



# EMPLOYER ACCESS WORKSHOPS

## WELCOME


**Thank you for joining us!**


Please put any questions you  
have in the chat for our team to answer  
during the webinar.

# Agenda

- Dashboard
- Data Collections
- Demonstration
- Closing Remarks
- Questions

# Dashboard


Locally funded, financially sound.

[Go to imrf.org](#) | Welcome Christine 
[Sign Out](#)

## Welcome to the Partner Portal

### MY DOCUMENTS AND REPORTS

Documents [View All...](#)

Reports [View All...](#)

### MY DATA COLLECTIONS

5264

|   |                    |
|---|--------------------|
| 03077 - Wage Report - 02-01-2025 - 4                    | Action definition  |
| 05091 - Reciprocal Certification - 05-23-2025 - 1       | Action definition  |
| 09901 - Insurance and Union Deductions - 05-23-2025 - 1 | Initial Data Entry |
| 03077 - Wage Report - 02-01-2025 - 3                    | Action definition  |

[New Data Collection ...](#) [View All...](#)

### REQUESTS FOR INFORMATION

603

| Request Type         | Due Date   |
|----------------------|------------|
| Nothing              | 04-26-2024 |
| Nothing              | 05-10-2024 |
| Expected document    | 05-20-2024 |
| Nothing              | 05-30-2024 |
| Incomplete documents | 10-01-2024 |

[View All...](#)

### MY TEAM

|   |                                   |
|---|-----------------------------------|
| Donna Boyd_1492071<br>Employer Admin        | Last login<br>04-30-2025 12:00 AM |
| Sheryl Harrington_1492081<br>Employer Admin | Last login<br>04-28-2025 12:00 AM |
| Lois Lewis_1492101<br>Employer Admin        | Last login<br>04-08-2025 12:00 AM |
| Janet Embry_1492111<br>Employer Admin       | Last login<br>04-30-2025 12:00 AM |

[Add Team Member ...](#) [View All...](#)

### MEMBER EVENTS

2219

|                                   |     |
|-----------------------------------|-----|
| Disability Return To Work         | 3   |
| Employer Disability Certification | 217 |
| Enrollments                       | 0   |
| Member Information Changes        | 0   |
| Reciprocal Certification          | 259 |
| Termination Information           | 384 |

[View All...](#)

### MY IMRF TEAM

Partner Services

Regional Manager ()  
Mandy Beedle-Powers

Regional Manager ()  
Christine Fine

Regional Manager ()  
Brian Glover

Regional Manager ()  
Paul Parise

### SECURE MESSAGES

Type for a partner...

You have access to more than one Partner.  
Please provide an Partner code using the Partner Code selection box above in order to view messages.

[New Message](#) [View All...](#)


### ACCOUNT SUMMARY

Type for a partner...

Outstanding Invoices

Unapplied Credits


[View All...](#)



### FIND A MEMBER

To update member information, first find the member by searching using one or more of the terms below:

SSN / Member ID / Last Name



# Adding Team Member

Dashboard

Administration / Access Management

## My Team

My Team

**Add Team Member**

View: By Partner ▾

| Partner Code ▾ | First Name ▾ | Last Name ▾ | Profile        | Primary Contact                     | Executive Types | Portal Access ▾                     |
|----------------|--------------|-------------|----------------|-------------------------------------|-----------------|-------------------------------------|
|                |              |             | Employer Admin | <input checked="" type="checkbox"/> |                 | <input checked="" type="checkbox"/> |
|                |              |             |                |                                     |                 | <input checked="" type="checkbox"/> |

**Access Management**

Partner Information

# Adding Team Member

**Add Team Member** 1

To begin adding a team member, search by last name.

