



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

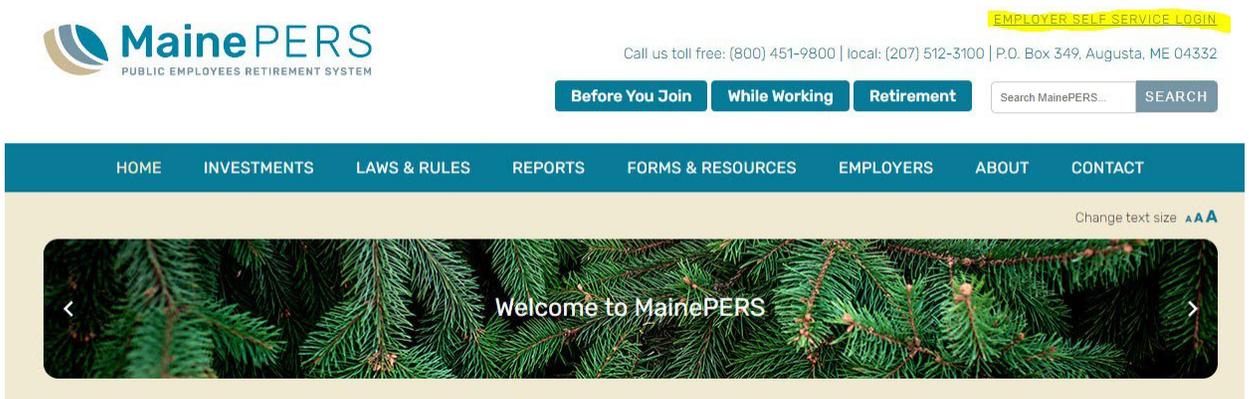
Employer Self-Service

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

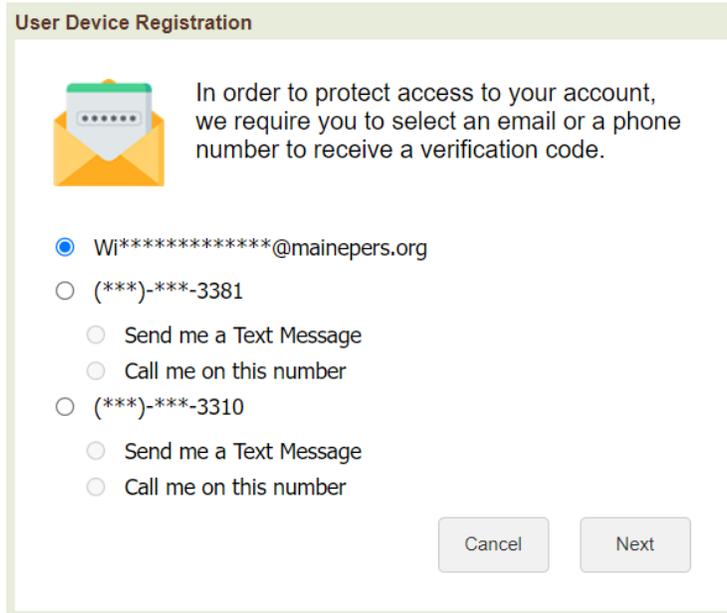
1. From the MainePERS website, www.mainebers.org, Click on the **Employer Self Service Login** link in the upper right hand corner of the page.



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

A screenshot of the Employer Self-Service login form. It is enclosed in a blue border. The form contains a 'User:' label above a text input field with the value 'TC999_MAnderson'. Below that is a 'Password:' label above a password input field with masked characters. A red box highlights the 'Log In' button. At the bottom of the form are links for 'Forgot User' and 'Forgot Password'. The footer of the page shows 'Version 10.0-ess QA v 0.36' and the 'Vitech V3' logo.

- 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

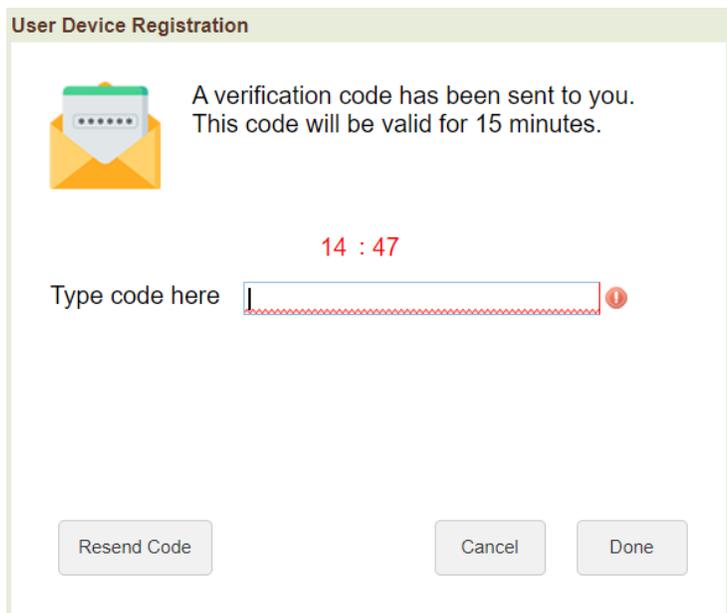
(***)-***-3310

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.*

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



User Device Registration

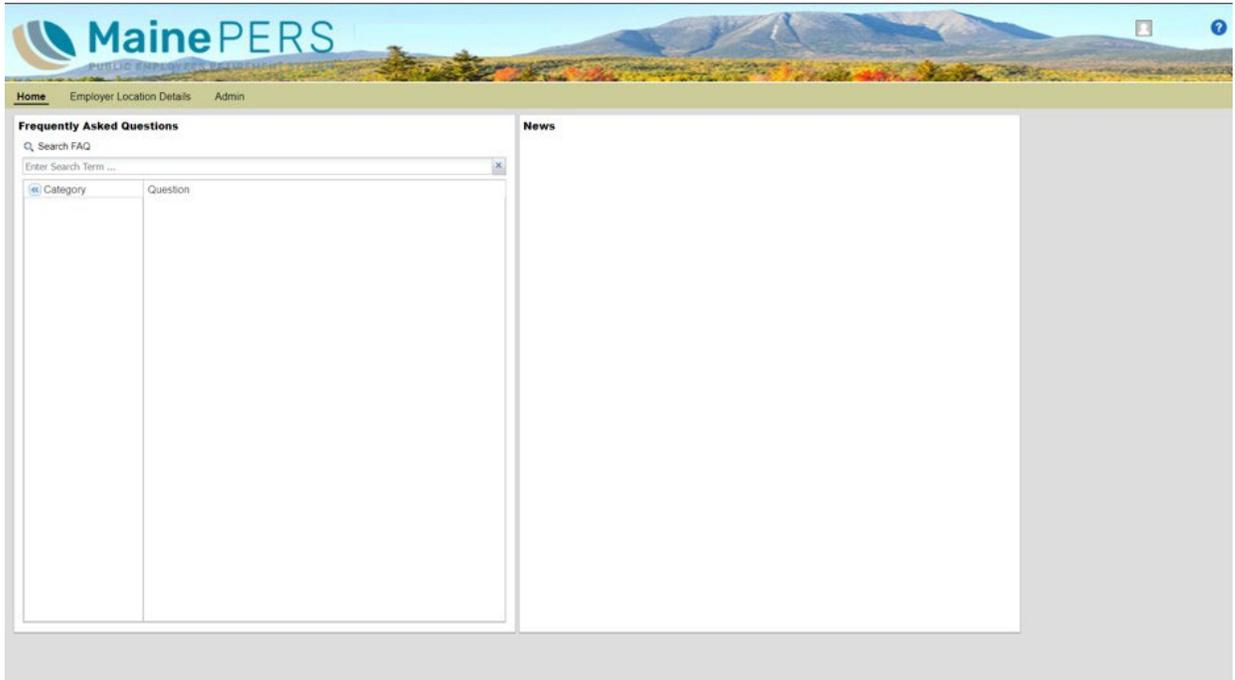
 A verification code has been sent to you. This code will be valid for 15 minutes.

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).

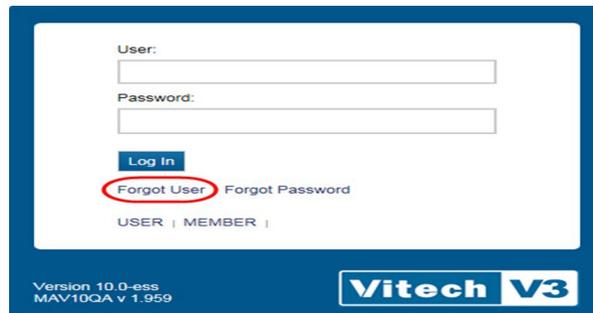
1. Select **Logout**.



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.



The *Forgot User Name* pop-up displays.



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

RETRIEVING A FORGOTTEN PASSWORD

The steps to retrieve a forgotten password are as follows:

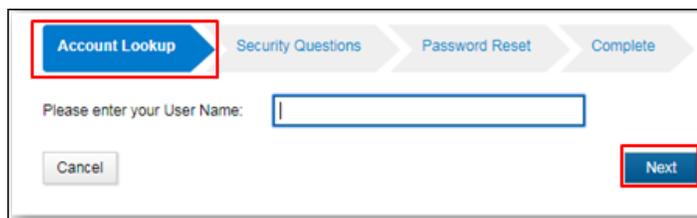
1. Click **Forgot Password** on the *ESS Login* window.



The screenshot shows the ESS Login window with the following elements:

- User:
- Password:
- Log In button
- Forgot User | **Forgot Password** (circled in red)
- USER | MEMBER |
- Version 10.0-rss, MAV10QA v. 1.959
- Vitech V3 logo

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



The screenshot shows the Account Lookup pop-up window with the following elements:

- Account Lookup (highlighted with a red box)
- Security Questions
- Password Reset
- Complete
- Please enter your User Name:
- Cancel button
- Next button (highlighted with a red box)

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

The *Security Questions* tab displays.



The screenshot shows the Security Questions pop-up window with the following elements:

- Account Lookup
- Security Questions** (highlighted with a red box)
- Password Reset
- Complete
- Please answer the security questions.
- Select First Security Question: What is your mothers maiden name?
- Enter Answer to First Question
- Cancel button
- Back button
- 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**.

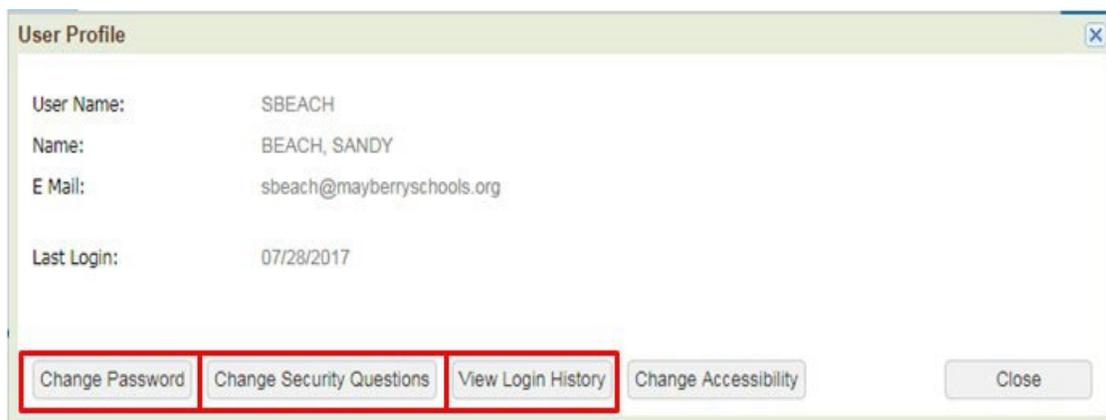
The *Password Reset* tab displays. And, you are sent an email confirming that your password has been changed.

ACCESSING THE USER PROFILE

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



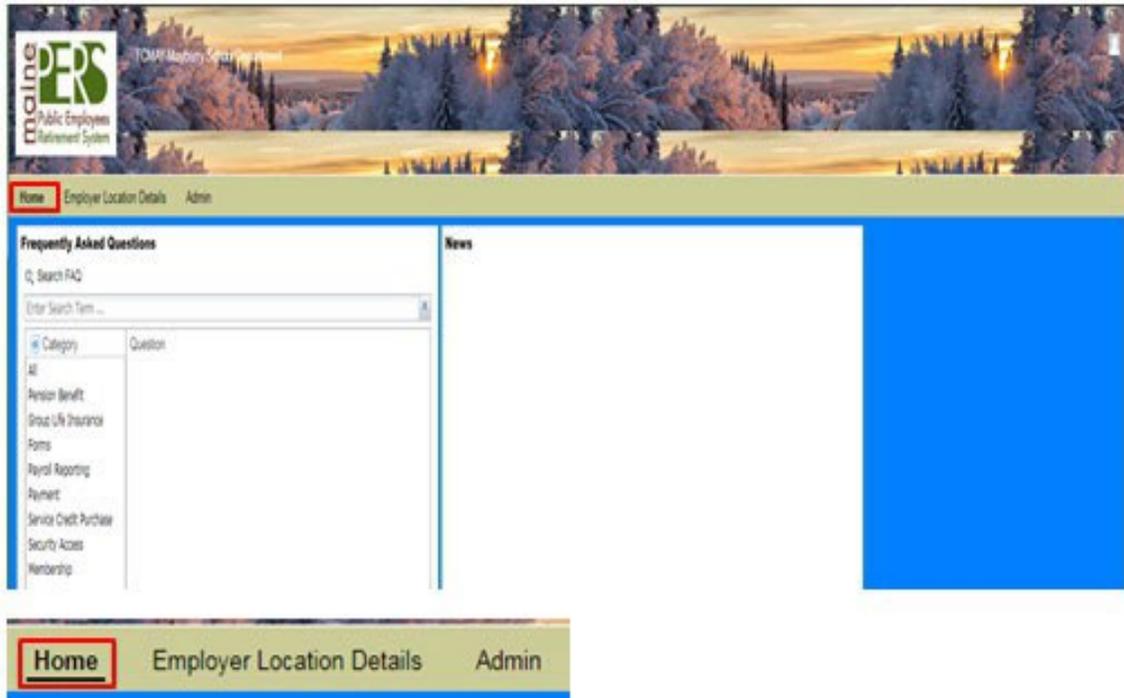
Changing a Password/Changing Security Questions/View Login History



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.

