenshot of the ESS Login window. It has a blue header and footer. The main area is white and contains two input fields for 'User:' and 'Password:'. Below these fields are two buttons: 'Log In' and 'Forgot User'. The 'Forgot User' button is circled in red. To the right of 'Forgot User' is the text 'Forgot Password'. At the bottom of the main area, there is a link 'USER | MEMBER |'. The footer contains the text 'Version 10.0-ess MAV10QA v 1.959' and the 'Vitech V3' logo.

The *Forgot User Name* pop-up displays.

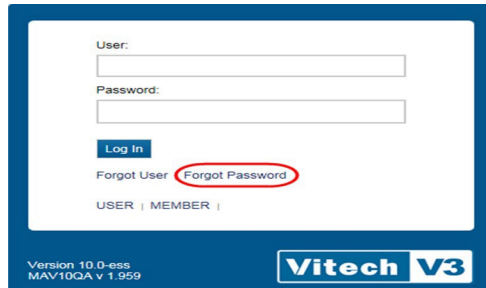
A screenshot of the 'Forgot User Name' pop-up window. It has a blue header with the title 'Forgot User Name'. The main area is white and contains the text 'Please enter your email address and your User Name will be emailed to you.' Below this text is an input field for 'Email Address:'. At the bottom right of the pop-up, there are two buttons: 'Ok' and 'Cancel'. The 'Ok' button is circled in red.

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

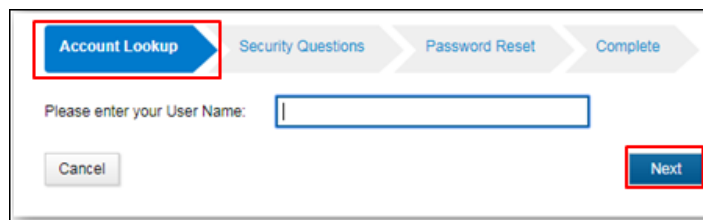
The steps to retrieve a forgotten password are as follows:

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



The screenshot shows the ESS Login window. It has a blue header and footer. The footer contains the text "Version 10.0-ess MAV10QA v 1.959" and the "Vitech V3" logo. The main content area has a white background. It contains a "User:" label and a text input field, a "Password:" label and a text input field, a "Log In" button, a "Forgot User" link, and a "Forgot Password" link which is circled in red. At the bottom, there are links for "USER" and "MEMBER".

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



The screenshot shows a pop-up window with a white background. At the top, there are four tabs: "Account Lookup", "Security Questions", "Password Reset", and "Complete". The "Account Lookup" tab is highlighted with a red box. Below the tabs, there is a label "Please enter your User Name:" followed by a text input field. At the bottom left is a "Cancel" button, and at the bottom right is a "Next" button, which is also highlighted with a red box.

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

The *Security Questions* tab displays.



The screenshot shows a pop-up window with a white background. At the top, there are four tabs: "Account Lookup", "Security Questions", "Password Reset", and "Complete". The "Security Questions" tab is highlighted with a red box. Below the tabs, there is a label "Please answer the security questions:". Underneath, there is a label "Select First Security Question:" followed by the text "What is your mothers maiden name?". Below that is a label "Enter Answer to First Question" followed by a text input field, which is highlighted with a red box. At the bottom left is a "Cancel" button, and at the bottom right are "Back" and "Next" buttons, with the "Next" button highlighted with a red box.

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**.

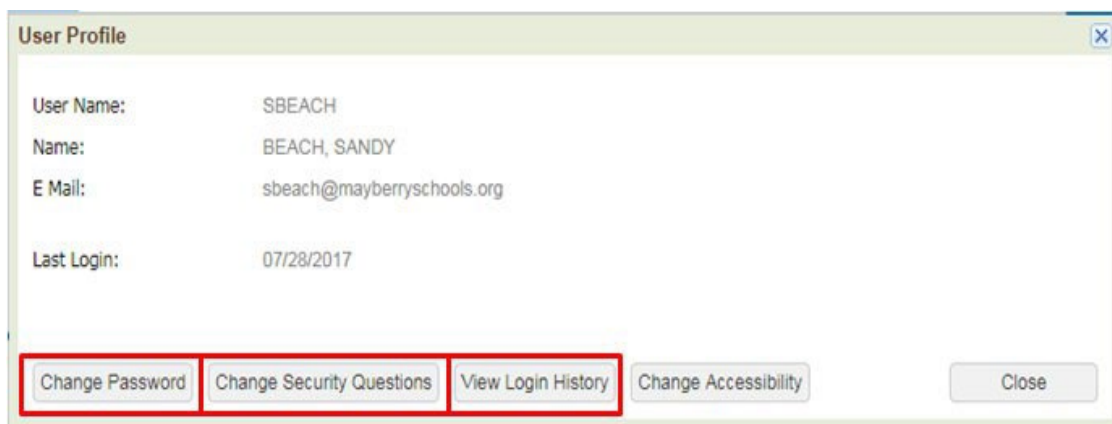
The *Password Reset* tab displays. And, you are sent an email confirming that your password has been changed.


ACCESSING THE USER PROFILE

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



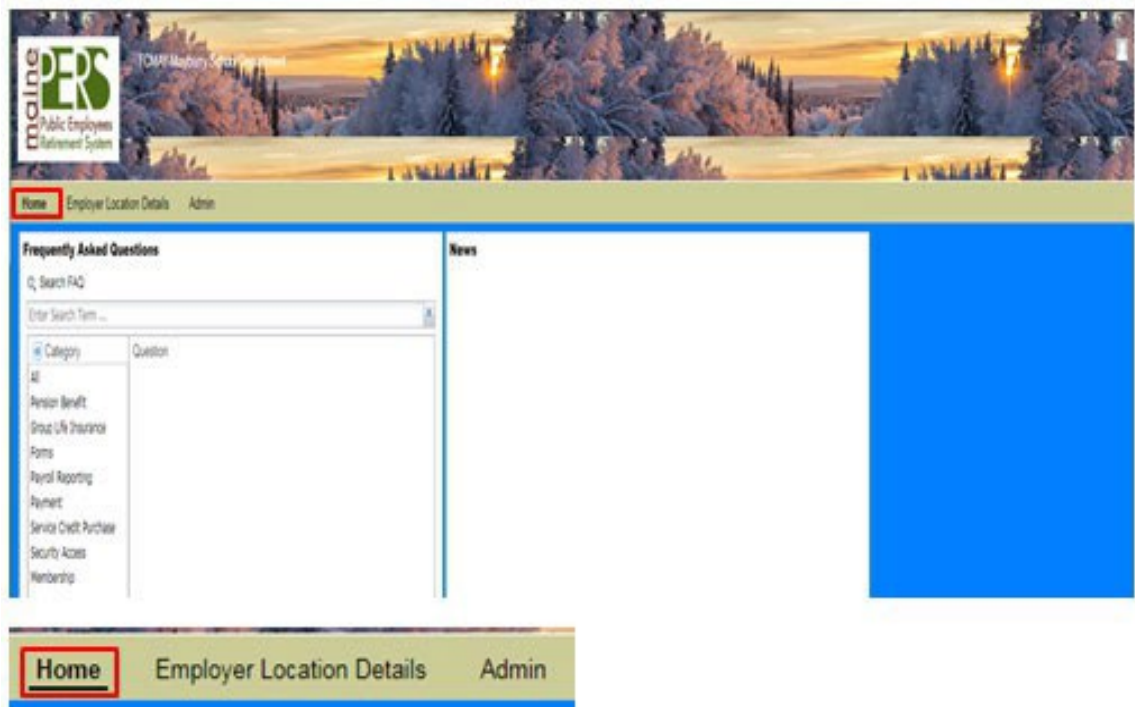
Changing a Password/Changing Security Questions/View Login History



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.

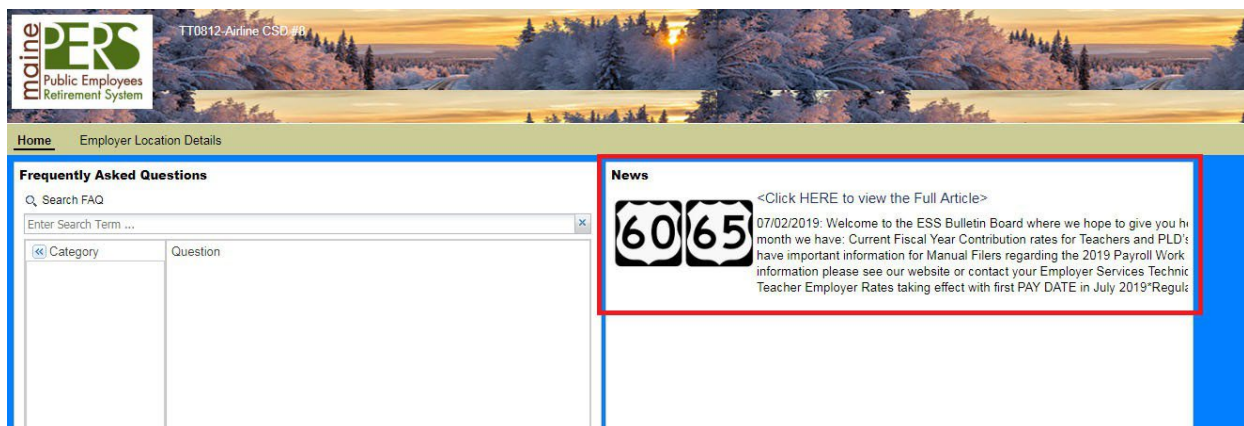
HOME TAB

- View *Frequently Asked Questions*



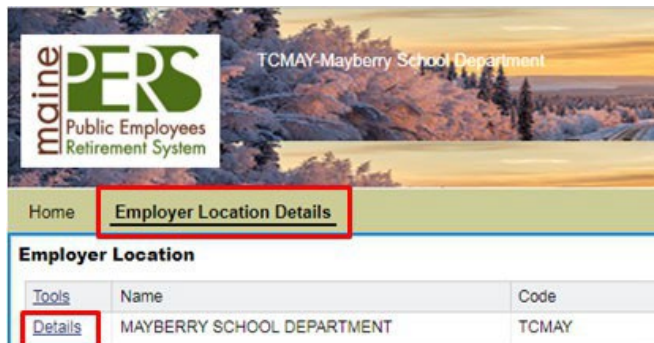
- View *News*

- Check here regularly for important information and updates from MainePERS

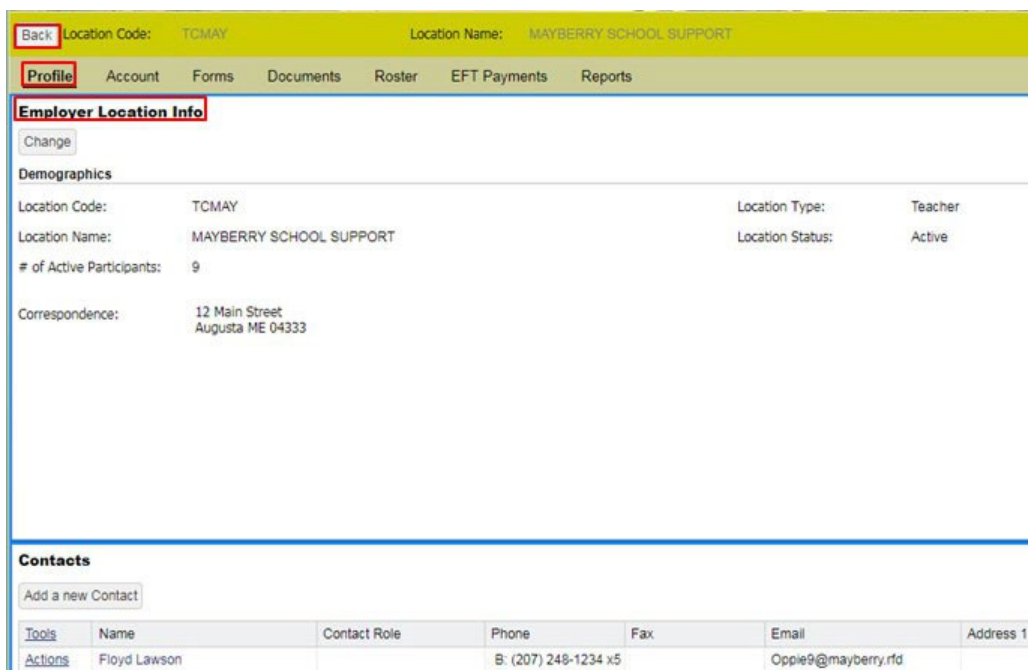


EMPLOYER LOCATION DETAILS TAB

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

[Back](#) Location Code: TCMAY Location Name: MAYBERRY SCHOOL DEPARTMENT

[Profile](#) [Account](#) [Forms](#) [Documents](#) [Roster](#) [EFT Payments](#) [Reports](#)