**Search**

**Search results**  
Plan Related Contacts

| First Name        | Last Name |
|-------------------|-----------|
| No Results Found. |           |

**Other Contacts**

| First Name        | Last Name | Business Email |
|-------------------|-----------|----------------|
| No Results Found. |           |                |

**Create New Team Member** 2 **Cancel**

**Basic Information**

First Name:\*

Last Name:\*

Business Email:\*

Business Phone:

**Partner Access** 3 **Add Partner**

**Add Information**

**My Team**

**My Team**

**Basic Information**

First Name:\*

Last Name:\*

Business Email:\*

Business Phone:

**Partner Access**

Profile:

Primary Contact:

**4**

**Select Role - Do not check Primary Contact**

- Deduction Org Admin
- Deduction Org All Access
- Deduction Org View Only
- Employer Admin
- Employer All Access
- Employer Financial
- Employer HR
- Employer View Only



# How to Locate Employer Rate – Employer Portal

**CONTRIBUTIONS**

Contribution Rates

2025

**Filter by Plan (REG, SLEP or ECO)**

| Year         | Effective Date | Pension Plan | Rate Type   | Contribution Rate |
|--------------|----------------|--------------|---|-------------------|
| 2025         | 01-01-2025     | REG          | Employer retirement normal contribution             | 4.94%             |
| 2025         | 01-01-2025     | REG          | Employer retirement funding adjustment contribution | 1.75%             |
| 2025         | 01-01-2025     | REG          | Employer death contribution                         | 0.12%             |
| 2025         | 01-01-2025     | REG          | Employer disability contribution                    | 0.04%             |
| 2025         | 01-01-2025     | REG          | Employer supplemental benefit payment contribution  | 0.62%             |
| <b>Total</b> |                |              |   | <b>7.47%</b>      |

**Partner Information**

# How to Locate Employer Rate – Quick Links

MEMBERS
RETIREES
**1 EMPLOYERS**
INVESTMENTS
ABOUT IMRF
PUBLICATIONS AND ARCHIVE

Employer Access Learning Center (EALC)  
for IMRF Employers

Welcome to the Employer Learning Center! On the right are key training materials to help you complete all of your daily tasks. Below is a description of what is in each area. All Employer Resources or training materials are provided to suit the users preference for learning. You may choose a PDF of steps to complete your task, review a PowerPoint or watch a recorded MP4 video.

**Employer FAQs**

**Employer Access Management:** In this section, you will find all functions to set up or remove your staff's (team member's) Employer Access.

**Wage Report Procedures:** This section includes all information to assist in creating and submitting your monthly wage report.

**Wage Adjustment Procedures:** Here, you will find all information to make individual or bulk wage adjustments in current/ prior years.

**Manage Member Events:** Please refer to this section for instructions on how to enroll, terminate, or update a member's information, view a member's profile, or file for disability.

**Document and Reports:** In this section, you will learn how to search for and view documents and generate reports.

**Employer Resources**

- EALC Home
- Employer Access Management
- Wage Report Procedures
- Wage Adjustment Procedures
- Manage Member Events
- Documents and Reports
- Pay Online Procedure
- Find Important Information
- Secure Messages
- Employer Access FAQs
- Employer Checklists
- 2025 Final Rate Notice Generator
- 2026 Preliminary Rate Notice Generator

**Quick Links**

- 2025 Employer Access Workshops
- How do I address VAC Errors on the Wage Report Data Collection?