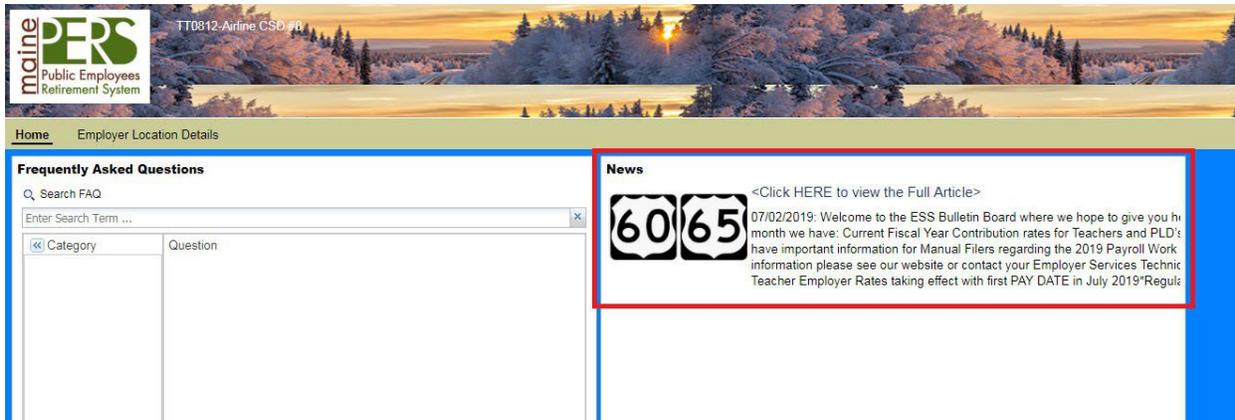
HOME TAB

- View *Frequently Asked Questions*



- View *News*

- Check here regularly for important information and updates from MainePERS

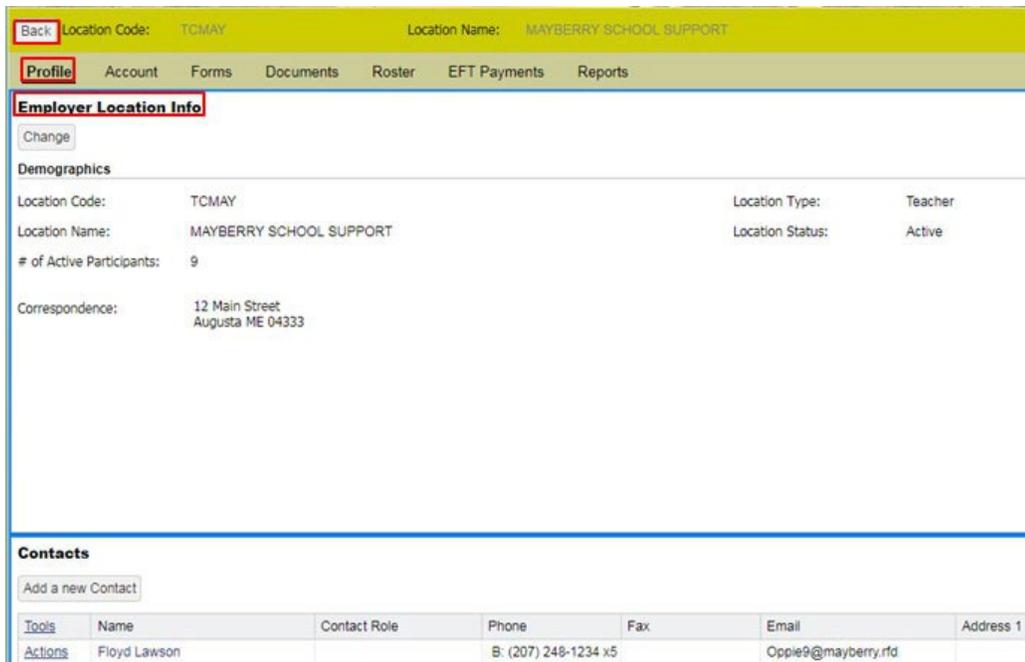


EMPLOYER LOCATION DETAILS TAB

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

The screenshot shows the ESS system interface. At the top, there is a yellow header bar with a 'Back' button, 'Location Code: TCMAY', and 'Location Name: MAYBERRY SCHOOL DEPARTMENT'. Below this is a navigation bar with tabs: Profile, Account, Forms, Documents, Roster, EFT Payments, and Reports. The 'Profile' tab is selected and highlighted with a red box. The main content area is titled 'Employer Location Info' and includes a 'Change' button. Under 'Demographics', the following information is displayed: Location Code: TCMAY, Location Name: MAYBERRY SCHOOL DEPARTMENT, Location Type: Teacher, Location Status: Active, and # of Active Participants: 9. Below this is a 'Contacts' section with an 'Add a new Contact' button and a table of contacts.

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.

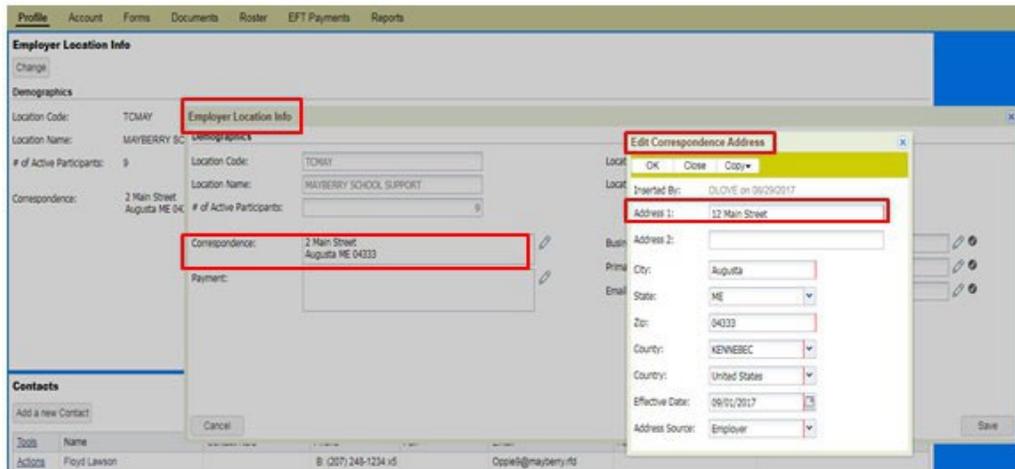
2. Click **Change** to enter edit mode.



The *Employer Location Info* pop-up displays.

3. Click in the field you wish to update.

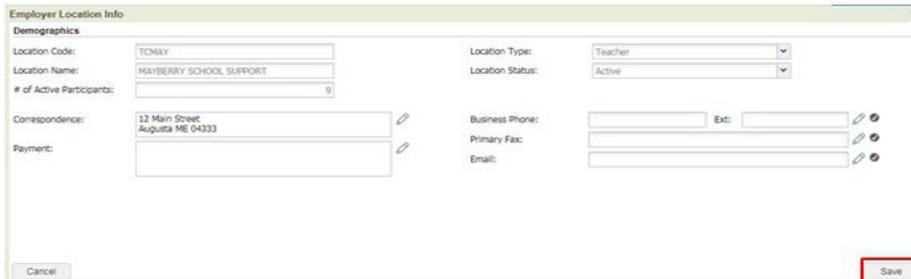
The *Edit Correspondence Address* pop-up displays.



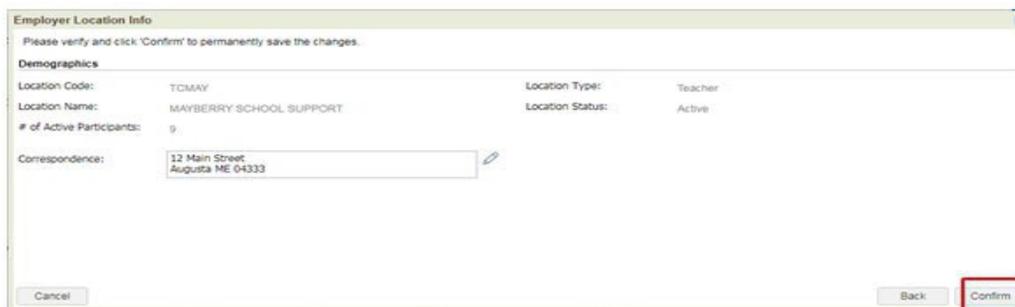
4. Make the necessary edits to the address.
5. Click **OK** to close the *Edit Correspondence Address* pop-up.



6. Click **Save**.



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



You have successfully updated your employer's address.

ADDING AND UPDATING EXISTING EMPLOYER CONTACTS

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

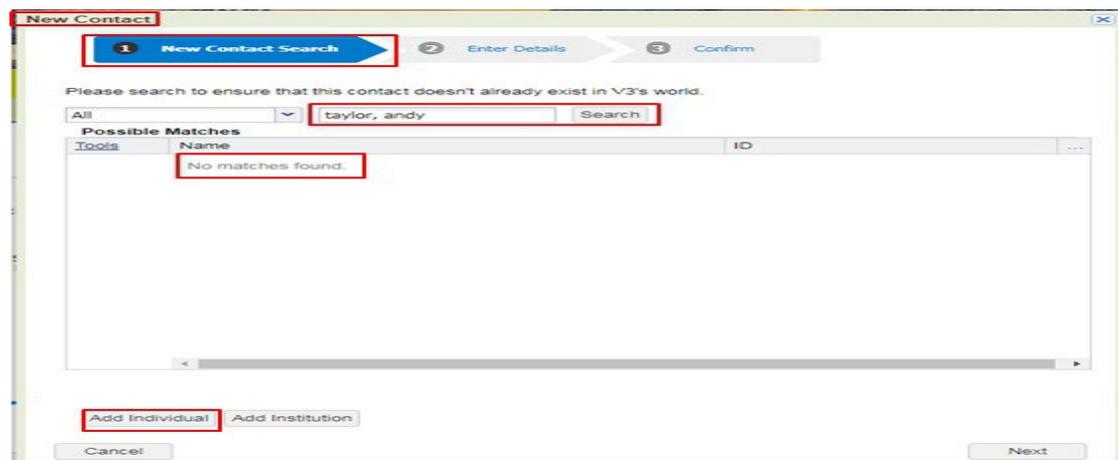
Adding a Contact (Adding/Updating ESS Users see page)

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

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



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



2. Enter the last name, first name in the search criteria
(e.g., the name of the person you are adding as a Contact – Smith, John T).
3. Click **Search**.
4. If the search returns a member for which you want to create a contact, click on that person's name.
5. If the search does not return the name of the person you wish to add, select the **Add Individual** button.

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

The New Contact sub-tab displays.

The screenshot shows the 'New Contact' form with the 'Enter Details' sub-tab selected. The form contains the following fields: Prefix (dropdown), Contact Role (dropdown), First Name, Middle Name, Last Name, Suffix (dropdown), Home Phone, Mobile Phone, Business Phone (with an Ext. field), Primary Fax, Email, Correspondence, and Payment. The 'Enter Details' sub-tab is highlighted in blue, and the 'Next' button at the bottom right is highlighted in red.

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' form with the 'Confirm' sub-tab selected. The form displays the information entered in the previous sub-tab: First Name: Karen, Last Name: Drebillis, Business Phone: (207) 333-4444, Email: kfrebillis@dummy.net, and Correspondence: P.O. Box 349, Augusta ME 04330. The 'Confirm' sub-tab is highlighted in blue, and the 'Confirm' button at the bottom right is highlighted in red.

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 location 'MAYBERRY SCHOOL DEPARTMENT'. The 'Contacts' table lists two contacts: Sandy Beach and Opi Taylor. A context menu is open over the 'Sandy Beach' row, with 'Details' highlighted.

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	

Context menu for 'Sandy Beach':

- Actions
- Details
- Delete
- Spade
- Actions
- Opi Taylor

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.

Employer Location Info:

Location Code: TCMAY
Location Name: MAYBERRY SCHOOL DEPARTMENT
Location Type: Teacher
Location Status: Active
of Active Participants: 9
Correspondence: 123 Mayberry Lane, Augusta ME 04333

Contacts Table:

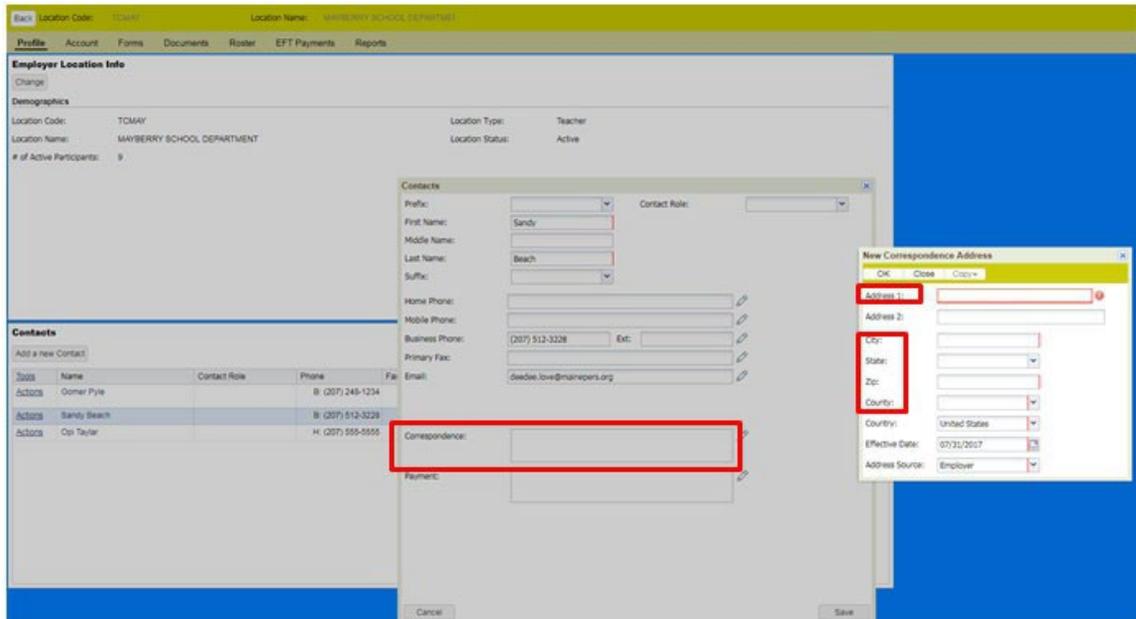
Tools	Name	Contact Role	Phone	Fax
Actions	Ormer Pyle		B: (207) 248-1234	
Actions	Sandy Beach		B: (207) 512-3228	
Actions	Sammy Spade		B: (207) 248-9999	
Actions	Opi Taylor		H: (207) 555-5555	

Contacts Pop-up:

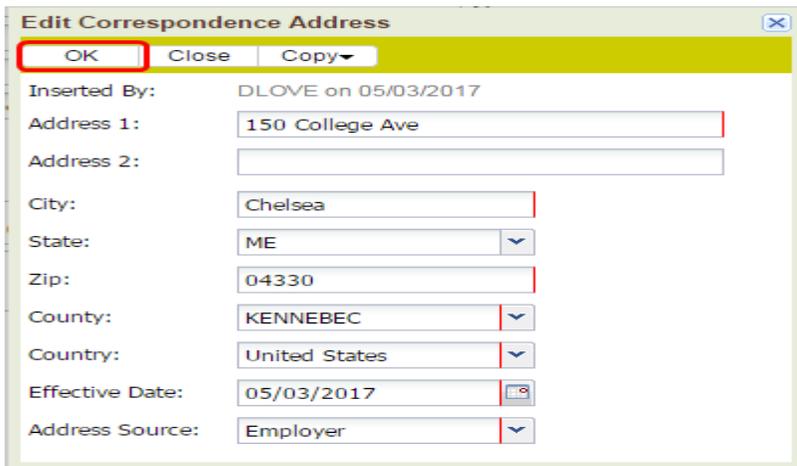
Change

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

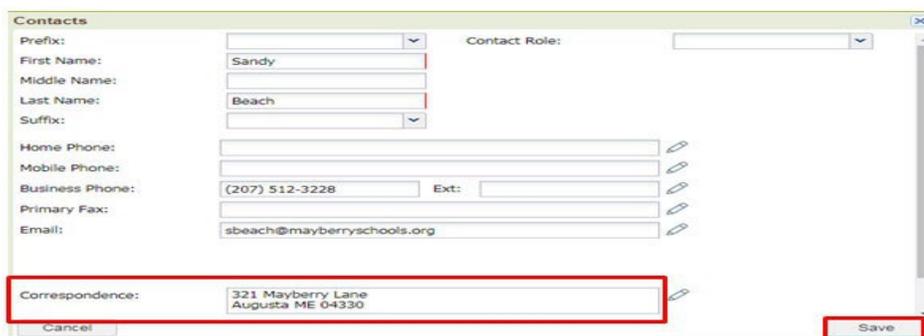
- Click in the field you wish to update.
The appropriate pop-up displays.