Employer Location Info
[Change](#)

Demographics

Location Code:	TCMAY	Location Type:	Teacher
Location Name:	MAYBERRY SCHOOL DEPARTMENT	Location Status:	Active
# of Active Participants:	9		

Contacts
[Add a new Contact](#)

Tools	Name	Contact Role	Phone	Fax	Email	Address 1
Actions	Sandy Beach		B: (207) 512-3228		deedee.love@mainepers.org	
Actions	Opi Taylor		H: (207) 555-5555		opi.taylor@mainepers.org	

PROFILE TAB

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

Updating Employer Location Demographics

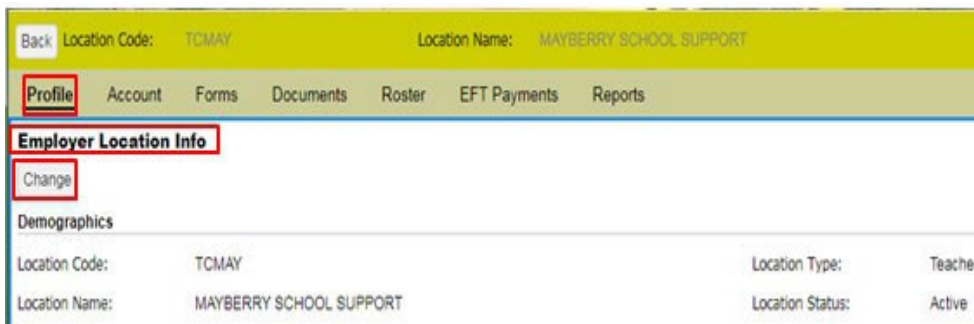
You can update the demographics of your employer by navigating to the **Employer Location Details** section by clicking on the **Details** link. Then, at the *Profile* tab click **Change**, which generates an editable Employer Location Info window.

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.

The screenshot shows the 'Employer Location Info' form. The 'Demographics' section includes fields for Location Code (TOMAY), Location Name (MAYBERRY SCHOOL SUPPORT), and # of Active Participants (9). The 'Correspondence' section shows the current address: 2 Main Street, Augusta ME 04333. An 'Edit Correspondence Address' pop-up is open, showing the same address and allowing for edits. The pop-up has fields for Address 1, Address 2, City, State, Zip, Country, and Effective Date. The 'OK' button is highlighted.

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

A close-up of the 'Edit Correspondence Address' pop-up. The 'OK' button is highlighted with a red box.

6. Click **Save**.

The screenshot shows the 'Employer Location Info' form after the address has been updated. The 'Correspondence' section now shows the new address: 12 Main Street, Augusta ME 04333. The 'Save' button is highlighted with a red box.

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

The screenshot shows the 'Employer Location Info' form with a confirmation message: 'Please verify and click 'Confirm' to permanently save the changes.' The 'Confirm' button is highlighted with a red box.

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 screenshot shows the 'Profile' tab selected in the top navigation bar. Below it, the 'Employer Location Info' section is visible, including a 'Change' button and demographic details like 'Location Code: TCMAY', 'Location Name: MAYBERRY SCHOOL SUPPORT', '# of Active Participants: 9', and 'Correspondence: 12 Main Street, Augusta ME 04333'. At the bottom, the 'Contacts' section is highlighted, showing an 'Add a new Contact' button and a table with columns 'Tools', 'Name', and 'Contact Role'. The table currently lists 'Floyd Lawson'.

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

The screenshot shows the 'New Contact' wizard with three steps: '1 New Contact Search', '2 Enter Details', and '3 Confirm'. The 'New Contact Search' step is active. It prompts the user to 'Please search to ensure that this contact doesn't already exist in V3's world.' There is a search input field containing 'taylor, andy' and a 'Search' button. Below the search field, a table titled 'Possible Matches' shows 'No matches found.' At the bottom, there are buttons for 'Add Individual', 'Add Institution', 'Cancel', and 'Next'.

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.

The screenshot shows the 'New Contact' dialog box with the 'Enter Details' sub-tab selected. The sub-tab is highlighted with a blue arrow and the number 2. The 'Confirm' sub-tab is also visible with the number 3. The form contains the following fields: Prefix (dropdown), First Name (text), Middle Name (text), Last Name (text), Suffix (dropdown), Contact Role (dropdown), Home Phone (text), Mobile Phone (text), Business Phone (text), Ext. (text), Primary Fax (text), Email (text), Correspondence (text), and Payment (text). The 'Next' button is highlighted with a red box.

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.

The screenshot shows the 'New Contact' dialog box with the 'Confirm' sub-tab selected. The sub-tab is highlighted with a blue arrow and the number 3. The 'Enter Details' sub-tab is also visible with the number 2. The form contains the following fields: Prefix (dropdown), First Name (text), Middle Name (text), Last Name (text), Suffix (dropdown), Contact Role (dropdown), Business Phone (text), Ext. (text), Email (text), Correspondence (text), and Payment (text). The 'Confirm' button is highlighted with a red box.

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 screenshot shows the 'Employer Location Info' page for 'MAYBERRY SCHOOL DEPARTMENT'. The 'Profile' tab is selected. Below the 'Demographics' section, there is a 'Contacts' section with a table listing contacts. The 'Actions' button for 'Sandy Beach' is highlighted, and a pop-up menu is displayed with 'Details' selected.

Tools	Name	Contact Role	Phone	Fax	Email	Address 1
Actions	Sandy Beach		B: (207) 512-3228		deedee.love@mainepers.org	
Actions	Opi Taylar		H: (207) 555-5555		opi.taylor@mainepers.org	

Pop-up menu for Sandy Beach:

- Actions
- Details
- Delete
- Spade
- Actions
- Opi Taylar

The appropriate pop-up displays.

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

The screenshot shows the 'Employer Location Info' page with the 'Contacts' pop-up open. The 'Change' button in the upper left corner of the pop-up is highlighted. The pop-up displays the contact details for 'Sandy Beach'.

Tools	Name	Contact Role	Phone	Fax
Actions	Gomer Pyle		B: (207) 249-1234	
Actions	Sandy Beach		B: (207) 512-3228	
Actions	Sammy Spade		B: (207) 249-9999	
Actions	Opi Taylar		H: (207) 555-5555	

Pop-up details for Sandy Beach:

- Change
- Profile
- First Name: Sandy
- Middle Name:
- Last Name: Beach
- Suffix:
- Business Phone: (207) 512-3228
- Email: sbeach@mayberryschools.org
- Contact Role:
- Correspondence: 123 Mayberry Lane, Augusta ME 04330
- Close

- Click in the field you wish to update.
The appropriate pop-up displays.

The screenshot shows the 'Employer Location Info' page for 'MAYBERRY SCHOOL DEPARTMENT'. A 'Contacts' pop-up is open, showing contact details for 'Sandy Beach'. A red box highlights the 'Correspondence' field in the contact details. Another red box highlights the 'New Correspondence Address' dialog, which is open and shows fields for 'Address 1', 'Address 2', 'City', 'State', 'Zip', 'County', 'Country', 'Effective Date', and 'Address Source'.

- Make the necessary updates and click OK.

The screenshot shows the 'Edit Correspondence Address' dialog. The 'OK' button is highlighted with a red box. The dialog contains the following information:

- Inserted By: DLOVE on 05/03/2017
- Address 1: 150 College Ave
- Address 2:
- City: Chelsea
- State: ME
- Zip: 04330
- County: KENNEBEC
- Country: United States
- Effective Date: 05/03/2017
- Address Source: Employer

- Click Save

The screenshot shows the 'Contacts' pop-up. The 'Correspondence' field is highlighted with a red box and contains the text '321 Mayberry Lane Augusta ME 04330'. The 'Save' button is also highlighted with a red box.

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

Contacts [X]

Please verify and click 'Confirm' to permanently save the changes.

Prefix: Contact Role:

First Name: Sandy

Middle Name:

Last Name: Beach

Suffix:

Business Phone: (207) 512-3228 Ext:

Email: sbeach@mayberryschools.org

Correspondence: 321 Mayberry Lane
Augusta ME 04330

Cancel Back **Confirm**

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 Tylar		H: (207) 555-5555		opi.taylor@mainepers.org	

ACCOUNT TAB

Profile **Account** Forms Documents Roster EFT Payments Reports

Account

Trans Type: All
 Status: Open
 Report Status: All

Upload File File History
 Schedule Payment Payment History

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	09/29/2017	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	09/29/2017	2694630	Work Report Adjustment	Adjust Comp & EES Beauchesne, Adams & Loo...	Open	Released	10/31/2017	(\$185.58)
Actions	09/29/2017	2695402	Work Report Adjustment	Adjust incorrect Comp & EES Clomeil, County, C...	Open	Released	10/31/2017	(\$363.65)
Actions	09/29/2017	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	09/29/2017	2694593	Work Report Adjustment	Adjust incorrect ComprEES Sasseville, Hood, D...	Open	Released	10/31/2017	(\$2,492.91)
Actions	09/29/2017	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.

The screenshot shows the 'Account' tab interface. At the top, there's a header bar with 'Back', 'Location Code: TCMAY', and 'Location Name: MAYBERRY SCHOOL DEPARTMENT'. Below this is a navigation bar with tabs: 'Profile', 'Account' (highlighted), 'Forms', 'Documents', 'Roster', 'EFT Payments', and 'Reports'. The 'Account' section has three filter dropdowns: 'Trans Type' (set to 'All'), 'Status' (set to 'Open'), and 'Report Status' (set to 'All'). To the right of these filters are buttons for 'Upload File', 'File History', 'Schedule Payment', and 'Payment History'. Below the filters is a table with the following columns: 'Tools', 'Activity Date', 'Trans #', 'Trans Type', 'Trans Identifier', 'Trans Status', 'Report Status', 'Due Date', 'Balance', 'Debit', and 'C...'. The table contains two rows of transaction data.

Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance	Debit	C...
	03/01/2017	2661645	Work Report	04/17/2017 TCMAY*	Open	Prebill	04/17/2017	\$0.00	\$0.00	\$...
	04/01/2017	2661646	Work Report	05/15/2017 TCMAY*	Open	Prebill	05/15/2017	\$0.00	\$0.00	\$...

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 screenshot shows the 'Account' tab interface, similar to the previous one. The table now has an 'Actions' column. The first row of data has an 'Actions' button highlighted with a red box. The second row of data has a 'Details' button highlighted with a red box. The table columns are: 'Tools', 'Activity Date', 'Trans #', 'Trans Type', 'Trans Identifier', 'Trans Status', 'Report Status', 'Due Date', 'Balance', 'Debit', and 'C...'. The table contains two rows of transaction data.

Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance	Debit	C...
Actions	04/01/2017	2674301	Work Report	05/15/2017 TCMAY	Open	Prebill	05/15/2017	\$0.00	\$0.00	\$...
Details	05/15/2017	2674311	Work Report	06/15/2017 TCMAY*	Open	Prebill	06/15/2017	\$37.42	\$3,037.42	(\$...

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

Profile

Account

Forms

Documents

Roster

EFT Payments

Reports

Account

Trans Type: All

Status: Open

Report Status: All

Upload File

File History

Schedule Payment

Payment History

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 Clomei, 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	09/31/2017	(\$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.

The screenshot shows the 'Account' page for TCMAY. It includes a navigation bar with 'Profile', 'Account', 'Forms', 'Documents', 'Roster', 'EFT Payments', and 'Reports'. The 'Account' section has filters for 'Trans Type', 'Status', and 'Report Status'. Below these are buttons for 'Upload File', 'File History', 'Schedule Payment', and 'Payment History'. A table lists transactions with columns: Tools, Activity Date, Trans #, Trans Type, Trans Identifier, Trans Status, Report Status, Due Date, Balance, Debt, and C... The 'Tools' column contains a dropdown menu with 'Actions', 'Details', 'Edit/View', and 'Submit'. The 'Details' option is highlighted with a red box.

Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance	Debt	C...
Actions	05/01/2017	2677054	Work Report	05/15/2017 TCMAY*	Open	Prebil	05/15/2017	\$0.00	\$0.00	\$...
Details	17	2677057	Work Report	09/15/2017 TCMAY*	Open	Prebil	09/15/2017	\$0.00	\$0.00	\$...
Edit/View	17	2677056	Work Report	05/15/2017 TCMAY*	Open	Prebil	05/15/2017	\$0.00	\$0.00	\$...
Submit	17	2677055	Work Report	07/17/2017 TCMAY*	Open	Prebil	07/17/2017	\$0.00	\$0.00	\$...

