Member Information Change Procedure – Add Record

Summary

This procedure explains how to manually create a Member Information Change Data Collection using the Add Record method via Employer Access.

Steps

The procedure is as follows:

1. Navigate to the **Left-hand Tool Bar**.
   a. Click **Business Functions** (graph) icon.
   b. Click **Data Collections**.
   c. Click **Create Data Collection**.
   d. Complete the following fields in the **1. Definition** tab:
      o **Data Type:** Determines the type of workflow (e.g., **Member Information Changes**)
      o **Partner Code:** This field will be pre-populated for your convenience.
      o **Effective Date**
      o **Data Collection Name:** For record-keeping purposes, we recommend naming the Data Collection with the following information:
      Partner #-[data collection type]_[current date] – Member first and last name – Member ID
   e. Click **Save and Continue**.

2. Click **Add Record** to create the Member Information Changes Data Collection manually.
   a. Complete the following fields in the **2. Add Member Data** tab:
      o **Items with an asterisk are mandatory** (Current SSN, First Name, Last Name)
      o Enter:
         ▪ Member Information **– Only fill in the field(s) that will be changed/revised.**
            • **Current Social Security Number**
            • **Correct Social Security Number** (if applicable)
            • **Member ID** (if applicable)
            • **First Name**
            • **Last Name**
            • **Maiden Name** (if applicable)
            • **Name Suffix** (if applicable)
            • **Birth Date**
            • **Gender**

- **Marital Status**
- **Phone Number** (if applicable)
- **Mobile Number** (if applicable)
- **Email** (if applicable)
- Residential Address, enter any changes.
  - **Address line 1**
  - **Address line 2** (if applicable)
  - **City**
  - **State**
  - **Zip Code**
- Mailing Address (if different from Residential Address)
  - **Address line 1**
  - **Address line 2** (if applicable)
  - **City**
  - **State**
  - **Zip Code**
- Employment Information **(If any of the fields are being revised below, you must fill in ALL fields in this section)**
  - **Hire Date:** Date when member's employment first started. If this date is not changing, you can find the current date on file on the Member Profile page under the "Employment" tab.
  - **Position:** If the position is not changing, enter position on file. If the position IS changing or being updated, list the new position. If the member is changing plans, please complete an Enrollment Data Collection instead. You can find the current position on file on the Member Profile page under the "Employment" tab.
  - **Position Effective Date:** If updating the position the member was enrolled in, use the Enrollment Date on file. This can be found on the Member Profile page under the "Employment" tab. If the member is changing positions, use the date when the new position became effective.
  - **Payroll Calendar:** Select All 12 Months Paid or Seasonal Pattern (see chart below)
  - **Pay Calendar effective Date:** This should match the date entered in the Position Effective Date field.
  - **Pay frequency:** Pay schedule that the member follows.
  - **Enrollment Date:** Date at which the member joined the pension plan. If this date is not changing, you can find the current date on file on the Member Profile page under the "Employment" tab.

b. Click **Save**.

3 Click **Add Record** to enter another member, repeat instructions from step 2 until all members are added to the data collection.

4. Click **Validate** to begin the validation process in the **3. Validate Member Data** tab. In this step, data is validated against formatting and business requirements. Respond to the errors and/or warnings and close the **Member Summary**. Once all exceptions have been resolved, click **Continue**.

   a. Errors will show in **RED**, and warnings will show in **ORANGE**, with the total number of issues for each member. On the right-hand side of your screen, you have the option to check the box for the specific error/warning to view the members that were impacted as such. This allows you to filter by error/warning.

   b. **To respond to an ERROR,** click the row of the member's name to highlight and open the Member Summary to the right.
      - Click **View Member Data** to make any necessary changes and corrections. After the correction is made, click **Save and Validate**.
      - Click **Postpone Member** to save the member in a Data Collection to be submitted later. In the pop-up window, enter an explanation regarding the reason why the member is being postponed, then click **Save**.
      - Click **Reject Member** to remove the member from the data collection. In the pop-up window, enter an explanation regarding the reason why the member is being rejected, then click **Save**.

   c. **To respond to a WARNING**, click the row of the member's name to highlight and open the Member Summary to the right. You then will need to complete one of the four options below to address the warning.
      - Click **View Member Data** to make any necessary changes and corrections. After the correction is made, click **Save and Validate**.
      - Click **Approve Warning.** In the pop-up window, click the drop-down arrow to indicate a reason to approve the warning. Click **Save.**
      - Click **Postpone Member** to save the member in a Data Collection to be submitted later. In the pop-up window, enter an explanation regarding the reason why the member is being postponed, then click **Save**.
      - Click **Reject Member** to remove the member from the data collection. In the pop-up window, enter an explanation regarding the reason why the member is being rejected, then click **Save**.

5. From the **4. Review & Submit** tab review the listed Data Collection, Data Entry Summary and Reports. Once review is complete, click **Submit** to finalize filing the data collection.

This procedure is complete.

Charts:

Position Titles:

Description of Positions
General Position/Common Law Employee
Appointed - Governing Body
City Hospital Worker
Contractor/Consultant
Elected - Assessor
Elected - Auditor
Elected - Board of Review - Tax appeals
Elected - Circuit Clerk
Elected - Clerk
Elected - Collector
Elected - Coroner
County - Elected Governing Body (Board Members)
County - Elected Executive of County Board
Elected - Governing Body (Board members)
County - Elected Governing Body Chairperson, elected by electors
County - Elected Governing Body Chairperson, elected by county board
Elected - Mayor/President
Elected - Recorder
Elected - Road/Highway Commissioner
Elected - Sheriff
Elected - States Attorney
Elected - Supervisor
Elected - Supervisor of Assessments
Elected - Treasurer
Fire Department Employee - does not perform fire duties
Fire Fighter
Full Time Deputized Position
General position/Common Law Employee
Police Chief
Police Department Employee - Does not perform police duties
Police department Employee - Performs police duties
Police Officer
Public Defender
School - License/Certification required for position
School - working toward licensed position
School Coach - person does not perform teaching duties for an IL public school
School Treasurer
Teacher's Aide/Paraprofessional - Assists with children in a school

Seasonal Patterns – Letter equals the first letter of each month with reported pay, ^ equals each month that is Seasonal. When they are paid in the months in which they are required to work, they receive free service for the Seasonal months in which they are not. See an example below, Employers will see the patterns applicable to them.

Description	Details
All 12 Months Paid	Pay reported in all 12 months
1_JFMAM^^^^OND	**Example: Pay reported in Jan, Feb, Mar, Apr, May,^,^,^,^, Oct Nov, Dec. ^= Seasonal months.**