

# Enrollments Procedure - Add Record

## Summary

This procedure explains how to manually create the Enrollments 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 the **Business Functions** (graph) icon.
  - b. Click **Data Collections**.
  - c. Click **Create Data Collection**.
  - d. Complete the following fields in the **1. Definition** tab:
    - **Data Type**: Determines the type of workflow (e.g., **Enrollments**)
    - **Partner Code**: This field will be pre-populated for your convenience.
    - **Effective Date**
    - **Data Collection Name**: For record-keeping purposes, we recommend naming the Data Collection with the following information:  
*Partner #-[data collection type]\_[current date]- Employee first and last name*
  - e. Click **Save and Continue**.
2. Click **Add Record** to create the Enrollment 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**
        - **First Name**
        - **Last Name**
        - **Maiden Name** (if applicable)
        - **Middle Name** (if applicable)
        - **Name Suffix** (if applicable)
        - **Birth Date**
        - **Gender**
        - **Marital Status**
        - **Telephone** (if applicable)
        - **Mobile Number** (if applicable)

- **Email** (if applicable)
- Residential Address
  - **Address line 1**
  - **Address line 2** (if applicable)
  - **City**
  - **State**
  - **Zip Code**
- Mailing Address (if different from Residential)
  - **Address line 1**
  - **Address line 2** (if applicable)
  - **City**
  - **State**
  - **Zip Code**
- Employment Information
  - **Enrollment Type:** New Enrollment or Employer Audit Omitted Service
    - **For additional steps on how to process Employer Audit Omitted Service, follow the procedures at the end of this document.**
  - **Hire Date:** Date when the employee became employed
  - **Position**
  - **Position Effective Date:** Date when the position above became effective. This should match the Enrollment Date.
  - **Payroll Calendar:** Select All 12 months paid or one of the seasonal patterns listed
  - **Pay frequency:** How often the member is paid by the employer
  - **Expected Annual Hours:** The hourly standard this member is under
  - **Plan**
  - **Enrollment Date:** Date when the employee is eligible to participate in IMRF



- 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.

## STEPS FOR PROCESSING EMPLOYER AUDIT OMITTED SERVICE

### EMPLOYMENT INFORMATION

- **Enrollment Type:** Select “Employer Audit Omitted Service”
- **Hire Date:** Date when the employee became employed
- **Position**
- **Position Effective Date:** Date when the position above became effective
- **Payroll Calendar:** Select All 12 months paid or one of the seasonal patterns listed
- **Pay Frequency:** How often the employee is paid by the employer
- **Expected Annual Hours:** The hourly standard this employee would have been enrolled in
- **Plan**
- **Enrollment Date:** Date when the employee would have been eligible to participate in IMRF

### TERMINATION INFORMATION

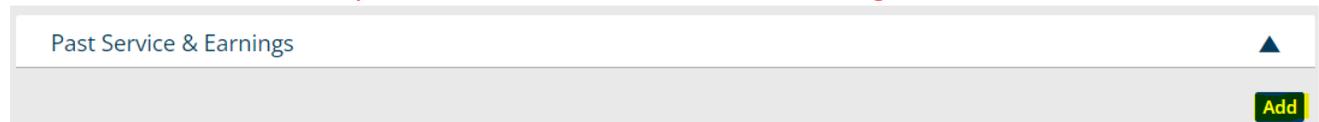
- **Termination Reason:** This field only needs to be completed if the employee no longer works with the employer.
- **Termination Date:** This field only needs to be completed if the employee no longer works with the employer.

### PAST SERVICE & EARNINGS

EAOM service and earnings should be entered on a calendar-year basis. For example, if entering service from March 2021 through November 2023, the Begin Date and End Date should be entered as noted below:

Begin Date: 03-01-2021	End Date: 12-31-2021
Begin Date: 01-01-2022	End Date: 12-31-2022
Begin Date: 01-01-2023	End Date: 11-30-2023

**NOTE:** Multiple years can be entered in the same data collection by clicking the “Add” button, which can be found directly underneath the “Past Service & Earnings” section. It looks like this:



- **Omitted Earnings Amount:** Enter the calendar-year earnings amount.
  - **Worked Hours:** Enter the calendar-year hours worked.
- Click **Save**.

**This procedure is complete.**

## Charts

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	<b>Example: Pay reported in Jan, Feb, Mar, Apr, May, ^, ^, ^, Oct Nov, Dec. ^= Seasonal months.</b>