#### MainePERS – EMPLOYER SELF SERVICE



Employer Self Service (ESS) User Guide



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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, <u>www.mainepers.org</u>, 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.

Forgot User   Forgot Password	

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				
O (***)-***-3	○ (***)-***-3381				
<ul> <li>Send me a Text Message</li> <li>Call me on this number</li> <li>(***)-***-3310</li> </ul>					
<ul><li>Send me</li><li>Call me c</li></ul>	a Text Message on this number				
	Cancel Next				

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				
Resend Code	Cancel Done			

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



The *ESS Home Page* tab looks like this:

### LOGGING OUT OF ESS

Click the **Profile Image** cicon 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.

User:	
Password:	
Log In	
USER   MEMBER	assword
Version 10.0-ess MAV10QA v 1.959	Vitech V3

The Forgot User Name pop-up displays.

	mail address and your User Name	will be emailed to you.
riease enter your e		
riease enter your	,	

- 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.

User:	
Password:	
Log In Forgot User Forgot F	Password
USER   MEMBER	
Version 10.0-ess MAV10QA v 1.959	Vitech V3

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

Account Lookup Security Questions	Password Reset	Complete
Please enter your User Name:		
Cancel		Next

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

The Security Questions tab displays.

Account Lookup Security Questions	Password Reset	Com	plete
Please answer the security questions.			
Select First Security Question: What is your mothe	rs maiden name?		

- 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**

User Profile				×
User Name:	SBEACH			
Name:	BEACH, SANDY			
E Mail:	sbeach@mayberryscho	pols.org		
Last Login:	07/28/2017			
Change Password	Change Security Questions	View Login History	Change Accessibility	Close

- 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**

Address State	Arrie Atrie	Taxata (1997)	Taxada Taxada Taxada
Prequently Asked Qu Q, Skath FAQ Than Sanh Tam	estions	Sees.	
Category Al Ansian Benfit Brauz Uk Jhannos Forns Reyns Recordig Alement Secrity Access Neutochio	Question		
Home	Employer Location	Details Admin	

■ 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.

Back Loca	ation Code:	TCMAY		Loc	ation Name: MAYE	BERRY SCHOOL SU	PPORT	
Profile	Account	Forms	Documents	Roster	EFT Payments	Reports		
Employe	r Location	Info						
Change								
Demograp	hics							
ocation Co	ode:	TCMAY					Location Type:	Teacher
ocation Na	ame:	MAYBER	RY SCHOOL SUP	PORT			Location Status:	Active
# of Active	Participants:	9						
Correspond	lence:	12 Main S Augusta I	Street ME 04333					
Contacts	s							
Add a new	Contact							
Tools	Name		Conta	act Role	Phone	Fax	Email	Address
Actions	Floyd Lawso	n			B: (207) 24	8-1234 x5	Opple9@mayber	rry.rfd

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
- <u>Documents</u> 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
- <u>Roster</u> Tab provides you with a list of employees, active and terminated for your employer only
- <u>EFT Payments</u> Tab where you set up account information to be used for Electronic Funds Transfers (EFTs)
- <u>Reports</u> Tab provides you with the Employer Remittance Report and ESS GLI Level Report

COLL COL	cation Code:				abon Name: Novi					
Profile	Account	Forms	Documents	Roster	EFT Payments	Reports				
Employe	er Location	Info				24	8			
Change										
Demograp	phics									
Location C	ode:	TCMAY					Loc	ation Type:	Teache	er
Location N	lame:	MAYBERR	Y SCHOOL DEP	ARTMENT			Loc	ation Status:	Active	
# of Active	Participants:	9								
Contact	5									
Contact Add a new	i <b>s</b> ar Contact									
<b>Contact</b> Add a new	es av Contact				Destr			Paul		
Contact Add a new Tools Actions	s a Contact Name Sandy Bearl	ħ	Conta	act Role	Phone B: 2007	Fa	X.	Email deedee toueSite	maineders.org	Address 1

### **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.

Back Locat	ion Code:	TCMAY		Loc	ation Name: MAYE		DRT	
Profile	Account	Forms	Documents	Roster	EFT Payments	Reports		
Employer	Location	Info						
Change								
Demographi	ics							
Location Cod	e:	TCMAY					Location Type:	Teacher
Location Nan	ne:	MAYBERR	RY SCHOOL SUP	PORT			Location Status:	Active

The Employer Location Info pop-up displays.

3. Click in the field you wish to update.

The *Edit Correspondence Address* pop-up displays.

Profile Account	Forms Doc	cumenta Roster E	FT Payments Reports						
Employer Location	Info								
Change									
Demographics									
Location Code:	TOMAY	Employer Location Info							10
Location Name:	MAYBERRY SC	conographics	Maria and Andrewson			Edit Correspon	dence Address		x
# of Active Participants:	3	Location Code:	TONAY		Locat	OK Cel	e Copy+		
	1 Mar Drug	Location Name:	MAYBERRY SCHOOL SUPPORT		Locat	Inserted By:	DLOVE on 002901	107	
conspondence:	Augusta ME (HC	# of Active Participants:				Address 1:	12 Main Street		
	1	Correspondence:	2 Main Street Augusta ME 04333	0	Busie	Address 2:			00
		Payment:	-	0	Prime	City:	Augusta		00
					Enal	State:	ME	*	00
						20:	04033		
						County:	KENNEBEC	*	
Contacts						Courtery:	United States	*	
The second s						Effective Date:	09/01/2017	3	
ADD & NEW COTEST		Cancel				Address Source:	Enployer	*	Save
3008 Name			1.000 (100	( an and ) )	114			100	

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

Edit Corr	esponden	ce Address	×
ОК	Close	Copy-	

6. Click Save.

Demographis Location Tope: Teacher  Location Type: Teacher  solution Code: TOMAY Location Type: Teacher  solution Status:  solution Status	imployer Location Info	6						
Location Code: TDMAY Location Type: Teacher  Location Type: Ceacher  Location Status: Active  Consecondence: 12 Main Street Location Status: 12 M	Demographics							
Location Name:     MunitERRY SCHOOL SUPPORT     Location Status:     Active       # of Active Participants:     g       Consepondence:     12 Main Street       Augusta ME 04333     Primary Fac:       Payment:     g	Location Code:	TCMAY		Location Type:	Teacher	*		
e of Active Participants: 9 Consegondence: 12 Main Street Augusta ME 04333 Primary Fax: 00 Primary Fax: 00 Final: 00	location Name:	MAYBERRY SCHOOL SUPPORT		Location Status:	Active	*		
tonespondence: 12 Main Street Augusta ME 04333 0 Business Phone: Ext: 00 heyment: 0 Pinany Fax 00 terment: 00	of Active Participants:	9						
Augusta ME (4533 0 0 Prinary Fac 0 0	Correspondence:	12 Main Street	0	Business Phone:		Ext:	00	
tyment: Email: 00		Augusta ME 04333		Primary Fax:			00	
	Payment:		0	Email:			00	
								_
	Cancel						S	ave

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

conprojet cocasion mito					
Please venity and click 'Cr	onfirm' to permanently save the changes.				
Demographics					
Location Code:	TCMAY		Location Type:	Teacher	
Location Name:	MAYBERRY SCHOOL SUPPORT		Location Status:	Active	
# of Active Participants:	9				
Correspondence:	12 Main Street Augusta ME 04333	0			
Cancel					Back Confirm

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.

	New Contact Search	Enter Details	Confirm	
200			2010-00-00-00-00-00-00-00-00-00-00-00-00-	
Please se	earch to ensure that this con	tact doesn't already exi	ist in V3's world.	
All	<ul> <li>taylor,</li> </ul>	andy	Search	
Possibl	le Matches			
Tools	Name		ID	
	No matches found.			
	*			
Add Inc	<			

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.

Prefix:	Contact Role:		~
First Name:	Ŋ`		
Middle Name:			
Last Name:			
Suffix:	×		
Home Phone:		0	
Mobile Phone:		0	
Business Phone:	Ext:	0	
Primary Fax:		0	
Email:		0	
Correspondence:		0	
Payment:		0	

- 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.

Contact		
New Contact	t Search 2 Enter Details 3 Confirm	
Prefix:	Contact Role:	
First Name:	Karen	
Middle Name:		
Last Name:	Drebillis	
Suffix:		
Business Phone:	(207) 333-4444 Ext:	
Email:	kfrebillis@dummy.net	
Correspondence:	P.O. Box 349 Augusta ME 04330	
	Augusta ME 04330	

- 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.

Dath Cotab				LOC	additional approximation					
Profile	Account	Forms	Documents	Roster	EFT Payments	Reports				
mployer	Location I	Info								
Change										
emographi	cs									
cation Code	e:	TCMAY					Location Type:	Teacher		
cation Nam	ve:	MAYBERR	Y SCHOOL DE	PARTMENT			Location Status:	Active		
of Active Pa	articipants:	9								
ontacts	1									
Los a non C	(treteo)									
and a right o										
Tools	Name		Cont	tact Role	Phone	Fax	Email		Address 1	
Actions	Sandy Beach	1			B: (207) 5	12-3228	deedee.love@m	ainepers.org		
Actions	Opi Taylar				H: (207) 5	55-5555	opi.taylor@maini	epers.org		
					-					
		Actions	Sandy	Beach						
		Actions	Sandy	Beach						
		Actions	Sandy etails	pade						
		Actions De De	i Sandy etails elete	pade						

The appropriate pop-up displays.

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

Back LO	cation Code:			Loca	don Name: MART						
Profile	Account	Forms	Documents	a Roster	EFT Payments	Reports					
Change	er Location (	nfo									
Location C	ode:	TOMAY					U	xation Type:	Teacher.		
Location N	AMTHE:	MAYDER	RY SCHOOL D	IPARTMENT			U	xation Status:	Active		
# of Active	e Participantsi	9						Contacta			
Correspondence: 123 Marybarry Lane Augusta ME 64333			Change Prefix First Name: Middle Name: Last Name: Suffix Business Phone: Email:	Contact Role: Bandy Beach (2017) 512-5228							
Contact	te							-			
Add a new	w Contait										
Tagin Additions	Name Opmer Pyle		0	ordact Role	Phone B (207)	Fax.		Correspondence:	123 Mayberry Augusta ME 0	Lane 4330	
Actors	Banty Beach				B (207)	512-3228					
Actions	Sammy Spa				B (207)	245-9999					
Actors	Opi Taylar				H. (207)	565-5555					
								Close			

3. Click in the field you wish to update.

The appropriate pop-up displays.