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

The screenshot shows the 'Transaction Details' pop-up window. It has a 'Close' button at the top. The main section displays transaction information: Employer (TCMAY Mayberry School Department), Employer Location (TCMAY: MAYBERRY SCHOOL DEPARTMENT), Trans # (2677054), Identifier (05/15/2017 TCMAY*), Inserted Date (05/01/2017), Updated Date (05/01/2017), and Status (Open). Below this is a 'Transaction' section with a 'Type' dropdown set to 'Work Report'. It lists various payment types with their amounts: Pre-Retirement (0.00), SCP Payments (0.00), ER Contributions (0.00), UAL Contributions (0.00), Administrative Revenue (0.00), Cash Fund (0.00), Total (\$0.00), and Charge Type. At the bottom is a 'Details' section with 'Show Funds' and 'Show Fund Groups' buttons. Below these is a table with columns: Tools, Activity Date, Type, Identifier, EEC, ERC, REV, Total Amount, Created By, and St. The table contains one row with data: 05/01/2017, Original, 05/15/2017 TCMAY*, \$0.00, \$0.00, \$0.00, \$0.00, DLOVE on 05/01/2017, and Ac.

Tools	Activity Date	Type	Identifier	EEC	ERC	REV	Total Amount	Created By	St
	05/01/2017	Original	05/15/2017 TCMAY*	\$0.00	\$0.00	\$0.00	\$0.00	DLOVE on 05/01/2017	Ac

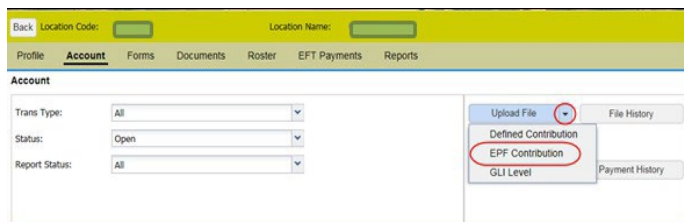
- **Transaction Section:** Shows information about that transaction in its current state, including the **Type** of transaction, the payment type (Pre-Retirement contributions, ER contributions), **Identifier** information, and the **Due Date**.
- **Details Section:** Shows the history of the transaction
- **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.

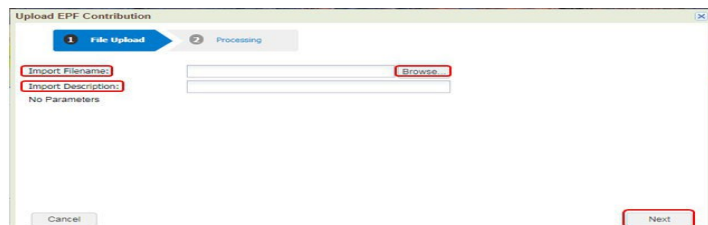
To upload an EPF Contribution File:

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



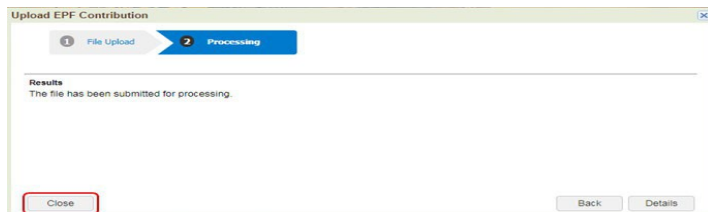
The *Upload EPF Contribution* pop-up displays.

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.



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

The screenshot shows the 'Account' page with a yellow header bar. Below the header, there are tabs for Profile, Account, Forms, Documents, Roster, EFT Payments, and Reports. The 'Account' tab is selected. On the right side of the page, there are buttons for 'Upload File', 'File History', 'Schedule Payment', and 'Payment History'. The 'File History' button is highlighted with a red box.

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.

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

The screenshot shows the 'File History' window with a yellow header bar. Below the header, there are filters for File Definition, Date Range, and Status. A table lists the file history records. The first row is highlighted with a red box, showing a 'Ready' status. The 'Actions' link for this row is also highlighted with a red box.

Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start
Actions	5451	Ready	04/12/2017	EPF Contributi...	TCMAY 3-201...	Not Processed	04/12/2017
Validate	54466	Completed	03/29/2017	GLI Level	GLI Level 201...	Processed wit...	03/29/2017
Details							
Process							
Void							

- Click the **Actions** link for the EPF Contribution file you just uploaded.
- Select **Validate**.

The screenshot shows the 'File History' window with a yellow header bar. Below the header, there are filters for File Definition, Date Range, and Status. A table lists the file history records. The first row is highlighted with a red box, showing a 'Ready' status. The 'Actions' link for this row is also highlighted with a red box.

Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status
Actions	50453	Ready	11/08/2016	EPF Contributi...	EPF Contributi...	Not Processed
Validate	50452	Completed	11/08/2016	Defined Contri...	Defined Contri...	Processed Successfully
Details	50451	Completed	11/07/2016	GLI Level	test2	Processed with Exceptions
Process	50450	Completed	11/07/2016	GLI Level	test	Processed with Exceptions
Void						
Download						

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

- 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.

Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start	File Process Start
Actions	5451	Validated	04/12/2017	EPF Contributi...	TCMAY 3-201...	Validated with Errors	04/12/2017	04/12/2017
Actions	54466	Completed	03/29/2017	GLI Level	GLI Level 201...	Processed with Exceptions	03/29/2017	03/29/2017

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.

Tools	Import Header Id	Process Flag	Inserted Date	File Definition
Validate	43295	Validated	11/08/2016	EPF Contributi...
Details	43294	Completed	11/08/2016	EPF Contributi...
Process	43293	Validated	11/08/2016	EPF Contributi...
Void	43292	Validated	11/08/2016	EPF Contributi...
Download	43291	Validated	11/08/2016	EPF Contributi...
	43288	Completed	11/07/2016	EPF Contributi...

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

Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start	File Process Start
Actions	57105	Completed	08/30/2017	EPF Contributi...	TCMAY 5/201...	Processed Successfully	08/30/2017	08/30/2017

- 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 screenshot shows the 'Account' tab selected in the top navigation bar. On the right side of the page, there are several buttons: 'Upload File', 'File History' (circled in red), 'Schedule Payment', and 'Payment History'. On the left, there are dropdown menus for 'Trans Type' (set to All), 'Status' (set to Open), and 'Report Status' (set to All).

The *File History* screen displays.

The screenshot shows the 'File History' screen with a table of file records. The 'Tools' button is circled in red. The table has columns: Import Header Id, Process Flag, Inserted Date, File Definition, Import Description, Status, File Load Start, and File Process Start.

Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start	File Process Start
Actions	57107	Validated	09/05/2017	EPF Contributi...	TCMAY 6-2017	Validated with Errors	09/05/2017	09/05/2017

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

The screenshot shows the 'File History' screen with the 'Tools' menu open. The 'Reports' option is selected, and the 'Standard Import Report' option is highlighted. The table shows two records: one with status 'Validated with Errors' and another with status 'Processed with Exceptions'.

Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start
Export	16	Validated	04/12/2017	EPF Contributi...	TCMAY 3-201...	Validated with Errors	04/12/2017
View	66	Completed	03/29/2017	GLI Level	GLI Level 201...	Processed with Exceptions	03/29/2017

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.



Close

Standard Import Report

Print

Export

Standard Import Details Report
For 54470 TCMAY 3/2017

Parameters
Detailed Record Status: All
Sort By: Record Seq No

As Of Date: 04/24/2017
Generated On: 04/24/2017 16:58:44
Page 1 of 3

Import Record Seq No	Data String	Detail Record Status	Error Message
1	00272MAYBERRY SCHOOL DEPT125 sCHOOL sT. MAYBERRY NC 01234 TIM TAYLOR 207123456703282017OFIE VERSIONEPF 004 00272TCMAY 032017903021101TAYLOR, Validated Successfully ANDY 005465000 0101195011 Y0101 00420384 00321590000000000000000000000000 000000 D 03282017N D 11000000001 03282017N D 00272TCMAY 032017903021101TAYLOR, Validated Successfully ANDY 000200000 0101195017 YEX01 00100000 00076500000000000000000000000000 000000 D 03282017N D 11000000001 03282017N D 00272TCMAY 032017903021103TAYLOR, Validated Successfully BEA 000000000 0104195011 Y0207 00244000 00165500000000000000000000000000	Not Processed	
2			
3			
4			

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**

Close

Select Parameters

Import Header ID: 71169

Import Name: P0023 September 2018 Payroll file

Detail Record Status: --All--

Datastring View: Summary

Sort By: Summary

Schedule: ☐ ☐

Save as: ☐ Html

Comment:

Use Primary Datasource: ☐

Run

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

Close

Standard Import Report

Print

Export

Standard Import Details Report
For 54470 TCMAY 3/2017

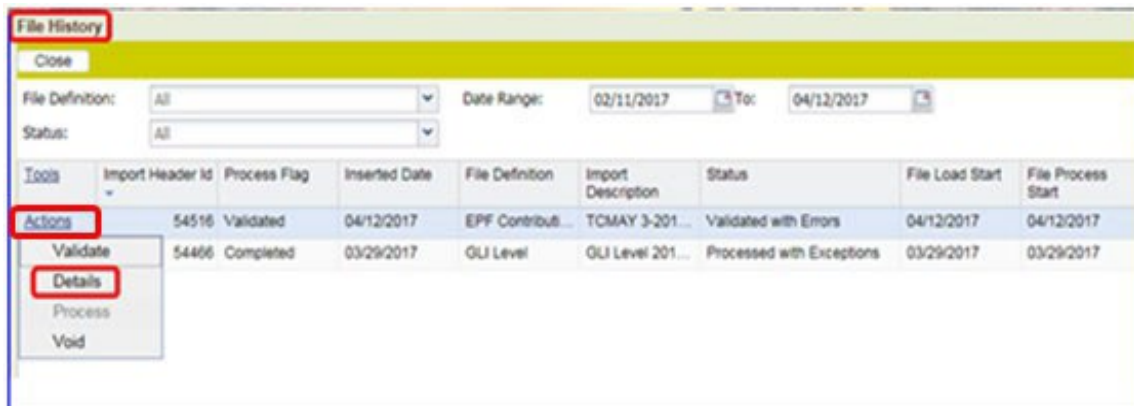
Parameters
Detailed Record Status: Validated with Errors
Sort By: Record Seq No

As Of Date: 04/25/2017
Generated On: 04/25/2017 10:03:15
Page 1 of 1

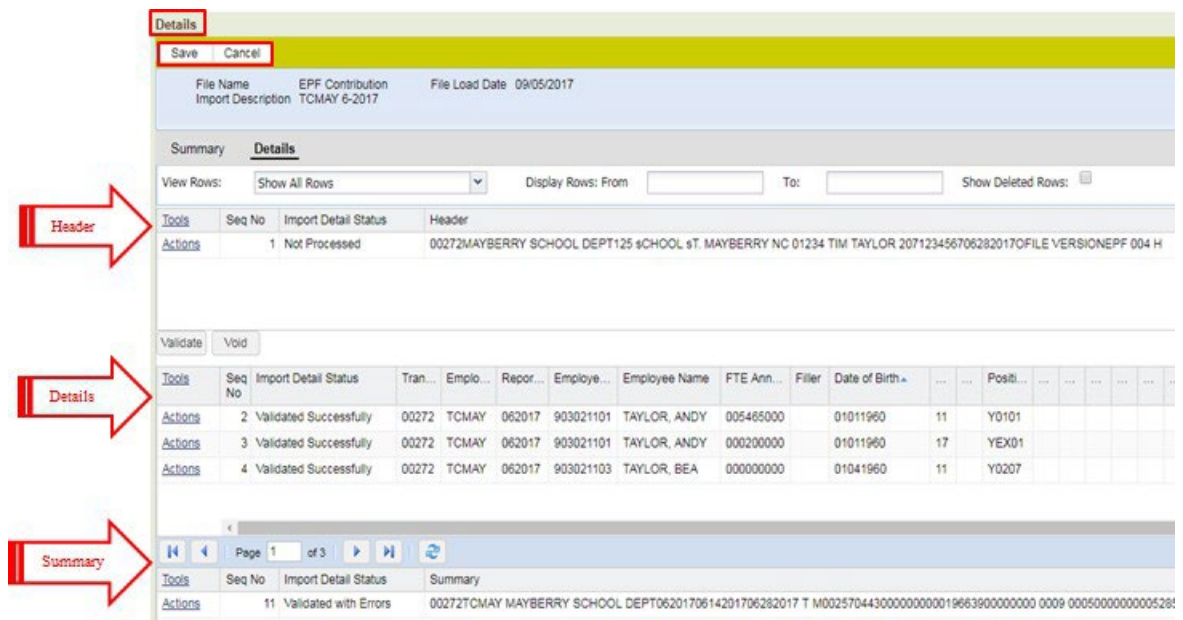
Import Record Seq No	Data String	Detail Record Status	Error Message
2	00272TCMAY 032017903021107CAMPBELL, OTIS 002400000 000000 D 03282017N D 00153000000000000000000000000000 000000 D 03282017N D	Error	D04 - SSN 903021107 does not match V3 participant's DCB.