**2**

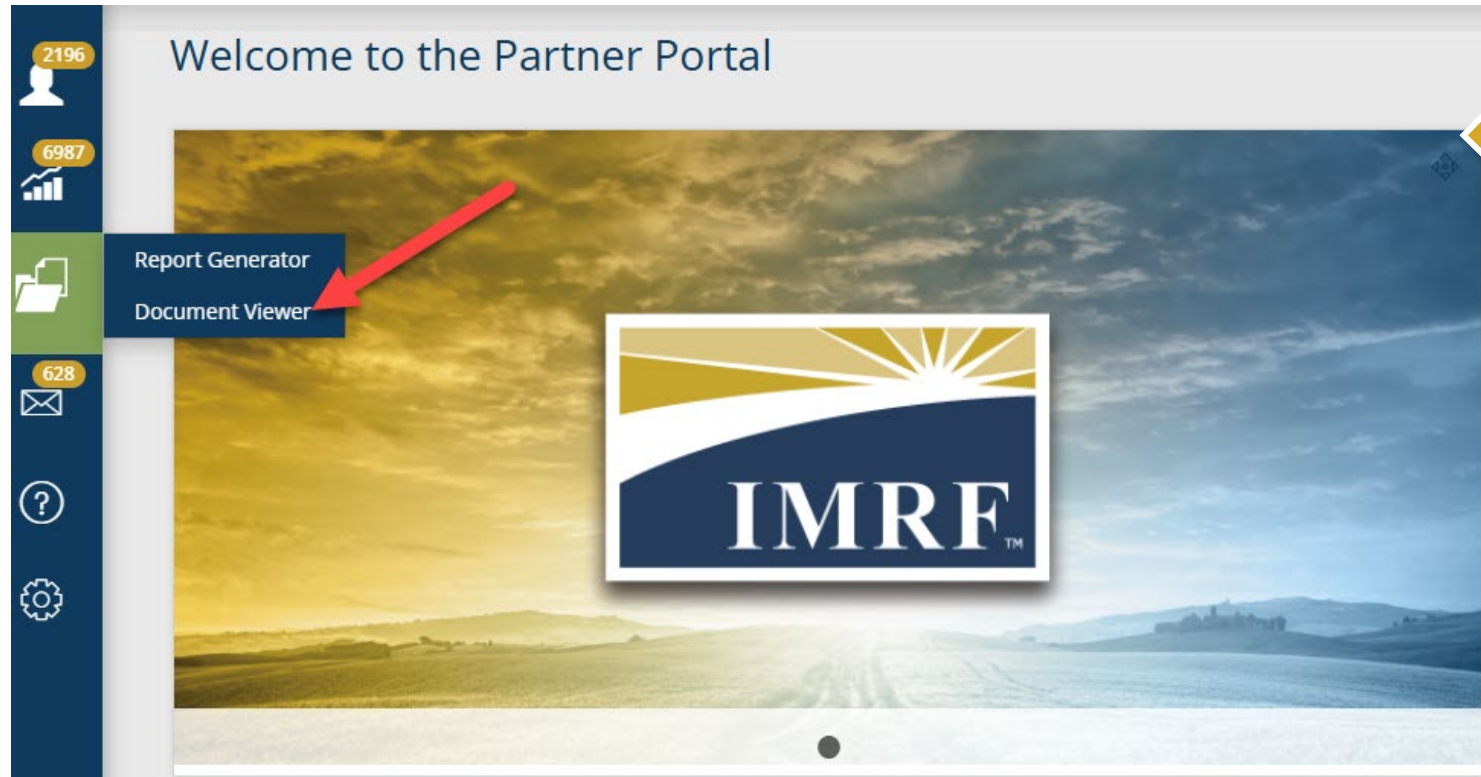
**Contribution Rates for Calendar Year 2026**

Date: May 2025  
Employer Name:   
Employer Number:

The employer rates below are based on a 10 year amortization period.  
Your IMRF contribution rates on all earnings paid to IMRF members and employer rates for the 2026 calendar year are:

|                                     | IMRF Contributions |
|-------------------------------------|--------------------|
| Member Contributions (tax-deferred) | REGULAR<br>4.50 %  |
| Employer Contributions              |                    |
| - Retirement Rate                   | 4.16 %             |
| Normal Cost                         | 2.11 %             |
| Calculated Funding Adjustment       | 6.27 %             |
| Net Retirement Rate                 |                    |
| - Other Program Benefits            | 0.04 %             |
| Disability                          | 0.11 %             |
| Death                               | 0.62 %             |
| Supplemental Benefit Payment        |                    |
| <b>TOTAL EMPLOYER RATE</b>          | <b>7.04 %</b>      |

# How to View Documents (Payments, A/P Stmts, GASB reports and more)



Search Parameters

Partner:

Search By:

☐ Event Type

☒ Document Category

GASB 68 - Census Data - Active

Search

Additional Information

Specific documents are specific to the organization(s) you administer.