Back Loc	ation Code:	TOMAK	Locatio	n Name: WARRENOLV SC	HOLL SEPARTINE						
Profile	Account	Forms Doc	umenta Roster	EFT Payments Report							
Change	r Location I	inte									
Location Co Location No # of Active	ode: ame: Participanta:	TCMAY MAYBERRY SC- 9	KOOL DEPARTMENT		Loc	on Type: Teacher on Status: Active					
					Contacts Profix: First Name: Middle Name: Last Name: Suffix:	Sandy Contact Noise		Wew Correspon	dence Address 6 Copy+		×
Contact Add a new	• Contact				Home Phone: Mobile Phone: Business Phone Primary Fair	(207) 512-3228 Ext:	0	Address 2: City:		3	
2005 Actions	Name Comer Pyle		Contact Role	Phone B: (207) 248-1234	Fai Email	deedee.love@manepers.org	0	Zp: County:			
Actors	Bandy Beach Opi Taylor			B (207) 512-3229 H (207) 555-5555	Correspondence			Courtery: Effective Date:	United States 07/31/2017	¥	
					Payment		0	Address Source	Enployer	Y	
					Carcel			210			

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

Edit Correspon	dence Address		×
	se Copy <del>v</del>		
Inserted By:	DLOVE on 05/03/20	17	
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	~	

#### 5. Click Save

Contacts				2
Prefix:		Contact Role:		~
First Name:	Sandy			
Middle Name:				
Last Name:	Beach			
Suffix:	· · ·			
Home Phone:			0	
Mobile Phone:			0	
Business Phone:	(207) 512-3228	Ext:	0	
Primary Fax:			0	
Email:	sbeach@mayberryschools.org	10	0	
			_	
Correspondence:	321 Mayberry Lane Augusta ME 04330		0	
Cancel				Save

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

Contacts					×
Please verify and clici	k 'Confirm' to permanently sa	ave the chan	ges.		
Prefix:			Contact Role:		
First Name:	Sandy				
Middle Name:					
Last Name:	Beach				
Suffix:					
Business Phone:	(207) 512-3228	Ext:		]	
Email:	sbeach@mayberrysch	ools.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@cityhali.net	123 City Circle Augusta ME 04330
Actions	Sandy Beach		B: (207) 512-3228	3	sbeach@mayberryschools.org	321 Mayberry Lane Augusta ME 04330
Actions	Sammy Spade		B: (207) 248-9999	)	deedee.love@mainepers.org	123 Mayberry Lane Augusta ME 04333
Actions	Opi Taylar		H: (207) 555-5555	5	opi.taylor@mainepers.org	

### **ACCOUNT TAB**

Account	á.	044						
Trans Type	81	Ali			pload File	File Histo	ry I	
Status:		Open		-				
Report Sta	tus:	Al	,	Sche	dule Payment	Payment His	Payment History	
Tools	Activity Dat	e Trans#	Trans Type	Trans identifier	Trans Status	Report Status	Due Date	Balance
Actors	10/02/2017	3696979	Week Depart Adjustment	Adjust incoment Comp. 8 EE9 Deletier 07/0017	0000	Relevand	11/20/2017	\$46.77
Actions	09/29/2017	2695405	Work Report Adjustment	Adjust incorrect Comp & EES Pellevie Onzonn	Open	Released	10/31/2017	\$135.17
Actions	09/28/2017	2695403	Work Report Adjustment	Adjust Incomert Comp & EES County 07/2017	Onen	Prehill	10/31/2017	\$170.00
Actions	09/29/2017	2695405	Work Report Adjustment	Adjust incorrect Comp & EES Mathon, Merritt, M.	Open	Released	10/31/2017	\$112.14
Actors	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 Clomel, County, C.	Open	Released	10/31/2017	(\$363.65)
Actors	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 ComplEES Sasseville, Hood, D	Open	Released	10/31/2017	(\$2,492.91)
Actions	09/28/2017	2695401	Work Report Adjustment	Adjust incorrect Comp & EES Adams, Aldrich, A	Open	Released	10/31/2017	(\$1,212.57)
Actions	07/25/2017	2468197	Work Report Adjustment	Adjust incorrect Comp & EES Look 06/2017	Open	Released	08/31/2017	(\$207.59)
Actions	09/01/2017	2475216	Work Report	10/16/2017	Open	Prebill	10/16/2017	\$0.00
Details	10/01/2017	2696515	Gillipunica	10/15/2017	Open	Draft	10/15/2017	\$2 670 97

(Employer Account <u>Balances</u> 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.

Profile	Account	Forms C	ocuments Roste	r EFT Payments Reports						
ccount										
trans Typ	« )	Al		¥	Upload File +	File Histo	ey .			
Raft.et		Open		×						
Acont Sta	AK.	48								
		-		151	Schedule Payment	Payment H	story			
		-			Schedule Payment	Payment H	illory			
Ison	Activity Dat	Turs #	Trans Type	Tans Identifier	Schedule Payment	Payment H	Due Date	Balance	Dept	
Issis	Activity Dat 03/01/0017	Trans #	Trans Type 5 Work Report	Trans Identifier 04/17/2017 TCMAIN*	Trans Status Open	Payment H Report Status Probil	Due Date 04/17/20/17	Balance 80.0	Debit	\$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.

Contract of the second	ccount	Forms Doc	uments Roster	EFT Payments Reports								
count												
Trans Type:	All			*	Upload File	• File Histo	ry					
Stabus:	Op	en.		×								
Report Status:	All			*	Schedule Payment	Payment H	story					
Tools		1-000		(e			0.000			2.44		c
Joois Ac	ctivity Date	Trans#	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance		Debit		C
Iools Ac Actions 04	tivity Date	Trans # 2674301	Trans Type Work Report	Trans Identifier 05/15/2017 TCMAY	Trans Status Open	Report Status Prebili	Due Date 05/15/2017	Balance	\$0.00	Debit	\$0.00	C S

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.

Profile	Account	orms Doc	uments Roster	EFT Payments Reports				
count								
Trans Type	c Al		1.	-	Upload File	File Histo	v	
Status:	Ope	0						
Report Sta	tus: All			v	ad in Dayment	Payment History		
				30	equie Payment	Payment Pie	ногу	
					-			
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	\$135.1
Actions	09/28/2017	2695403	Work Report Adjustment	Adjust incorrect Comp & EES County 07/2017	Open	Prebill	10/31/2017	\$170.0
Actions	09/29/2017	2695405	Work Report Adjustment	Adjust incorrect Comp & EES Mathon, Merritt, M	Open	Released	10/31/2017	\$112.14
Actions	09/28/2017	2694630	Work Report Adjustment	Adjust Comp & EES Beauchesne, Adams & Loo	Open	Released	10/31/2017	(\$185.58
Actions	09/28/2017	2695402	Work Report Adjustment	Adjust incorrect Comp & EES Ciomei, County, C	Open	Released	10/31/2017	(\$363.65
Actions	09/28/2017	2695404	Work Report Adjustment	Adjust incorrect Comp & EES Godfrey, Hazelkor	Open	Released	10/31/2017	(\$837.22
Actions	10/01/2017	2695172	Work Report	11/15/201	Open	Prebill	11/15/2017	\$0.00
Actions	09/28/2017	2694593	Work Report Adjustment	Adjust incorrect ComplEES Sasseville, Hood, D	Open	Released	10/31/2017	(\$2,492.91
Actions	09/28/2017	2695401	Work Report Adjustment	Adjust incorrect Comp & EES Adams, Aldrich, A	Open	Released	10/31/2017	(\$1,212.57
Actions	07/25/2017	2468197	Work Report Adjustment	Adjust incorrect Comp & EES Look 06/2017	Open	Released	08/31/2017	(\$207.59
Actions	09/01/2017	2475216	Work Report	10/16/2017	Open	Prebill	10/16/2017	\$0.00
Details	10/01/2017	2696515	GI I Invoice	10/15/2017	Open	Draft	10/15/2017	\$2 670 97

#### Balance(s) For Your Employer

### **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.

Back Location	Codec TC		1	cation Name: MAYBERRY SCHOOL DEFW							
Profile A	Account F	orms Doc	uments Roster	EFT Payments Reports							
locount											
Trans Type:	All			×	Upload File +	File Histo	e v				
Status:	Ope	n		*							
Report Status:	All			Y	Schedule Payment	Payment Ha	story				
		Maria a		1.000.000.000.000			1.200.200				
Tools A	Activity Date	Trans#	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance		Deot	C.
		107710.00	Intel months	MULTING TOURS	0	Evenil	05/15/2017		\$0.00	\$0.0	
Actions 0	05/01/2017	2011004	Work Neport	DOLIDITATI LITRIAL.	Upen	L LEPHN					0.5
Actions 0 Details	17	2677057	Work Report	09/15/2017 TCMAY*	Open	Prebil	09/15/2017		\$0.00	\$0.0	0 5
Actions C Details Edit/Ver	17 17 17	2677054 2677056 2677056	Work Report Work Report Work Report	09/15/2017 TCMAY* 09/15/2017 TCMAY* 09/15/2017 TCMAY*	Open Open	Prebil	09/15/2017 09/15/2017		\$0.00 \$0.00	\$0.0	0 5

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

ansaction	n Details									
Ciose										
Employer:	TCMAN	Aayberry School	Department		Inserted (	Date: 08/01/2				
Employer	Location: TOMAY	MAYBERRY SC	HOOL DEPART		Updated (	Date: 06/01/2	017			
Trans #:	2677054				Status:	Open				
Identifier:	96/15/20	17 TCMAY*								
ransactio	on									
Type:	Work P	leport	*	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 Charge Type:		\$0.00				
Jetails Show Eu	ode Show Fund /	and the								
Toole	Articity Date	Tune	Monthlar		FEC	ERC	REV	Total Amount	Created By	63
THURS	05/01/2017	Original	05/15/201	7 TCMAY*	\$0.00	\$0.00	\$0.00	\$0.00	DLOVE on 08/01/2017	Ac
	1111111111111	1.07 57.58	1.2.2.2.2.2.2			1000				

- 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.

Profile Acco	ant Forms Documents	Roster EFT Paymer	ts Reports		
ccount					
Trans Type:	All	~		Upload File	File History
Status:	Open	~		Defined Contribution	
Report Status:	All	~		GLL evel	Payment History

The Upload EPF Contribution pop-up displays.

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



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

6. Close the Upload EPF Contribution pop-up.



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

Profile Accou	nt Forms Docu	ments Roster	EFT Payments	Reports		
ccount						
Trans Type:	Al		×		Upload File -	File History
Status:	Open					
Report Status:	Al		~		Schedule Payment	Payment History

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

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

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

ne msto								
Close								
File Definit	tion:	All		~	Date Range:	02/11/2017	To:	04/12/2017
Status:		All		~				
Tools Import Header In		t 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 Process	ed 04/12/2017
Valid	ate	54466	Completed	03/29/2017	GLI Level	GLI Level 201	Processed w	vit 03/29/2017
Deta	ils							
Proc	ess							
Void								

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

e Definition: All  All  All  All  All  All  All  All		
Latus:         All         v           cols         Import Header Id         Process Flag         Inserted Date         File Definition         Import Description         Status           ctions         50453         Ready         11/08/2016         EPF Contributi         EPF Contributi         Not Processed Succes           Validate         50451         Completed         11/08/2016         Defined Contri         Processed Succes           Details         50451         Completed         11/07/2016         GILI Level         tets2         Processed with FW	To: 11/08/2016	
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         EIF Contributi         Defined Contri         Processed Succes           Details         50451         Completed         11/07/2016         Gi Li eval         test2         Processed with Ex		
Status         50453         Ready         11/08/2016         EPF Contributi         EPF Contributi         Not Processed           Validate         50452         Completed         11/08/2016         Defined Contri         Defined Contributi         Not Processed Successed           Details         50451         Completed         11/07/2016         GUI Level         test2         Processed with Fx		
Validate 50452 Completed 11/08/2016 Defined Contri Defined Contri Processed Succes		
Details 50451 Completed 11/07/2016 GLLLevel test2 Processed with Ex	essfully	
	Exceptions	
Process 50450 Completed 11/07/2016 GLI Level test Processed with Exc	Exceptions	

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

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

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

Close									
File Definit	ion: All		¥	Date Range:	02/11/2017	To:	04/12/2017	8	
Status:	All		*			_			
Tools	Import Heade	Process Fla	Inserted Date	File Definition	Import Description	Status		File Load Start	File Process Start
Actions	54	Validated	04/12/2017	EPF Contributi	TCMAY 3-201	Validated w	ith Errors	04/12/2017	04/12/2017
Actions	54	66 Completed	03/29/2017	GLI Level	GLI Level 201	Processed	with Exceptions	03/29/2017	03/29/2017

- 12. Review Exceptions and correct <u>ALL</u> 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.