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

The screenshot shows the 'Details' window with the 'View Rows' dropdown menu open. The 'Show Problem Rows' option is highlighted. The window also displays 'Save' and 'Cancel' buttons, and a table with columns 'File Name', 'EPF Contribution', and 'File Load Date'.

File Name	EPF Contribution	File Load Date
Import Description	TCMAY 5/2017 PR	

Summary Details

View Rows: Show All Rows Show Problem Rows

Tools Seq

Actions 1 Not Processed 00272MAYB

11. Highlight the row needing to be corrected.

The screenshot shows the 'Details' window with a table containing one row. The row is highlighted in red. The table has columns 'Tools', 'Seq No', 'Import Detail Status', 'Transmitter Code', and 'Employee'.

Tools	Seq No	Import Detail Status	Transmitter Code	Employee
Actions	8	Validated with Errors	00272	TCMAY

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

The screenshot shows the 'Details' window with the 'Tools' menu open. The 'View' option is highlighted. The window also displays 'Save' and 'Cancel' buttons, and a table with columns 'File Name', 'EPF Contribution', and 'File Load Date'.

File Name	EPF Contribution	File Load Date
Import Description	TCMAY 5/2017 PR	

Summary Details

View Rows: Show Problem Rows

Tools Seq No Import Detail Status

Actions 1 Not Processed

Validate Void

Tools Seq No Import Detail Status

Export

Modify

View

Revert Settings

Advanced Sort

Reports

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.

The screenshot displays the Maine PERS (Public Employees Retirement System) interface for the TCMAY-Mayberry School Department. The main window is titled "Details" and includes a "Save" button and a "Cancel" button. Below these, there are fields for "File Name", "EPF Contribution", and "File Load Date". The "File Load Date" is set to "07/31/2017".

The "Summary" tab is selected, showing a table with columns: "Seq No", "Import Detail Status", "Transmitter Code", and "Employer". The table contains two rows:

Seq No	Import Detail Status	Transmitter Code	Employer
1	Not Processed	00272MAYBERRY SCHOOL DEF	
8	Validated with Errors	00272	TCMAY

Below the table, there are "Validate" and "Void" buttons. At the bottom, there is a "Page 1 of 1" indicator and navigation buttons.

The "View Row Tool" window is open on the right side of the screen. It has a title bar with "View Row Tool" and a close button. The window contains a table with columns "Name" and "Value". The table lists various fields and their corresponding values:

Name	Value
Seq No	
Import Detail Status	Validated with Errors
Transmitter Code	00272
Employer Code	TCMAY
Reporting Month/Year	052017
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
Filler	
Filler	
Excess/Payback Status	
Filler	
Filler	
Filler	
Retirement Plan Partici...	Y
Filler	
Filler	
Earnable Compensation	00200000
Filler	
Employee Retirement C...	0015300
Additional Employee Re...	0000000
Time Paid	00000
Time Unit Code	C
Expected Full-time for ...	0000
Expected Weeks Per Year	00
Filler	
Filler	

The "View Row Tool" window has "OK" and "Cancel" buttons at the bottom.

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 0015300000000000000000C000000 000000 0 11000000001 06282017N D	Error	D8.4 - SSN 903021107 does not match V3 participant's DOB.

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.

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)

Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start	File Process Start
Actions	57152	Validated	08/03/2017	EPF Contribu...	TCMAY 4/201...	Validated with Errors	08/03/2017	08/03/2017
Validate	57151	Validated	07/31/2017	EPF Contribu...	TCMAY 5/201...	Validated with Errors	07/31/2017	08/02/2017
Details	57142	Completed	07/28/2017	EPF Contribu...	TCMAY 5/201...	Voided	07/28/2017	07/28/2017

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**.

Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status
Actions	57152	Validated	08/03/2017	EPF Contribu...	TCMAY 4/201...	Validated with Exceptions
Validate	57151	Validated	07/31/2017	EPF Contribu...	TCMAY 5/201...	Validated with Errors
Details	57142	Completed	07/28/2017	EPF Contribu...	TCMAY 5/201...	Voided

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

Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start
Actions	54476	Completed	04/24/2017	EPF Contribu...	TCMAY 3/2017	Processed Successfully	04/24/2017

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.**

export (14).pdf 1 / 1

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.

The screenshot shows the 'Account' tab in the ESS system. At the top, there are tabs for Profile, **Account**, Forms, Documents, Roster, EFT Payments, and Reports. Below the tabs, there are dropdown menus for Trans Type (All), Status (Open), and Report Status (All). To the right, there are buttons for Upload File, File History, Schedule Payment, and Payment History. Below these, there is a table with the following columns: Tools, Activity Date, Trans #, Trans Type, Trans Identifier, Trans Status, Report Status, Due Date, Balance, Debit, and C... The table contains one row of data: Actions, 05/01/2017, 2674281, Work Report, 07/17/2017 P0999*, Open, **Initial**, 07/17/2017, \$0.00, \$0.00, and \$... The 'Report Status' column is highlighted with a red box.

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)

The screenshot shows a dropdown menu for the 'Trans Identifier' field. The selected value is '06/15/2017 P0999*'. The field is highlighted with a blue box.

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

The screenshot shows the 'Account' tab in the ESS system. At the top, there are tabs for Profile, **Account**, Forms, Documents, Roster, EFT Payments, and Reports. Below the tabs, there are dropdown menus for Trans Type (All), Status (Open), and Report Status (All). To the right, there are buttons for Upload File, File History, Schedule Payment, and Payment History. Below these, there is a table with the following columns: Tools, Activity Date, Trans #, Trans Type, Trans Identifier. The table contains one row of data: **Actions**, 05/01/2017, 2677060, Work Report, 06/15/2017 P0999*. The 'Actions' dropdown menu is highlighted with a red box, and the 'Edit/View' option is selected.

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

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

Work Report Editor

Save Apply Cancel

Employer: City of Hallowell Report Type: Regular Report Period: 05/01/2017 - 05/31/2017 # of Participants: 3
 Employer Location: PERS - CITY OF HALLOWELL Report Status: Initial Identifier: 9031000 - 05/01/2017 PERSOP # of Rows: 3
 Report Source: Employee Date Received: 05/02/2017 Billing Type: Contributions Interest Date: 05/15/2017

Summary Detail Basis Summary

Exception Filter: Please Select

Add Member Delete Selected

Tools	Actions	SSN	Name	Start Date	Stop Date	Comp	EES	Ho	Days	Pay R	Pay Rate	PSC	POS	Plan Name	Rate Category	SCP	FTE Days	FTE Hrs	Wks/Yr	FTE Contract
Actions		903...	TAYLOR, ANDY	05/01/2017	05/31/2017	\$0.00	\$0.00				\$0.00	11	09901	PLD Regular A	REG	\$0.00				\$0.00
Actions		903...	TAYLOR, BEA	05/01/2017	05/31/2017	\$0.00	\$0.00				\$0.00	11	09901	PLD Regular A	REG	\$0.00				\$0.00
Actions		903...	TAYLOR, OPIE	05/01/2017	05/31/2017	\$0.00	\$0.00				\$0.00	11	09901	PLD Regular A	REG	\$0.00				\$0.00

Page Totals Report Totals \$0.00 \$0.00 0.00 0 \$0.00 \$0.00 \$0.00 0 0.00 0 \$0.00

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

Work Report Editor

Save Apply Cancel

Employer: Town of Hallowell Report Type: Regular Report Period: 05/01/2017 - 05/31/2017 # of Participants: 1
 Employer Location: PERS - TOWN OF HALLOWELL Report Status: Initial Identifier: 9031000 - 05/01/2017 PERSOP # of Rows: 1
 Report Source: Employee Date Received: 05/02/2017 Billing Type: Contributions Interest Date: 05/15/2017

Summary Detail Basis Summary

Exception Filter: Please Select

Add Member Delete Selected

Tools	Actions	SSN	Name	Start Date	Stop Date	Comp	EES	Hours	Days	Pay R	Pay Rate	PSC	POS	Plan Name	Rate
Actions		987-65-1234	BUTLER, BROOKLYNN	05/01/2017	05/31/2017	\$5,000.00	\$400.00			Con...	\$0.00	11	09901	PLD Regular A	REG

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

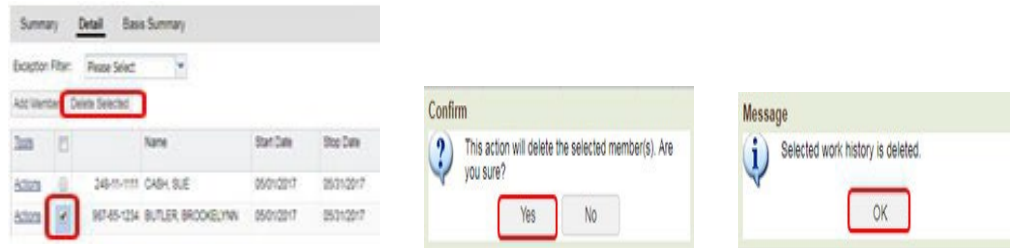
Add Member Delete Selected

Tools	Actions	SSN	Name	Start Date	Stop Date	Comp	EES
Actions		248-11-1111	CASH, SUE	05/01/2017	05/31/2017	\$0.00	\$0.00
Actions		987-65-1234	BUTLER, BROOKLYNN	05/01/2017	05/31/2017	\$5,000.00	\$400.00

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

Summary Detail Basic Summary																
Exception Filter: Please Select																
Add Member: Delete Selected																
Tools		Name	Start Date	Stop Date	Comp	EEB	Hours	Days	Pay R	Pay Rate	PSC	POS	Plan Name	Rate Category	SCP	FTE Day
Actions	<input type="checkbox"/>	245-11-1111 CASH-BUE	05/01/2017	05/01/2017	\$2,500.00	\$300.00	240.00		Hourly	\$1.25	11	09602	PL-2 Regular A	REG		40.00
Actions	<input type="checkbox"/>	907-45-1234 BUTLER BROOKLYNN	05/01/2017	05/01/2017	\$1,000.00	\$400.00			Con	\$1.00	11	09601	PL-2 Regular A	REG		

- 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'.



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

Work Report Editor

Save Apply Cancel

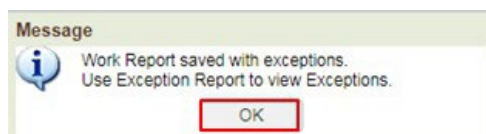
Employer: City of Mayberry

Employer Location: P0999 CITY OF MAYBERRY

Report Source: Employer

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

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



- If errors exist, errors must be resolved. If exceptions exist, exceptions must be reviewed for accuracy and resolved if necessary.
- To determine what errors and exceptions need correction or review, go to *Actions* then *Edit View*, which opens the *Work Report Editor*.

