Employer Access Member Events Procedure

Summary

The *Member Events* procedure describes where to find the data request that an employer needs to complete as part of another process that was started by an IMRF staff member (for example, Retirement or Disability Claim) and enter and return the requested information.

Procedure

1. Access **Member Events** screen using one of the following actions:
   - Click the **Members and Events** (person) icon on the Tool Bar on the left and select **Events.**

   OR
   - Find the **Member Events** widget on the main dashboard click **View All** in the lower right corner.
2. The **Events** screen shows all members for which an event has occurred, such as a termination or retirement.
   - The table is sorted by creation date. The default view is "In Progress." Once the status is "Submitted," the event will move from this list to the "Completed" list.
3. To change the view, select one of the following options from the **View** field:
   - In Progress
   - Completed
   - All
4. To search in a specific column, click the appropriate funnel icon.
5. To work on or view a member event, select the appropriate row.
   - The information is displayed in the box on the right.

   Note: An Event Status of "Submitted" can only be viewed.
6. To edit a member event, click the **View/Edit Information** button in the box.
7. Enter the required fields in the new transaction request, such as wages, contributions, and services. *These fields follow the same process as the Data Collections for various events but are strictly used for a specific member.*
8. Click one of the following buttons:
   - **Save and Submit:** Runs validations. If there are no errors, the process moves to the "Submitted" status.
   - **Save Draft:** Runs validations. If there are no errors, the process remains at the "Started" status.
9. Correct any errors. Then, select the appropriate button to save the corrected information. Refer to the specific Data Collection procedure for additional information on correcting any errors.
10. As appropriate, approve any warnings. Then, click the **Save and Submit** button again.
11. After successful submission, the following actions occur:
    - The message, "Your event has been submitted" appears.
    - You are returned to the **Events** screen.

    Note: To see your newly submitted event, refresh the table.

This procedure is complete.