

Employer Access Overview/Logging In Procedure

Summary

The *Employer Access Overview* procedure describes the main features and elements available on the Employer Access.

By the end of this procedure, IMRF Employers and Partners will know how to:

- Identify the main features of the Employer Access.

Registering and Logging In

For Employer Admins to active their Employer Access account, you will receive an email with a secure link. Click on “Click Here” in the email to be directed to the IMRF login page to register. The link brings you to the IMRF Portal Log in screen. You will need to set your temporary password to log in.

- You will create a password based on the required password criteria.
- Click **Save** after entering and confirming your password.
- After selecting your password, you will be asked to set up security questions from a list. You can click on the modify drop-down arrow to show the different options of questions. The system uses these questions and answers if you forget your password and need to reset it.
- Click **Next** when complete.
- To confirm your security questions, click the **Save** button.
- To complete the registration process, please read and accept the Terms of Use then click **Save**.
- Click **Continue** to have access to the portal.

Supported Browsers

Refer to the following table for the supported browsers.

Operating System	Supported Browsers					
	Internet Explorer	Edge	Google Chrome	Mozilla Firefox	Android Browser	Apple Safari
Windows	11	N – 2	N – 2	N – 2	n/a	n/a
Apple (OS X)	n/a	n/a	N – 2	N – 2	n/a	N – 2

Note: N: current version; N – 2: current version plus the previous two major releases; n/a: not applicable.

Dashboard

Access the different features of the Employer Access from the Dashboard.

Toolbar Menu

From the Tool Bar, you may access the Employer Access features.

Widgets

The dashboard widgets display a quick overview of the processes in progress for the different functionalities of the Employer Access.

1. The widgets are expandable and can be moved to a different location on the dashboard.
2. At the top-right of each widget, the following three icons may appear:
 - A. An orange circle with the number of non-completed processes.
 - B. An icon to move the widget.
 - C. An icon to expand the widget.
3. The link **View all** redirects the user to the complete listing grid.
4. Click a line to see the details.
5. An action can be triggered directly from some of the widgets.
6. Click a down arrow to see more information.
7. Click an up arrow to collapse the information.

Widget Name	Description
Member Events	View events performed through both the Event feature and the Data Collection feature.
My Data Collections	View previous data collections. <ul style="list-style-type: none"> ● Click a line to go to the step of the data collection where it stopped the last time. ● Click the New Data Collection button to create a new Data collection.
Account Summary	View Outstanding Invoices and Unapplied Credits. <ul style="list-style-type: none"> ● Click a line to go to the Account Summary feature.
Find a Member Widget	Search for a member by last name or social security number.
My IMRF Team	Access the contact information for IMRF and your Field Representative.
My Documents and Reports	View documents that have been posted on the Document Viewer for the last 14 days. <ul style="list-style-type: none"> ● Click the encircled arrow to open the document.
Requests for Information	View the expected documents. <ul style="list-style-type: none"> ● Click a line to go to the related Request for Information with the expected information on the right.
Secure Messages	View Secure Messages. Unread messages remain indefinitely in the widget and are bold. Messages that have been read remain in the widget up to one week. <ul style="list-style-type: none"> ● Click a line to go to the related secure message. ● Click the New Message button to create a new secure message.
My Team	Access the contact information for the employees on your team. <ul style="list-style-type: none"> ● Double-click a line to view the employee's phone number and email.

Filters and Search

1. For each list, the user can sort the information by using the displayed fields.
 - A. Click the title of the column to sort in a decreasing or increasing order.
2. For each field with a funnel icon next to it, the user can click the funnel, and a search field opens.
3. For each table, the following information appears at the bottom of the page:
 - The number of pages in the table.
 - Arrows to scroll through the different table pages.

Header and Footer

The Header provides options to link to IMRF's general website as well as access to communication and account preference updates.

1. Within the header, click the IMRF logo or the words **Go to imrf.org** to jump to the IMRF website www.imrf.org.
2. Click the person icon next to your name to access the **Communication Preferences** screen to select your delivery method for the weekly update.
3. Click **Sign Out** to sign out of the Employer Access Portal.
4. Click the lock icon next to Sign Out to change your password or security questions.

The Footer provides several links to IMRF social media sites and other information, including the following:

- Last login information as a timestamp
- About this site
- Terms of Use
- Contact Us
- Privacy Policy and Legal Disclaimer
- www.imrf.org
- Facebook
- Twitter
- LinkedIn
- Vimeo

Help

Click **Learning Center** (question mark) in the Tool Bar for help navigating the Employer Access.

1. Learning Center
 - A. Click **Learning Center** for IMRF videos and instructions on how to perform common processes.
2. Education Workshop
 - A. Click **Education Workshop** to register for an IMRF informative employer workshop.

This procedure is complete.