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



- Click **Save**



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

Contacts ✕

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

Prefix: Contact Role:

First Name:

Middle Name:

Last Name:

Suffix:

Business Phone: Ext:

Email:

Correspondence:

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		deede.love@mainepers.org	123 Mayberry Lane Augusta ME 04333
Actions	Opi T aylar		H: (207) 555-5555		opi.taylor@mainepers.org	

ACCOUNT TAB

The screenshot shows the 'Account' tab interface. At the top, there are navigation tabs: Profile, **Account**, Forms, Documents, Roster, EFT Payments, and Reports. Below the tabs, the 'Account' section contains three dropdown filters: 'Trans Type' (set to All), 'Status' (set to Open), and 'Report Status' (set to All). To the right of these filters are four buttons: 'Upload File', 'File History', 'Schedule Payment', and 'Payment History'. Below the filters and buttons is a table with the following columns: Tools, Activity Date, Trans #, Trans Type, Trans Identifier, Trans Status, Report Status, Due Date, and Balance. The table contains 14 rows of transaction data.

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 Clomei, 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 Comp/EES 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 are navigation tabs: Profile, **Account**, Forms, Documents, Roster, EFT Payments, and Reports. Below the tabs, there are filter dropdowns for '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 columns: Tools, Activity Date, Trans #, Trans Type, Trans Identifier, Trans Status, Report Status, Due Date, Balance, Debit, and C...

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. At the top, there are navigation tabs: Profile, **Account**, Forms, Documents, Roster, EFT Payments, and Reports. Below the tabs, there are filter dropdowns for '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 columns: Tools, Activity Date, Trans #, Trans Type, Trans Identifier, Trans Status, Report Status, Due Date, Balance, Debit, and C... The 'Tools' column for the second row contains a dropdown menu with options: **Actions**, Details, Edit/View, and Submit.

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 Edit/View Submit	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

Account								
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 MAYBERRY SCHOOL DEPARTMENT. It features a table of transactions with the following data:

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 Transaction Details pop-up window displays the following 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
- Status:** Open

The **Transaction** section shows:

- Type:** Work Report
- 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
- Charge Type:**

The **Details** section shows a table of fund details:

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

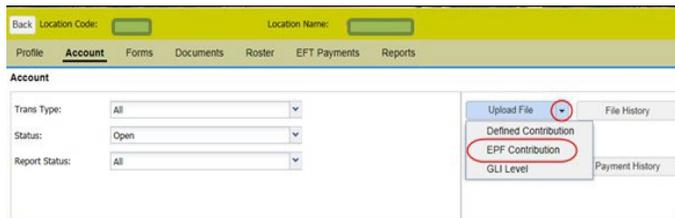
- **Transaction Section:** Shows information about that transaction in its current state, including the **Type** of transaction, the payment type (Pre-Retirement contributions, ER contributions), **Identifier** information, and the **Due Date**.
- **Details Section:** Shows the history of the transaction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

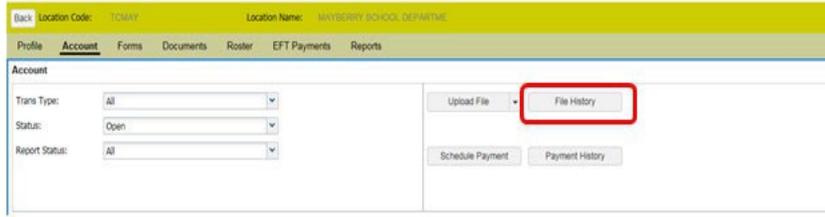


The *Upload EPF Contribution* pop-up updates with the results that the file has been submitted for processing.

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



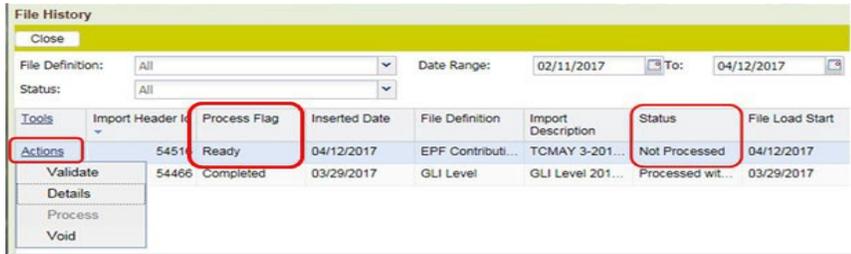
- To review the uploaded file, click **File History**.



The *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***).



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



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
Actions	43295	Validated	11/08/2016	EPF Contributi...
Validate	43294	Completed	11/08/2016	EPF Contributi...
Details	43293	Validated	11/08/2016	EPF Contributi...
Process	43292	Validated	11/08/2016	EPF Contributi...
Void	43291	Validated	11/08/2016	EPF Contributi...
Download	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.

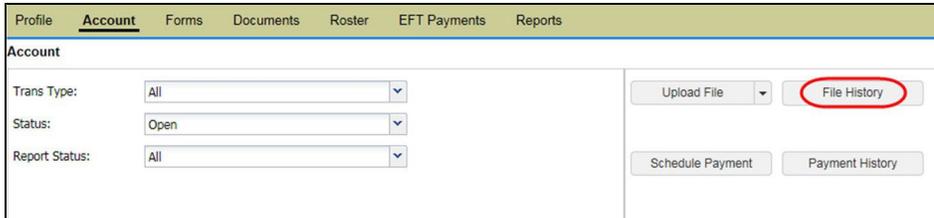
Note: To Update the Account Tab for the current balance: click 'Back' – Details, this will refresh the Account Tab.

CORRECTING ERRORS AND EXCEPTIONS

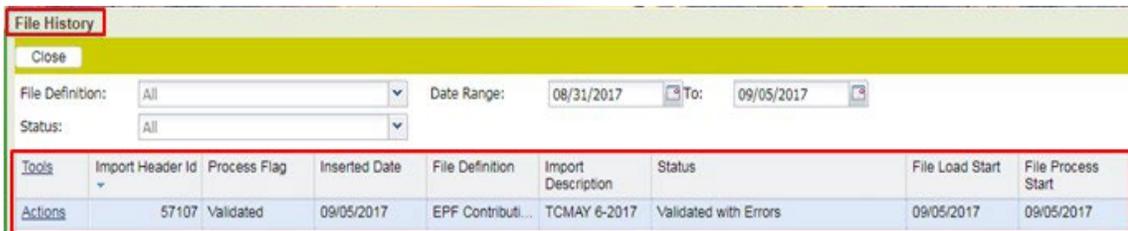
RETRIEVING THE STANDARD IMPORT REPORT

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:

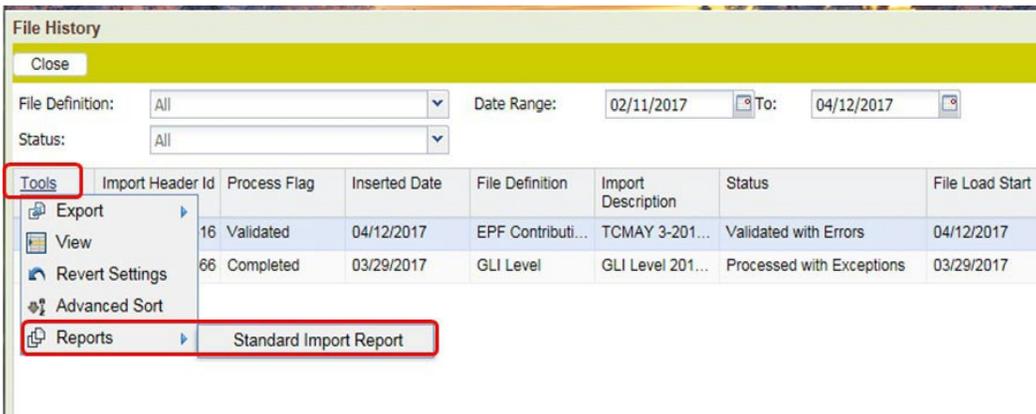
1. Click **File History**.



The *File History* screen displays.

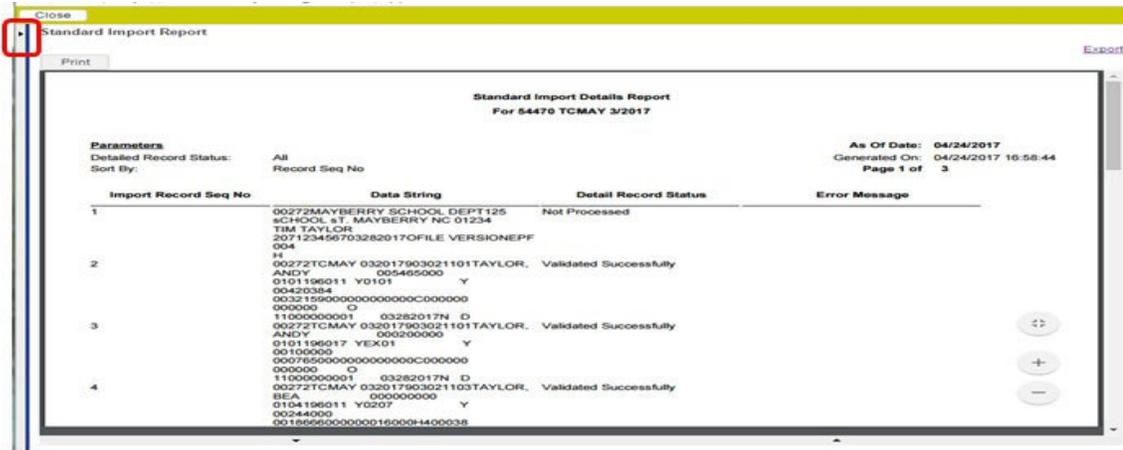


2. Click on the line of the file requiring corrections. Then, click **Tools – Reports – Standard Import Report**



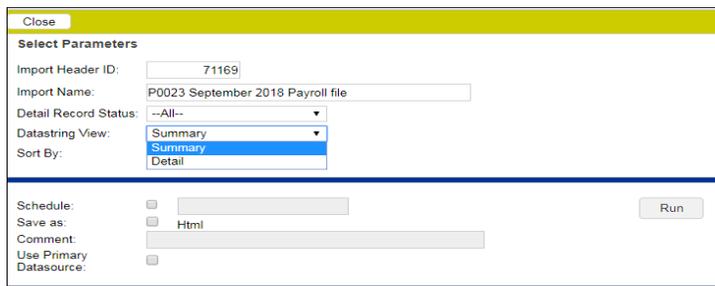
3. The **Standard Import Report** can be sorted by *All, Validated with Errors, Validated with Exceptions, etc.*

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



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

6. Select the **Data string View** drop down: change the option to **Detail** and click **Run**

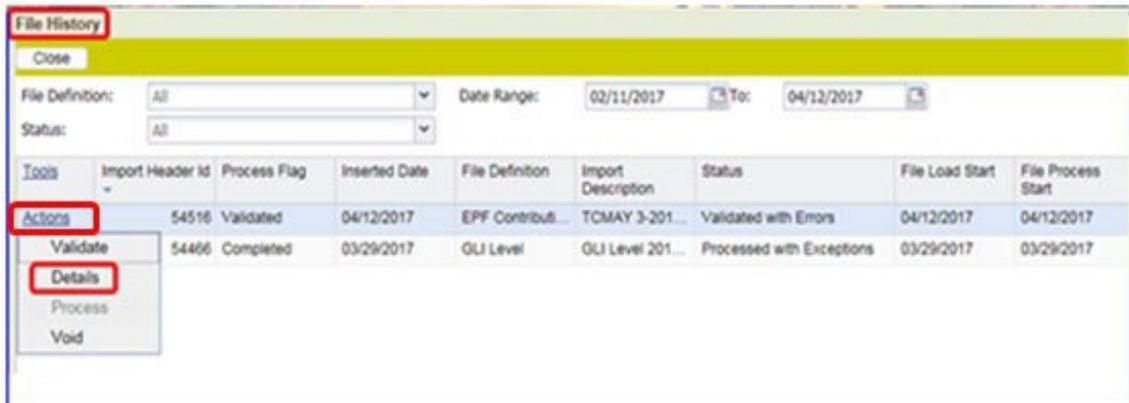


7. Click **Print**, then **Close**

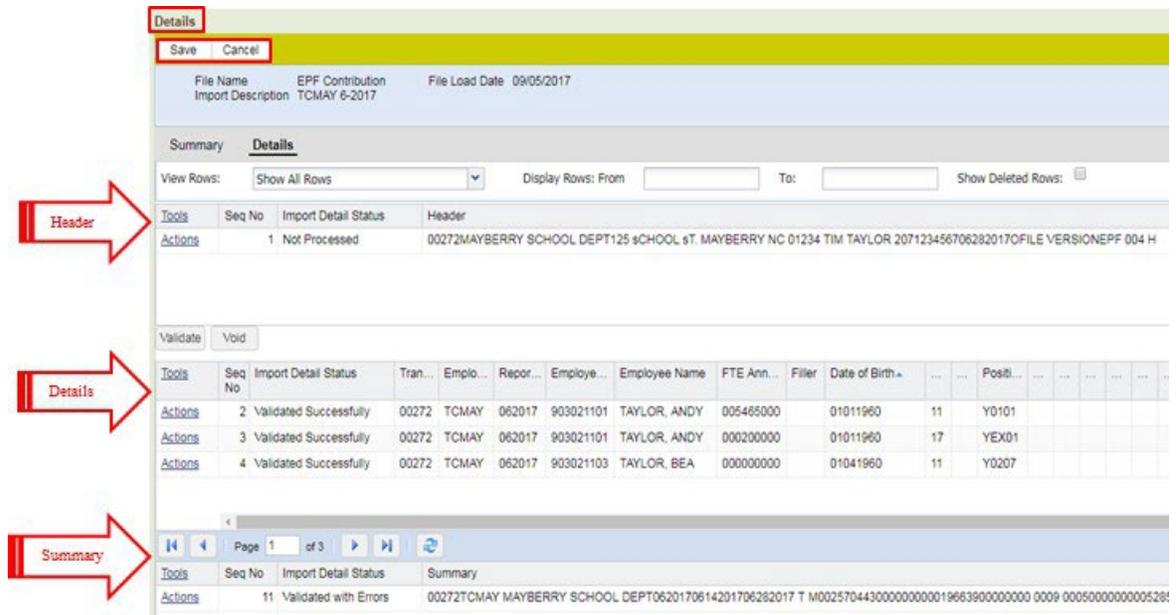


The **Import Record Seq. No** column indicates the line of the file with the error. The **Error Message** column describes the issue, and all errors and exceptions are described in the *ESS Validation Guide for Electronic Payroll Filing*, available on the MainePERS website.

