ERM Manage Submission Contact and User QRG - Employer

This quick reference guide (QRG) is for use during the annual and continuing management of contact and user information in the Employer Reporting and Maintenance (ERM) application.

Manage Submission Unit Contact Information

Manage Submission Contact and User

- Manage Submission Unit Contact
- Modify Existing Submission Unit Contact
- Add a New Submission Contact
- Add an Existing Submission Unit Contact
- Manage Employer Users

To manage Submission Unit contact information. click Employer then click Manage Submission Unit. Your unit will populate as seen in Figure 1. Click the Contact tab, click the dropdown next to Contact Status, select active, and click search to see your active contacts.



Home V Employer	Submission	Units Unit Name New Courty - A	uditor	Unit Type Other Government	Employer Name New County	Status Farticipating	Fund Name PERF
Create Employer Manage Employer Submission Unit Transfer V Submission Unit	Acct Detail Contacts First Name	Addr & Phone	Pay Admin	W&C Conta	cts PERF Hyt		
Manage Submission Unit	Action	First Name	Last Name	Email Address	Contact Types		
Member Transfer PERF Employer Enrollment	Modify	Dinah	Shore	dsabbath@inprs.in	Authorized Agent A	urer/Finance Perso	Treasurer Wage and nnel Retirement Rate
Member	Modify	Whitney	Deal	wdeal@inprs.in.go	Authorized Agent		
Wage and Contribution	Modify	Bob	Test	test@test.com	Authorized Agent		
 Administration PERF Links 	Add Contact						
Employer Reports	Contact Phone		1				1 A A
Contact Us	Action Modify	Phone Type Main	Phone (555) 555-5555				Extension
	Add Phome Numb	ver					

Modify Existing Submission Unit Contact

To modify an existing submission unit contact, click **Modify**, as seen in the table above, next to the name of the contact you wish to select. Here you can update the contact status or contact types for that individual.

Add a New Submission Unit Contact

To add a new submission unit contact, click **Add Contact** (Figure 1) to populate the pop-up screen.

On the Add Information Unit Contact screen, complete the requested information and for the **Status**, click the ∇ and select **Active**.

Figure 2: Add Submission Unit Contact

Prefix	•		
* First Name		1	
Mdde Name	1		
* Last Name			
Email Address			
Phone Type	Man		
* Phone			
Extension			
* Status			
Effective Date	Concession of the second se		
Contact Types	Authorized Agent	_	
	Auth Agent - Clerk-Treasurer		
	Wage and Contribution Treasurer/Finance	2	
	Personnel	30	
	Retrement		
	Rate Letter Other Contact	4	
		32	
		11000	



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Add an Existing Submission Unit Contact

Each Submission Unit contact must have an email address that is unique in the ERM application. If you attempt to add a contact and you get a message stating that the contact cannot be added because the contact's email address already exists, you must add the contact through the "Administration" section of the ERM application. After Administration, click **Users** for the employer user screen to display as shown below. Select **Add Contacts** to search for the email address of your existing contact to apply any user roles, but also permission to be an active contact for more than one submission unit.

Figure 3: User, Employer User tab, Submission Unit Contacts section

tome mployer	Employer User					
4ember Nage and Contribution Administration My Profile Users	Submission U Submission U	nit ID:		1		
Communication Configuration	⊻ Submission	Units				
PERF Links	Unit ID	Unit Name				
Employer Reports Contact Us	8010000	New County - PERF	t.,			
	Submission Uni	t Contacts				
	Action	Employer User	First Name	Last Name	Email	
			Jamie	Wells	jwells1@new.gov	

Manage Employer Users

ERM security administrators can add new Employer Users in the ERM application. Before a new Employer User can be added and assigned a security role, he or she must be added as a Submission Unit contact in the ERM application. To access options for adding new user, click the **Users tab** as seen in the image below.

Figure 4: User, Employer User tab, Defined Sections

ome	Employer Use					
ployer	✓ Search Subr	mission Unit				
ember	Submission L	Jnit ID:			Section 1	
age and Contribution	Submission Unit	Name:			Sector	
dministration	Sabrinssion onic	Search		_		
My Profile		bearun				
Users	~ Submission	Unite				
Communication					Section 2	
Configuration	Unit ID	Unit Name	=		Section 2	
Configuration ERF Links					Section 2	
	Unit ID	Unit Name New County - PERF	-		Section 2	
Configuration ERF Links mployer Reports	Unit ID 0000111	Unit Name New County - PERF	First Name	Last Name	Section 2)
Configuration ERF Links nployer Reports	Unit ID 0000111 Submission Uni	Unit Name New County - PERF	1	Last Name Goodal		Section 3
Configuration RF Links nployer Reports	Unit ID 0000111 Submission Uni Action	Unit Name New County - PERF it Contacts Employer User	First Name		Email	Section 3

Section 1 allows you to search for unit you are wanting to make updates to if it has not prepopulated in Section
Section 3 select create user to grant user roles to a New Contact or select Modify User for an existing contact to make any updates or deactivate their access to ERM for your unit.

References

For detailed instructions refer to the *Manage an Employer* section for contact information and the *Manage a* Submission Unit section for user roles of the <u>Employer Reporting Maintenance (ERM) Employer Management</u> <u>User Manual</u> available on the INPRS website.

