



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.

Upcoming Webinars – Mark your Calendar

November

Part 1: Authorized Agent Webinar: Introduction, Enrollment, Wage Reporting, and Termination: Wednesday, November 4, at 9:30 AM (central time)

Please join us for an overview of IMRF and a review of the Member Enrollment, Wage Reporting of IMRF Reportable Earnings, Wage Reports/ Adjustments, Accelerated Payments, and Termination protocol and processing.

Part 2: Authorized Agent Webinar: Benefits, Employer Rates, and Legislation: Wednesday, November 18, at 9:30 AM (central time)

Please join us for an overview of IMRF Benefits, Refunds, Disability, Death, and Retirement. This Part will also cover an overview of Pension Funding Basics, Employer Contributions and Rates, and current Legislation.



Health Insurance and Union Deductions

Join this session to learn more about Health Insurance and Union Deductions, how the data collection is created when a retiree has a revision or termination of their insurance deduction.

Tuesday, November 17 from 10 AM to 11 AM

Register Today

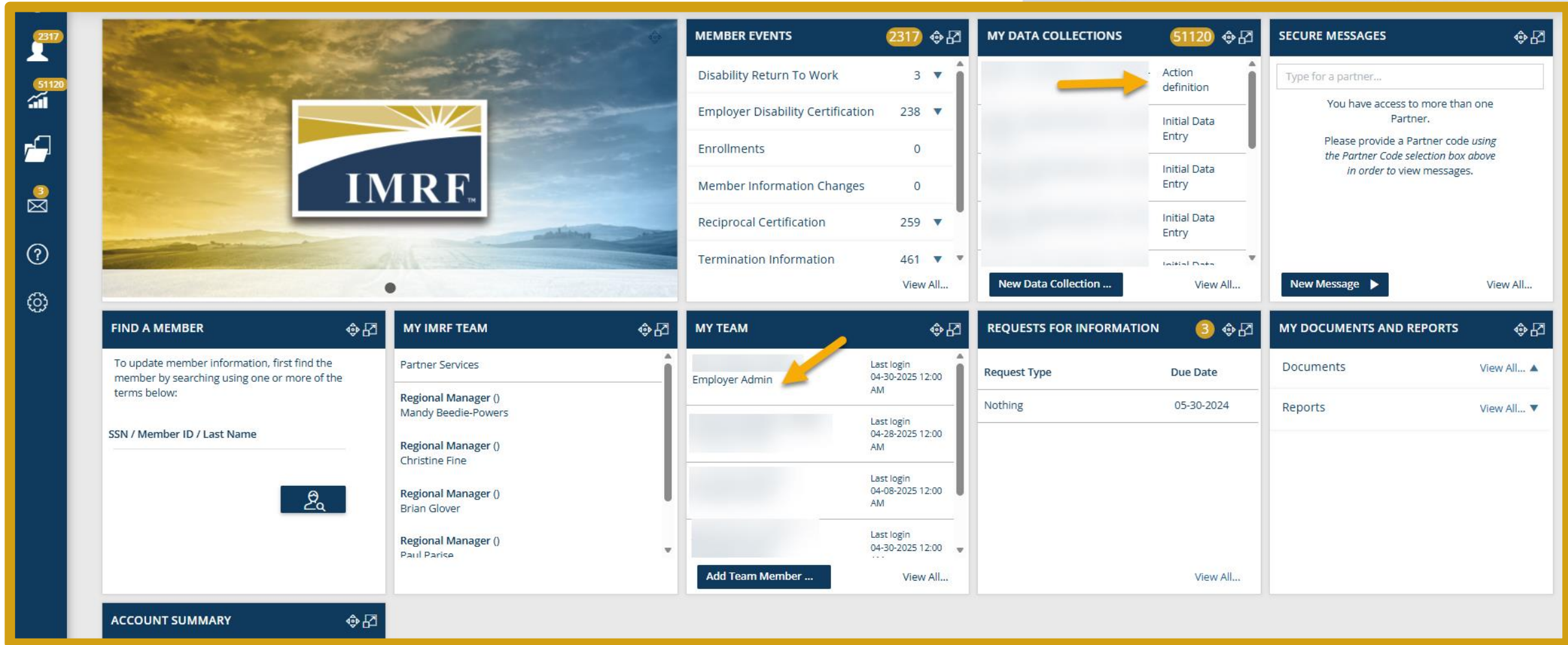


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Agenda

- Dashboard
- Authorized Agent Appointment
- Team Member Roles and Tips
- Hot Topics Member Resources
- Questions
- Closing Remarks