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



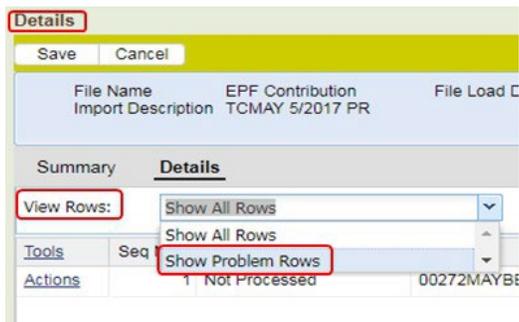
- You are now in a mode allowing you to edit data (see that *Save* and *Cancel* are the only options available while in edit mode).



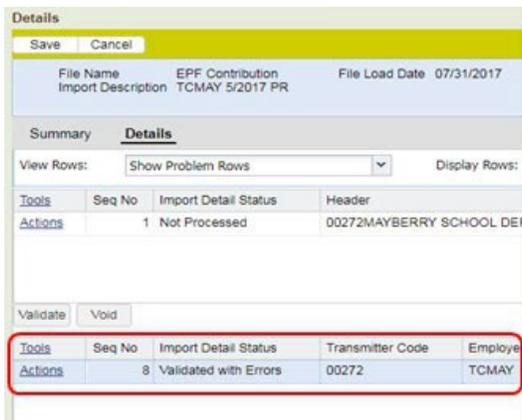
Note: three sections to this Details Screen:

Header Section – Detail Section – Summary Section

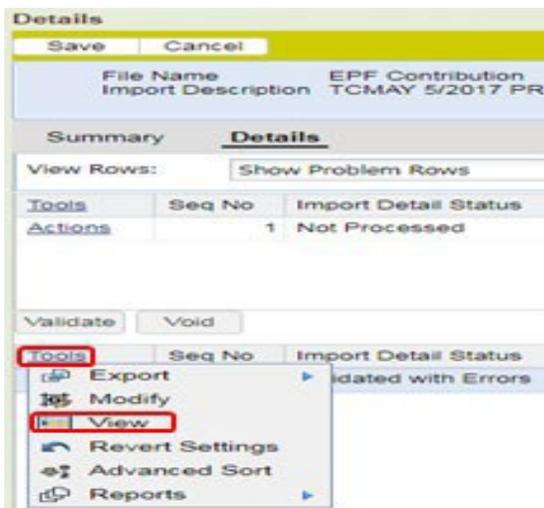
10. To show only problem rows, click on the *View Rows* dropdown arrow and select



11. Highlight the row needing to be corrected.

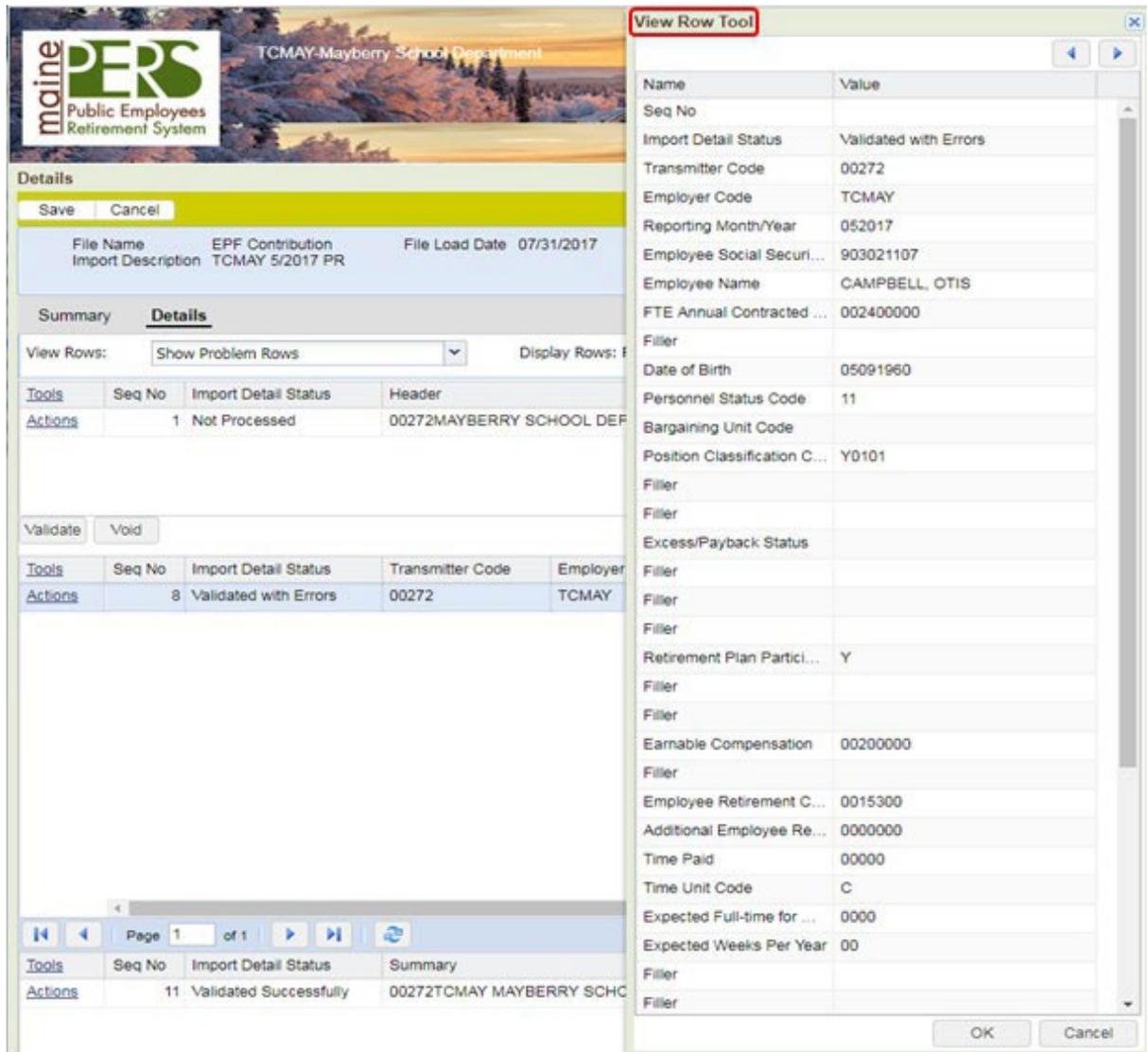


12. Click **Tools** then **View**.



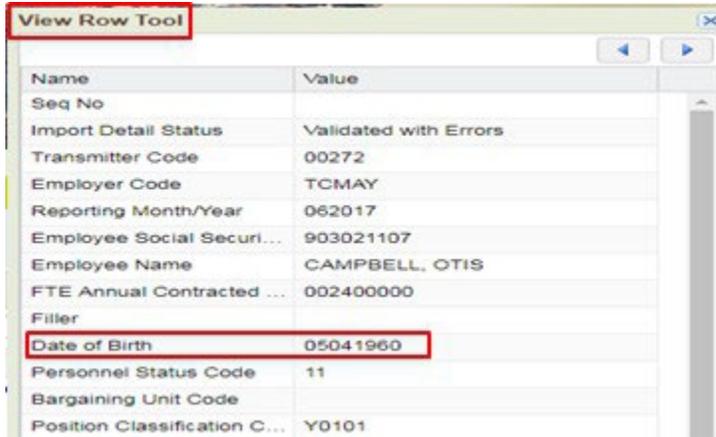
13. You can stretch this window out by clicking on the top of the *View Row Tool* screen. Hold and drag up to the top of the screen.

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

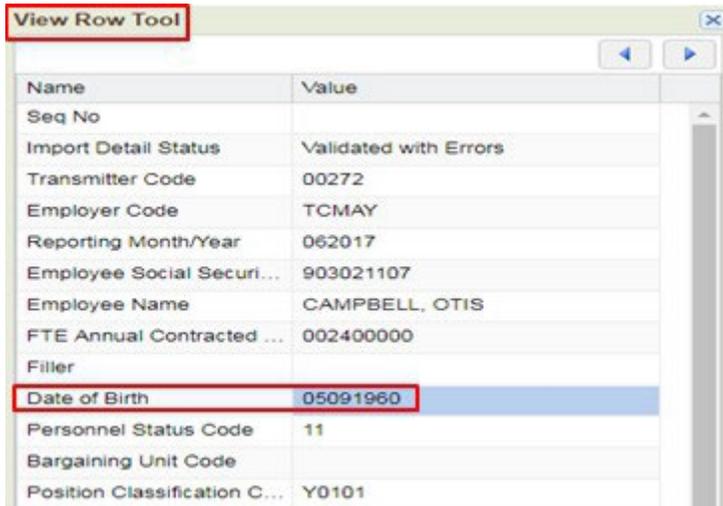


15. Go to the data element that the edit indicates is incorrect. In this example, *Date of Birth*.

Import Record Seq No	Data String	Detail Record Status	Error Message
8	00272TCMAY 062017903021107CAMPBELL, OTIS 002400000 05041960 1 Y0101 Y 00200000 0015300000000000000000000000000000 000000 0 11000000001 06282017N D	Error	D8.4 - SSN 903021107 does not match V3 participant's DOB.



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



17. Click **OK**.

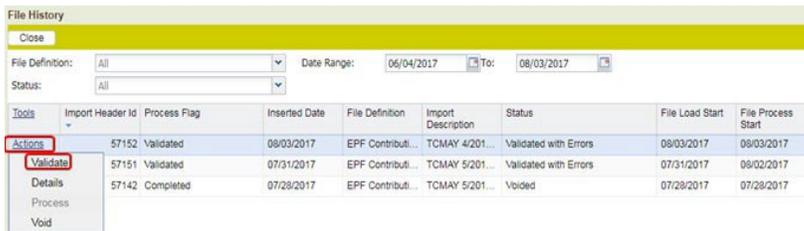
18. Continue correcting all errors and review/correct any exceptions.

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



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

20. Validate the file again (Actions/Validate)



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

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

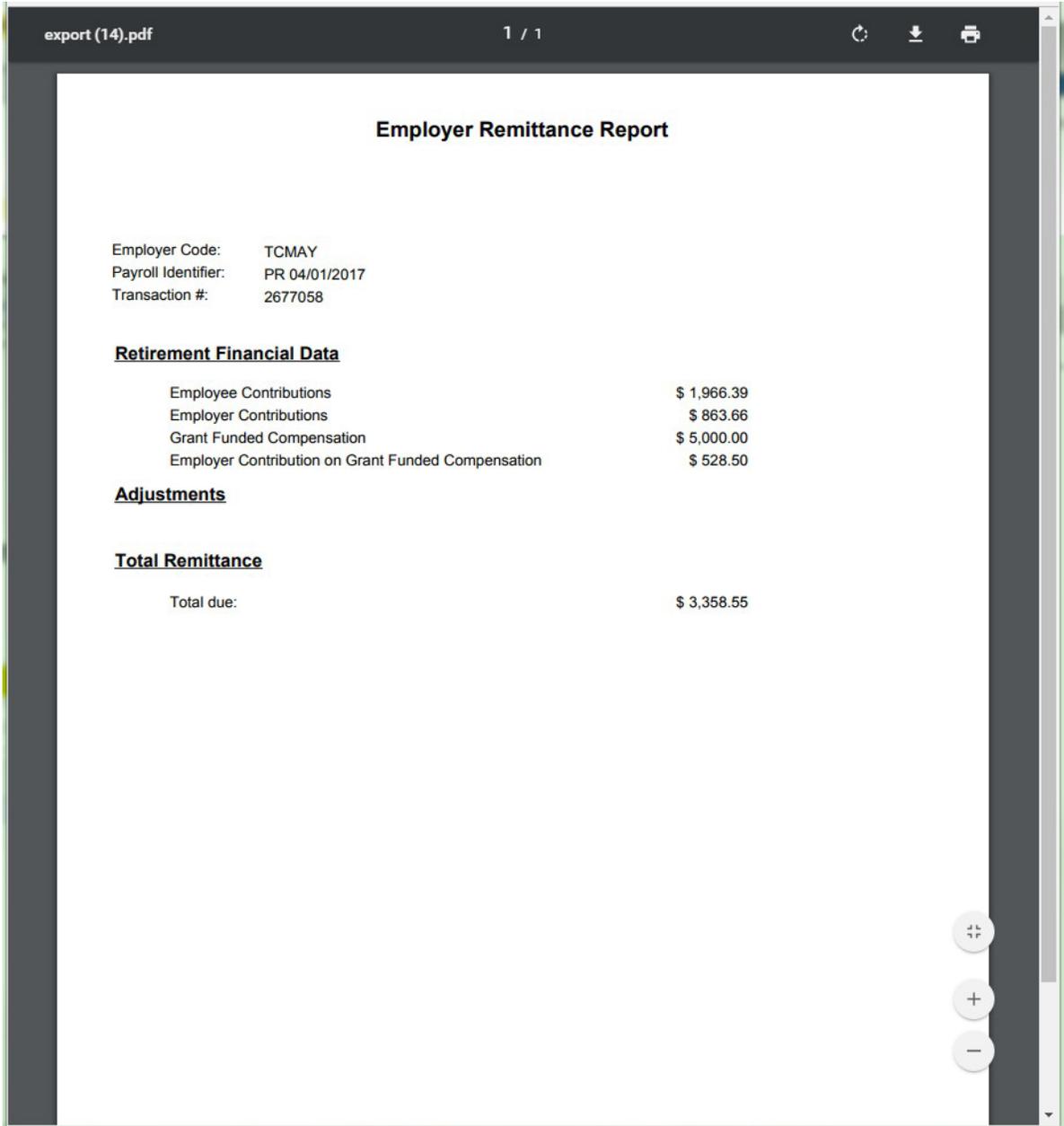
22. Click **Actions**, then **Process**.



