



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.

Authorized Agent Webinar Schedule for 2026



Wed. Oct. 14th
Wed. Nov. 4th

Part 1
Introduction, Enrollment, Wage Reporting and Termination



Wed. Sept 23rd
Wed. October 28th

Part 2
IMRF Benefits, Employer Rates & Legislation



To sign up for future Authorized Agent webinars, please go to www.imrf.org, under Employers tab and select Workshops & Materials.

Employer Disability Process Agenda

- Disability Basics
- Employer Resources
- Data Collection Creation
- How to Submit an Employer Disability Certification
- How to Upload the Employee's Job Description
- Return to Work Process



IMRF Disability Protection

All IMRF members with 12 consecutive months of service are eligible to apply:

Protects income and service

Protects retirement and death benefits

Has a 30-day waiting period. Earnings from employer must stop; workers' comp and Social Security disability offsets



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Disability Types

Temporary

- All claims begin as temporary
- Includes maternity and alcoholism
- Does not include self-inflicted
- Substitutes for normal wages
- Continues service and earnings

Total and Permanent

- IMRF evaluates for eligibility



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Resources for Authorized Agents

- Employer Access
- Employer Learning Center
- Workshops
- Authorized Agent Manual



Employer Access Learning Center Accessing through www.imrf.org

The screenshot displays the IMRF website interface. At the top, the IMRF logo is on the left, and navigation links for 'Text Size', 'Home', and 'Contact Us' are on the right. A search bar is also present. Below the logo, the tagline 'Locally funded, financially sound.' is visible. A horizontal menu bar contains links for 'MEMBERS', 'RETIREES', 'EMPLOYERS', 'INVESTMENTS', 'ABOUT IMRF', and 'PUBLICATIONS AND ARCHIVE'. The 'EMPLOYERS' link is highlighted with an orange arrow. Below this menu, there are two main sections: 'FOR AUTHORIZED AGENTS' and 'EMPLOYERS MUST KNOW'. The 'FOR AUTHORIZED AGENTS' section lists links to the 'Authorized Agents Manual', 'Employer Access Learning Center', and 'New Authorized Agent Information'. The 'EMPLOYERS MUST KNOW' section lists various resources including 'Understanding Financial Documents', 'GASB 68 Resources', 'Employer Rates', 'Reports for Employers', 'Considering Participation in IMRF', 'Early Retirement Incentive', 'Employees with Reciprocal Service', 'FMLA', 'Appeal Procedures', 'IMRF Employer Compliance Review', 'Converting Military Service', 'Hiring IMRF Retirees - Cautions', 'Pay Increases - Know the Costs', 'NCPERS Group Life Insurance', '2026 Employer Rate Webinar', 'Employer Cost and Participation', 'Helping Members with Forms', 'Evaluating IMRF Positions', and 'Minimum Monthly Contributions'. A section titled 'Preliminary Rates for 2027' is also present, stating that 2027 Preliminary Rate information is available in Employer Access and providing a link to learn more.

Text Size: [A](#) [A](#) [A](#) | [Home](#) | [Contact Us](#)

Search:

MEMBER LOGIN **EMPLOYER ACCESS**

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

FOR AUTHORIZED AGENTS

- Authorized Agents Manual
- Employer Access Learning Center
- New Authorized Agent Information

IMRF Employer Representatives

- IMRF Employer Representatives
- Employer Workshops and Materials
- Monthly Wage Reporting

Preliminary Rates for 2027

Your 2027 Preliminary Rate information is available now in Employer Access! Learn how to access your rate information [here](#).

EMPLOYERS MUST KNOW

- Understanding Financial Documents
- GASB 68 Resources
- Employer Rates
- Reports for Employers
- Considering Participation in IMRF
- Early Retirement Incentive
- Employees with Reciprocal Service
- FMLA
- Appeal Procedures
- IMRF Employer Compliance Review
- Converting Military Service
- Hiring IMRF Retirees - Cautions
- Pay Increases - Know the Costs
- NCPERS Group Life Insurance
- 2026 Employer Rate Webinar
- Employer Cost and Participation
- Helping Members with Forms
- Evaluating IMRF Positions
- Minimum Monthly Contributions

Employer Checklists

for IMRF Employers

8



Please review the helpful checklists below when enrolling an employee, terminating an employee or submitting death, disability and retirement benefits.