Dashboard



The dashboard features a central banner with the IMRF logo and a navigation sidebar on the left. The main content area is divided into several sections:

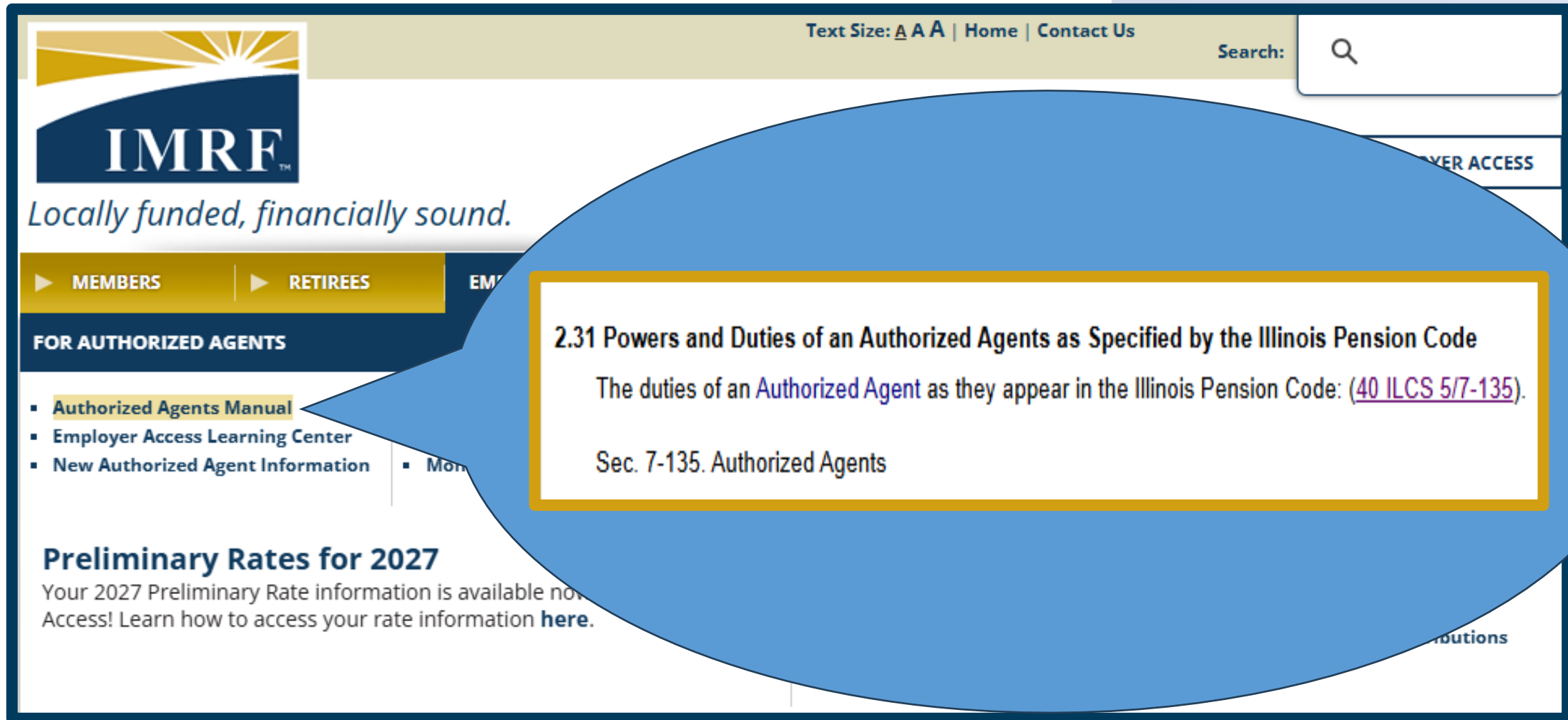
- MEMBER EVENTS** (2317): A list of events including Disability Return To Work (3), Employer Disability Certification (238), Enrollments (0), Member Information Changes (0), Reciprocal Certification (259), and Termination Information (461). A "View All..." link is at the bottom.
- MY DATA COLLECTIONS** (51120): A list of data collections with a dropdown menu showing "Action definition", "Initial Data Entry", and "Initial Data Entry". A "New Data Collection ..." button and a "View All..." link are at the bottom.
- SECURE MESSAGES**: A section for secure messages with a search bar, a message body, and a "New Message" button.
- FIND A MEMBER**: A section for finding members with a search bar and a "Find" button.
- MY IMRF TEAM**: A list of team members including Partner Services, Regional Manager (Mandy Beedie-Powers), Regional Manager (Christine Fine), Regional Manager (Brian Glover), and Regional Manager (Paul Parise).
- MY TEAM**: A list of team members including Employer Admin, with a "Last login" timestamp and a "View All..." link.
- REQUESTS FOR INFORMATION** (3): A table with columns for Request Type and Due Date, showing a request for "Nothing" due on "05-30-2024". A "View All..." link is at the bottom.
- MY DOCUMENTS AND REPORTS**: A section for documents and reports with "View All..." links.
- ACCOUNT SUMMARY**: A section for account summary.