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



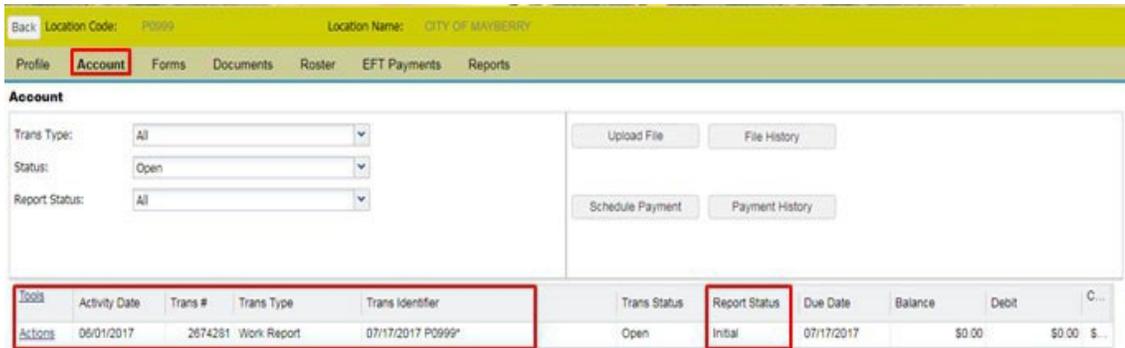
24. You now can print your Remittance Report. See page 69 for instructions to print Remittance Report. **Always send a copy of the Remittance Report with your payment.**



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. The 'Account' tab is highlighted in the navigation menu. Below the navigation menu, there are several dropdown menus for 'Trans Type', 'Status', and 'Report Status'. To the right, there are buttons for 'Upload File', 'File History', 'Schedule Payment', and 'Payment History'. At the bottom, there is a table with the following data:

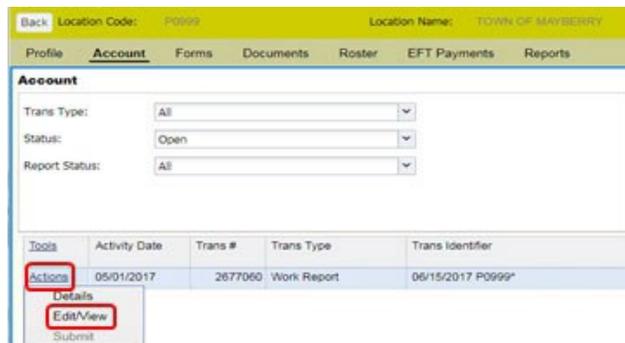
Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance	Debit	C...
Actions	05/01/2017	2674281	Work Report	07/17/2017 P0999*	Open	Initial	07/17/2017	\$0.00	\$0.00	\$...

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 'Trans Identifier' field with the value '06/15/2017 P0999*'.

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



The screenshot shows the 'Account' tab in the ESS system. The 'Actions' menu is open, showing options for 'Details', 'Edit/View', and 'Submit'. The 'Edit/View' option is highlighted.

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

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

The screenshot shows the 'Work Report Editor' interface. At the top, there are fields for Employee (City of Machery), Employer Location (POSS - CITY OF MACHERY), Report Type (Regular), Report Status (Initial), Report Period (05/1/2017 - 05/31/2017), Identifier (K07100 - 05/15/2017 POSSP), Report Source (Employee), Date Received (05/02/2017), Billing Type (Contributions), # of Participants (2), and # of Rows (2). Below this is a 'Summary' tab with an 'Exception Filter' dropdown. A table of members is displayed with columns: Tools, Actions, SSN, Name, Start Date, Stop Date, Comp, EES, Ho., Days, Pay Rt CD, Pay Rate, PSC, POS, Plan Name, Rate Category, SCP, FTE Days, FTE Hrs, Wks/Yr, and FTE Contract. Three rows are visible, all for Taylor, Andy, Bea, and Ope, with SSNs 903-... and dates 05/01/2017 to 05/31/2017. A red box highlights the table area.

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

This screenshot shows the 'Work Report Editor' interface with one member listed: Butler, Brooklyn, SSN 987-65-1234, dates 05/01/2017 to 05/31/2017, Comp \$5,000.00, EES \$400.00. The 'Add Member' button is highlighted with a red box.

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

The first screenshot shows the 'Add Member' dialog box with the 'Name' field containing '248111111' and a red box around it. The second screenshot shows the main table with a new row added: CASH, SUE, SSN 248-11-1111, dates 05/01/2017 to 05/31/2017, Comp \$0.00, EES \$0.00. A red box highlights this new row.

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

Job	Name	Start Date	Stop Date	Comp	EEB	Hours	Days	Pay R/ CD	Pay Rate	PSC	POS	Plan Name	Rate Category	SCP	FTE Day	FTE Hrs	Wage	FTE Contract
<input type="checkbox"/>	245-11-1111 CASH-BUE	05/01/2017	05/01/2017	\$2,500.00	\$300.00	240.00		Hourly	\$12.50	11	09602	P1.0-Reguar A	REG		\$0.00	40.00	\$2	\$0.00
<input type="checkbox"/>	907-45-1234 BUTLER BROOKLYN	05/01/2017	05/01/2017	\$0.000.00	\$400.00			Con.	\$0.00	11	09601	P1.0-Reguar A	REG		\$0.00			\$40,000.00

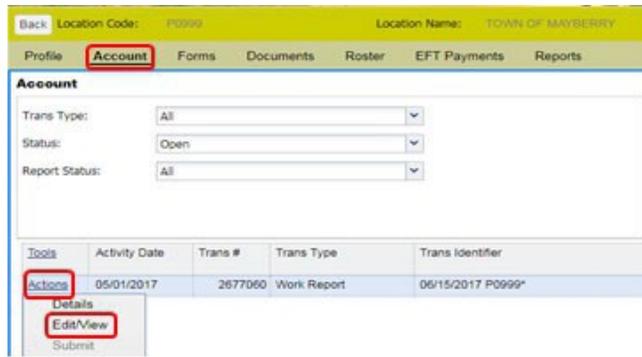
- If a member should be removed from this list, check the box at beginning of row and click on *Delete Selected*. Confirm pop-up displays; click 'Yes' then 'OK'.

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

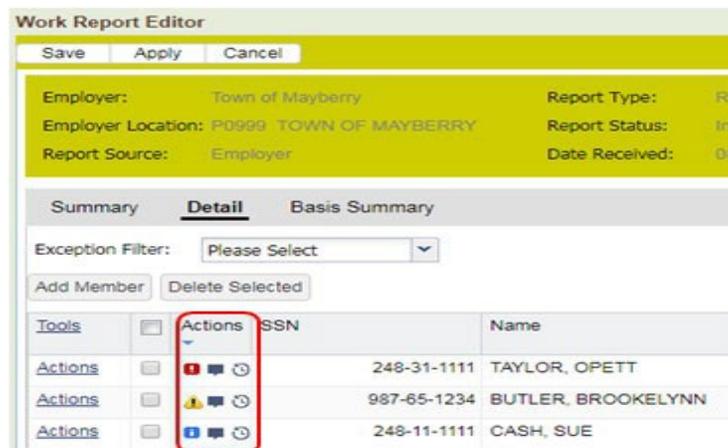
Note: The *Apply* function is also available to you. *Apply* will save your entered data without exiting from the *Edit* mode.

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

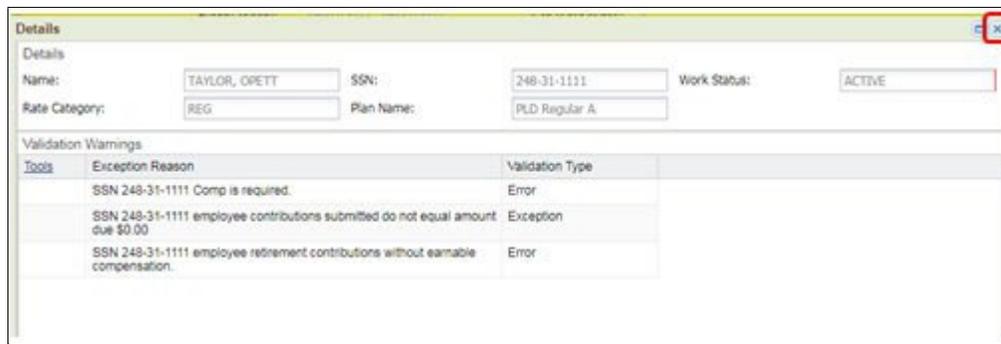
- If errors exist, errors must be resolved. If exceptions exist, exceptions must be reviewed for accuracy and resolved if necessary.
- To determine what errors and exceptions need correction or review, go to *Actions* then *Edit View*, which opens the *Work Report Editor*.



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



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



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

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

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: #0677061 - 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	09/15/2017 P0999*	Open	Prebill	09/15/2017	\$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.

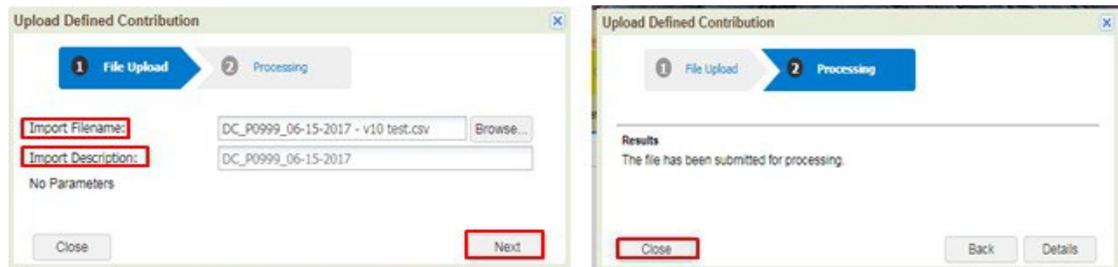
To upload a MaineSTART Defined Contribution File:

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.**

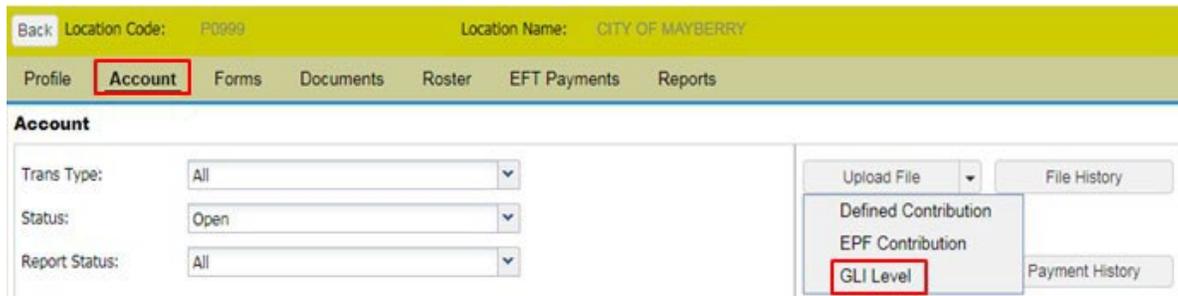
UPLOADING A GLI LEVEL FILE

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.

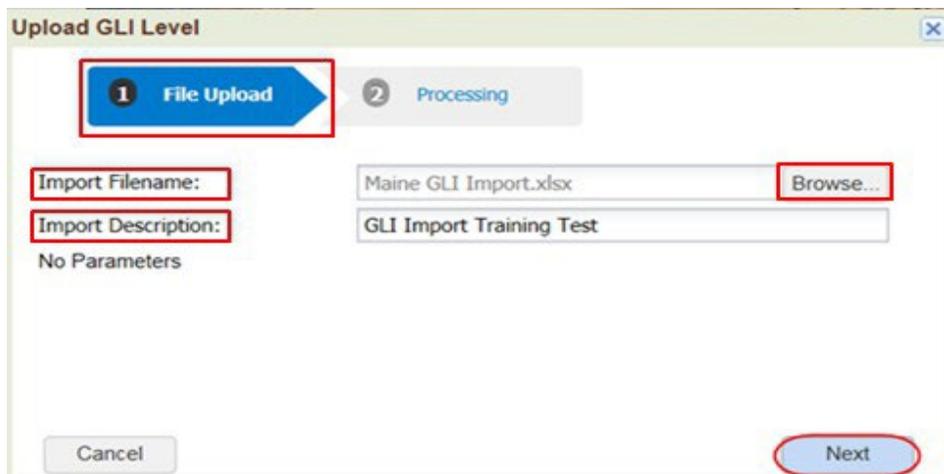
To upload a GLI Level File:

Navigate to the *Account* tab.

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



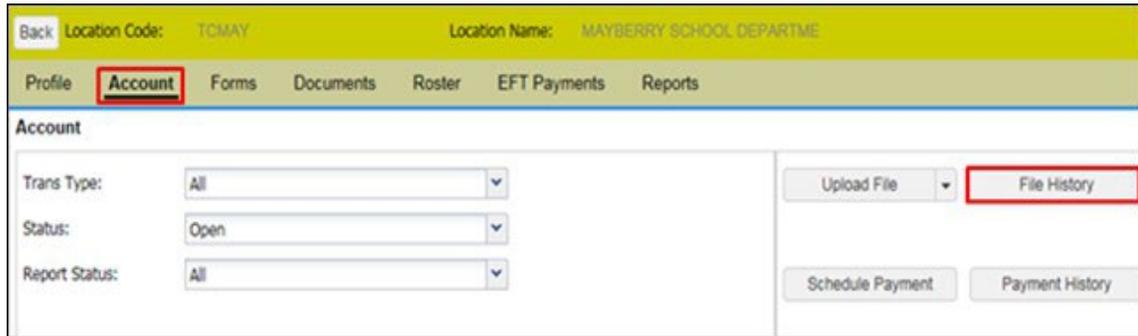
3. The *Upload GLI Level* pop-up displays.
4. Complete the following fields:
 - **File Name:** Browse for the appropriate file
 - **Import Description:** Enter an appropriate description for the import
5. Click **Next**.



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

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

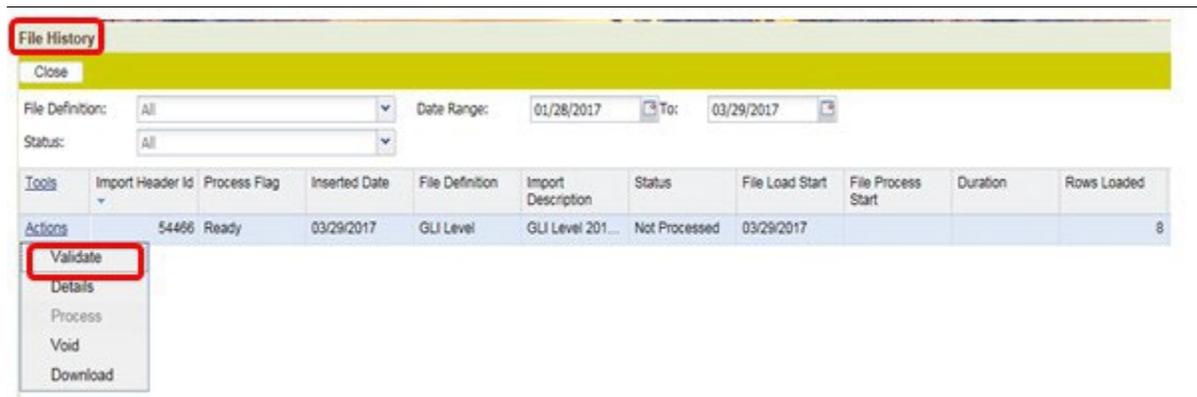
7. Click File History.



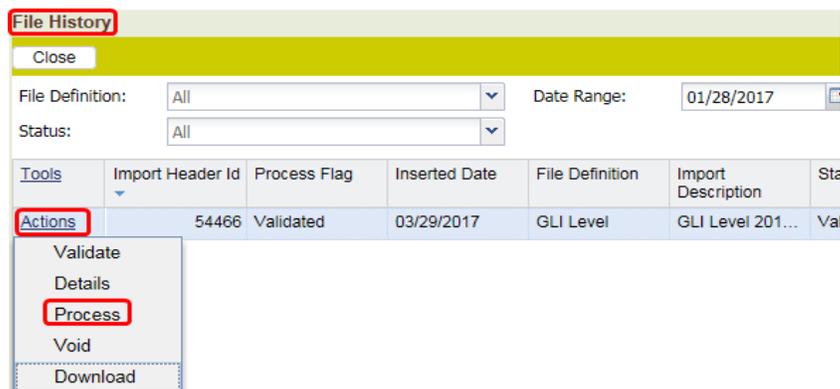
The *File History* window displays with a Ready status for the GLI Level file.