(To view the member "Retirement Checklist" that is mentioned in this employer checklist, click here.)

Training Topic	Format
Should this employee be enrolled in IMRF?	
Participation - Steps to enroll employees in IMRF	
Death Benefit Checklist	
Disability Checklist	
Termination Checklist	
Retirement Application Checklist (To view the member "Retirement Checklist" that is mentioned in this employer checklist, click here.)	

Employer Resources

[EALC Home](#)

[Employer Access Management](#)

[Wage Report Procedures](#)

[Wage Adjustment Procedures](#)

[Data Collections](#)

[Manage Member Events](#)

[Documents and Reports](#)

[Pay Online Procedure](#)

[Find Important Information](#)

[Secure Messages](#)

[Employer Access FAQs](#)

[Employer Checklists](#)

[2026 Final Rate Notice Generator](#)

[2027 Preliminary Rate Notice Generator](#)



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Disability Checklist

Data Collections for Employer:

- **Complete when member will be off for more than 30 days**

Employer Disability Certification:

- **Return to work data collection when employee returns to work along with physician release.**

Member required documentation through member portal or mail:

- **Member Disability Application**
- **Physician Certification**
- **Copy of Member Birth Certificate required**



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IMRF Employer Checklist

Disability Checklist

DO NOT submit this checklist to IMRF—for employer's use only.

Use this checklist as a reference only or place a copy in the member's file. The completed checklist then provides documentation of the disability application process and should **not** be submitted to IMRF.

To avoid possible loss of benefits...
Application for disability benefits must be made to IMRF no later than six months from the date of disability (this date refers to the date assigned by the doctor certifying the employee's disability).

Disability Checklist

☐ Date member last worked (does not include sick or vacation time) _____

☐ Date member last paid (not the date of the member's last paycheck, but the last day for which the member will receive wages or compensation, including sick and vacation time) _____

Member signs into Member Access for the following forms:

☐ Attending Physician's Statement—Temporary Disability Claim

☐ Member's Application for IMRF Disability Benefits

Member applies for disability through Member Access

☐ Member completes and submits the Member's Application for IMRF Disability Benefits form

Employer signs into Employer Access:

☐ Employer creates the Employer Disability Certification Data Collection

Other issues, if applicable:

☐ Health Insurance Continuation vs. COBRA, see IMRF Manual for Authorized Agents

☐ If workers' compensation is supplemented, check reporting rules by calling Employer Services at 1-800-728-7971

☐ Workers' compensation and/or Social Security offsets

☐ If disability will last longer than five months, advise member to apply for Social Security disability. Phone Number: 1-800-772-1213

☐ Consider retirement benefits vs. disability options if eligible

Employer should complete and file with IMRF at the end of disability:

☐ Create a Disability Return to Work Data Collection in Employer Access

☐ Submit physician release

What is a Data Collection?

- Details are now sent as a Comma-Separated Value or .CSV File
- Filing is Simple, Fast and Easy
- There is also the Add Record Manual Entry which responds interactively

To begin the process of entering an Employer Disability Certification, a new Data Collection must be started.

The screenshot shows the IMRF Partner Portal dashboard. The left sidebar contains navigation links: Dashboard, Members and Events, Business Functions, Reports & Documents, Message Center, Learning Center, and Administration. The main content area features a header with the slogan "Locally funded, financially sound." and a large image of a smiling woman. Below the header, there are several sections: "MY DATA COLLECTIONS" (highlighted with a yellow box and an arrow pointing to it from the "Data Collections" link in the sidebar), "ACCOUNT SUMMARY", "REQUESTS FOR INFORMATION", "TS AND REPORTS", "MEMBER EVENTS", "MY IMRF TEAM", "SECURE MESSAGES", and "FIND A MEMBER". The "MY DATA COLLECTIONS" section lists several data collections, including "Disability Return To Work 07-01-20 22" and "Wage Report - 05-01-2022 - 5". The "ACCOUNT SUMMARY" section shows "Outstanding Invoices" and "Unapplied Credits" both at \$0.00. The "REQUESTS FOR INFORMATION" section shows a "Request Type" dropdown menu. The "TS AND REPORTS" section shows "View All..." links. The "MEMBER EVENTS" section shows a list of events: "Disability Return To Work", "Employer Disability Certification", "Enrollments", "Member Information Changes", and "Termination Information", each with a count of 0. The "MY IMRF TEAM" section shows "Partner Services". The "SECURE MESSAGES" section shows "02146" and "No Results Found.". The "FIND A MEMBER" section shows a search form with "SSN / Last Name" and a "New Message" button.