Back Location Code: P0999 Location Name: TOWN OF MAYBERRY

Profile **Account** Forms Documents Roster EFT Payments Reports

Account

Trans Type: All
Status: Open
Report Status: All

Tools	Activity Date	Trans #	Trans Type	Trans Identifier
Actions	05/01/2017	2677060	Work Report	06/15/2017 P0999*

Details
Edit/View
Submit

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

Work Report Editor

Save Apply Cancel

Employer: Town of Mayberry Report Type: Re
Employer Location: P0999 TOWN OF MAYBERRY Report Status: Init
Report Source: Employer Date Received: 08

Summary **Detail** Basis Summary

Exception Filter: Please Select

Add Member Delete Selected

Tools	Actions	SSN	Name
Actions	[Red icon]	248-31-1111	TAYLOR, OPETT
Actions	[Yellow icon]	987-65-1234	BUTLER, BROOKELYN
Actions	[Blue icon]	248-11-1111	CASH, SUE

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

Details

Details

Name: TAYLOR, OPETT SSN: 248-31-1111 Work Status: ACTIVE
Rate Category: REG Plan Name: PLD Regular A

Validation Warnings

Tools	Exception Reason	Validation Type
	SSN 248-31-1111 Comp is required.	Error
	SSN 248-31-1111 employee contributions submitted do not equal amount due \$0.00	Exception
	SSN 248-31-1111 employee retirement contributions without earnable compensation.	Error

***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'.

Back Location Code: P0999 Location Name: TOWN OF MAYBERRY

Profile **Account** Forms Documents Roster EFT Payments Reports

Account

Trans Type: All
 Status: Open
 Report Status: All

Tools	Activity Date	Trans #	Trans Type	Trans Identifier
Actions	05/01/2017	2677061	Work Report	06/15/2017 P0999*

Details
Edit/View
 Submit
 Delete

Work Report Editor










Save Apply Cancel

Employer: Town of Mayberry Report Type: Regular Report Period: 05/01/2017 - 05/31/2017
 Employer Location: P0999 TOWN OF MAYBERRY Report Status: Initial Identifier: #2677061 - 06/15/2017
 Report Source: Employer Date Received: 06/06/2017 Billing Type: Contributions

Summary **Detail** Basis Summary

Exception Filter: Please Select

Add Member Delete Selected

Tools	Actions	SSN	Name	Start Date	Stop Date	Comp	EES
Actions	  	248-31-1111	TAYLOR, OPETT	05/01/2017	05/31/2017	<input type="text" value="300"/>	\$4,000.00
Actions	  	967-65-1234	BUTLER, BROOKELYN	05/01/2017	05/31/2017	\$500.00	\$400.00
Actions	  	248-11-1111	CASH, SUE	05/01/2017	05/31/2017	\$2,500.00	\$200.00

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

Back Location Code: P0999 Location Name: TOWN OF MAYBERRY

Profile **Account** Forms Documents Roster EFT Payments Reports

Account

Trans Type: All
 Status: Open
 Report Status: All


Upload File File History
 Schedule Payment Payment History

Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance	Debit	C...
Actions	05/01/2017	2677061	Work Report	06/15/2017 P0999*	Open	Initial	06/15/2017	\$2,187.50	\$2,187.50	\$...

Details
Edit/View
Submit
 Delete

The following pop-up displays:

Message

 The selected work report was submitted successfully.

OK

18. Select **OK**.

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

Back Location Code: P0999 Location Name: CITY OF MAYBERRY

Profile **Account** Forms Documents Roster EFT Payments Reports

Account

Trans Type: All
 Status: Open
 Report Status: All

Upload File File History
 Schedule Payment Payment History

Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance	Debit	Credit
Actions	07/01/2017	2674282	Work Report	08/15/2017 P0999*	Open	Prebill	08/15/2017	\$640.00	\$640.00	\$0.00

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.**

export (14).pdf 1 / 1

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

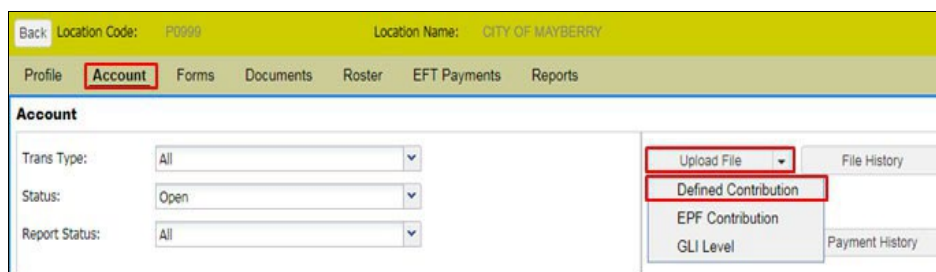
Total due:	\$ 3,358.55
------------	-------------

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.

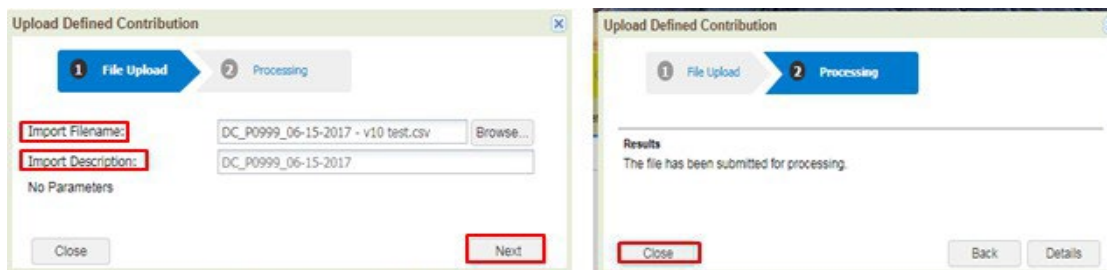
To upload a MaineSTART Defined Contribution File:

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.**

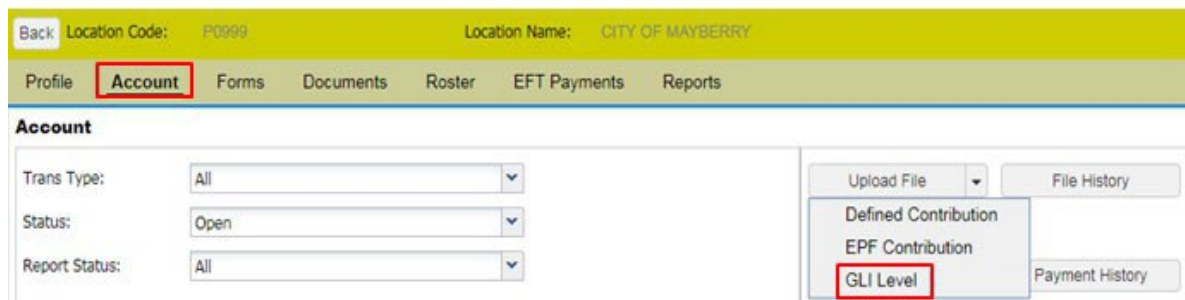
UPLOADING A GLI LEVEL FILE

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:

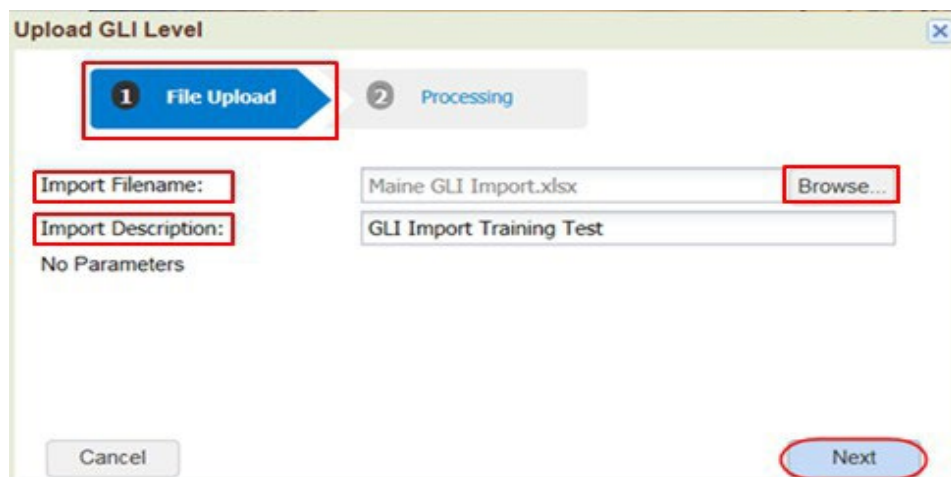
Navigate to the *Account* tab.

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



The screenshot shows the 'Account' tab selected in a navigation menu. The 'Upload File' dropdown menu is open, and 'GLI Level' is highlighted. The 'Account' section contains filters for 'Trans Type' (All), 'Status' (Open), and 'Report Status' (All). Other buttons visible are 'File History' and 'Payment History'.

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 window shows a progress bar with '1 File Upload' and '2 Processing'. The 'Import Filename' field contains 'Maine GLI Import.xlsx' and the 'Import Description' field contains 'GLI Import Training Test'. The 'Browse...' button is next to the filename field. The 'Next' button is highlighted.

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 screenshot shows the 'Account' tab selected in a navigation bar. Below the navigation bar, there are three dropdown menus: 'Trans Type' (set to 'All'), 'Status' (set to 'Open'), and 'Report Status' (set to 'All'). To the right of these menus, there are four buttons: 'Upload File', 'File History' (highlighted with a red box), 'Schedule Payment', and 'Payment 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 screenshot shows the 'File History' window. At the top, there is a 'Close' button. Below it, there are two dropdown menus: 'File Definition' (set to 'All') and 'Status' (set to 'All'). To the right of these, there is a 'Date Range' section with 'From' and 'To' date pickers, both set to '01/28/2017'. Below this, there is a table with the following columns: 'Tools', 'Import Header Id', 'Process Flag', 'Inserted Date', 'File Definition', 'Import Description', 'Status', 'File Load Start', 'File Process Start', 'Duration', and 'Rows Loaded'. The table contains one row with the following data: '54466', 'Ready', '03/29/2017', 'GLI Level', 'GLI Level 201...', 'Not Processed', '03/29/2017', an empty cell, an empty cell, and '8'. Below the table, there is an 'Actions' link. A dropdown menu is open under 'Actions', showing the following options: 'Validate' (highlighted with a red box), 'Details', 'Process', 'Void', and 'Download'.

The Process Flag column updates with a status of Validated

The screenshot shows the 'File History' window. At the top, there is a 'Close' button. Below it, there are two dropdown menus: 'File Definition' (set to 'All') and 'Status' (set to 'All'). To the right of these, there is a 'Date Range' section with 'From' and 'To' date pickers, both set to '01/28/2017'. Below this, there is a table with the following columns: 'Tools', 'Import Header Id', 'Process Flag', 'Inserted Date', 'File Definition', 'Import Description', and 'Sta'. The table contains one row with the following data: '54466', 'Validated', '03/29/2017', 'GLI Level', 'GLI Level 201...', and 'Val'. Below the table, there is an 'Actions' link. A dropdown menu is open under 'Actions', showing the following options: 'Validate', 'Details', 'Process' (highlighted with a red box), 'Void', and 'Download'.

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**.


File History						
Close						
File Definition:	All	Date Range:	03/10/2016	To:	09/08/2017	
Status:	All					
Tools	Import Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status
Actions	54573	Completed	02/27/2017	GLI Level	2017 GLI LEVELS	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

Back Location Code: TCMAY Location Name: MAYBERRY SCHOOL

Profile Account Forms Documents Roster EFT Payments **Reports**




Reports

 **Generate Report**

Generate Report

1 Report Type 2 Report Parameters 3 Confirm

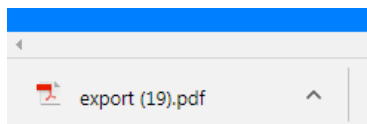
Select one of the following reports for ad hoc generation

 ESS GLI Level Report	Select
 Employer Remittance Report	Select
 GLI Invoice	Select

Cancel **Next**

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.



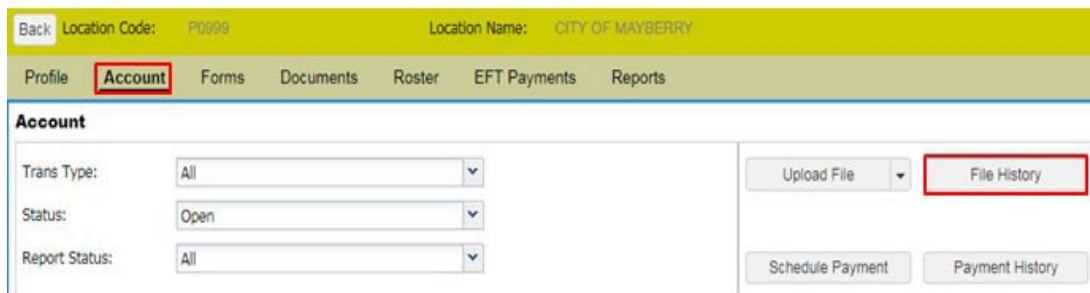
GLI Level
Start Date = 04/01/2017 for TCMAY TCMAY

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.

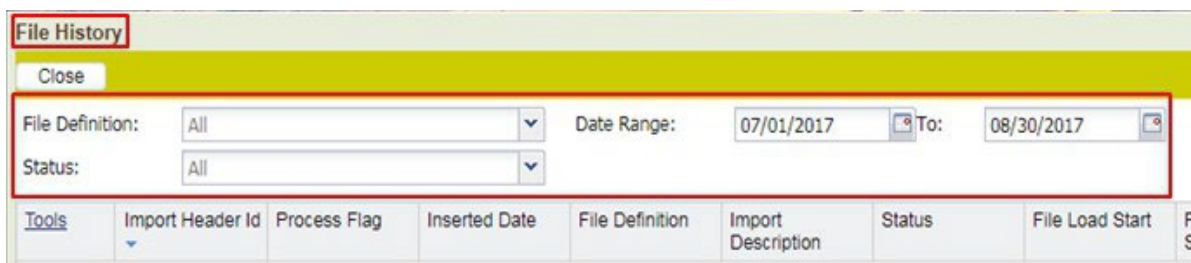
1. Navigate to the *Account* tab and click *File History*.