Select the **Employer** from the drop-down list then choose how you want to search for the document.

There are two ways to search for a specific document: By **Event type** or by **Document category**.

Searching by **Event type** will bring up a list of events and the documents generated by that event.

Searching by **Document category** will bring up a list of documents by specific type.


Once you have located the document you want to view, use the Action icon next



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# Employer Reserve Information Now Available




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Reports & Documents / Report Generator

## Report Generator

| Report ▼ ▲  | Description ▼  |
|---|--|
| Account summary - outstanding payments                    | This report allows you to check outstanding payments and historical payments.                                      |
| Deduction Vendor Payment to Member Records Reconciliation | Deduction Vendor Payment to Member Records Reconciliation  |
| Employer Reserve Statement <b>2</b>                       | Employer Reserves Statement.   |
| Employer Security   | This report allows to check the Employer Security.   |
| Finance Report 1 - Invoices and Payments                  | This report allows to check the list of invoices, returns, and payments for employers and their plan participants. |
| IMRF Member Data  | This report allows you to extract all IMRF data related to the the specified member.                               |
| Monthly Deduction Summary By Vendor                       | Monthly Deduction Summary By Vendor.   |
| Newly suspended or deceased pensioners report             | Newly suspended or deceased pensioners reports.  |
| Purchase of Service Statement                             | Purchase of Service Statement.   |



2211 York Road, Suite 500 Oak Brook, IL 60523-2337 1-800-728-7971  
www.imrf.org

### 2024 Employer Retirement Reserve Statement

Employer Nbr:

Phone Number:

|   |       |                              |              |
|---|-------|------------------------------|--------------|
| Regular Reserve Account                   |       | DEATH                        | 0.150        |
| RETIREMENT NORMAL                         | 4.200 | DISABILITY                   | 0.080        |
| Retirement 4.200                          |       | SUPPLEMENTAL BENEFIT PAYMENT | 0.620        |
| Opening Balance, January 1, 2024          |       |                              | 6,291,174.17 |
| Interest on Opening Balance - Rate: 7.25% |       |                              | 456,110.13   |
| ER Retirement - Contributions Balance     |       |                              | 808,010.90   |
| ER Retirement - Adjustments               |       |                              | 12,283.44    |
| ER Retirement - Balance                   |       |                              | 0.00         |
| Residual Investment Income                |       |                              | 0.00         |
| Ending Balance, December 31, 2024         |       |                              | 7,567,578.64 |



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# Postponed, Verifying and In Progress Data Collections

Business Functions / Data Collections

## My Data Collections

Create Data Collection

View: In Progress ▾

| Partner Code ▾ | Data Type ▾ | Data Collection Name ▾                               | Status ▾               |
|----------------|-------------|--|------------------------|
|                | Wage Report | Wage Report - 05-01-2025 - 1 (Verification Required) | Verification Requested |
|                | Wage Report | - Wage Report - 05-01-2025 - 1                       | Initial Data Entry     |
|                | Wage Report | - Wage Report - 04-01-2025 - 1                       | Initial Data Entry     |

Wage Report - 05-01-2025 - 1 (Verification Required)

Partner Code: [Redacted]  
 Partner Name: [Redacted]  
 Data Type: Wage Report  
 Data Collection Name: [Redacted] - Wage Report - 05-01-2025 - 1 (Verification Required)  
 Start Date: 05-01-2025  
 End Date: 05-30-2025  
 Status: Verification Requested  
 Case ID: 16448-10M4

Business Functions / Data Collections

## My Data Collections

Create Data Collection

View: In Progress ▾

| Partner Code ▾ | Data Type ▾                | Data Collection Name ▾                                    | Status ▾          |
|----------------|----------------------------|---|-------------------|
|                | Member Information Changes | - Member Information Changes - 05-28-2025 - 1 (Postponed) | Action definition |

03341 - Member Information Changes - 05-28-2025 - 1 (Postponed)

Partner Code: [Redacted]  
 Partner Name: [Redacted]  
 Data Type: [Redacted]  
 Data Collection Name: 03341 - Member Information Changes - 05-28-2025 - 1 (Postponed)  
 Effective Date: 05-28-2025  
 Status: Action definition  
 Case ID: 2985712-D956  
 Processed by: [Redacted]

Data Entry Summary

No Files.