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

9. Select **Validate**.



The Process Flag column updates with a status of Validated



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

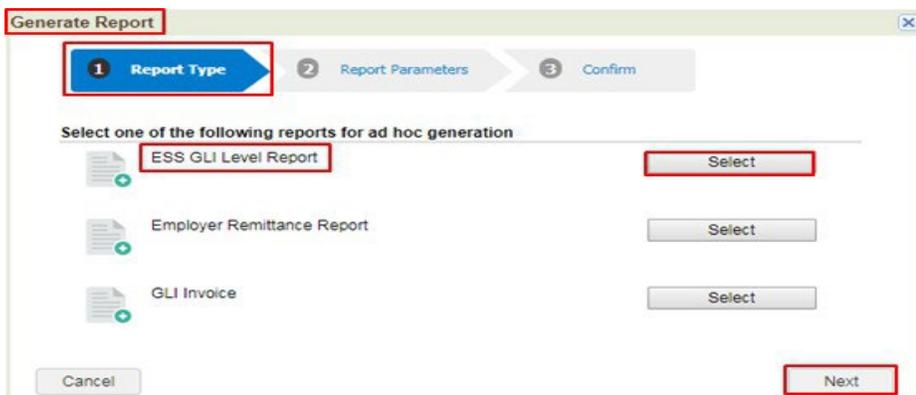
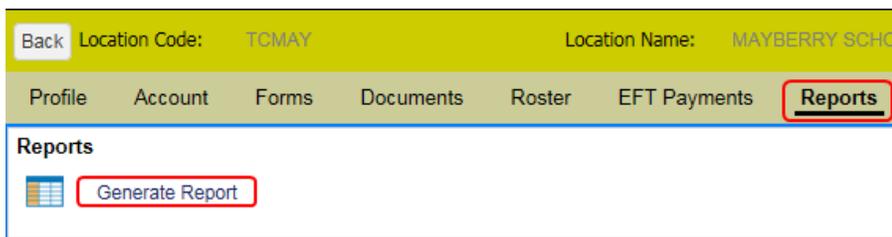
11. Select **Process**.

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

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

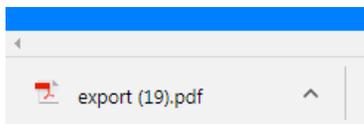
12. **Close** the *File History* window.

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



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.



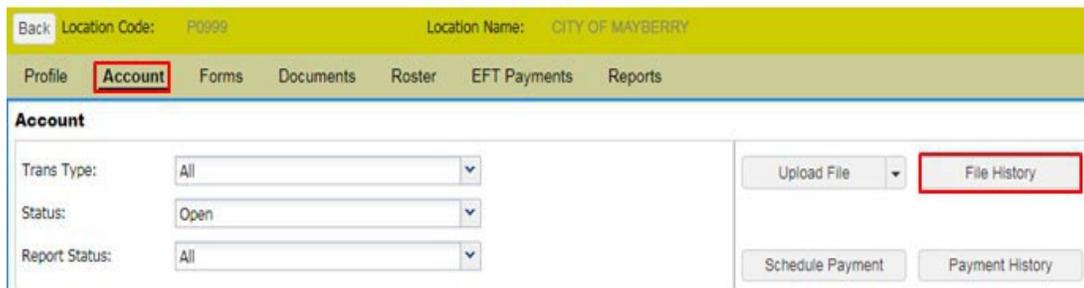
GLI Level
Start Date = 04/01/2017 for TCMAY TCMAY

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	File, 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.

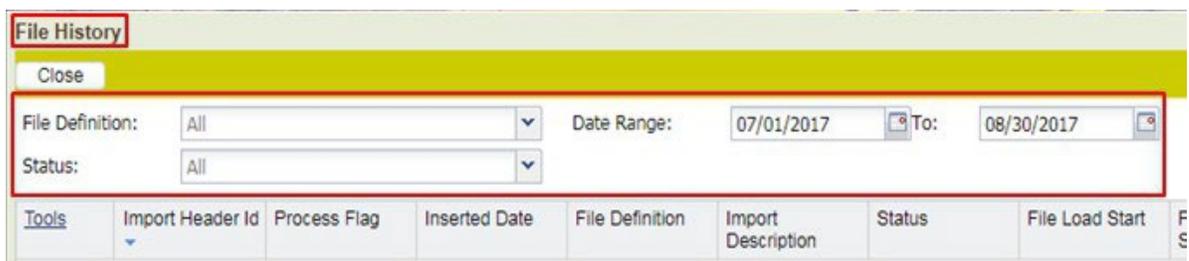
1. Navigate to the *Account* tab and click *File History*.



The screenshot shows a web application interface for an account. At the top, there is a yellow header bar with "Back", "Location Code: P0999", and "Location Name: CITY OF MAYBERRY". Below this is a navigation menu with tabs: Profile, Account (highlighted with a red box), Forms, Documents, Roster, EFT Payments, and Reports. The main content area is titled "Account" and contains three dropdown menus: "Trans Type:" set to "All", "Status:" set to "Open", and "Report Status:" set to "All". To the right of these menus are four buttons: "Upload File" (with a dropdown arrow), "File History" (highlighted with a red box), "Schedule Payment", and "Payment History".

The *File History* pop-up displays.

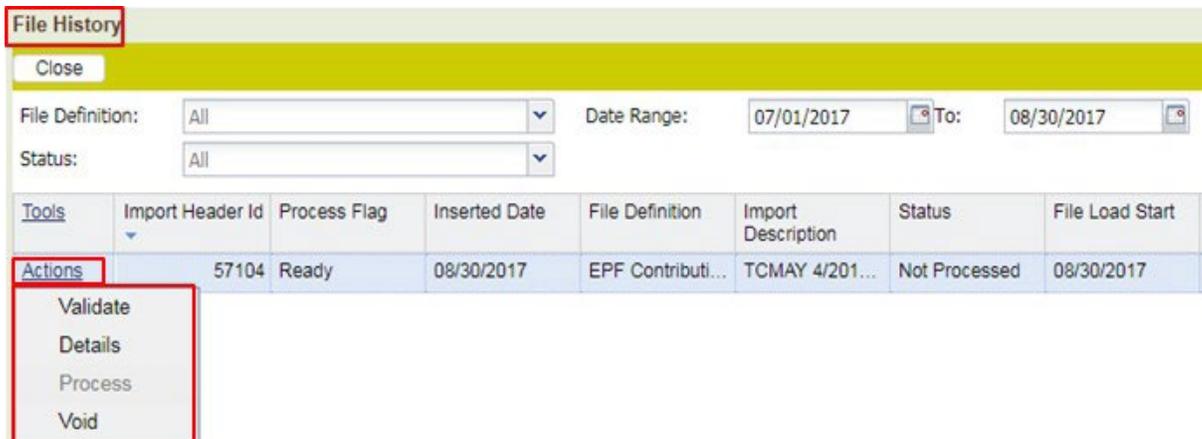
2. Filter records by **File Definition** and **Status**.



The screenshot shows a "File History" pop-up window. It has a yellow header bar with "File History" and a "Close" button. Below the header are filter options: "File Definition:" set to "All", "Date Range:" from "07/01/2017" to "08/30/2017", and "Status:" set to "All". Below the filters is a table with the following columns: Tools, Import Header Id, Process Flag, Inserted Date, File Definition, Import Description, Status, File Load Start, and F S.

'ACTIONS' OPTIONS IN THE FILE HISTORY POP-UP

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



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

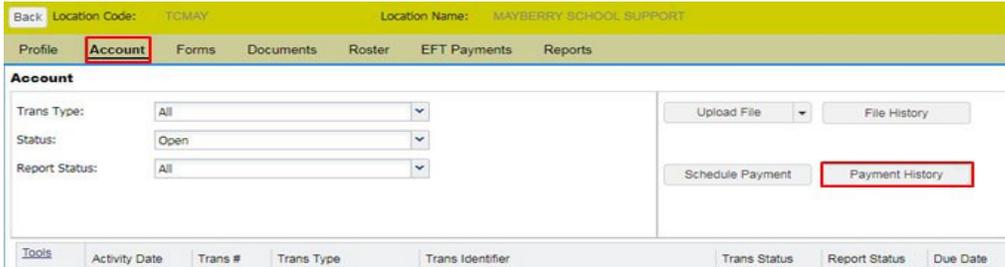
SCHEDULING AN ELECTRONIC FUNDS TRANSFER (EFT) PAYMENT

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

VIEWING PAYMENT HISTORY

To view payment history:

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



The *Payment History* pop-up displays.

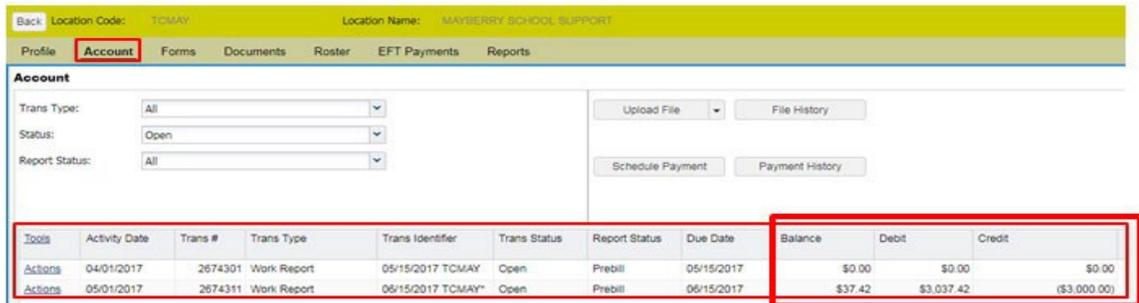
3. **Schedules** tab lists all ACH payments waiting to be processed.



4. Click the **History** tab.



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



FORMS TAB

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

The screenshot displays the 'Forms' tab interface. At the top, there is a navigation bar with 'Back', 'Location Code: TCMAY', and 'Location Name: MAYBERRY SCHOOL SUPPORT'. Below this is a secondary navigation bar with tabs for 'Profile', 'Account', 'Forms', 'Documents', 'Roster', 'EFT Payments', and 'Reports'. The 'Forms' tab is selected and highlighted.

Under the 'Forms' tab, there are two main sections:

- EForms**: A section with a 'Submitted Forms' link on the right.
- Forms in Progress**: A table with the following data:

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

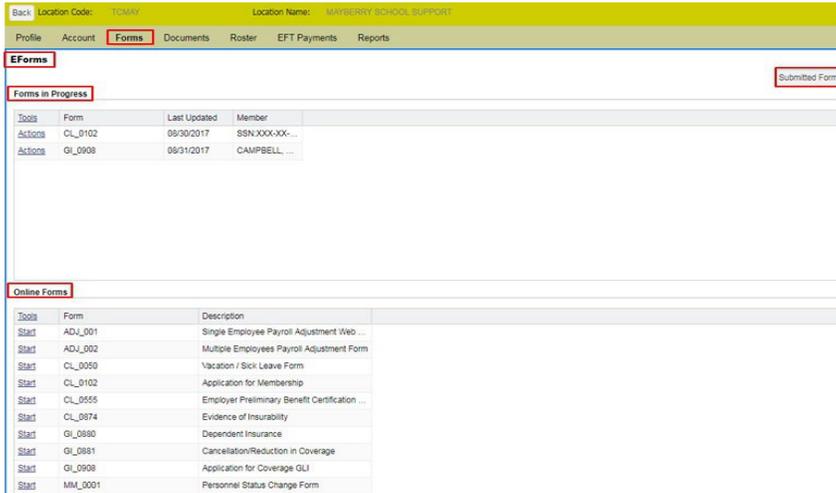
Below the 'Forms in Progress' section is the **Online Forms** section, which contains a list of forms with the following data:

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_0674	Evidence of Insurability
Start	GI_0690	Dependent Insurance
Start	GI_0681	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.

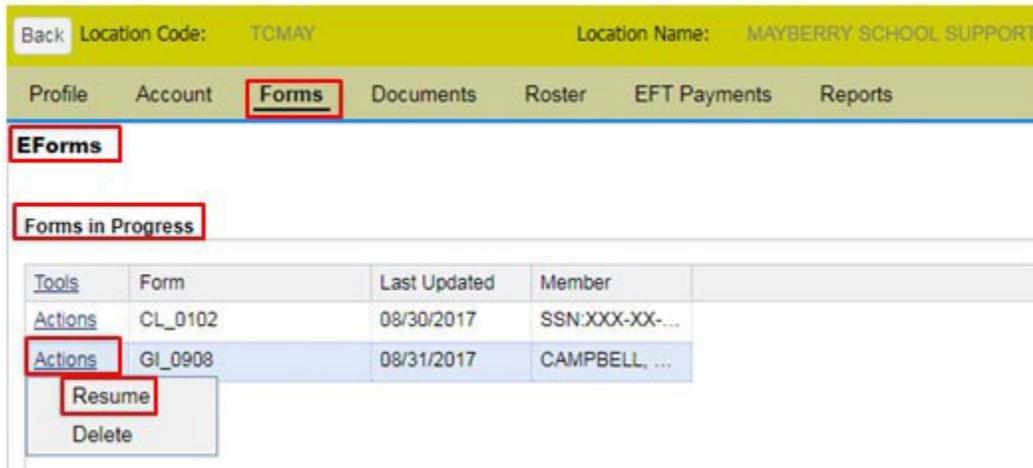


FINISHING FORMS IN PROGRESS (THOSE SAVED AS DRAFT)

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

To resume editing:

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

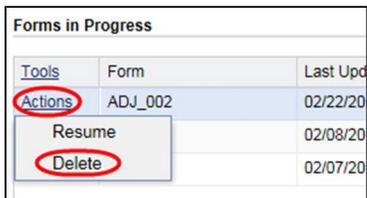


The partially-completed form displays.

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

To delete a form:

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



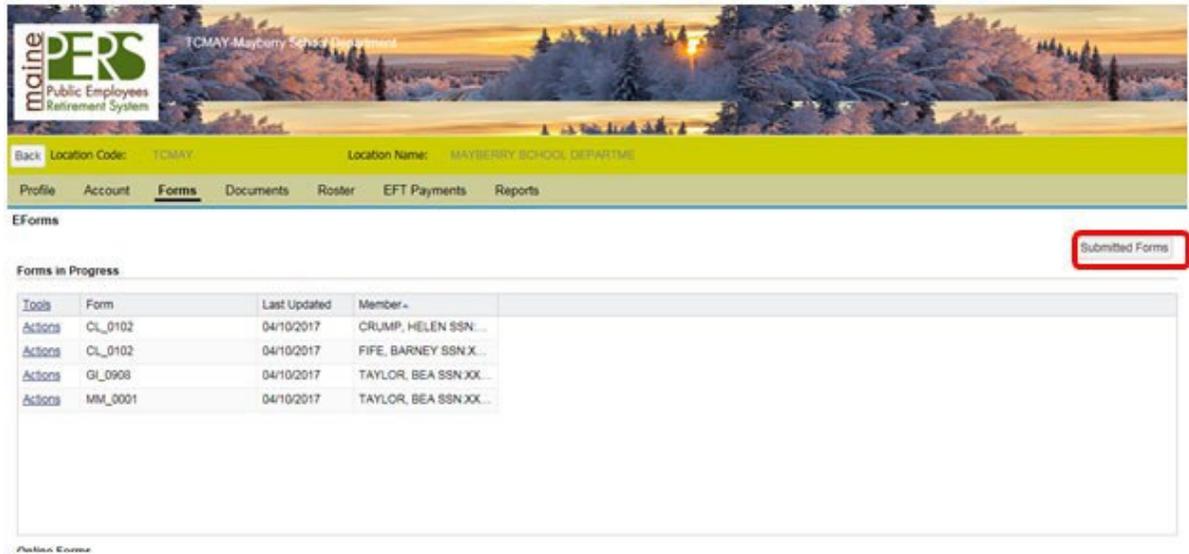
The **Delete Confirmation** pop-up displays.