File History	/					
Close						
File Definitio	on: A	11		~	Date Range:	
Status: A		11		~		
Tools	Import He	eader Id	Process Flag	Inserted Date	File Definition	
Actions		43295	Validated	11/08/2016	EPF Contributi	
Valida	te	43294	Completed	11/08/2016	EPF Contributi	
Details	5	43293	Validated	11/08/2016	EPF Contributi	
Proces	s	43292	Validated	11/08/2016	EPF Contributi	
Void		43291	Validated	11/08/2016	EPF Contributi	
Downl	oad	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.** 

ile Histo	ry										
Close											
File Defini	tion:	All		*	Date Range:	07/09/2017	To:	To: 09/07/2017	3		
Status:		All		*							
Tools	Impor	rt 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.

Profile	Account	Forms	Documents	Roster	EFT Payments	Reports		
Account								
Trans Type:		All			*		Upload File 👻	File History
Status:		Open			~			
Report Status	5:	All			~		Schedule Payment	Payment History
							Schedule Payment	Payment History

#### The File History screen displays.

Close	ry _										
File Definit	tion:	All		<b>v</b>	Date Range:	08/31/2017	Это:	09/05/2017	3		
Status:	All		*								
Tools	Impor	t 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 v	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** 

File Definition:	All			¥	Date Range:	02/11/2017	To:	04/12/2017		
Status:	All			*						
Export	t Heade	Id	Process Flag	Inserted Date	File Definition	n Import Status Description			File Load Start	
		16	Validated	04/12/2017	EPF Contributi	TCMAY 3-201	Validated	with Errors	04/12/2017	
Revert Sett	ings Sort	66	Completed	03/29/2017	GLI Level	GLI Level 201	Processed	with Exceptions	03/29/2017	
P Reports	Þ		Standard Imp	ort Report						

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

• Sta

nt				
	Standard	Import Details Report		
	For 644	170 TCMAY 3/2017		
Parameters			As Of Date:	04/24/2017
Sort By:	Record Seq No		Page 1 of	3
Import Record Seq No	Data String	Detail Record Status	Error Message	
1	00273MAYBERRY SCHOOL DEPT125 sCHOOL ST. MAYBERRY NC 01234 11M TAYLOR 207123456703282017OFILE VERSIONEPF H	Not Processed		
2	002727CMAY 032017003021101TAYLOR, ANDY 005465000 0101190011 Y0101 Y 00420384 0032159000000000000000000000000000000000000	Validated Successfully		
3	11000000001 03282017N D 00272TCMAY 032017903021101TAYLOR. ANDY 000200000 0101190017 YEX01 Y	Validated Successfully		41
	000765000000000000000000000000000000000			+
4	00272TCMAY 032017903021103TAYLOR, BEA 000000000 0104196011 Y0207 Y 00244000	Validated Successfully		-

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

Close	
Select Parameters	
Import Header ID:	71169
Import Name:	P0023 September 2018 Payroll file
Detail Record Status:	All <b>•</b>
Datastring View:	Summary •
Sort By:	Summary Detail
Schedule:	Run
Save as:	Html
Comment:	
Use Primary Datasource:	

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

Standard Import Report				Exped
	Standar	rd Import Details Report 54470 TCMAY 3/2017		
Parametera Detailed Record Status: Sort By:	Validated with Errors Record Seq No	Destrill Barrard Barton	As Of Date: 04/25/2017 Generated On: 04/25/2017 10:03:15 Page 1 of 1	
a contraction and no	0027171CHA0Y 0020797000 0020797000 002070000 00000000 00000000 00222017N D	Eror	OK 4 . Bisk MODELTUT dues not match VS participant's DOL	

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**.

	1001					3	
	•						
ler Id Process Flag	Inserted Date	File Definition	Import Description	Status		File Load Start	File Process Start
4516 Validated	04/12/2017	EPF Contribut	TCMAY 3-201	Validated with	th Errors	04/12/2017	04/12/2017
4466 Completed	03/29/2017	OLI Level	GLI Level 201	Processed in	with Exceptions	03/29/2017	03/29/2017
	er Id Process Flag 4516 Validated 4466 Completed	er Id Process Flag Inserted Date 4516 Validated 04/12/2017 4466 Completed 03/29/2017	er Id Process Flag Inserted Date File Definition 4516 Validated 04/12/2017 EPF Contribut. 4466 Completed 03/29/2017 GLI Level	er Id Process Flag Inserted Date File Definition Import Description 4516 Validated 04/12/2017 EPF Contribut. TCMAY 3-201 4466 Completed 03/29/2017 GLI Level GLI Level 201	er Id Process Flag Inserted Date File Definition Import Description Status 4516 Validated 04/12/2017 EPF Contributi. TCMAY 3-201 Validated w 4466 Completed 03/29/2017 GLI Level 0LI Level 201 Processed	Import         Import         Status           4516         Validated         04/12/2017         EPF Contributi         TCMAY 3-201         Validated with Errors           4466         Completed         03/29/2017         QLI Level         QLI Level 201         Processed with Exceptions	er Id Process Flag Inserted Date File Definition Import Description Status File Load Start 4516 Validated 04/12/2017 EPF Contributi. TCMAY 3-201. Validated with Emons 04/12/2017 4466 Completed 03/29/2017 OLI Level OLI Level 201 Processed with Exceptions 03/29/2017

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).

	Summar	y Det	tails														
N	View Rows	Sh	ow All Rows		*	Dis	olay Rows: Fro	m	T	0:			Sho	w Deleted	d Rov	vs: 🗉	8
	Tools	Seq No	Import Detail Status		Header												
_/	Actions		Not Processed		00272MAYB	ERRY SC	HOOL DEPT	125 sCHOOL ST. M	AYBERRY NC	01234	TIM TAYLOR 207	12345	67062	82017OF	ILE	VERSI	ION
	Teste	Oco Inc.	and Data Clarkes	Tran	Emplo	Repor	Employe	Employee Name	FTE Ann	Filler	Date of Birth .			Positi			
ails	10015	No No	ont Detail Status														
aila	Actions	No 2 Val	idated Successfully	002	72 TCMAY	062017	903021101	TAYLOR, ANDY	005465000		01011960	11		Y0101			
ails	Actions Actions	2 Val 3 Val	idated Successfully idated Successfully	002	72 TCMAY 72 TCMAY	062017 062017	903021101 903021101	TAYLOR, ANDY TAYLOR, ANDY	005465000		01011960 01011960	11 17		Y0101 YEX01			

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

Save	Canc	el	
File	Name ort Des	EPF Contribution cription TCMAY 5/2017 PR	File Load D
Summa	ry .	Details	
Summa View Rows	ry . s:	Details_	~
Summa View Rows	ry s:	Details Show All Rows Show All Rows	~
Summa View Rows Tools	ry 5: Seq I	Details Show All Rows Show All Rows Show Problem Rows	<b>v</b>

11. Highlight the row needing to be corrected.

File	Name	EPF Contribution	File Load Date	07/31/2017
Imp	ort Descrip	tion TCMAY 5/2017 PR		
Summa	iry Det	ails		
View Row	s: Sh	ow Problem Rows	*	Display Rows:
Tools	Seq No	Import Detail Status	Header	
Actions		Not Processed	00272MAYBERR	Y SCHOOL DE
Validate	Void			
Tools	Seq No	Import Detail Status	Transmitter Code	Employe
		A de l'alacta al coltab. Proposa	00070	TCHIAV

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

Save	Cancel	
File	Name port Descript	EPF Contribution TCMAY 5/2017 P
Summa	ry Det	ails
View Row	s: She	w Problem Rows
Tools	Seq No	Import Detail Status
Actions	1	Not Processed
Validate	Void	
Validate	Void Seq No	Import Detail Status
Validate	Void Seq No ort	Import Detail Status
Validate	Void Seq No ort	Import Detail Status
Validate Tools C Exp 105 Moo View	Void Seq No ort lify	Import Detail Status
Validate Tools CP Exp Top Mod Top Mod C Rev	Void Seq No ort lify v	Import Detail Status
Validate Tools top Exp Tools Mod View Rev e\$ Adv	Void Seq No ort lify ert Settings anced Sort	Import Detail Status

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 o	drag the botto	m edge of the '	View Row Tool	window to lengthen it.

e			TCMAY-Mayb	arry School Departmen	1			4	
-51	1		and the second	Contract	der transfer to	Name	Value		
2	ubli	c Employ	rees to the total			Seq No			
EIR	etire	ement Sys	stem the star	-		Import Detail Status	Validated with Errors		
talla	-	ALC: NO	State of the second	and .		Transmitter Code	00272		
etairs	-				_	Employer Code	TCMAY		
Save		Cancel				Reporting Month/Year	052017		
F	File t	Name of Descrip	EPF Contribution tion TCMAY 5/2017 PR	File Load Date 07	7/31/2017	Employee Social Securi	903021107		
		in Descrip				Employee Name	CAMPBELL, OTIS		
Sum	man	De	tails			FTE Annual Contracted	002400000		
					and the Provide	Filler			
ew R	ows:	Sh	ow Problem Rows	Y D	splay Rows: F	Date of Birth	05091960		
ools		Seq No	Import Detail Status	Header		Personnel Status Code	11		
Actions	E I		1 Not Processed	00272MAYBERRY S	SCHOOL DEF	Bargaining Unit Code			
						Position Classification C	Y0101		
						Filler			
						Filler			
/alidate		Void				Excess/Payback Status			
Tools		Seq No	Import Detail Status	Transmitter Code	Employer	Filler			
Actions		1	8 Validated with Errors	00272	TCMAY	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	с		
	-	4			-	Expected Full-time for	0000		
14	4	Page	1 of 1 🕨 射	2		Expected Weeks Per Year	00		
Tools		Seq No	Import Detail Status	Summary		Filler			
Actions		1	1 Validated Successfully	00272TCMAY MAYE	BERRY SCHC	Filler			

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
 3	00272TCMAY 062017903021107CAMPBELL, OTIS 002400000 05041960 1 Y0101 Y 00200000 0015300000000000000000000000000000	Error	D8.4 - SSN 903021107 does not match V3 participant's DOB.