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Authorized Agent

5



The screenshot shows the IMRF website with a blue callout bubble highlighting the 'Authorized Agents' section. The callout bubble contains the following text:

2.31 Powers and Duties of an Authorized Agents as Specified by the Illinois Pension Code

The duties of an [Authorized Agent](#) as they appear in the Illinois Pension Code: ([40 ILCS 5/7-135](#)).

Sec. 7-135. Authorized Agents

The website header includes the IMRF logo, the tagline 'Locally funded, financially sound.', and navigation links for 'Text Size: A A A', 'Home', and 'Contact Us'. A search bar is also present. The main navigation menu includes 'MEMBERS', 'RETIREES', and 'EMPLOYERS'. The 'FOR AUTHORIZED AGENTS' section lists 'Authorized Agents Manual', 'Employer Access Learning Center', and 'New Authorized Agent Information'. A section titled 'Preliminary Rates for 2027' mentions that 2027 Preliminary Rate information is available now and provides a link to learn how to access rate information.



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Notice of Appointment Form – Request Secure Message


 FOR5J00-0003VBZ



Notice of Appointment of Authorized Agent
 Revised August 2023
 Questions? Call 1-800-728-7971.

Upload this form through Employer Access

Please print in capital letters, using black ink.


 Employer Number


 Employer Name

AUTHORIZED AGENT INFORMATION


 First Name


 M.I.

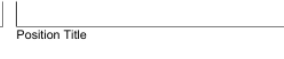

 Last Name


 Jr., Sr., II, etc.


 Type of Governing Body


 Date Appointment Made
(MM/DD/YYYY)


 Effective Date of Appointment
(MM/DD/YYYY)

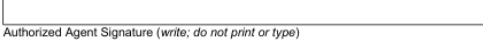

 Position Title

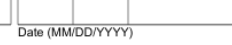
Do you give the Authorized Agent the authority to:

File a Petition for Nominations of an Executive Trustee of IMRF ☐ Yes ☐ No

Cast the Ballot for Election of an Executive Trustee of IMRF ☐ Yes ☐ No

The Authorized Agent does not need to participate in IMRF to file a petition or cast a ballot. If you do not give the Authorized Agent the authority to petition and/or vote, the governing body must perform these duties.

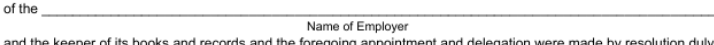

 Authorized Agent Signature (write; do not print or type)


 Date (MM/DD/YYYY)

IMPORTANT NOTE: By law, all new Authorized Agents must attend Authorized Agent training within three months of appointment. Visit the IMRF website at <https://www.imrf.org> to register for Authorized Agent training.

CERTIFICATION

I, , do hereby certify that I am  Clerk or Secretary

of the  Name of Employer

and the keeper of its books and records and the foregoing appointment and delegation were made by resolution duly adopted on the date indicated.


 FOR5J00-0003VBZ


 Employer Number

BUSINESS MAILING ADDRESS


 First Name


 M.I.


 Last Name


 Jr., Sr., II, etc.

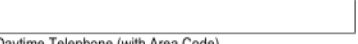

 Mailing Address

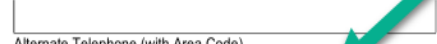

 County


 City


 State


 Zip Code (zip+4 if known)


 Daytime Telephone (with Area Code)


 Alternate Telephone (with Area Code)


 Fax Number (with Area Code)


 Email

INSTRUCTIONS

- The governing body of an IMRF employer (including townships) can appoint any qualified party as the employer's IMRF Authorized Agent.
- The governing body makes the appointment by adopting a resolution.
- The clerk or secretary of the governing body must certify the appointment (see Certification on previous page).