2. Click **Yes**.

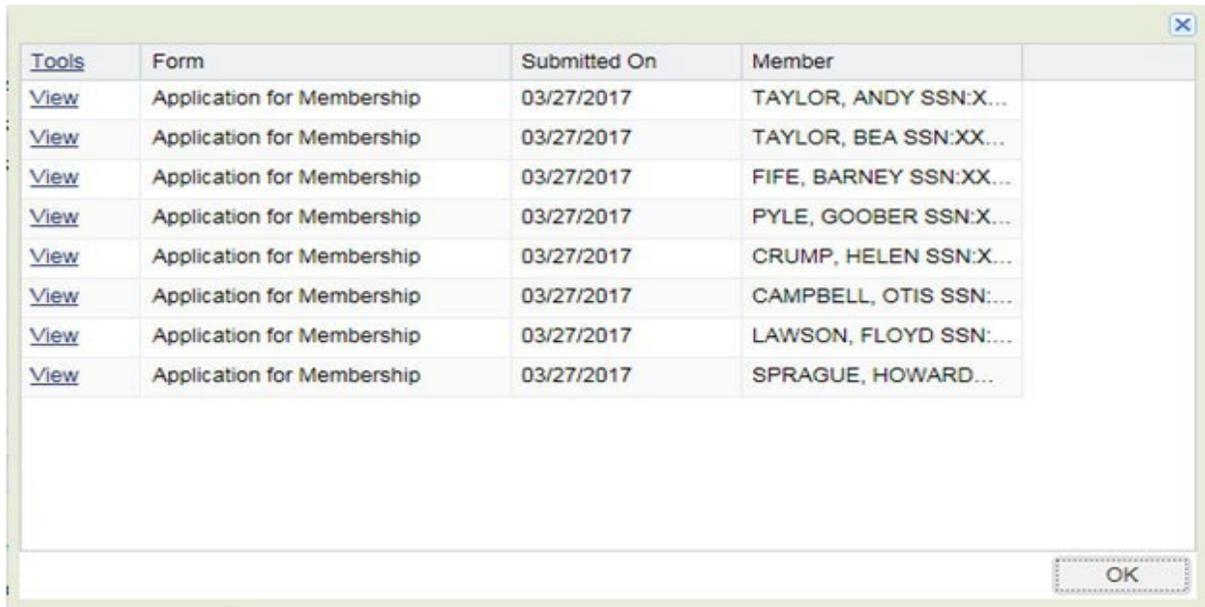
That form is no longer listed in the Forms in Progress section.

VIEWING SUBMITTED FORMS

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



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



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

DOCUMENTS TAB

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

- GLI Invoice (Group Life Insurance monthly bill – *new location for this document*)
- Employer Statement of Account
- Statement of Annual Cost (formerly known as “green sheets”)

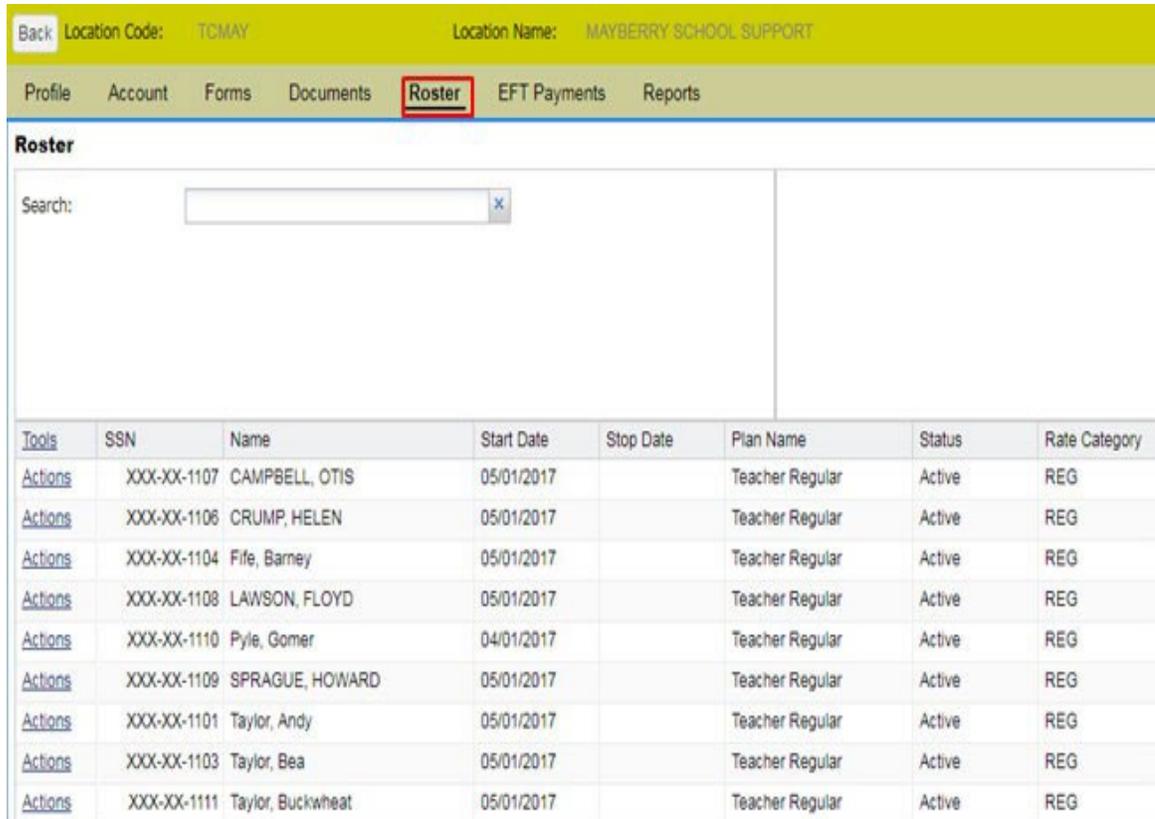
The screenshot shows the 'Documents' tab selected in the top navigation bar. The main content area displays a list of documents under the heading 'Documents'. The first document is 'GLI Invoice - Period - 09/1/2017 - 09/30/2017', dated 10/05/2017, with 'Doc-Out' and 'Email Notified' status. A red arrow points to this document from the label 'Life Ins Invoice'. The next three documents are 'Employer Statement of Account - EMPLOYER_STATEMENTS_OF_ACCOUNT', dated 09/08/2017, 08/21/2017, and 07/18/2017, all with 'Doc-Out' and 'Email Notified' status. The final document is 'Annual Statement of Cost - ANNUAL_STATEMENT_OF_COST', dated 06/08/2017, with 'Doc-Out' and 'Printed' status. A red arrow points to this document from the label 'PLD Only'.

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: x

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

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: Elig Change Reason:
Base Hours:
GLI GF:

Leave of Absence

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

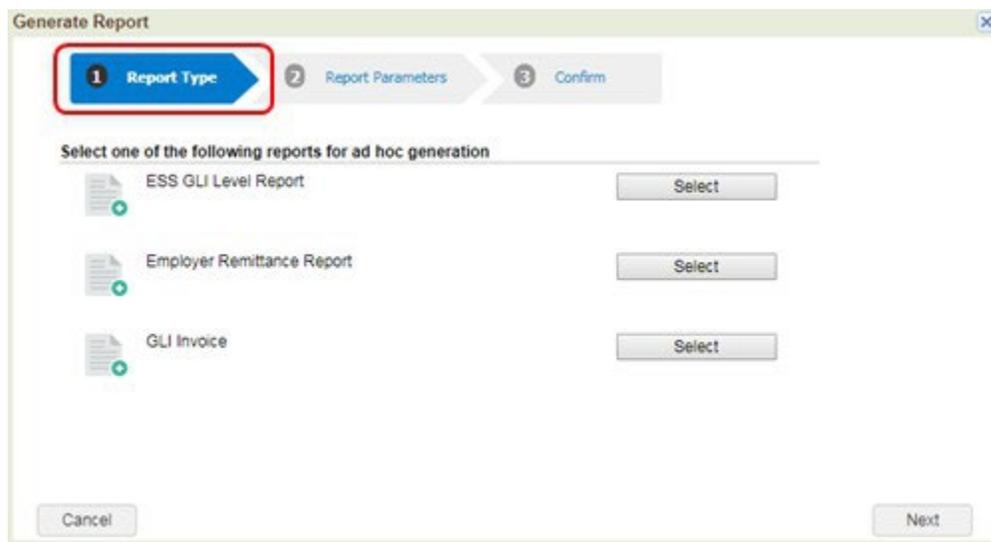
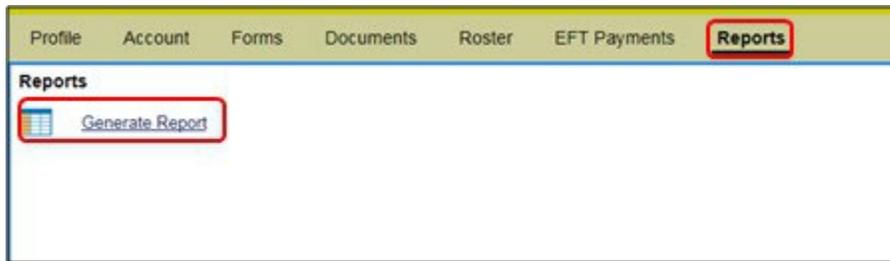
Close

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

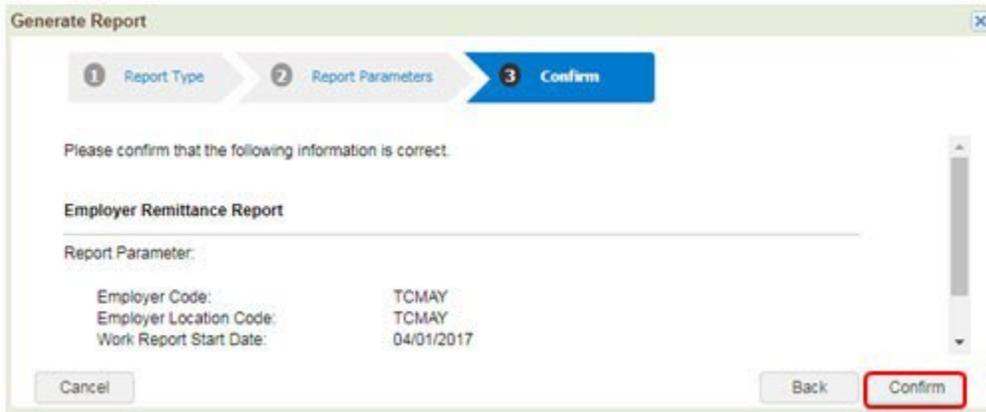
The screenshot shows a 'Generate Report' dialog box with three steps: 1. Report Type, 2. Report Parameters, and 3. Confirm. Step 1 is highlighted with a red box. Below the steps, there is a section titled 'Select one of the following reports for ad hoc generation'. Three report options are listed: 'ESS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

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

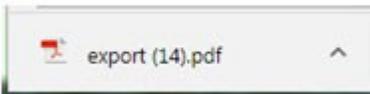
- 3) Click **Next**

The screenshot shows the 'Generate Report' dialog box at Step 2: Report Parameters. The 'Employer Remittance Report' is selected. Below the title, there are three input fields: 'Employer Code' with a dropdown menu showing 'TCMAY', 'Employer Location Code' with a dropdown menu showing 'TCMAY', and 'Work Report Start Date' with a date picker showing '05/01/2017'. Each of these three input fields is highlighted with a red box. At the bottom right, there is a 'Next' button, also highlighted with a red box. A 'Back' button is located to its left, and a 'Cancel' button is at the bottom left.

- 4) Click **Confirm**



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



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

- 6) **Print** your Report

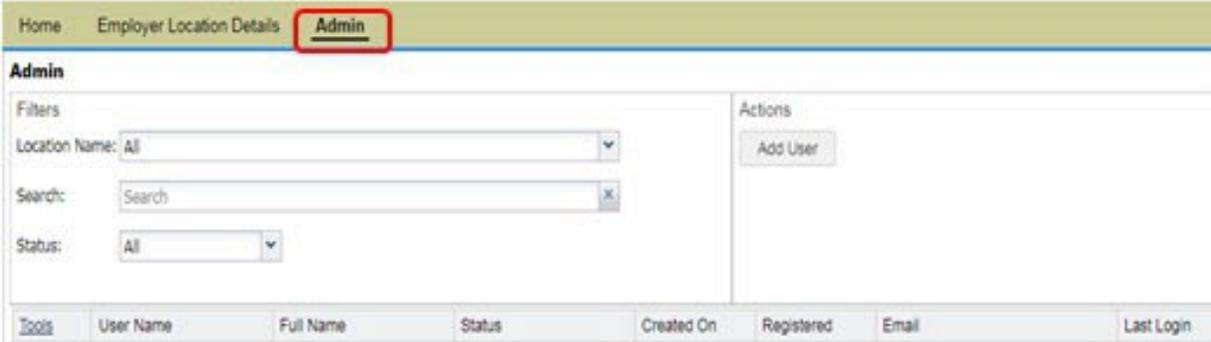


- 7) X out of the PDF window.
8) Submit a copy of the Remittance report with your payment.