View Row Tool		(×
1	4	
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.

lew Row Tool			6
		•	►
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.

Details	Details
Save Cancel	Edit Close
File Name EPF Contribution [ Import Description TCMAY 5/2017 PR	File Name EPF Contribution Import Description TCMAY 4/2017 PR
Summary Details	Summary Details

You are back at the File History tab

20. Validate the file again (Actions/Validate)

Close											
File Definition:		All		*	✓ Date Range: 06/04/2017 ☐ To: 08/03/2017		08/03/2017				
Status:		All		*							
Tools	Impor	t Header Id	Process Flag	Insert	ted Date	File Definition	Impor	t iption	Status	File Load Start	File Process Start
Actions		57152	Validated	08/03	/2017	EPF Contribu	ti TCM	AY 4/201	Validated with Errors	08/03/2017	08/03/2017
Valid	fate	57151	Validated	07/31	/2017	EPF Contribu	ti TCM	Y 5/201	Validated with Errors	07/31/2017	08/02/2017
Deta Proc	uls ess	57142	Completed	07/28	/2017	EPF Contribu	ti TCM	NY 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.

File Definit	tion:	All		*	Date Ra	nge: 06/05/	2017 🖸 To	08/04/2017
Status:		All		*				
Tools	Import	Header Id	Process Flag	Inser	ted Date	File Definition	Import Description	Status
Actions		57152	Validated	08/03	/2017	EPF Contributi	TCMAY 4/201	Validated with Exceptions
Valida	ate	57151	Validated	07/31	/2017	EPF Contributi	TCMAY 5/201	Validated with Errors
Detai	ls	57142	Completed	07/28	2017	EPF Contributi	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.

Close									
File Defin	ition:	All		*	Date Range:	04/24/2017	To:	04/26/2017	3
Status:		All		*					
Tools	Impo •	rt Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status		File Load Star
Actions		54470	Completed	04/24/2017	EPF Contributi	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		¢	ŧ	ē
	Employer Remitta	ance Report			
Employer Code:	TCMAY				
Payroll Identifier: Transaction #:	PR 04/01/2017				
The second secon	20//036				
Retirement Fin	ancial Data				
Employee	Contributions	\$ 1,966.39			
Employer C	Contributions	\$ 863.66			
Grant Fund	ded Compensation	\$ 5,000.00 \$ 528 50			
Adjustments					
Total Remittan	ce				
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:

- Back Location Code: P0999 Location Name: CITY OF MAYBERRY Profile Account Forms Documents Roster EFT Payments Reports Account All ٠ Trans Type: Upload File File History Open ۷ Status: Al ¥ Report Status Schedule Payment Payment History C... Activity Date Trans# Trans Type Trans Identifier Trans Status Report Status Due Date Balance Debit 07/17/2017 05/01/2017 2674281 Work Report 07/17/2017 P0999 Open itial \$0.00 \$0.00 \$. tions
- 1. Navigate to the *Account* tab.

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



3. Click Actions, then Edit/View.

Profile	Account	Forms	Doc	uments	Roster	EFT Pa	yments	Reports
ecount	8							
frans Type	N	All				*		
tatus:		Open				*		
leport Stat	bus:	AB				*		
Report Stat	tus:	All				*		
Report Stat	tus:	AB				*		
Report Stat	Activity Da	All Trans	s#	Trans Type		♥ Trans k	dentifier	

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.* 

Employer Employer Report Sc	r Loca iource ary	City Core 710 Ellis Detail	et bispin og. Cette pryset Dæ	of Mediciner	Report Report Date Re	Type: Po Statue: scelved:	gine na cocciti			Rapo Sdart Billing	t Period fler: ) Type:	000 #057 Curri	42013 - 04/1 12005 - 04/11 18946-09	14204 (* 1201 (* 1	000-	# of Partici # of Roves Interest Dat	senta: 3 3 Ne: 00/11	asar -				
ception	Fitur	1 Plea	e Select																			
1018	10	Actons	85N	Name-	Start Date	6ftop Date	Comp		EE5	P10	. Day	Pay Rt CD	Pay Rate	PBC	POS	Plan Name	Rate Category	SCP	FTE Days	FTEHR	Wha/W	FTE Contract
stora	- 63		909-	TAYLOR, ANDY	05/01/2017	05/31/2017		\$5.00		0.00			\$0.00	51	09901	PLO Regular A	REG	80.00				R.
1978	0		903-	TAYLOR, BEA	05/01/2017	05/31/2017		\$0.00		0.00			\$0.00	11	09901	PLD Regular A	RED	\$3.00				5
ctons	- 62		903-	TAYLOR, OPE	05/01/2017	05/31/2017		\$0.00		0.00			\$0.00	- 91	09901	PLO Regular A	REG	\$0.00				5

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

Work Report Editor															11 2
Save Appy	Cancel														
Employer: Employer Location: Report Source:	tours of Maylacry House: Toryaccir Managoria Tenance	Report Type: Report Status: Date Received:	Replan Inter Intercont		Asport Period: Scientifier: Billing Type:	station7 - brit KR7700 - b015 Carabatan		# of Participants # of Rows: Interest Data:							
Summary D	tal Basis Summary Peace Select ×														
1008 E Ad	ions SSN	Name	Start Date	Sitop Date	Comp	EES	Hours	Days	Pay Rt CD	Pay Rate		PSC	POS	Plan Name	Rat
Atlan D D	0 907-65-1234	BUTLER, BROCKELYNN	05/01/2017	05/31/2017	\$5,000.00	\$400.00			Con .		\$0.00	- 11	09901	PLD Regular A	REC

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

		-									
Test and					Name	and free	Rea Data				
	0	~~~				Carl Lines					
6.023	0				248111111	15/01/2017	05/31/2017				
6.023	0		0	987-65-1234	BUTLER, BROOKELY	NN 05/01/2017	05/31/2017				
Add Me	mbe	r C	elete Se	lected							
Add Me	mbe		elete Se Actions	SSN	1	Name	1	Start Date	Stop Date	Comp	EES
Add Me Tools Actions	mbe		elete Se Actions	SSN	248-11-1111	Name CASH, SUE	1	Start Date 05/01/2017	Stop Date 05/31/2017	Comp 50.00	EES \$0.00

8. Complete the New Member's monthly payroll information. Click Apply.
| Sunn                | η.    | Deal Basi   | Sunnay           |                     |                           |                 |            |       |      |                                 |    |       |                         |                      |      |          |       |       |        |                      |
|---------------------|-------|-------------|------------------|---------------------|---------------------------|-----------------|------------|-------|------|---------------------------------|----|-------|-------------------------|----------------------|------|----------|-------|-------|--------|----------------------|
| Boogston<br>Acc Men | Flar: | Peak Select |                  |                     |                           |                 |            |       |      |                                 |    |       |                         |                      |      |          |       |       |        |                      |
|                     |       |             |                  |                     |                           |                 |            |       |      |                                 |    |       |                         |                      |      |          |       |       |        |                      |
| 100                 | 2     |             | Nane             | Sattile             | Stop Cutte                | Care            | EES        | Hous  | Daja | Pay R. Pay Rate<br>CD           | 25 | C POS | Parillane               | Rate Callegory       | \$79 | FTE Days | FTEHS | 11977 | F      | TE Contract          |
| ina<br>stora        | 1     | 26:11:11    | Name<br>CABH BLE | Sur Dek<br>150-2017 | Stop Calle<br>(550) (217) | Care<br>E 100 0 | EES EXC SE | Hours | Days | Pay R: Pay Rute<br>CD<br>Hourly | P5 | C POS | PanNane<br>PL3 Replar A | Rate Calegory<br>RED | 529  | FTE Days | FTEHS | 1997F | я<br>9 | TE Contract<br>NO DI |

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

aetor	Re	Peace Select						
t ilen	-	in Seechd				Confi	m	Message
10	ď,		lane	Battine	Stor Date	(?)	This action will delete the selected member(s). Are	Selected work history is deleted.
32	0	26/5/151 (	CABH, SUE	05010217	25312217	Y	you sure?	Y _
222		9745-034	BUTLER BROOKEUTW	05012017	05312977		Yes No	ОК

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



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

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

1	Work Report saved with exceptions. Use Exception Report to view Exceptions.
	OK

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

Profile	Account	Form	ns Doc	uments Roste	r EFT Pay	ments	Reports
count		1					
Trans Typ	e:	All			*		
Status:		Open			*		
Report Sta	etus:	All			*		
Tools	Activity Da	All T	rans #	Trans Type	Trans Ide	entifier	

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

Save	Apply	/ Can	cel				
Employer	rs.	Town	of Maybe	erry	Rep	oort Type:	R
Employer	r Locati	on: P099	9 TOWN	OF MAYBERRY	Rep	oort Status:	In
Report Se	ource:	Emple	oyer		Dat	e Received:	
Exception	Filter:	Please	Select	<b>~</b>			
Exception Add Memi	Filter:	Please	e Select	▼			
Exception Add Memi <u>Tools</u>	Filter:	Please Delete Sele Actions	e Select ected SSN	~	Name		
Exception Add Memi <u>Tools</u> Actions	Filter:	Please Delete Sele Actions	e Select ected SSN	248-31-1111	Name TAYLOR,	OPETT	
Exception Add Mem Tools Actions Actions	Filter:	Please Delete Selv Actions	Select	248-31-1111 987-65-1234	Name TAYLOR, BUTLER,	OPETT	IN

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

Details           Name:         TAYLOR, OPETT         SSN:         248-31-111         Work Status:         ACTIVE           Rate Category:         REG         Plan Name:         PLD Regular A         PLD Regular A         ACTIVE           Validation:         Validation Type         SSN 248-31-1111         Complex Subject on the submitted do not equal amount due \$30.00         Enception         Enception	Details						
Name:         TAYLOR, OPETT         SSN:         248-31-111         Work Stabul:         ACTIVE           Rate Category:         REG         Plan Name:         PLD Regular A         PLD Regular A         PLD Regular A           Validation Warnings         Exception Reason         Validation Type         Emor         Emor           SSN 248-31-1111         Cmp is required.         Emor         Emor         Emor           use \$0.00         Submitted do not equal amount due \$0.00         Exception         Exception							
Rate Category:         REG         Plan Name:         PLD Regular A           Validation         Validation Reason         Validation Type           SSN 248-31-1111         Complexe contributions submitted do not equal amount due \$0.00         Error	Name:		TAYLOR, OPETT	SSN:	248-31-1111	Work Status:	ACTIVE
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	Rate Categor	ary:	REG	Plan Name:	PLD Regular A		
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	Validation V	Warnings					
SSN 249-31-1111 Comp is required. Error SSN 249-31-1111 employee contributions submitted do not equal amount Exception due \$0.00	Tools	Exception Real	son		Validation Type		
SSN 248-31-1111 employee contributions submitted do not equal amount. Exception due \$0.00	9	SSN 248-31-11	11 Comp is required.		Error		
		SSN 248-31-11 due \$0.00	11 employee contribution	is submitted do not equal amount	Exception		
SSN 248-31-1111 employee retirement contributions without earnable Error compensation.		SSN 248-31-11 compensation	11 employee retirement of	contributions without earnable	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**'.