The screenshot shows the 'Account' tab selected in a navigation bar. Below the navigation bar, there are three dropdown menus for 'Trans Type' (set to 'All'), 'Status' (set to 'Open'), and 'Report Status' (set to 'All'). To the right of these menus, there are four buttons: 'Upload File', 'File History' (highlighted with a red box), 'Schedule Payment', and 'Payment History'.

The *File History* pop-up displays.

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



The screenshot shows the 'File History' pop-up window. It has a 'Close' button at the top left. Below it, there are two filter sections: 'File Definition' with a dropdown set to 'All', and 'Status' with a dropdown set to 'All'. To the right of these, there is a 'Date Range' section with two date pickers: '07/01/2017' and '08/30/2017'. Below the filters, there is a table with the following headers: 'Tools', 'Import Header Id', 'Process Flag', 'Inserted Date', 'File Definition', 'Import Description', 'Status', and 'File Load Start'.

'ACTIONS' OPTIONS IN THE FILE HISTORY POP-UP

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

The screenshot shows the 'File History' pop-up window. At the top is a yellow bar with a 'Close' button. Below this are filters for 'File Definition' (set to 'All'), 'Date Range' (from '07/01/2017' to '08/30/2017'), and 'Status' (set to 'All'). A table lists file history entries with columns: Tools, Import Header Id, Process Flag, Inserted Date, File Definition, Import Description, Status, and File Load Start. One entry is visible with 'Import Header Id' 57104, 'Process Flag' 'Ready', 'Inserted Date' '08/30/2017', 'File Definition' 'EPF Contributi...', 'Import Description' 'TCMAY 4/201...', 'Status' 'Not Processed', and 'File Load Start' '08/30/2017'. A red box highlights the 'Actions' button in the 'Tools' column, which has opened a dropdown menu with options: 'Validate', 'Details', 'Process', and 'Void'.

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**.

Back Location Code: TCMAY Location Name: MAYBERRY SCHOOL SUPPORT

Profile **Account** Forms Documents Roster EFT Payments Reports

Account

Trans Type: All
Status: Open
Report Status: All

Upload File File History

Schedule Payment **Payment History**

Tools Activity Date Trans # Trans Type Trans Identifier Trans Status Report Status Due Date

The *Payment History* pop-up displays.

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

Payment History

Close

Schedules History

Tools Bank Account Description Frequency Payment Date Payment Amount

Actions MainePERS Contributions 6/2017 PR payment One-Time Payment 09/08/2017 \$1,910.46

4. Click the **History** tab.

Payment History

Close

Schedules **History**

As Of: Last 60 Days

Date of Request	Payment Date	Payment Amount	# Of transactions	Status	Bank Name	Bank Routing Number	Bank Account Number	Bank Account Type	Description
09/31/2017	09/31/2017	\$3,000.00	1	Issued	SEACOAST CREDIT UNION	211489229	XXXX56789	Checking	

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.

Back Location Code: TCMAY Location Name: MAYBERRY SCHOOL SUPPORT

Profile **Account** Forms Documents Roster EFT Payments Reports

Account

Trans Type: All
Status: Open
Report Status: All

Upload File File History

Schedule Payment **Payment History**

Tools Activity Date Trans # Trans Type Trans Identifier Trans Status Report Status Due Date

Balance	Debit	Credit
\$0.00	\$0.00	\$0.00
\$37.42	\$3,037.42	(\$3,000.00)

FORMS TAB

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

[Back](#) Location Code: TCMAY Location Name: MAYBERRY SCHOOL SUPPORT

Profile Account **Forms** Documents Roster EFT Payments Reports

EForms

Submitted Forms

Forms in Progress

Tools	Form	Last Updated	Member
Actions	CL_0102	08/30/2017	SSN:XXX-XX-...

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_0890	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

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 identifier 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 identifier 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 acquiring 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.

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.

A screenshot of the bottom of a web form. It features a light gray background with a thin blue border. On the left, there is a button labeled "Cancel". On the right, there are three buttons labeled "Preview", "Save as Draft", and "Save as Final" in that order from left to right. The buttons are light gray with rounded corners and a subtle shadow.

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.

Back Location Code: TC MAY Location Name: MAYBERRY SCHOOL SUPPORT

Profile Account **Forms** Documents Roster EFT Payments Reports

EForms

Forms in Progress

Tools	Form	Last Updated	Member
Actions	CL_0102	08/30/2017	SSN:XXX-XX-...
Actions	GI_0908	08/31/2017	CAMPBELL, ...

Resume
Delete

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.

Forms in Progress

Tools	Form	Last Upd
Actions	ADJ_002	02/22/20
Resume		02/08/20
Delete		02/07/20

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 screenshot shows the MainePERS Public Employees Retirement System interface. At the top, there is a banner with the MainePERS logo and a scenic image of a forest. Below the banner, a navigation bar includes links for Profile, Account, Forms, Documents, Roster, EFT Payments, and Reports. The 'Forms' link is currently selected. Below the navigation bar, there is a section titled 'EForms' with a sub-section 'Forms in Progress'. To the right of this section, a button labeled 'Submitted Forms' is highlighted with a red rectangular box. Below the 'Forms in Progress' section, there is a table with columns for Tools, Form, Last Updated, and Member. The table contains four rows of data, each with a link to view the form details.

Tools	Form	Last Updated	Member
Actions	CL_0102	04/10/2017	CRUMP, HELEN SSN:...
Actions	CL_0102	04/10/2017	FIFE, BARNEY SSN:X...
Actions	GI_0908	04/10/2017	TAYLOR, BEA SSN:XX...
Actions	MM_0001	04/10/2017	TAYLOR, BEA SSN:XX...

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

The screenshot shows a pop-up window with a table of submitted forms. The table has columns for Tools, Form, Submitted On, and Member. There are eight rows of data, each with a 'View' link in the Tools column. The pop-up window has a close button (X) in the top right corner and an 'OK' button in the bottom right corner.

Tools	Form	Submitted On	Member
View	Application for Membership	03/27/2017	TAYLOR, ANDY SSN:X...
View	Application for Membership	03/27/2017	TAYLOR, BEA SSN:XX...
View	Application for Membership	03/27/2017	FIFE, BARNEY SSN:XX...
View	Application for Membership	03/27/2017	PYLE, GOOBER SSN:X...
View	Application for Membership	03/27/2017	CRUMP, HELEN SSN:X...
View	Application for Membership	03/27/2017	CAMPBELL, OTIS SSN:...
View	Application for Membership	03/27/2017	LAWSON, FLOYD SSN:...
View	Application for Membership	03/27/2017	SPRAGUE, HOWARD...

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”)

The screenshot shows the 'Documents' tab selected in the top navigation bar. The 'Documents' section lists five items, each with a PDF icon, a title, a date, and a status. Two red arrows point to specific items: one labeled 'Life Ins Invoice' points to the first item, and another labeled 'PLD Only' points to the last item.

Document Title	Date	Status
GLI Invoice - Period - 09/1/2017 - 09/30/2017	10/05/2017	Doc-Out Email Notified
Employer Statement of Account - EMPLOYER_STATEMENTS_OF_ACCOUNT	09/08/2017	Doc-Out Email Notified
Employer Statement of Account - EMPLOYER_STATEMENTS_OF_ACCOUNT	08/21/2017	Doc-Out Email Notified
Employer Statement of Account - EMPLOYER_STATEMENTS_OF_ACCOUNT	07/18/2017	Doc-Out Email Notified
Annual Statement of Cost - ANNUAL_STATEMENT_OF_COST	06/08/2017	Doc-Out Printed

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.

[Back](#) Location Code: TCMAY Location Name: MAYBERRY SCHOOL SUPPORT

Profile Account Forms Documents **Roster** EFT Payments Reports

Roster

Search:

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

Back Location Code: Location Name:

Profile Account Forms Documents **Roster** EFT Payments Reports

Roster

Search:

Tools	SSN	Name	Start Date	Stop Date	Plan Name	Status	Rate Category
Actions	XXX-XX-7191		07/01/1995		PLD Group Life Insurance	Active	GLI
Details			07/01/1995		PLD Regular A	Active	REG
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.

Member Contract

Employer: TCMAY-Mayberry School Department Employer Location: TCMAY MAYBERRY SCHOOL SUF

SSN: XXX-XX-1107

Name: CAMPBELL, OTIS

Member Contract

Plan Name: Teacher Regular Rate Category: REG

Start Date: 05/01/2017 Status: Active

Stop Date: mm/dd/yyyy POS: Y0101

Account Id: PSC: 11

Contract Year: D-8/1-7/31 GLI Billing:

Base Hours: Elig Change Reason:

GLI GF: ☐

Leave of Absence

Tools	Type	Start Date	Stop Date	SVC Multiplier	Last SVC	Voided?
-------	------	------------	-----------	----------------	----------	---------

Close

Employee Information

Selecting this option generates a new window with two tabs:

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

Back Name: CAMPBELL, OTIS DOB: 05/09/1960 SSN: XXX-XX-1107

Member Demographics GLI Level

Member Info

Demographics

Prefix:		SSN:	XXXXX1107
First Name:	OTIS	Birth Date:	05/09/1960
Middle Name:		Gender:	Male
Last Name:	CAMPBELL	Suffix:	
Correspondence:	6 BOOKER AVE AUGUSTA 04330		

Back Name: DOB: 05/30/1967 SSN: XXX-XX-3931

Member Demographics **GLI Level**

GLI Level

Tools	Start DT	Stop Date	ER Location Code	Position Code	Level	Type	Age
	04/01/2011	03/31/2012		G0001	\$30,000.00	Active	43
	04/01/2012	03/31/2013		G0001	\$26,000.00	Active	44
	04/01/2013	03/31/2014		G0001	\$25,000.00	Active	45
	04/01/2014	03/31/2015		G0001	\$26,000.00	Active	46
	04/01/2015	03/31/2016		G0001	\$26,000.00	Active	47
	04/01/2016	03/31/2017		G0001	\$28,000.00	Active	48
	04/01/2017	03/31/2018		G0001	\$27,000.00	Active	49

GLI Retiree Level

GLI Retiree Levels

Tools	Disability	ERL Code	Start Date	Stop Date	Level	Manual Override
-------	------------	----------	------------	-----------	-------	-----------------

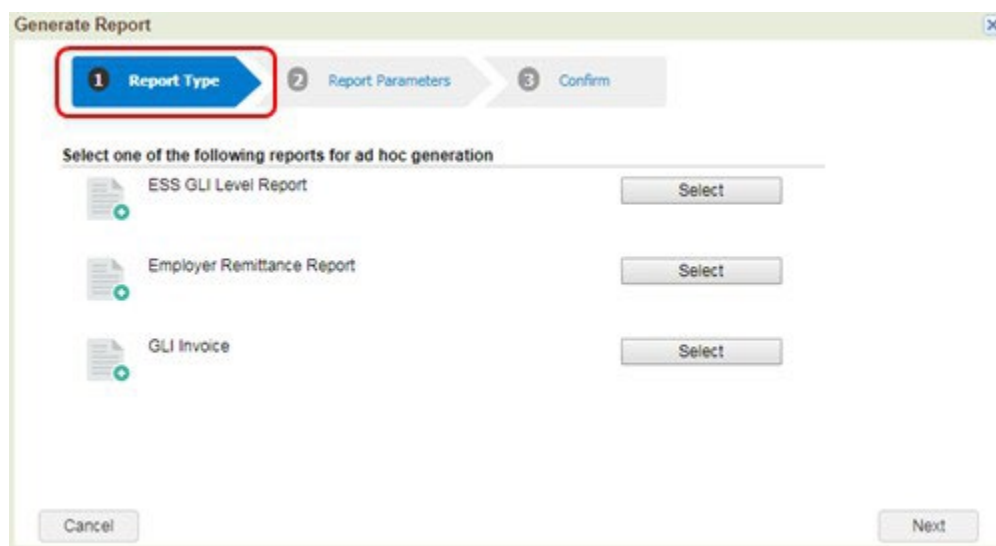
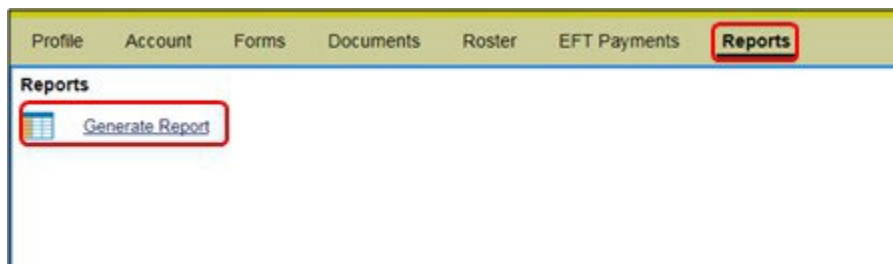
You can use the **Back** button to return to the *Roster* tab (making the other tabs visible as well).