ADMIN TAB

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

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



The screenshot shows the 'Admin' tab selected in a navigation bar. Below the navigation bar, the 'Admin' section contains a 'Filters' area with three dropdown menus: 'Location Name' set to 'All', 'Search' with a search box containing 'Search', and 'Status' set to 'All'. To the right of the filters is an 'Actions' area with an 'Add User' button. Below the filters and actions is a table header 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
-------------	---	---	---	---	---

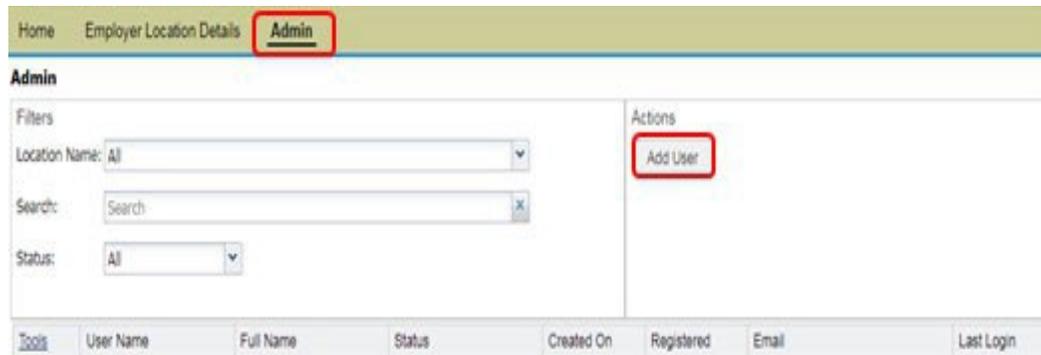
Reports

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

CREATING AN ESS USER ACCOUNT

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

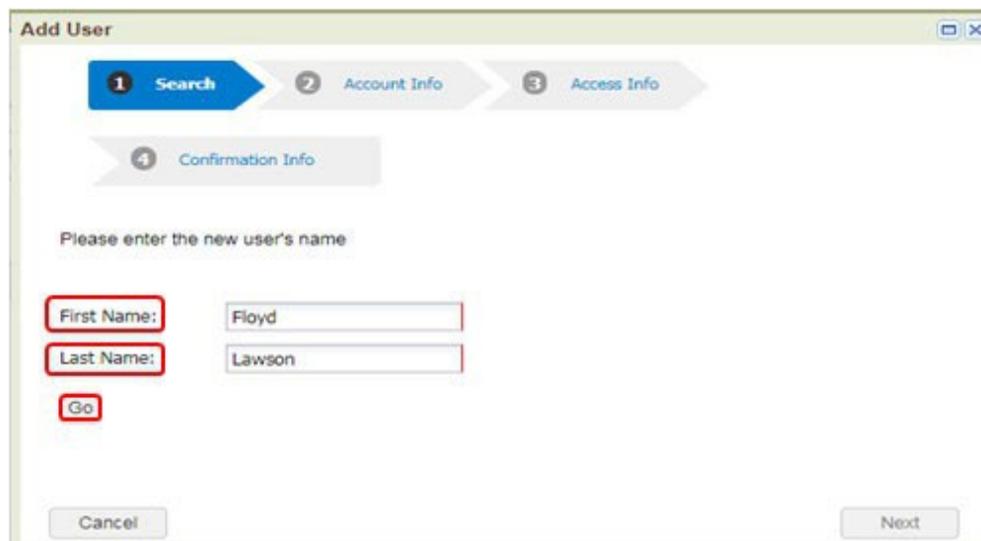
1. Click **Add User**.



The screenshot shows the 'Admin' tab selected in the top navigation bar. Below the navigation bar, there are filter options for 'Location Name', 'Search', and 'Status'. On the right side, there is an 'Add User' button highlighted with a red box. Below the filters is a table header 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 with four steps: 1. Search, 2. Account Info, 3. Access Info, and 4. Confirmation Info. The 'Search' step is currently active. Below the steps, there is a prompt 'Please enter the new user's name'. There are two input fields: 'First Name' with the value 'Floyd' and 'Last Name' with the value 'Lawson'. A 'Go' button is highlighted with a red box. There are also 'Cancel' and 'Next' buttons at the bottom.

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.			

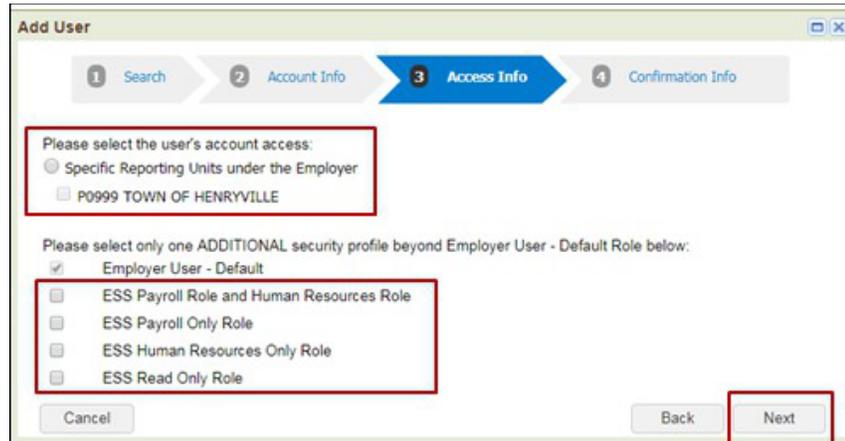
5. Create a new person by clicking **New**. The *Add User* wizard displays the *Account Info* tab, which is prepopulated with the new user's name. A *User name* is automatically assigned to the new User.

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 form titled "Add User" with a progress bar at the top indicating four steps: 1. Search, 2. Account Info (current step), 3. Access Info, and 4. Confirmation Info. Below the progress bar, there is a prompt: "Please enter the following information so that the new user can register and create the account." The form contains several input fields, some of which are highlighted with red boxes. The first set of red boxes highlights the "First Name" field (containing "Location"), "Last Name" field (containing "Jane"), "User" field (containing "Jane"), and "E Mail" field (containing "I"). The second set of red boxes highlights the "Birth Date" field (containing "mm/dd/yyyy" and a calendar icon). The third set of red boxes highlights the "Business Phone" field (with an "Ext:" field), "MFA Phone" field (with an "Ext:" field), and "MFA Email" field. At the bottom of the form, there are three buttons: "Cancel", "Back", and "Next". The "Next" button is 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.*

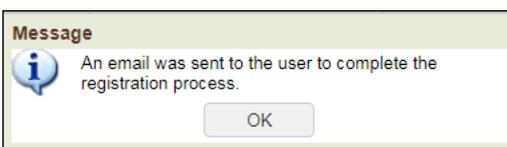


10. Click **Next**.

The wizard displays the *Confirmation Info* tab.

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

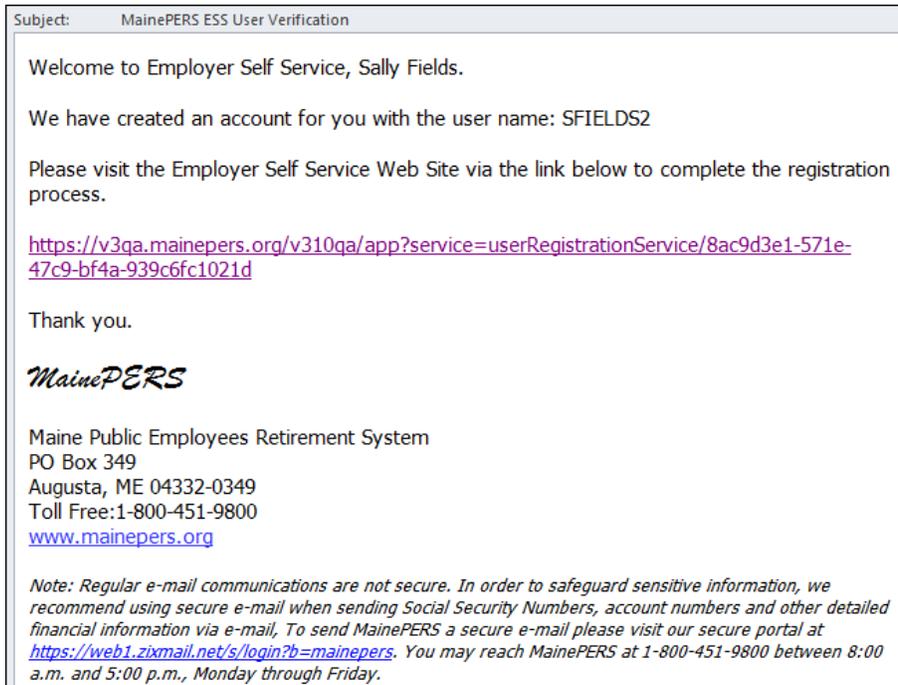
The new User receives an email inviting him or her to complete the registration process.



REGISTERING AS A USER FOR ESS

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

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



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

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

The screenshot shows the 'Verify User Registration Wizard' web form with the following fields and steps:

1 Identification (selected) | 2 Security Setup | 3 Confirmation

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

User Name: SFIELDS2

First Name: Sally

Last Name: Fields

Email: deedee.love@mainepers.org

Enter the following security identifiers:

Birth Date: mm/dd/yyyy

Mobile Phone: [input field]

Business Phone: [input field] Ext: [input field]

MFA Phone: [input field] Ext: [input field]

Buttons: 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**.

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
- Password must have a minimum of 1 capital letters

Enter your new Password: [password field] Strong

Please confirm your password: [password field]

Cancel Back **Next**

The third step of the wizard generates.

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

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

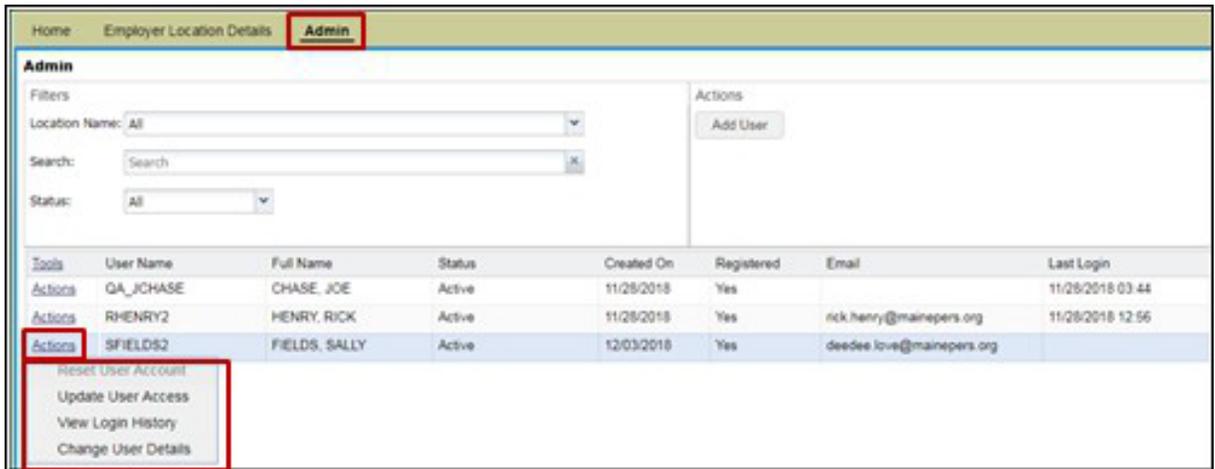
Security Question 3: What is your father's middle name?
Security Answer 3: TEST

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 interface with a navigation bar containing 'Home', 'Employer Location Details', and 'Admin' (highlighted with a red box). Below the navigation bar, there are filters for 'Location Name' (set to 'All'), a search box, and a 'Status' dropdown (set to 'All'). An 'Add User' button is located in the top right. A table lists users with columns: Tools, User Name, Full Name, Status, Created On, Registered, Email, and Last Login. The table contains three rows: QA_JCHASE (CHASE, JOE), RHENRY2 (HENRY, RICK), and SFIELDS2 (FIELDS, SALLY). A red box highlights the 'Actions' column for the SFIELDS2 user, which has opened 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:

E Mail:

Name:

Please enter or update the following required user security attributes.

Birth Date:

Home Phone:

Mobile Phone:

Business Phone: Ext:

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

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

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
 - P0999 TOWN OF HENRYVILLE
- Deactivate Account

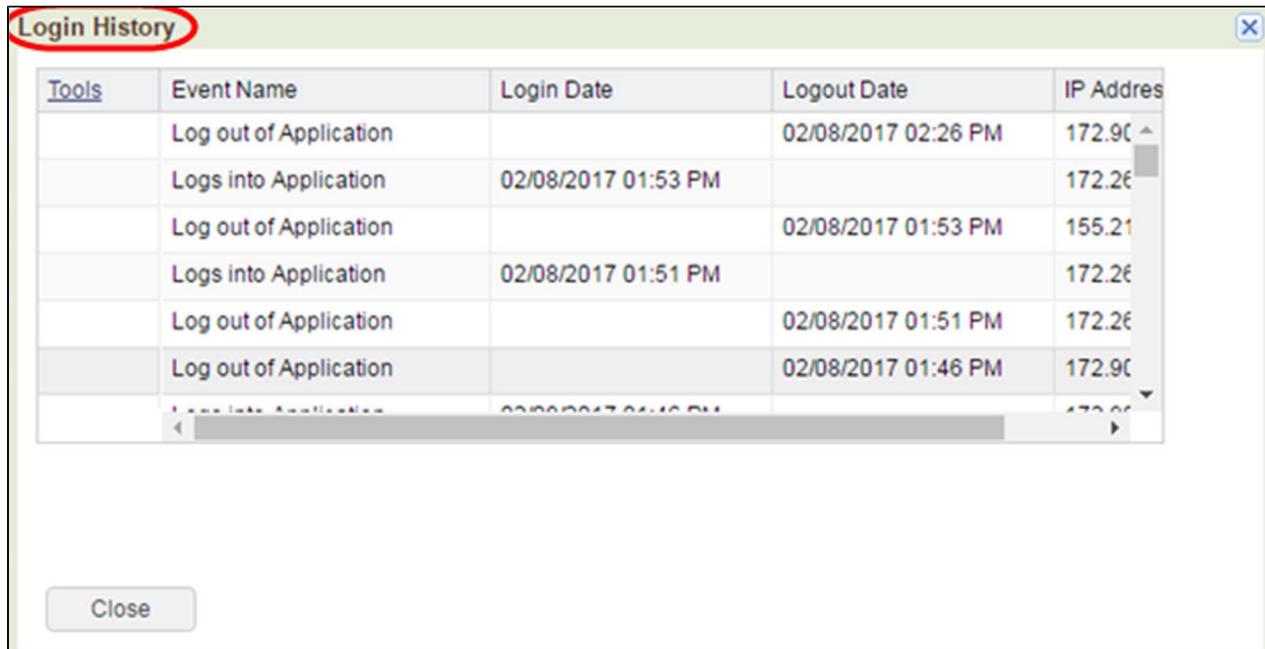
Security Profile (optional):

- 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.



The screenshot shows a 'Login History' pop-up window with a table of login events. The table has five columns: 'Tools', 'Event Name', 'Login Date', 'Logout Date', and 'IP Address'. The 'Tools' column contains a link labeled 'Tools'. The 'Event Name' column lists 'Log out of Application' and 'Logs into Application'. The 'Login Date' and 'Logout Date' columns show dates and times from 02/08/2017. The 'IP Address' column shows IP addresses like 172.90 and 155.21. A 'Close' button is located at the bottom left of the pop-up.

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

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 values:

- Prefix: [Dropdown]
- Birth Date: 05/05/1960
- First Name: Sally
- Middle Name: [Empty]
- Last Name: Fields
- Suffix: [Dropdown]
- SSN: [Empty]
- Alt ID 2: [Empty]
- Home Phone: [Empty]
- Mobile Phone: (207) 248-1815
- Business Phone: (207) 512-0001 Ext: [Empty]
- MFA Phone: (207) 512-0002 Ext: [Empty]
- Email: deede.love@mainepers.org
- MFA Email: [Empty]
- Correspondence: [Empty]
- Payment: [Empty]

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

This screenshot shows the 'User Details' form with a context menu open over the MFA Phone field. The menu options are:

- Add
- Details
- Delete

This screenshot shows the 'User Details' form with the MFA Phone 1 and MFA Phone 2 fields highlighted by a red box. The values are:

- MFA Phone 1: (207) 512-0002 Ext: [Empty]
- MFA Phone 2: (207) 512-0001 Ext: [Empty]