Enter Data Collection Information and Save/Continue

Business Functions / Data Collections

Create Data Collection

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

New Data Collection Information

Data Type:* → Employer Disability Certification

Partner Code:

Effective Date:* 08-03-2022

Data Collection Name:* Employer Disability Certification - 08-03-2022 - 1

* Mandatory fields

Save and Continue

Cancel

Progress Summary

Next steps

2. Add member data: Upload a file or enter data manually. Validate and correct any input level exceptions.
3. Validate member data: Validate the data and resolve any member data exceptions.
4. Review and submit: Check data summaries and submit member data to IMRF.

Additional Information

Complete all mandatory fields (*) and select **Save and continue**.

Select **Cancel** to go back to the data collection listing without saving. Cancel will remove/delete the data collection.

Input errors
You must correct all input errors (if applicable) before continuing to the validation process.

Click Add Record to Enter Member Data.

The screenshot shows the IMRF website interface for Employer Disability Certification. The header includes the IMRF logo and the tagline "Locally funded, financially sound." The navigation bar shows "Business Functions / Data Collections" and "Employer Disability Certification". The status is "Initial Data Entry". The main content area has a message: "There is currently no data in this data collection. Add data for one member via the Add Record feature or upload data from a file via Upload File." Below this message are two buttons: "+ Add Record" (highlighted with a yellow box) and "Upload File". A table with columns "Social Security Number", "Member ID", "First Name", "Last Name", and "Actions" is shown, with "No Results Found." below it. On the right side, there is a "Validate" button, a "File Summary" section with "No Files." and an "Upload File" button, and a "Progress Summary" section with "Next steps" listed below.

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Go to imrf.org | Welcome | Sign Out

Business Functions / Data Collections

Employer Disability Certification

Status: Initial Data Entry

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

There is currently no data in this data collection. Add data for one member via the Add Record feature or upload data from a file via Upload File.

+ Add Record Upload File View: All

Social Security Number	Member ID	First Name	Last Name	Actions
No Results Found.				

Validate

File Summary No files

No Files.

Upload File

Progress Summary

Next steps

- 3. Validate member data: Validate the data and resolve any member data exceptions.
- 4. Review and submit: Check data summaries and submit member data to IMRF.

Enter Member Data Information and Save

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

Business Functions / Data Collections

Employer Disability Certification

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

Member Information

Social Security Number* 

Member ID 

First Name* 

Last Name* 

Employment Information

Last Date Worked* 

Last Compensation Received Date* 

Reoccurrence Within Past 6 Months* 

Seasonal Paid Over 12 Months 

Return To Work Information

Workers Compensation Claim

Revised Form

Save

Cancel

Progress Summary

Next steps

3. Validate member data: Validate the data and resolve any member data exceptions.

4. Review and submit: Check data summaries and submit member data to IMRF.

Additional Information

You must correct all input errors (if applicable) to continue with the validation process.

To manually add another entry, select **Save**, or go back to the data collection listing by selecting **Cancel** without saving.

Then Validate

The screenshot displays the IMRF web application interface for the 'Employer Disability Certification' process. The top navigation bar includes the IMRF logo and the tagline 'Locally funded, financially sound.' On the right, there are links for 'Go to imrf.org', 'Welcome', and 'Sign Out'. The main content area shows the 'Business Functions / Data Collections' section with the title 'Employer Disability Certification'. Below this, a progress bar indicates the current step is '3. Validate Member Data'. A yellow arrow points to a 'Validate' button in the top right corner of the main content area. The main content area also features a table with columns for 'Social Security Number', 'Member ID', 'First Name', 'Last Name', and 'Actions'. A callout box points to the table with the text 'All members entered will display on screen.' The right sidebar contains a 'File Summary' section with a 'No files' message and an 'Upload File' button. Below this is a 'Progress Summary' section with 'Next steps' and 'Additional Information' sections.

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Go to imrf.org | Welcome | Sign Out

Business Functions / Data Collections

Employer Disability Certification

Status: Initial Data Entry

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

+ Add Record Upload File View: All

Social Security Number	Member ID	First Name	Last Name	Actions

All members entered will display on screen.