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

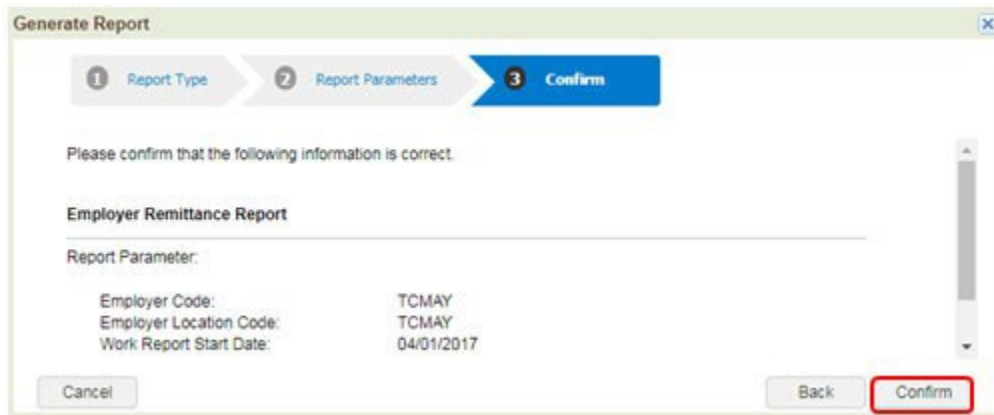
The screenshot shows the 'Generate Report' dialog box with three steps: 1. Report Type, 2. Report Parameters, and 3. Confirm. Step 1 is highlighted with a red box. Below the steps, the text 'Select one of the following reports for ad hoc generation' is displayed. Three report options are listed: 'ESS GLI Level Report', 'Employer Remittance Report', and 'GLI Invoice'. Each option has a 'Select' button to its right. The 'Employer Remittance Report' option and its 'Select' button are highlighted with a red box. At the bottom left is a 'Cancel' button, and at the bottom right is a 'Next' button, which is also highlighted with a red box.

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

- 3) Click **Next**

The screenshot shows the 'Generate Report' dialog box with three steps: 1. Report Type, 2. Report Parameters, and 3. Confirm. Step 2 is highlighted with a red box. The title 'Employer Remittance Report' is displayed. Below the title, three input fields are shown: 'Employer Code:', 'Employer Location Code:', and 'Work Report Start Date:'. Each field has a corresponding value: 'TCMAY', 'TCMAY', and '05/01/2017'. The input fields are highlighted with red boxes. At the bottom left is a 'Cancel' button, and at the bottom right are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red box.

- 4) Click **Confirm**



Generate Report

1 Report Type 2 Report Parameters 3 **Confirm**

Please confirm that the following information is correct.

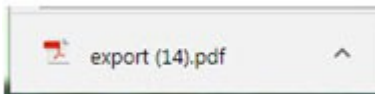
Employer Remittance Report

Report Parameter:

Employer Code: TCMAY
Employer Location Code: TCMAY
Work Report Start Date: 04/01/2017

Cancel Back **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



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

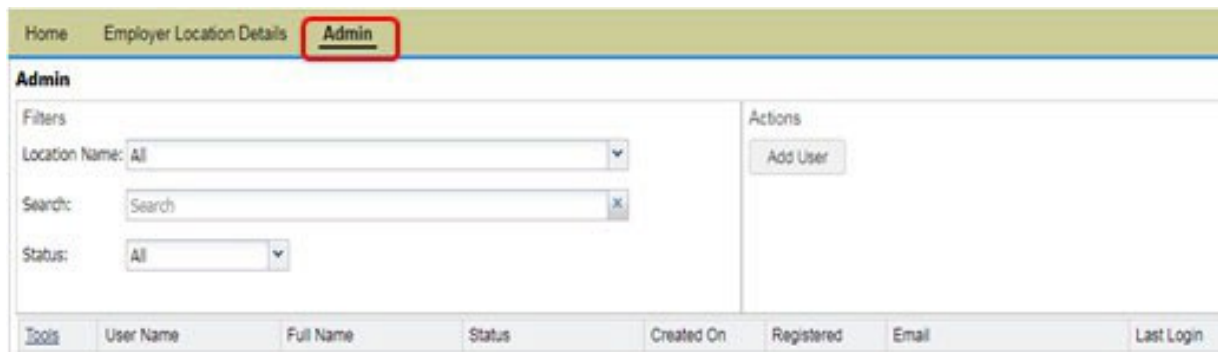
Total due:	\$ 3,358.55
------------	-------------

- 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:



The screenshot shows the ESS Admin tab interface. At the top, there is a navigation bar with three tabs: 'Home', 'Employer Location Details', and 'Admin'. The 'Admin' tab is highlighted with a red box. Below the navigation bar, the 'Admin' section is displayed. It includes a 'Filters' section on the left with three dropdown menus: 'Location Name' (set to 'All'), 'Search' (with a search box and a magnifying glass icon), and 'Status' (set to 'All'). To the right of the filters is an 'Actions' section with a button labeled 'Add User'. Below these sections is a table with the following columns: 'Tools', 'User Name', 'Full Name', 'Status', 'Created On', 'Registered', 'Email', and 'Last Login'.

- 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
-------------	---	---	---	---	---

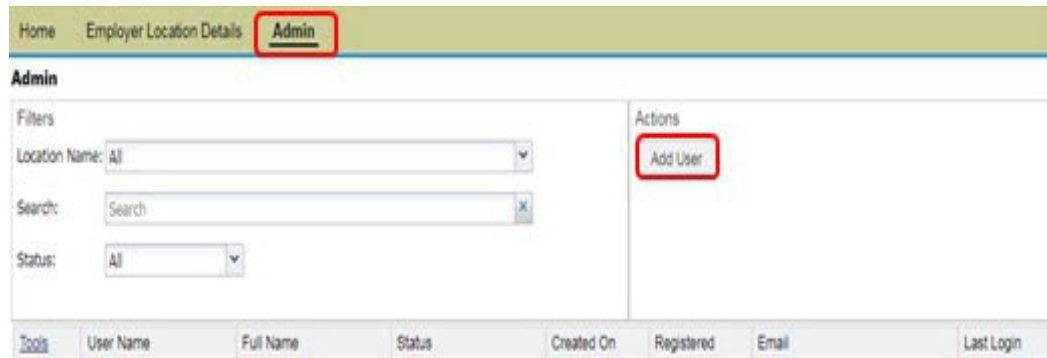
Reports

R	R	R	R	R
---	---	---	---	---

CREATING AN ESS USER ACCOUNT

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

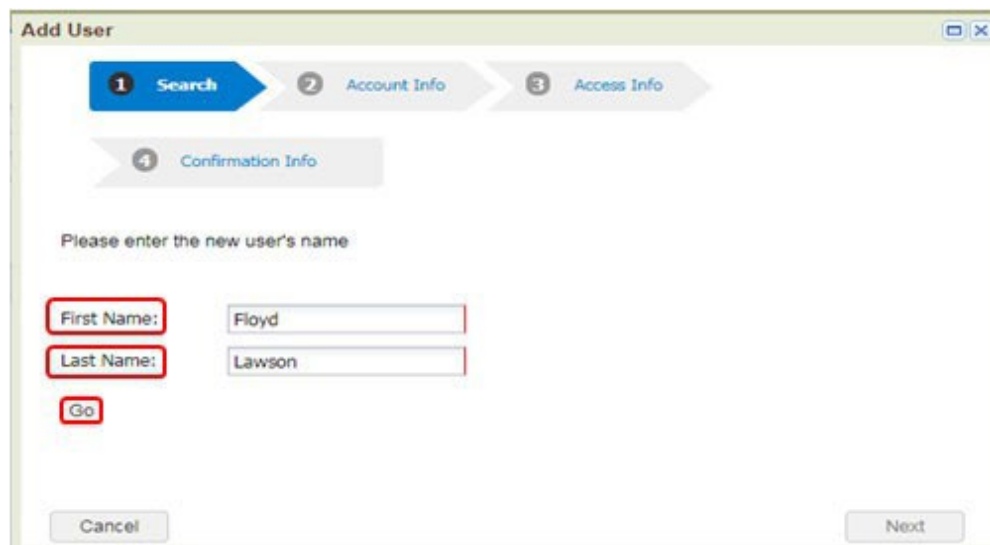
1. Click **Add User**.



The screenshot shows the 'Admin' tab selected in the top navigation bar. Below the navigation bar, the 'Admin' section is visible. On the left, there are filters for 'Location Name' (set to 'All'), 'Search' (with a search box), and 'Status' (set to 'All'). On the right, under the 'Actions' section, the 'Add User' button is highlighted with a red box. Below the filters and actions, there is a table with columns: Tools, User Name, Full Name, Status, Created On, Registered, Email, and Last Login.

The *Add User* wizard displays.

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



The screenshot shows the 'Add User' wizard. At the top, there are four steps: 1. Search (highlighted in blue), 2. Account Info, 3. Access Info, and 4. Confirmation Info. Below the steps, the text 'Please enter the new user's name' is displayed. There are two input fields: 'First Name:' with the value 'Floyd' and 'Last Name:' with the value 'Lawson'. Both labels and the input fields are highlighted with red boxes. Below the input fields is a 'Go' button, also highlighted with a red box. At the bottom, there are 'Cancel' and 'Next' buttons.

4. Search results display:

Please select the new user from the list below. If the new user does not exist in the list below, click New.

Add User

1 Search 2 Account Info 3 Access Info 4 Confirmation Info

Please enter the new user's name

First Name:

Last Name:

Please select the new user from the list below. If the new user does not exist in the list below, click New.

Tools	Name	SSN	Address
No matches found.			

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 screenshot shows a web application window titled "Add User". At the top, there is a progress bar with four steps: 1 Search, 2 Account Info (highlighted), 3 Access Info, and 4 Confirmation Info. Below the progress bar, a message states: "Please enter the following information so that the new user can register and create the account." The form contains several input fields. A red box highlights the "First Name:" field, the "Last Name:" field (containing "Jane"), the "User:" field (containing "UJane"), and the "E Mail:" field (containing "I"). Another red box highlights the "Birth Date:" field (containing "mm/dd/yyyy" and a calendar icon). Below these, there are fields for "Home Phone:", "Mobile Phone:", "Business Phone:", "MFA Phone:", and "MFA Email:". The "Business Phone:" and "MFA Phone:" fields each have an "Ext:" field next to them. A red box highlights the "Business Phone:" field, the "MFA Phone:" field, and the "MFA Email:" field. At the bottom right, there are three buttons: "Cancel", "Back", and "Next" (highlighted with a red box).

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.*

Add User

1 Search 2 Account Info 3 Access Info 4 Confirmation Info

Please select the user's account access:

- ☒ Specific Reporting Units under the Employer
- ☐ P0999 TOWN OF HENRYVILLE

Please select only one ADDITIONAL security profile beyond Employer User - Default Role below:

- ☒ Employer User - Default
- ☐ ESS Payroll Role and Human Resources Role
- ☐ ESS Payroll Only Role
- ☐ ESS Human Resources Only Role
- ☐ ESS Read Only Role

Cancel Back Next

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.