					Loca	tion Name:	TOWN OF MAYBERR	87 - C	
rofile	A	ccount	For	ms Doc	uments Roster	EFT Payme	nts Reports		
count	£								
rans Typ	e:		All			~			
tatus:			Open			*			
eport Sta	atus:		All			~			
loois	A	ctivity Da	te 1	Trans #	Trans Type	Trans Identif	fer		
Actions	0	5/01/2017	7	2677061	Work Report	06/15/2017	P0999*		
Deta	ails A.Cou								
Sub	mit								
Dele									
Den	0.040								
ork Dana	ut Ed	liter							
ork Repo	ort Ed	litor							
ork Repo Save	App	litor ly Car	ncel						
ork Repo Save	App	litor ly Car Tow	ncel		Report Type:	Regular		Report Period:	05/01/2017 - 05/3
ork Repo Save Employer Employer	App	litor ly Car Tour Son: P095	ncel 1 of Mayla 29 TOWN	any I OF MAYBER	Report Type: RY Report Status:	Regular Initial		Report Period: Identifier:	05/01/2017 - 05/3 #2577061 - 06/15
Employer Report So	App App Locat	litor ly Car Towr Son: P095 Emp	ncel 1 of Maybi 19 TOWN	ery I OF MAYBER	Report Type: RY Report Status: Date Received:	Register Initial 01/06/2017		Report Period: Identifier: Billing Type:	05/01/2017 - 05/1 #2577061 - 06/15 Contributions
ork Repo Save Employer Employer Report Si	App App Locat	litor V Car Towr Son: P095 Emp	ncel 1 of Maylo 10 TOWN loyer	ery I OF MAYBER	Report Type: Report Status: Date Received	Regular Initial 09/00/2017		Report Period: Identifier: Billing Type:	05/01/2017 - 05/1 #2977061 - 06/15 Contributions
Employer Employer Report Summa	App App Locat ource:	litor ly Car Tour con: Poss Emp Detail	ncel 1 of Maybr 19 TOWN Ioyer Basi	iny I OF MAYBER s Summary	Report Type: Report Status: Date Received	Regular Initial 98/08/2017		Report Period: Identifier: Billing Type:	05/01/2017 - 05/3 #2677061 - 06/15 Contributions
Save Employer Employer Report Si Summa Exception	App App Locat ource: iny Filter:	litor V Car Tour Con: P095 Emp Detail Pleas	ncel 1 of Mayb 39 TOWN loyer Basi e Select	eny I OF MAYBER s Summary	Report Type: Report Status: Date Received	Regutar Initial 09/06/2017		Report Period: Identifier: Billing Type:	05/01/2017 - 05/2 #2577051 - 06/15 Contributions
Save Employer Report Si Summa Exception Add Memi	ort Ed App r r Locat ource: Fiter: ber	litor V Car Town Son: P000 Emp Detail Pleas Delete Se	ncel 1 of Maybr 19 TOWN loyer Basi e Select lected	nny I OF MAYBER s Summary  ♥	Report Type: Report Status: Date Received	Regutar Initial : 08/08/2017		Report Period: Identifier: Billing Type:	05/01/2017 - 05/2 #2577/05 - 06/15 Combutions
Employer Employer Report Si Summa Exception Add Memi	App App Locat ource: Fiter:	litor y Car Town ton: P000 Emp Detail Pleas Delete Se Actions	ncel 1 of Maybe 10 TOWN Basi Basi e Select lected SSN	eny I OF MYBER S Summary	Report Type: Report Status: Date Received	Regutar trittal : DR/08/2017 Start Da	te Stop Date	Report Period: Identifier: Billing Type:	05x01/2017 - 05x2 #0577061 - 06/15 Constitutions
Employer Employer Employer Report Si Summa Exception Add Memi Tabls	ort Ed App r Locat ource: Filter: ber	litor V Car Tour Tour Don: P005 Emp Detail Pleas Delete Se Actions 0 m (2)	ncel 1 of Maybr 19 TOWN loyer Basi e Select lected SSN	s Summary	Report Type: RY Report Status: Date Received: Name 11 TAYLOR, OPETT	Regutar tvittal OB/08/2017 Start Da	fe Stop Date	Report Period: Identifier: Billing Type:	05/01/2017 - 05/3 #267700 06/15 Contributions
Employer Employer Report Si Summa Exception Add Memi Tools Actions Actions	ort Ed App r Locat ource: Fiter:	litor y Car Tour ton: P005 Emp Detail Pleas Delete Se Actions Q = Q Actions	ncel 1 of Maybr 20 TOWN loyer Basi e Select sected SSN	1 OF MYBER s Summary 248-31-1 987-65-12	Report Type: Report Status: Date Received: Name III TAYLOR, OPETT 34 BUTLER, BROCKPI	Regutar tettal : 09/08/2017 Start Da 05/01/20 YNN 05/01/20	te Stop Date 017 05/31/2017 05/31/2017	Report Period: Identifier: Billing Type: Comp	0501/2017 - 05/15 atte77001 - 06/15 Contributions
erk Repo Save Employer Employer Report Si Summa Exception Add Memi Exception Add Memi Exception Add Memi Exception	r Local ource: Fiter:	ittor y Car Town Con: P0% Emp Detail Pleas Delete Se Actions Q © Q Q	ncel vot Maybe Portowik lover Basi e Select lected SSN	erry s Summary 248-31-1 987-65-12	Report Type: Report Status: Date Received Name III TAYLOR, OPETT 34 BUTLER, BROCKEL'	Regutar tvital DB/06/2017 Start Da 05/01/20 YNN 05/01/20	0e Stop Date 017 05/31/2017 017 05/31/2017	Report Period: Identifier: Billing Type: Comp 200 \$500.0	05/01/2017 - 05/0 rtg5770006/15 Constitutions

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

Al			Upload File +	File Histo	w.			
Open								
All		*	Schedule Payment	Payment He	dary			
ate Trans#	Trans Type	Trans Identifier	Trans Status	Report Status	Oue Date	Balance	Debit	
2677061	Work Report	06/15/2017 P0999*	Open	Indial	06/15/2017	82,187.50	82.	187.50
	All Open (All Trans.# 7 26/7061	All Open All Item Trans # Trans Type 7 2877051 Wark Report	All         w           Open         w           All         w           All         v           Inters # Trans Type         Trans Identifier           17         2477061: Wesk Report         06150017 P0099*	All Copen · · · · · · · · · · · · · · · · · · ·	All Updat File + File Hats Open All   Trans # Trans Type Tass laertifier Trans Status Report Report Payment Pa	All         V           Open         V           All         V           Binedule Payment         Payment History           etc         Trans If Trans Type         Trans UserStiffer           7         3877051         Wark Report         Dirit/S0017 P0990*	All Upbad File - Pile Hattiny Open All	All  Upted File - File Hatery Open All File Tans # Tans Type Trans libertifier Tans Blake Report Status Oue Date Baance Debt 27 3477061 Wax Report D0152017 P0399* Open Initial 06152017 B2.187.50 B2

The following pop-up displays:

Messa	ge
į,	The selected work report was submitted successfully.

18. Select OK.

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

Protile	Account	Forms	Documents	Roster EFT Pa	ayments F	Reports						
Account							2					
Trans Type	r: [	All		*			Upload Fi	le •	F	ile History		
Status:		Open		~								
Report Stal	tus:	All		*			Schedule P	ayment	Pay	ment History		
						_						
Tools	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status-	Due Date	Balance		Debit	Credit	

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	10	0	±	۰	j
	Employer Re	mittance Report				l
Employer Code: Payroli Identifier: Transaction #	TCMAY PR 04/01/2017 2017/564					I
Retirement F	inancial Data					
Employe Employe Grant Fu Employe	e Contributions ir Contributions inded Compensation ir Contribution on Grant Funded Compens	\$ 1,965.39 \$ 863.66 \$ 5,000.00 ation \$ \$28.50				
Adjustments						Ľ
Total Remitta	ince					
Total du	e.	\$ 3,358.55				
6						I
					100	
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and the second sec						÷

### 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**.

Back Location Coo	e: P0999	Location Name:			
Profile Acco	unt Forms Docume	nts Roster EFT Payme	ents Reports		
Account					
Trans Type:	All	~		Upload File -	File History
Status:	Open	~		Defined Contribution	
D	Lan .	1.0		EPF Contribution	
	All	*			Daumont Lieton

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.

×	Upload Defined Contribution	×
	1 File Upload 2 Processing	
Browse	Besults	
	The file has been submitted for processing.	
Next	Close Ba	ack Details
	Browse	Upload Defined Contribution      File Upload     Processing      Browse      Results      The file has been submitted for processing.      Next     Close     Bit

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 <u>GLI LEVEL FILE</u>**

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.

Upload GLI Level		0
1 File Upload	Processing	
Import Filename:	Maine GLI Import.xlsx	Browse
Import Description:	GLI Import Training Test	
No Parameters		
		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.

And a state of the					
Profile Acco	unt Forms Docume	nts Roster EFT Payments	Reports		
ccount					
Trans Type:	Al	~	Upload Fi	le 🔹	File History
Drah et-	Open	¥			
3080035		(1)			

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.

ile Histo	y										
Close											
ile Definit	le Definition: All		*	Date Range:	01/28/2017	To: 03	/29/2017				
Ratus:	1	All		*							
Tools	Import i	Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start	File Process Start	Duration	Rows Loaded
<u>ictions</u>		54466	Ready	03/29/2017	GLI Level	GLI Level 201	Not Processed	03/29/2017			8
Actions Valid	ate	54466	Ready	03/29/2017	GLI Level	GLI Level 201	Not Processed	03/29/2017			
Deta	15										
Void											
Down	load										

#### The Process Flag column updates with a status of Validated

File Histor	У						
Close							
File Definiti	on:	All		*	Date Range:	01/28/2017	
Status: Al		All		*			
Tools	Tools Import Header Id		Process Flag	Inserted Date	File Definition	Import Description	Sta
Actions		54466	Validated	03/29/2017	GLI Level	GLI Level 201	Val
Valida	ite						
Details	s						
Proce	ss						
Void							
Down	load						

- 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 Histo Close	ny						
File Definition: Status:	All		*	Date Range:	03/10/2016 🔤 To:	09/08/2017	
	All		•				
Tools	Tools Import He		Process Flag	Inserted Date	File Definition	Import Description-	Status
Actions		54573	Completed	02/27/2017	GLI Level	2017 GLI LEVE	ELS 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 Loca	ition Code:	TCMAY		Loc	ation Name:	MAYB	ERRY SCHO
Profile	Account	Forms	Documents	Roster	EFT Paym	ents	Reports
Reports	enerate Repor	t					
Generate R	Report Type		Report Parameters	e	Confirm		×
36664	ESS GLI	Level Report	]			Select	
	GLI Invoi	ce				Select	
Cance	el						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.