Validate

File Summary No files

No Files.

Upload File

Progress Summary

Next steps

3. Validate member data: Validate the data and resolve any member data exceptions.

4. Review and submit: Check data summaries and submit member data to IMRF.

Additional Information

To add data to this collection, select **Add Manual Entry** to manually add data for an individual member, or select **Upload File** to upload a file or use the File Builder.

Resolve any Errors/Warnings then Review and Submit.

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Go to imrf.org | Welcome Sign Out

Business Functions / Data Collections

Employer Disability Certification

Status: Action definition

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

Social Security Number ▼	Member ID ▼	First Name ▼	Last Name ▼	Actions
No Results Found.				

Validate **Continue**

View Filter Action Required ▼

No action required

1 member No member with errors No member with warnings 1 member without exceptions

Progress Summary

Next steps

4. Review and submit: Check data summaries and submit member data to IMRF.

Additional Information

To submit member record data, please resolve all errors and warnings (if applicable).

Any errors or warnings will show here to resolve before you can continue.

Review the Data Collection, Submit and Confirm.

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Business Functions / Data Collections

Employer Disability Certification

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

Data Collection Summary

Partner Code:*		Effective Date:*	08-03-2022
Data Type:*	Employer Disability Certification	Case ID:	CAS-02668-F3Y8
Data Collection Name:*	Employer Disability Certification		

Data Entry Summary

File Uploads:

General Information	Members Statuses
Manual Entries:	1 Without Exceptions:
Total Members Records:	1 With Errors:
	With Warnings:

Members Actions

Ready For Load:	1
Validation Required:	0
Postponed:	0
Approved Warnings:	0
Rejected:	0

Reports

Validations Report: D0000Val.XLS
Data Change Information: D0000dci.XLS

Submit

Progress Summary

You are currently viewing the last step of the data collection process prior to submission.

Additional Information

Review the data collection details you have entered.

You must resolve all errors and warnings before you can submit your data collection.

When you are finished, select **Submit**.

Submit

Final validation and submission of the data collection may take a while. You can check the status of your data collection in the data collection listing

Confirm **Cancel**

Upload the Job Description with a Secure Message

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Message Center / Secure Messages

Secure Messages

New Message

To: IMRF

Topic: -- Select topic --

Subject: Job Description

Normal text

Hello,

Please see the attached job description for (member name)
(Member ID).

Add file (optional)

DROP files here
OR
Select files from your computer

Accepted files: CSV, TXT, PDF, PNG, JPG, TIF, TIFF, DOC, DOCX, XLS, XLSX, PPT, PPTX, LOG. Maximum file size: 100.00MB. Maximum number of files: 5

Cancel

Select Topic "Disability"

Subject: "Job Description"

Include Member's Name and ID#

Attach Job Description with Member Name and ID# on it

Submit

Success!

The Claim is Submitted

Now we will look at when a member returns to work

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

Business Functions / Data Collections

Create Data Collection

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

New Data Collection Information

Data Type:*

Partner Code:

Data Collection Name:*

* Mandatory fields

- Member Information Changes
- Termination Information
- Wage Report
- Wage Adjustments
- Enrollments
- Employer Disability Certification
- Disability Return To Work**
- Pensioner Return To Work

Save and Continue

Cancel

Progress Summary

Next steps

2. Add member data: Upload a file or enter data manually. Validate and correct any input level exceptions.
3. Validate member data: Validate the data and resolve any member data exceptions.
4. Review and submit: Check data summaries and submit member data to IMRF.

Enter Disability Return to Work Information and **Save**.

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Go to imrf.org | Welcome [User] | Sign Out

Business Functions / Data Collections

Disability Return To Work 07-01-2022

Status: Initial Data Entry

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

Member Information

Social Security Number*

Member ID

First Name*

Last Name*

Employment Information

Return To Work Type*

Return To Work Date*

Trial Work

Period Start Date

Period End Date

Hours Worked

Non Worked Hours With Earnings

Gross Hourly Pay Rate

Save

Cancel

Progress Summary

Next steps

3. Validate member data
4. Review and submit member data and submit member data

Additional Information

You must correct errors to continue with this process.

To manually go back to a previous step, click the 'Cancel' button. Saving will be lost.