Add User

1 Search 2 Account Info 3 Access Info 4 Confirmation Info

Please confirm the details below:

First Name: L
Last Name: J
User: L
E-Mail: l.jones@townofhenryville.com
Birth Date: 01/01/1980
MFA Phone: (716) 455-1100
MFA Email: l.jones@townofhenryville.com
Account Access: Access to Employer's specific accounts
Security Profile: Employer User - Default, ESS Payroll Role and Human Resources Role

Cancel Back Confirm

Message

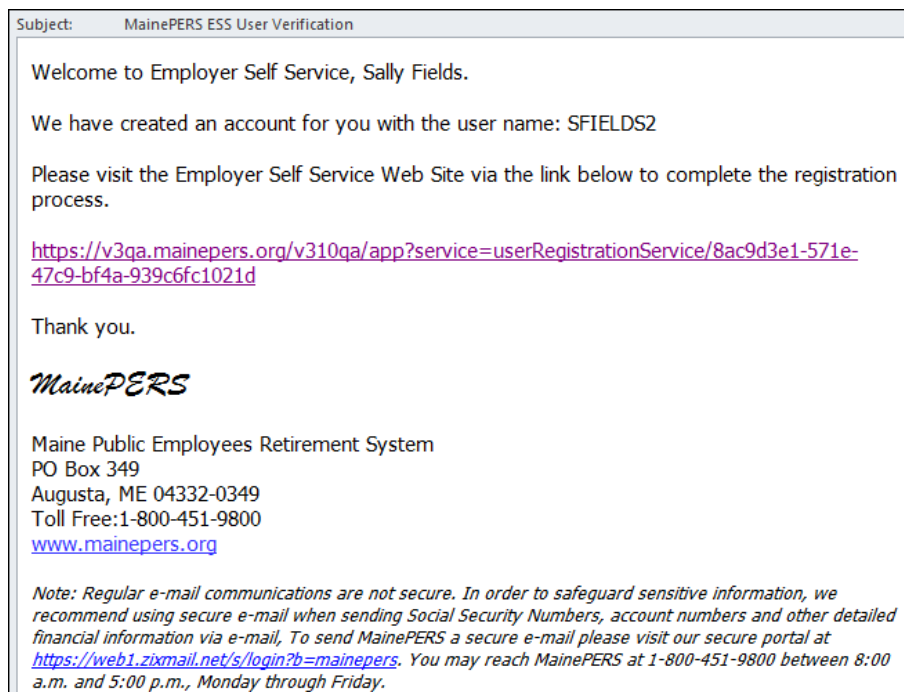
An email was sent to the user to complete the registration process.

OK

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.maineopers.org/v310qa/app?service=userRegistrationService/8ac9d3e1-571e-47c9-bf4a-939c6fc1021d>

Thank you.

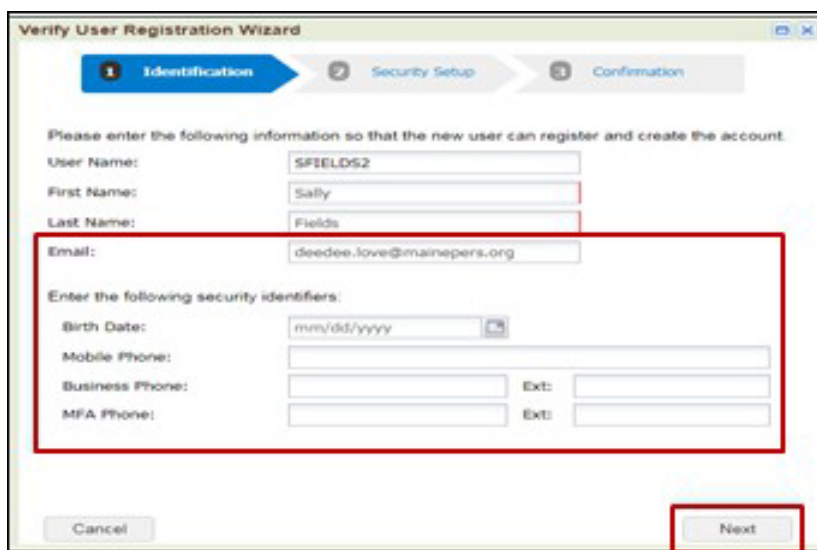
MainePERS

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



Verify User Registration Wizard

1 Identification 2 Security Setup 3 Confirmation

Please enter the following information so that the new user can register and create the account.

User Name:

First Name:

Last Name:

Email:

Enter the following security identifiers:

Birth Date:

Mobile Phone:

Business Phone: Ext:

MFA Phone: Ext:

Cancel 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 screenshot shows the 'Verify User Registration Wizard' window, specifically the 'Security Setup' step (Step 2 of 3). The window has a title bar and standard window controls. At the top, there are three steps: '1 Identification', '2 Security Setup' (highlighted), and '3 Confirmation'. Below the steps, the text 'Please setup your security questions' is followed by three rows of security questions and answers. Each row consists of a dropdown menu for the question and a text input field for the answer. The questions are: 'What is your mothers maiden name?', 'Where did you first meet your spouse?', and 'What was the name of your first pet?'. The answers entered are 'test', 'test', and 'test' respectively. Below the questions, there is a section titled 'Passwords must match the following rules' with four bullet points: 'Password must have a minimum of 8 characters', 'Password must have a minimum of 1 alphabetic characters', 'Password must have a minimum of 1 numeric characters', and 'Password must have a minimum of 1 non alpha numeric characters'. Below this, there are two password input fields: 'Enter your new Password:' and 'Please confirm your password:'. The first field has a strength indicator showing 'Strong'. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next' (highlighted with a red circle).

Verify User Registration Wizard

1 Identification 2 Security Setup 3 Confirmation

Please setup your security questions

Security Question 1: What is your mothers maiden name?

Security Answer 1: test

Security Question 2: Where did you first meet your spouse?

Security Answer 2: test

Security Question 3: What was the name of your first pet?

Security Answer 3: test

Passwords must match the following rules

- Password must have a minimum of 8 characters
- Password must have a minimum of 1 alphabetic characters
- Password must have a minimum of 1 numeric characters
- Password must have a minimum of 1 non alpha numeric characters

Enter your new Password:

Please confirm your password: 🔒

Cancel Back Next

- The third step of the wizard generates.
7. Verify the information.
 8. Click **Confirm**.

The screenshot shows the 'Verify User Registration Wizard' window, specifically the 'Confirmation' step (Step 3 of 3). The window has a title bar and standard window controls. At the top, there are three steps: '1 Identification', '2 Security Setup', and '3 Confirmation' (highlighted). Below the steps, the text 'Please confirm the creation of the following user account.' is followed by a list of user details: 'First Name: FLOYD', 'Last Name: Lawson', 'User: FLAWSON', and 'E Mail: rick.henry@mainepers.org'. Below this, there are three rows of security questions and answers. Each row consists of a label for the question and answer, and the answer is displayed in a text input field. The questions are: 'From what high school did you graduate?', 'In what city were you born?', and 'What is your father's middle name?'. The answers displayed are 'TEST', 'TEST', and 'TEST' respectively. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Confirm' (highlighted with a red circle).

Verify User Registration Wizard

1 Identification 2 Security Setup 3 Confirmation

Please confirm the creation of the following user account.

First Name: FLOYD

Last Name: Lawson

User: FLAWSON

E Mail: rick.henry@mainepers.org

Security Question 1: From what high school did you graduate?

Security Answer 1: TEST

Security Question 2: In what city were you born?

Security Answer 2: TEST

Security Question 3: What is your father's middle name?

Security Answer 3: TEST

Cancel Back 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:

The screenshot shows the 'Admin' tab selected in the top navigation bar. Below the navigation bar, there are filters for 'Location Name' (set to 'All'), a 'Search' field, and a 'Status' dropdown (set to 'All'). To the right of the filters is an 'Add User' button. Below the filters is a table with columns: Tools, User Name, Full Name, Status, Created On, Registered, Email, and Last Login. The table contains three rows of user data. The 'Actions' column for the user 'SFIELDS2' is highlighted, showing a dropdown menu with the following options: Reset User Account, Update User Access, View Login History, and Change User Details.

Tools	User Name	Full Name	Status	Created On	Registered	Email	Last Login
Actions	QA_JCHASE	CHASE, JOE	Active	11/28/2018	Yes		11/28/2018 03:44
Actions	RHENRY2	HENRY, RICK	Active	11/28/2018	Yes	rick.henry@mainepers.org	11/28/2018 12:56
Actions	SFIELDS2	FIELDS, SALLY	Active	12/03/2018	Yes	deedee.love@mainepers.org	

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.

Reset User Account

User: FLAWSON

E Mail: Oppie9@mayberry.rfd

Name: LAWSON, FLOYD

Please enter or update the following required user security attributes.

Birth Date: 01/09/1960

Home Phone:

Mobile Phone:

Business Phone: (207) 248-1234 Ext:

Once Reset, the user will be required to re-register their account to gain access.

Please type 'YES' and click 'Reset Account': YES

Reset Account Cancel

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.

Update Security Profile

User: MBEASLEY
E Mail: deede.love@mainepers.org
Name: BEASLEY, MISSIS

Access Level:

- ☒ Specific Accounts under the Employer
 - ☒ PO999 TOWN OF HENRYVILLE
- ☐ Deactivate Account

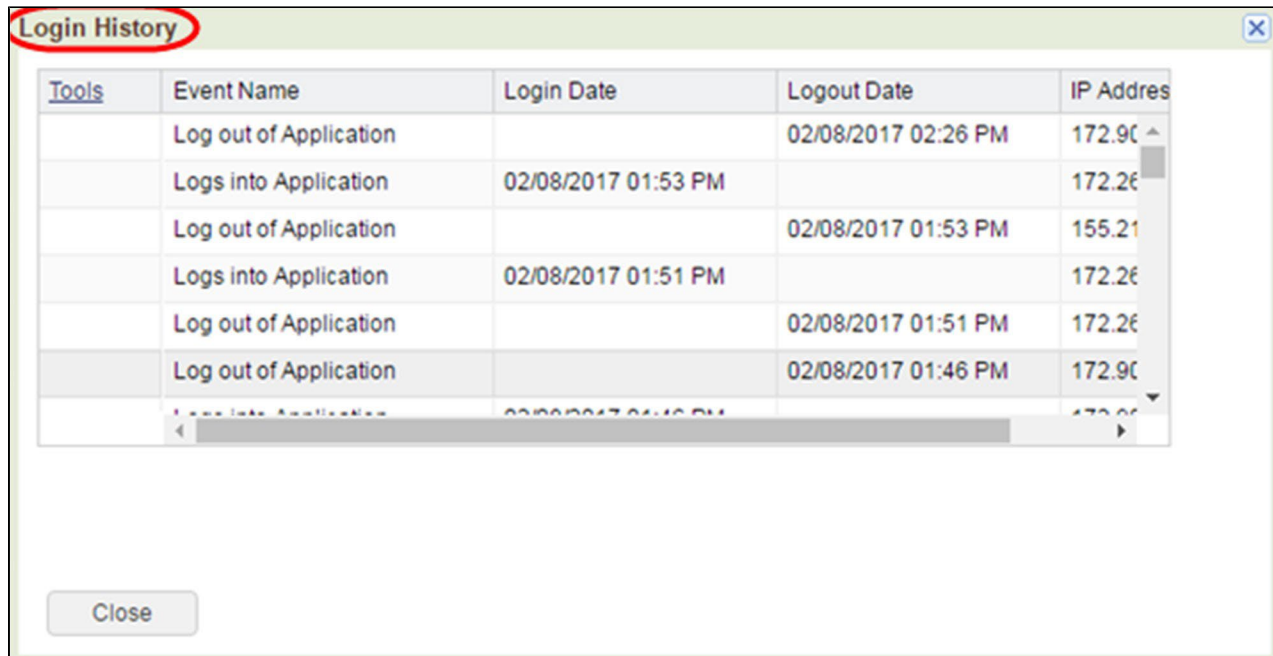
Security Profile (optional):

- ☒ Employer User - Default
- ☒ ESS Payroll Role and Human Resources Role
- ☐ ESS Payroll Only Role
- ☐ ESS Human Resources Only Role
- ☐ ESS Read Only Role

OK **Cancel**

VIEWING LOGIN HISTORY

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



Tools	Event Name	Login Date	Logout Date	IP Address
	Log out of Application		02/08/2017 02:26 PM	172.90 ^
	Logs into Application	02/08/2017 01:53 PM		172.26
	Log out of Application		02/08/2017 01:53 PM	155.21
	Logs into Application	02/08/2017 01:51 PM		172.26
	Log out of Application		02/08/2017 01:51 PM	172.26
	Log out of Application		02/08/2017 01:46 PM	172.90
	Logs into Application	02/08/2017 01:46 PM		172.90

Close

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.

The 'User Details' form contains the following fields and sections:

- Buttons:** Save, Apply, Cancel
- Personal Information:** Prefix (dropdown), First Name (Sally), Middle Name, Last Name (Fields), Suffix (dropdown), SSN, Alt ID 2.
- Birth Date:** 05/05/1960
- Phone Numbers:** Home Phone, Mobile Phone ((207) 248-1815), Business Phone ((207) 512-0001 Ext:), MFA Phone ((207) 512-0002 Ext:).
- Email:** deede.love@mainepers.org
- MFA Email:**
- Correspondence:**
- Payment:**

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

2. Click **Add**

This screenshot shows the 'User Details' form with a red box highlighting the pencil icon next to the 'MFA Phone' field. A context menu is open, showing the 'Add' option highlighted in red.

This screenshot shows the 'User Details' form with a red box highlighting the 'MFA Phone' field and its associated 'Add' button. The 'MFA Phone' field is now populated with ((207) 512-0002 Ext:).