Report Ty		eport Parameters	firm	
0				
FEE CITY and Dec				
ESS GLI Level Rep	port			
mployer Code:	TCMAY	0	~	
nployer Location Cod	de: TCMAY	r	~	
art Date:	04/01/	2017		
Cancel			Back	Next
orato Doport				
erate Report				
Report T	vpe 🖸 R	teport Parameters 3 Confir		
Report Ty	vpe 🛛 R	teport Parameters 3 Confir	<b>m</b>	
Report T	ype 🛛 R	report Parameters	m	
Please confirm th	vpe 2 R	report Parameters Confir	m	
Please confirm the ESS GLI Level F	vpe 2 R nat the following info	report Parameters 3 Confir ormation is correct.	<b>m</b>	
Please confirm the ESS GLI Level F	vpe 2 R nat the following info Report	report Parameters 3 Confir armation is correct.	<b>m</b>	
Please confirm the ESS GLI Level F Report Parameter	vpe 2 R hat the following info Report	report Parameters Confir ormation is correct.	m	
Please confirm th ESS GLI Level R Report Paramete Employer C Employer C	ype 2 R hat the following info Report if: ode: scation Code:	teport Parameters 3 Confir ormation is correct. TCMAY	m	
Please confirm th ESS GLI Level F Report Paramete Employer LC Start Date:	ype 2 R hat the following info Report Mr: ode: occation Code:	teport Parameters 3 Confir ormation is correct. TCMAY TCMAY 04/01/2017	m	
Please confirm th ESS GLI Level F Report Paramete Employer Cc Start Date: Export As:	ype 2 R hat the following info Report Mr. ode: ocation Code:	TCMAY TCMAY 04/01/2017	m	
Please confirm th ESS GLI Level F Report Paramete Employer LC Start Date: Export As:	ype 2 R hat the following info Report Mr bode: bode: bode: bode: Pdf	teport Parameters 3 Confir ormation is correct. TCMAY TCMAY 04/01/2017	•••	

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 Locat	tion SSN	Employee Name	Position Code	Туре	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*.

back countrate				
Profile Accor	Int Forms Documents	Roster EFT Payments Reports	S	
ccount				
Trans Type:	All	~	Upload File +	File History
Status:	Open	*		
		hand		

The File History pop-up displays.

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

File Histo Close	ry							
File Definition: Status:	All 🗸			Date Range:	07/01/2017	To:	08/30/2017	
Tools	Impor	t Header Id	Process Flag	Inserted Date	File Definition	Import Description	Status	File Load Start

# 'ACTIONS' OPTIONS IN THE FILE HISTORY POP-UP

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

File Histo	ry								
Close									
File Definit	tion:	All			Date Range:	07/01/2017	То:	08/30/2017	
Status:		All		*					
Tools Impo		rt Header Id Process Flag		Inserted Date	File Definition	Import Status Description		File Load Start	
Actions	1	57104	Ready	08/30/2017	EPF Contributi	TCMAY 4/201	Not Processed	08/30/2017	
Valid Detai	late ils								
Proce	ess								
Void									

Action	Description
<ul> <li>Validate</li> </ul>	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: <u>https://mainepers.org/Employers/ESS-Guides.htm</u>.

### **VIEWING PAYMENT HISTORY**

To view payment history:

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

Profile Accourt	nt Forms	Documents	Roster	EFT Payments	Reports				
Account									
Trans Type:	All			*		Upload File	-	File Histor	ry
Status:	Open			~					
Report Status:	All			~		Schedule Paymen	it i	Payment His	story
							_	- syment - no	
Tools	2000 12000			1 - Contractor		l e constant		1 _ Contractor Contractor	

The Payment History pop-up displays.

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

Payment H	listory					
Close						
Schedu	les 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.

ayment History									
Close									
Schedules	History								
	1								
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
08/31/2017	08/31/2017	\$3,000.00	1	Issued	SEACOAST CREDIT UNION	211489229	XXXXX56789	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 Loca	tion Code:	TOMAY	U	ocation Name: MAYBER						
Profile	Account	Forms Dor	uments Roster	EFT Payments	Reports					
Account						77				
Trans Type	ĸ	All		~		Upload Fi	ie 👻	File History		
Status:		Open		•						
Report Stat	tus:	All		~		Schedule P	ayment	Payment History		
2										
Tools	Activity Dat	e Trans#	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Balance	Debit	Credit
Actions	04/01/2017	2674301	Work Report	05/15/2017 TCMAY	Open	Prebill	05/15/2017	\$0.00	\$0.00	\$0.00
Actions	05/01/2017	2674311	Work Report	06/15/2017 TCMAY*	Open	Prebill	06/15/2017	\$37.42	\$3,037.42	(\$3,000.00)

# FORMS TAB

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

Back Loo	cation Code: TCI		Loca	tion Name: MA	YBERRY SCHOOL SUPPORT	
Profile	Account Fo	Documents	Roster	EFT Payments	Reports	
EForms						Submitted Form
Forms in	Progress					0
Tools	Form	Last Updated	Member			
Actions	CL_0102	08/30/2017	SSN:000	K-XX		
Online Fo	orms					
Tools						
	Form	Desc	ription			
Start	Form ADJ_001	Descr	ription e Employee F	Payroll Adjustment 1	Web	
Start Start	Form ADJ_001 ADJ_002	Descr Single Multip	ription e Employee F ale Employee	Payroll Adjustment Is Payroll Adjustme	Web	
Start Start Start	Form ADJ_001 ADJ_002 CL_0050	Desci Single Multip Vacat	ription a Employee F ale Employee ion / Sick Lea	Payroll Adjustment 1 Is Payroll Adjustmer ave Form	Web Int Form	
Start Start Start Start	Form ADJ_001 ADJ_002 CL_0050 CL_0102	Descr Single Mutip Vacat Applie	ription a Employee P ale Employee ion / Sick Lea cation for Mer	Payroll Adjustment i is Payroll Adjustmer ave Form mbership	Web	
Start Start Start Start Start Start	Form ADJ_001 ADJ_002 CL_0050 CL_0102 CL_0555	Descr Single Multip Vacat Applic Emple	ription e Employee F ble Employee ion / Sick Lea tation for Mer oyer Prelimin	Payroll Adjustment i is Payroll Adjustmen ave Form mbership ary Benefit Certifica	Web ation	
Start Start Start Start Start Start Start	Form ADJ_001 ADJ_002 CL_0050 CL_0102 CL_0555 CL_0674	Desci Single Multip Vacat Applic Emple Evide	ription e Employee F ole Employee ion / Sick Lea cation for Mer oyer Prelimin nce of Insura	Payroll Adjustment I is Payroll Adjustment ave Form mbership aary Benefit Certifica ability	Web ation	
Start Start Start Start Start Start Start	Form ADJ_001 ADJ_002 CL_0050 CL_0102 CL_0555 CL_0674 Gl_0680	Desci Single Multip Vacat Applic Emple Evide Depe	ription a Employee F le Employee ion / Sick Lea ation for Mer ation for Mer	Payroll Adjustment I is Payroll Adjustment ave Form mbership aary Benefit Certifica ability nce	Web int Form ation	
Start Start Start Start Start Start Start Start Start	Form ADJ_001 ADJ_002 CL_0050 CL_0102 CL_0555 CL_0654 GL_0680 GL_0680	Desci Single Multip Vacat Applic Emple Evide Depe Cance	ription a Employee P ple Employee ion / Sick Lei cation for Mer over Prelimin nce of Insura ndent Insurar ellation/Redu	Payroll Adjustment I is Payroll Adjustment ave Form mbership ary Benefit Certifica ability nce action in Coverage	Web Int Form ation	
Start Start Start Start Start Start Start Start Start Start	Form ADJ_001 ADJ_002 CL_0050 CL_0102 CL_0555 CL_0674 GL_0880 GL_0881 GL_0908	Descr Single Multip Vacat Applic Emple Evide Depe Canc Canc	iption e Employee F ele Employee ion / Sick Let cation for Mer cation for Mer ellation/Redu cation for Cov	Payroll Adjustment i is Payroll Adjustment ave Form mbership ary Benefit Certifica ability nce action in Coverage verage GLI	Web ation	
Start Start Start Start Start Start Start Start Start Start Start Start	Form ADJ_001 ADJ_002 CL_0050 CL_0102 CL_0555 CL_0674 GI_0880 GI_0881 GI_0908 MM_0001	Desci Single Multip Vacat Applie Evide Evide Depe Cance Applie Perso	iption a Employee F ble Employee ion / Sick Lex- cation for Mer- oyer Prelimin nce of Insura ndent Insurar ellation/Redu cation for Co- onnel Status (	Payroll Adjustment i is Payroll Adjustment ave Form mbership ary Benefit Certifica ability nce action in Coverage verage GLI Change Form	Web ation	

### 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.

Back Loc	ation Code:	TEMAY		Local	tion Name: MA	BERRY SCHOO
Profile	Account	Forms	Documents	Roster	EFT Payments	Reports
EForms	]					
	_					
Forms in	Progress					
Tools	Form		Last Updated	Member		
Actions	CL_0102		08/30/2017	SSN XOO	X-XX	
Actions	GI_0908		08/31/2017	CAMPBE	ELL,	
Outine Fr						
Online Fo	rms					
Tools	Form		Descr	ription		
Start	ADJ_001		Single	e Employee P	Payroll Adjustment	Neb
Start	ADJ_002		Multip	le Employee	es Payroll Adjustme	nt Form
Start	CL_0050		Vacat	ion / Sick Lea	ave Form	
Start	CL_0102		Applic	ation for Mer	mbership	
Start	CL_0555		Emplo	oyer Prelimina	ary Benefit Certifica	ation
Start	CL_0874		Evide	nce of Insura	ability	
Start	GI 0880		Deper	ndent Insurar	nce	
Start	GL 0881		Cance	ellation/Redu	ction in Coverage	
Start	GI 0908		Annie	ation for Cou	verage GLL	
Clast	Las 0004		Base	and Ctatus (	Chapped Earm	
Staff	MINI_0001		Perso	innei status (	unange rorm	

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

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

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

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

\*Teacher Position Codes requiring update include grandfathered positions, authorized positions and positions requiring "basis" if the basis is not with the reporting employer location. For example, a member reported with the following codes for the first time under the reporting location would require submission of the membership application prior to payroll processing:

Y1001, Y0408, Y5555, Y0210, Y0209, Y0155, Y0104 and all YEX codes, unless the member has basis with the reporting employer location.

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

#### Note: Employee Employment Termination

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

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

#### 1. Click the **Start** link.

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.