Manual Entry: 1

Total Records

Total Members Records: 1  
 Members Without Exceptions: 0  
 Members With Errors: 1  
 Members With Warnings: 0

View / Edit Data Collection


# Final Wage Indicator Wage Report


1. Definition 2. Add Member Data 3. Validate Member Data 4. Review & Submit

## Member Information

Social Security Number\* 

Member ID

First Name\* 

Last Name\* 

## Payroll Information


Add

Plan\* 

REG

Period Start Date\* 

02-01-2025

Period End Date\* 

02-28-2025

Payment Date\* 

02-28-2025


Reportable Wages\* 

2000.00

Overtime 

Contributions\* 

90.00

Voluntary Additional Contributions 

Final Wages\* 

Yes

Must mark Y for FINAL  
WAGES

If marked N, you will  
need to do wage  
adjustment (see next  
slide)



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# Filing FINAL Wage Indicator

12

## Wage Adjustment Data Collection

Business Functions / Data Collections

### Wage Adjustments - 03-01-2025 - 2

1. Definition 2. Add Member Data 3. Validate Member Data 4. Review & Submit

Member Information

Social Security Number\* ⓘ

Member ID ⓘ

First Name\* ⓘ

Last Name\* ⓘ

Payroll Information

Plan\* ⓘ REG

Period Start Date\* ⓘ 02-01-2025

Period End Date\* ⓘ 02-28-2025

Payment Date\* ⓘ 02-28-2025

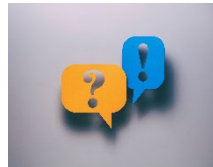
Adjusting Wages ⓘ 0.00

Adjusting Overtime ⓘ 0.00

Adjusting Contributions ⓘ 0.00

Adjusting Voluntary Additional Contributions ⓘ

Final Wages\* ⓘ Yes



OR



## Events

Members and Events / Events

### Wage Report

Payroll Information

Plan\* ⓘ

Period Start Date\* ⓘ

Period End Date\* ⓘ

Payment Date\* ⓘ

Reportable Wages\* ⓘ

Overtime ⓘ

Contributions\* ⓘ

Voluntary Additional Contributions ⓘ

Final Wages\* ⓘ

# DEMONSTRATION



# Closing Remarks



## EMPLOYER ACCESS WORKSHOPS

Join IMRF Employer Services at a virtual open house, to get *YOUR* “How do I?” questions answered about **Employer Access**.

Next Session:  
Tuesday, July 15 from 11 AM to Noon

MEMBERS

RETIREES

EMPLOYERS

INVESTMENTS

ABOUT IMRF

PUBLICATIONS AND ARCHIVE

# Employer Access Workshops



MAY 2, 2025

Join IMRF Employer Services for a virtual open house.

The sessions are designed to answer questions that IMRF employers have about Employer Access. Whether you are a new administrator or could use a refresher, the Employer Access Workshops are a great opportunity.

Register for one of these upcoming virtual meetings:

- **Tuesday, June 17 from 11 AM to Noon** 
- **Tuesday, July 1 from 3 PM to 4 PM**
- **Tuesday, July 15 from 11 AM to Noon**
- **Tuesday, July 29 from 3 PM to 4 PM**
- **Tuesday, August 19 from 11 AM to Noon**
- **Tuesday, September 2 from 3 PM to 4 PM**



Employer Access Workshops

[Click here for the Employer Workshop presentation.](#)



# Questions?