# Employer Disability Certification Procedure - Add Record

## Summary

This procedure explains how to manually create the Employer Disability Certification Data Collection for submission using the Add Record method in Employer Access.

## Steps

The procedure is as follows:

1. Navigate to the **Left-hand Tool Bar**.
   a. Click the **Business Functions** (graph) icon.
   b. Click **Data Collections**.
   c. Click **Create Data Collection**.
   d. Complete the following fields in the **1. Definition** tab:
   1. **Data Type**: Determines the type of workflow (e.g., **Employer Disability Certification**)
   2. **Partner Code**: This field will be pre-populated for your convenience.
   3. **Effective Date**
   4. **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 number*
   e. Click **Save and Continue**.

2. Click **Add Record** to create the Disability Certification Data Collection manually.
   a. Complete the following Fields in the **2. Add Member Data** tab:
   - Items with an asterisk are mandatory.
   - Enter:

     Member Information
     - **Social Security Number**
     - **Member ID Number** (optional)
     - **First Name**
     - **Last Name**

     Employment Information
     - **Last Day Worked**
     - **Last Compensation Received Date**
     - **Reoccurrence Within Past 6 Months**

- **Seasonal Paid Over 12 Months**

Return to Work Information (if applicable)

- **Has the member returned to work?**
- **Returned to Work Date**

Workers Compensation Claim (if applicable)

- **Workers Compensation Claim Filed**
- **Workers Compensation or Occupational Disease Approved Weekly Benefit Amount**
- **Workers Compensation or Occupational Disease Claim Start Date**
- **Workers Compensation or Occupational Disease Benefit Termination Date**

Revised Form

- **Is this a revision of a previously submitted Data Collection?**

b. Click **Save**.

3. Click **Add Record** to enter your next member, repeat instructions in step 2 until all members are entered.

4. Click **Validate** to begin the validation process in the **3. Validate Member Data** tab. In this step, data is validated against 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.

6. Then send IMRF the member's job description by uploading the file to a Secure Message. *NOTE* - Make sure to write the member's name and member ID number on the job description. To send a secure message:
   a. Click the envelope icon on the left toolbar.
   b. Select **Disability** as the topic.
   c. Use **Job Description** as the subject.
   d. Attach the job description document. *NOTE* - Make sure to include a message containing the member's name and member ID number in the body of the Secure Message. If you don't do this, then you won't be able to submit the message.
   e. When complete, click **Submit**. This will complete the Employer Disability Certification process.

**This procedure is complete.**