Public Employees Retirement System	P.O. Box 349 Augusta, ME 04332-0349 Telephone: (207) 512-310 Telephone: (207) 512-310 Fei: (207) 512-3101 FF: (207) 512-3102	0	AP	PLICATION FO	R MEMBERSHIP
TO BE COMPLETED BY E Member's Name: Social Security Number:	(Prefo) Date of Birth	(Fint) Gender O Male O Female	040 E-mail Addres	(Last)	diation
	address out a file of the state of the	AND IN A REAL PROPERTY AND	of Wild Indian In		C
I wish to join the Ma hainePERS laws and participating. I hereby FOR THOSE WITH OI that the opportunity to the provisions of option I am a MainePERS ret TO III: COMPLETE INF	(Breet PO Box) ine Public Employees Re rulers. I agree to deduction certify that all of the statem PTIONAL MEMBERSHIP ( enroll at any future date w sat membership, ince returning to work with MELCOVER	(Citry/Town) threment System and under is from my compensation at ents on this application are to ONLY, I do not wish to join the ill be subject to MainePERS an employer participating in t	(Blate) bland that my application he rate required by Maine ue and correct to the bes a Maine Public Employee laws and rules. See Sect he same plan from which	n and membership ePERS law for the it of my knowledge is Retirement Syste lion I on reverse fo i i retired.	(2IP) o are governed by plan in which I am and belief. em and understand r an explanation of
I wish to join the Ma MainePERS laws and participating. I hereby POR THOSE WITH O Inat the opportunity to Inat the opportunity to Inat a MainePERS ret TO HIL COMPUTED INT Employer Location Code:	(Ilmeet PO Box) ine Public Employees Re rules I agree to deduction certify that all of the statem PTCONAL MEMBERSHIP errol at any future date w sal membership, ine returning to work with MELOVIER TOMAY	(City/Town) threment System and under is from my compensation at t ents on this application are to ONLY, I do not wish to join the all be subject to MainePERS an employer participating in t Employer Location Name:	(State) stand that my application he rate required by Main us and correct to the Bess a Maine Public Employee laws and rules. See Sect he same plan from which MAYBERRY SCHOOL BU	n and membership ePERS law for the t of my knowledge is Retirement Syste lion I on reverse fo i retired. JPPORT	(2)P) o are governed by plan in which I am and belief, em and understand r an explanation of
I wish to join the Ma MainePERS taws and participating. I hereby. FOR THOSE WITH O Inat the opportunity to that the opportunity to the provisions of option I am a MainePERS ret TO THE COMPLETE D BY I Employer Location Code. Membership Start Date mmodyyyy:	(Breet PO Box) ine Public Employees Re rules Lagree to deduction certly that all of the staten PTIONAL MEMBERSHIP enroll at any future date w sal membership. ince returning to work with MPLOYER If PLD eligibility is t	(City/Town) threment System and under is from my compensation at t ents on this application are to ONLY. I do not wish to join the onli be subject to MannePERS an employer participating in t Employer Location Name: based on hours, total hours w	(Blate) stand that my application he rate required by Maine us and correct to the besis Maine Public Employee laws and rules. See Sect he same plan from which MAYBERRY SCHOOL SU orked in the last 12 conse in the last 16 conse	n and membership ePERS law for the it of my knowledge is Retirement Syste tion I on reverse fo it retired. JPPORT ecutive months: ecutive months:	(21P) o are governed by plan in which I am and belief or an explanation of
I wish to join the Ma mainePERS laws and participating. I hereby. FOR THOSE WITH O It is opportunity to the provisions of option I am a MainePERS ret TOTH COMPLETED BY Employer Location Code: Memberning Start Date minidovyvy: Title of Position	(Itmeet PO Box) ine Public Employees Re rules, Lagree to deduction certly that all of the statem PTIONAL MEMBERSHIP enroli at any future date w ust membership. Ine returning to work with MELOYER IT PLD eligibility is t	(City/Town) (trement System and under is from my compensation at t ents on this application are to ONLY I do not wish to join the ONLY I do not wish to join the ill be subject to MainePERS an employer participating in t Employer Location Name: based on hours, total hours w	(Blane) stand that my application he rate required by Maine ue and correct to the besis Maine Public Employee laws and rules. See Sect he same plan from which MAYBERRY SCHOOL SU orked in the last 12 consis in the last 18 consi- Position Cla	n and membership ePERS law for the of my knowledge tion I on reverse to it retired. JPPORT ecutive months: ecutive months: ass Code:	(21P) ore governed by plan in which I am and belter more sensitive encoded and the sensitive of the sensitive encoded and
I wish to join the Ma MainePERS taws and participating I hereby . POR THOSE WITH O Inat the opportunity to the provisions of option I am a MainePERS ret TO HIL COMPUTITIO HY Emptoyer Location Code: Membership Start Date ennidoxyyyy: Tube of Position: Plan Class:	(Breet PO Box) ine Public Employees Re rules Lagree to deduction certify that all of the statem PTODAL, MEMBERSHIP end at any fulure date w satimembership ine returning to work with MELOVIE TOMAY If PLD eligibility is t Personnel	(City/Town) (Irement System and under is from my compensation at t ents on this application are to ONLY i do not wish to join the an employer participating in t Employer Location Name: based on hours, total hours w Status Code:	(Blaite) stand that my application he rate required by Maine us and correct to the besis a Maine Public Employee laws and rules. See Sect he same plan from which MAYBERRY SCHOOL SU orked in the last 12 conse in the last 16 conse Position Cla Rate Sich	n and membership ePERS law for the it of my knowledge is Retirement Syste libor I on reverse for it retired. JPPORT ecutive months: ecutive months: ass Code: sedule:	(21P) pare governed by plan in which I am and believer im and understand r an explanation of

- 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.

	Cancel		Preview	Save as Draft Sa	ve as Final
--	--------	--	---------	------------------	-------------

### 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 Loca	ation Code:	TCMAY		Locati	on Name:	MAYB	ERRY SCHOOL SUPPORT
Profile	Account	Forms	Documents	Roster	EFT Paym	ients	Reports
Forms	]						
Forms in I	Progress						
Tools	Form		Last Updated	Member			
Actions	CL_0102		08/30/2017	SSN:XXX-	-xx		
Actions	GI_0908		08/31/2017	CAMPBEL	L,		
Resu	ume						

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		
Resu	me	02/08/20		
Delet		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.

maine	R	tov		Herene	A ADDRESS AND A REAL PROPERTY AND A REAL PROPE
1.12	and and		aller		1 ATALIAN A THE REAL PROPERTY OF
Back Loc	ation Code:			Location Name: MAYBE	
Profile	Account	Forms	Documents Ros	ter EFT Payments	Reports
EForms					
					Submitted Forms
Forms in	Progress				
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	GL_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.

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
- Statement of Annual Cost (formerly known as "green sheets")



### **ROSTER TAB**

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

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

Back Location Code: TGMAY		Dde: TCMAY Location Name: MAYBERRY SCHOOL SUPPORT					
Profile	Account Fo	rms Documents Ro	ester EFT Payme	ents Reports	i .		
Roster		10	- 60				
Search:			×				
		NAME OF TAXABLE AND A DESCRIPTION OF TAXABLE	the second s	I Description of the local sector			
Tools	SSN	Name	Start Date	Stop Date	Plan Name	Status	Rate Category
Tools Actions	SSN XXX-XX-1107	Name CAMPBELL, OTIS	Start Date 05/01/2017	Stop Date	Plan Name Teacher Regular	Status Active	Rate Category REG
Tools Actions Actions	SSN XXX-XX-1107 XXX-XX-1106	Name CAMPBELL, OTIS CRUMP, HELEN	Start Date 05/01/2017 05/01/2017	Stop Date	Plan Name Teacher Regular Teacher Regular	Status Active Active	Rate Category REG REG
Tools Actions Actions Actions	SSN XXX-XX-1107 XXX-XX-1106 XXX-XX-1104	Name CAMPBELL, OTIS CRUMP, HELEN Fife, Barney	Start Date 05/01/2017 05/01/2017 05/01/2017	Stop Date	Plan Name Teacher Regular Teacher Regular Teacher Regular	Status Active Active Active	Rate Category REG REG REG
Tools Actions Actions Actions Actions	SSN XXX-XX-1107 XXX-XX-1106 XXX-XX-1104 XXX-XX-1108	Name CAMPBELL, OTIS CRUMP, HELEN Fife, Barney LAWSON, FLOYD	Start Date 05/01/2017 05/01/2017 05/01/2017 05/01/2017	Stop Date	Plan Name Teacher Regular Teacher Regular Teacher Regular Teacher Regular	Status Active Active Active Active	Rate Category REG REG REG REG
Tools Actions Actions Actions Actions Actions	SSN XXX-XX-1107 XXX-XX-1106 XXX-XX-1106 XXX-XX-1104 XXX-XX-1108 XXX-XX-1110	Name CAMPBELL, OTIS CRUMP, HELEN Fife, Barney LAWSON, FLOYD Pyle, Gomer	Start Date           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017	Stop Date	Plan Name Teacher Regular Teacher Regular Teacher Regular Teacher Regular Teacher Regular	Status Active Active Active Active Active	Rate Category REG REG REG REG REG
Tools Actions Actions Actions Actions Actions Actions	SSN XXX-XX-1107 XXX-XX-1106 XXX-XX-1104 XXX-XX-1108 XXX-XX-1110 XXX-XX-1110	Name CAMPBELL, OTIS CRUMP, HELEN Fife, Barney LAWSON, FLOYD Pyle, Gomer SPRAGUE, HOWARD	Start Date 05/01/2017 05/01/2017 05/01/2017 05/01/2017 04/01/2017 05/01/2017	Stop Date	Plan Name         Teacher Regular	Status Active Active Active Active Active Active	Rate Category REG REG REG REG REG REG
Tools Actions Actions Actions Actions Actions Actions Actions	SSN XXX-XX-1107 XXX-XX-1107 XXX-XX-1106 XXX-XX-1104 XXX-XX-1108 XXX-XX-1109 XXX-XX-1109 XXX-XX-1109	Name CAMPBELL, OTIS CRUMP, HELEN Fife, Barney LAWSON, FLOYD Pyle, Gomer SPRAGUE, HOWARD Taylor, Andy	Start Date           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017           05/01/2017	Stop Date	Plan Name       Teacher Regular	Status Active Active Active Active Active Active Active	Rate Category REG REG REG REG REG REG REG
Tools Actions Actions Actions Actions Actions Actions Actions Actions	SSN XXX-XX-1107 XXX-XX-1106 XXX-XX-1106 XXX-XX-1104 XXX-XX-1109 XXX-XX-1109 XXX-XX-1109 XXX-XX-1101 XXX-XX-1101	Name CAMPBELL, OTIS CRUMP, HELEN Fife, Barney LAWSON, FLOYD Pyle, Gomer SPRAGUE, HOWARD Taylor, Andy Taylor, Bea	Start Date 05/01/2017 05/01/2017 05/01/2017 05/01/2017 04/01/2017 05/01/2017 05/01/2017 05/01/2017	Stop Date	Plan Name         Teacher Regular         Teacher Regular	Status Active Active Active Active Active Active Active Active Active	Rate Category REG REG REG REG REG REG REG REG

# **The Actions Button Options**

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

- Details
- Employee Information

Back Location Code:			Loca	Location Name:					
Profile	Account	Forms	Documents	Roster	EFT Payme	ents Reports			
loster									
Search:	[				×				
Tools	SSN	Name			Start Date	Stop Date	Plan Name	Status	Rate Category
Tools	SSN XXX-XX-7	Name			Start Date 07/01/1995	Stop Date	Plan Name PLD Group Life Insurance	Status Active	Rate Categor

#### 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.

SN: lame: ember Contract lan Name:	XXXX-XXX-1107 CAMPBELL, OTIS					
Name: Member Contract Plan Name:	CAMPBELL, OTIS					
Vember Contract Plan Name:						
Plan Name:					-	
	Teacher Regular	~	Rate Category:		REG	~
Start Date:	05/01/2017 🖪 Status:			Active	~	
Stop Date:	mm/dd/yyyy		POS:		Y0101	
Account Id:		~			11	
Contract Year:	D-8/1-7/31	~	GLI Billing:			~
Base Hours:			Elig Change Reason:			~
GLI GF:						
eave of Absence	8					
Tools Type	Start Date	Stop Date	SVC Multiplier	Last SVC	Voided?	
1900	Start Date	orop Dare	e.e.multiplier	200.010	- Olded I	

#### **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 Demogra	phics GLI Level				
Member Info					
Demographics					
Prefix:				SSN:	XXXXXX1107
First Name:	OTIS			Birth Date:	05/09/1960
Middle Name:				Gender:	Male
Last Name:	CAMPBELL			Suffix:	
Correspondence:	6 BOOKER AVE AUGUSTA 04330				

43
44
45
46
47
48
49

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: <u>https://mainepers.org/Employers/ESS-Guides.htm</u>.