Trial Work Period Provide:

Hours Worked

Non-Worked Hours

Member's Gross Hourly Pay Rate

Disability Return-to-Work Terms

Trial Work Period: Member is working a reduced or modified schedule in terms of work hours or days per week

Light Duty Period: Member is working normal hours but has medical restrictions

Full Release: Full release to return to work without restrictions.

Errors/Warnings, Click on the Row and a Member Summary Box will open.

The screenshot shows the IMRF system interface. At the top, the IMRF logo and tagline "Locally funded, financially sound." are visible. The user is logged in as "Go to imrf.org | Welcome" with a "Sign Out" button. The main heading is "Disability Return To Work 07-01-2022" with a status of "Action definition". Below this is a progress bar with four steps: 1. Definition, 2. Add Member Data, 3. Validate Member Data, and 4. Review & Submit. The current step is "Validate Member Data". A table with columns "Social Security Number", "Member ID", "First Name", "Last Name", and "Actions" is shown. A row is highlighted with a red "2" in the first column. A blue callout box with an arrow points to the "Actions" column of this row, containing the text: "Warning/Error issue click on the member's row of data to resolve". To the right of the table, there are "Validate" and "Continue" buttons. Below these, a "View Filter" section shows a dropdown menu set to "Action Required". Underneath, there are checkboxes for "Warnings 2", "The entered first name does not match t...", and "The entered last name does not match t...". At the bottom, a summary bar shows "1 member" with a red "No member with errors" label, an orange "1 member with warnings" label, and a purple "No member without exceptions" label.

Click on the option to resolve the Warning or Error.

The "Member Summary" box displays the following information:

Severity:	Warning
Error ID:	1301
Message:	The entered first name does not match the first name in our records.

1 / 2

View Member Data

Approve Warning

Postpone Member

Reject Member

Once Error/Warning is Resolved or “No Results Found” then Continue

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Go to imrf.org | Welcome [User] | Sign Out

Business Functions / Data Collections

Disability Return To Work 07-01-2022

Status: Action definition

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

Social Security Number ▼	Member ID ▼	First Name ▼	Last Name ▼	Actions
No Results Found.				

Validate

Continue

View Filter

Action Required ▼

No action required

1 member

No member with errors

No member with warnings

1 member without exceptions

Progress Summary

Next steps

4. Review and submit: Check data summaries and submit member data to IMRF.

Review Data Collection and Data Entry Summary Once Complete, Submit and Confirm

Submit

Final validation and submission of the data collection may take a while. You can check the status of your data collection in the data collection listing

Confirm **Cancel**

Data Collection Summary

Partner Code:* [] Start Date:* 07-01-2022
 Data Type:* Disability Return To Work End Date:* 07-01-2022
 Data Collection Name:* Disability Return To Work Case ID: CAS-02374-D0D1
 07-01-2022

Data Entry Summary

File Uploads:

General Information		Members Statuses	
Manual Entries:	1	Without Exceptions:	1
Total Members Records:	1	With Errors:	0
		With Warnings:	0

Members Actions

Ready For Load:	1
Validation Required:	0
Postponed:	0
Approved Warnings:	0
Rejected:	0

Reports

Validations Report: D0000Val.XLS
 Transactions Report: D0000tra.XLS
 Transactions Summary Report: D0000sta.XLS
 Data Change Information: D0000dci.XLS

Submit

Progress Summary

You are currently viewing the last step of the data collection process prior to submission.

Additional Information

Review the data collection details you have entered.

You must resolve all errors and warnings before you can submit your data collection.

When you are finished, select **Submit**.

Upload Physician's Release via Secure Message

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Go to imrf.org | Welcome Karen Sign Out

Message Center / Secure Messages

Secure Messages 02146

New Message

To: IMRF Topic: -- Select topic --

Subject: physician's release

Attached is the physician's release for Jane Doe (MID: 123-4567).

Add file (optional)

DROP files here
OR
Select files from your computer

Communicating through Secure Message to send documents and questions to our Employer Services Contact Center!

- Click “Envelope” on left toolbar for a Secure Message
- Select “Disability”
- Provide Member Name and MID
- Attach Physician's Release
- Submit

What We Covered Today

- **Disability Basics**
- **Employer Resources**
- **Data Collection Creation**
- **How to Submit an Employer Disability Certification**
- **How to Upload the Employee's Job Description**
- **Return to Work Process**



Questions?



Thank you for your time!

Send questions through Secure Messaging

Or

Employer Contact Center:

1-800-728-7971