#### **REPORTS TAB**

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

Profile	Account	Forms	Documents	Roster	EFT Payments	Reports
Reports						
🔲 Ge	nerate Report	J				

Report Type     Report Parameters	Confirm
Select one of the following reports for ad hoc generation ESS GLI Level Report	Select
Employer Remittance Report	Select
GLI Invoice	Select

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

Select one of the following reports for ad hoc generation	
ESS GLI Level Report	Select
Employer Remittance Report	Select
GLI Invoice	Select

#### 2) Enter required data

- a. Employer Code
- b. Employer Location Code
- c. Work Report Start Date

#### 3) Click Next

enerate Report			
Report Type	2 Report Parameters 3 Confirm		
Employer Remittance Re	port		_
Employer Code:	TCMAY	*	
Employer Location Code:	TCMAY	~	
Work Report Start Date:	05/01/2017	3	

#### 4) Click **Confirm**

nerate Report			
Report Type     Rep	ort Parameters 3 Confirm		
Please confirm that the following inform	nation is correct.		
Employer Remittance Report			
Report Parameter:			
Employer Code:	TCMAY		
Employer Location Code: Work Report Start Date:	TCMAY 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

export (14).pdf	171		¢	•	Ð
	Employer Remitta	ince Report			
Employer Code: Payroll Identifier: Transaction #:	TCMAY PR 04/01/2017 2677058				
Retirement Fir	nancial Data				- 10
Employee Employer Grant Fun Employer	Contributions Contributions ded Compensation Contribution on Grant Funded Compensation	\$ 1,966.39 \$ 863.66 \$ 5,000.00 \$ 528.50			
Adjustments					- 88
Total Remittar	ice				- 88
Total due:		\$ 3,358.55			- 10
					- 10
					- 88
					- 10
					- 10
					- 10
					0
					1

- 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:

Filters     Actions       Location Name: All         Search:     Search	Admin							
Location Name: All  Add User Search: Search	Filters					Actions		
Search x	Location Na	ime: All			*	Add User		
	Search:	Search			×			
Status: All *	Status:	Al	×					
	Tools	User Name	Full Name	Status	Created On	Registered	Email	Last Loc

- 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
<u>Profile</u>					
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
<u>Forms</u>					
Start	W	W	W	W	W
Submitted Forms	R	R	R	R	R
<b>Documents</b>	R	R	R	R	R
<u>Roster</u>	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.

Admin							
Filters					Actions		
Location N	kame: AJ		٧		Add User		
Search:	Search		×				
Status:	Al	¥					
Took	User Name	Full Name	Status	Created On	Registered	Email	LastLo

The Add User wizard displays.

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

dd User		
<b>1</b> 50	inch 🛛 🖉 Account Info 🔄 🕄 Access Info	
0	Confirmation Info	
Please enter t	e new user's name	
First Name:	Elowd	
Last Name:	Lawson	
Go		
Cancel		Next

#### 4. Search results display:

0 -	earch 🛛 Accol	unt Info	C Access Info	>0	Confirmation Info	
Please enter	the new user's name					
First Name:	Floyd					
Last Name:	Lawson	1				
Go						
Please selec	t the new user from the lis	t below. If the r	new user does not e	exist in the lis	t below, click New.	
Tools	Name	SSN	Address			
	NO matches loand.					

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.

3	
Dt:	
De:	

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.*

Search Account Info Access Info Confirmati  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: Final ESS Payroll Role and Human Resources Role ESS Payroll Only Role ESS Human Resources Only Role ESS Human Resources Only Role	
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	n Info
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	
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	
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	
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	
Employer User - Default  ESS Payroll Role and Human Resources Role  ESS Payroll Only Role  ESS Human Resources Only Role	
ESS Payroll Only Role     ESS Human Resources Only Role	
ESS Human Resources Only Role	
E So Human Resources Only Role	
ESS Boad Only Bala	
Eoo Read Only 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.

nd User						
0	O Access 244	0	• • • • • • • • • • •	tender .		
Please conferm the details	Delitros.					
First Parrie:	Location					
Last Name:	.come					
Sharer :	Lines					
E Holl	(pagametron-grates here	- ) - ) - (1-10)				
Belly Chatel						
HEA Phone	530114792 A186	Eve				
MEA Ernall	quantum dynamics	n. 6 mm				
Account Access	Access to Employer's	specific accounts				
Cancal					Back	Contern
ssage					0.8.1	Den
	cont to the upper to	a amplata tha				

### **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.

Pressed territori scree residentiti	g mormation so that the new user can register and e	create the account
User Name:	SFIELDS2	
First Name:	Sally	
Last Name:	Fields	
Email:	deedee.love@mainepers.org	
Enter the following secur Birth Date:	ity identifiers: mm/dd/yyyy	
Enter the following secur Birth Date: Mobile Phone:	ity identifiers: mm/dd/yyyy	
Enter the following secur Birth Date: Mobile Phone: Business Phone:	ity identifiers:       mm/dd/yyyy   Ext:	

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 Wiza	rd	
1 Identification	2 Security Setup 3 Confirmation	
Please setup your security qu	iestions	
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 fo	blowing rules	
Password must have a mini Password must have a mini Password must have a mini Password must have a mini Password must have a mini	imum of 8 characters imum of 1 alphabetic characters imum of 1 numeric characters imum of 1 non alpha numeric characters imum of 1 capital letters	
Enter your new Password:	Strong	
Please confirm your passwo	ord:	
Cancel	Back	

The third step of the wizard generates.

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

rify User Registration Wizard			
1 Identification	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:

Fiters					Actions		
Location Name: All				*	Add User		
Search:	Search			×			
Status:	All	¥					
Tools	User Name	Full Name	Status	Created On	Registered	Email	Last Login
Taola Actiona	User Name QA_JCHASE	Full Name CHASE, JOE	Status Active	Created On 11/25/2018	Registered Yes	Email	Last Login 11/26/2018 03-44
Taola Actiona Actiona	User Name GA_JCHASE RHENRV2	Full Name CHASE, JOE HENRY, RICK	Status Active Active	Created On 11/25/2018 11/25/2018	Registered Yes Yes	Email rick.herry@mairepers.org	Last Login 11/26/2018 03:44 11/26/2018 12:56
Taola Actiona Actiona Actiona	User Name GA_JCHASE RHENRY2 SFIELDS2	Full Name CHASE, JOE HENRY, RICK FIELDS, SALLY	Status Active Active Active	Created On 11/25/2018 11/25/2018 12/03/2018	Registered Yes Yes Yes	Email rick henry@mainepers.org deedee.love@mainepers.org	Last Login 11/26/2018 03:44 11/26/2018 12:56
Taola Actiona Actiona Actiona Rese	User Name GA_JCHASE RHENRY2 SFIELDS2 CUSer Account	Ful Name CHASE, JOE HENRY, RICK FIELDS, SALLY	Status Active Active Active	Created On 11/25/2018 11/25/2018 12/03/2018	Registered Yes Yes Yes	Email rick.henry@mainepers.org deedee.love@mainepers.org	Last Login 11/28/2018 03-44 11/28/2018 12:56

*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 <u>employer@mainepers.org</u>.

- 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		/	2
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:	1	
Once Reset, the user	will be required to re-register their account to gain access.		
Nassa hana 'VEE' and cl	rk Baset Armount's		
Prease type 105 and th			
Denet Account			Cancel
Reper Account			variver

### **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 <u>or</u> 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.

Jpdate Se	curity Profile	
User:	MBEASLEY	
E Mail:	deedee love@mainepers.org	
Name:	BEASLEY, MISSIS	
Security F	6 P0999 TOWN OF HENRYVILLE activate Account	
80	Employer User - Default	
8	ESS Payroll Role and Human Resources Role	
	ESS Payroll Only Role	
	ESS Human Resources Only Role	
	ESS Read Only Role	

# **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 Addres
	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
	4	00000047 04-40 044		170 01

## **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.

User Details				×
Save Apply C	Cancel			
Prefix:		✓ Birth Date:	05/05/1960	
First Name:	Sally			
Middle Name:				
Last Name:	Fields			
Suffix:		~		
SSN:				
Alt ID 2:				
Home Phone:			609	
Mobile Phone:	(207) 248-1815		0	
Business Phone:	(207) 512-0001	Ext:	0	
MFA Phone:	(207) 512-0002	Ext:		
Email:	deedee.love@mainepe	ers.org		
MFA Email:				
Correspondence			18	
			~	
Payment:			6	
1				

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

User Details				×	User Details				- 5
Save Apply	Cancel				Save Apply	Cancel			
Prefix:		✓ Birth Date:	05/05/1960	3	Palic		· Birth Date:	05/05/3860	13
First Name:	Sally				First Name:	Sally			
Middle Name:	-				Hode Name:				
Last Name:	Fields				Last Name	Felds			
Suffix:		*			Suffic		w		
SSN:					55%				
Alt ID 2:					AR ID 2:				
Home Phone:			0		Home Phone:			0	
Mobile Phone:	(207) 248-1815		0		Noble Phone:	(207) 248-581/5		0	
Business Phone:	(207) 512-0001	Ext:	0		Business Phone:	(207) 512-0081	be:	0	
MFA Phone:	(207) 512-0002	Ext:	P		HF4.Phone 1:	(207) 512-0002	0e	0	
Email:	deedee.love@mainep	ers.org	Add		HF4.Phone 2:	(207) 512-0001	0e	0	
MFA Email:			Delete		Email:	deedee.love@mainep	ernd	0	
					MF4 Email:			0	
Correspondence:			0						
					Correspondence:			0	
Payment:			0						
- ayment.									