IMRF, 2211 York Road, Suite 500, Oak Brook, Illinois 60523-2337
 Employer Services: 1-800-728-7971 FAX: 630-706-4289
www.imrf.org



New Authorized Agent Appointment

- ❑ Allow enough time for board meeting and appointment
- ❑ Designate appropriate team members with authority
- ❑ Do not add “primary” to role when adding team members
- ❑ Request customized barcoded Notice of Appointment form
- ❑ Do not share passwords

Team Member Roles



NOTE: When creating a new user employers should **NOT** check the Primary Contact box. This should only be used by IMRF staff and designates the role of **Authorized Agent**.

- **Employer Admin** – User has access to all portal functions and **may create new users**.
- **Employer All Access** – User has access to all portal functions, though they **cannot** create new users.
- **Employer Financial** – User has access to all financial functions, i.e. monthly Wage Report, Wage Adjustments, Insurance & Union Deductions, Accounts Payables and Receivables, all payment functions and history and Pensioner Return-to-work.
- **Employer HR** – User has access to all member process functions: Enrollments, terminations, change member information, death and disability, and Pensioner Return-to-work.
- **Employer View Only** – User is able to view basic information only.

Do you need to Add Team Member?

Step 1

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 ▾
00000	Jane	Doe	Employer Admin	☒		☒

Jane Doe

First Name:
Last Name:
Business Email:
Business Phone:
Profile: Employer Admin
Actions

View Team Member

Adding Team Member – Step 2

Add Team Member

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

Search results
Plan Related Contacts

First Name	Last Name	Partner Code	Date of Birth
No Results Found.			

Other Contacts

First Name	Last Name	Business Email
No Results Found.		

Adding Team Member – Step 3

Administration / Access Management

My Team

My Team

Basic Information

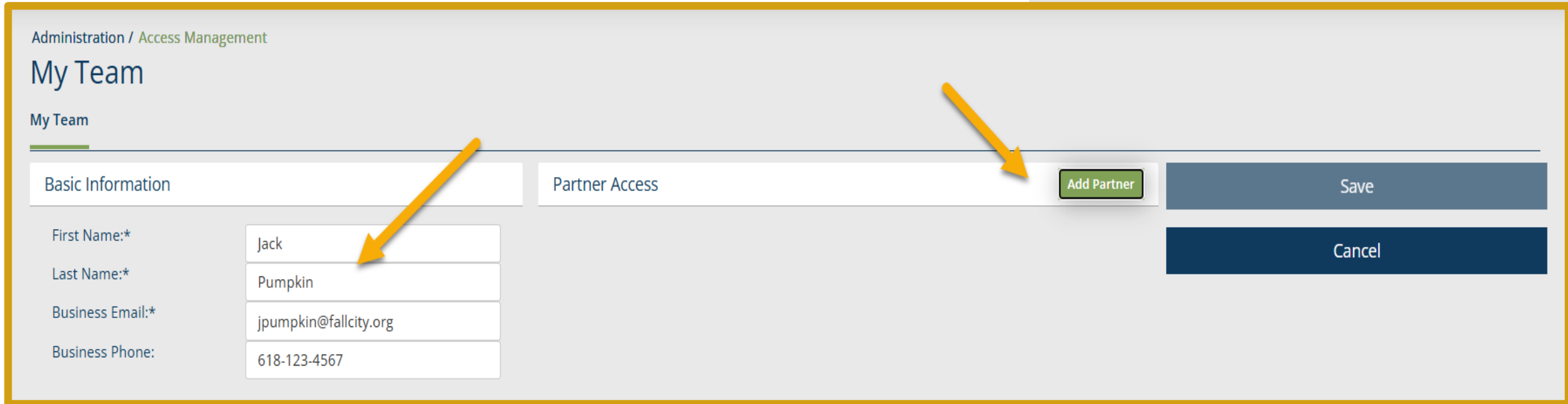
Partner Access

Add Partner

Save

Cancel

First Name:*	Jack
Last Name:*	Pumpkin
Business Email:*	jpumpkin@fallcity.org
Business Phone:	618-123-4567



Add Partner Info – Step 4

Add Partner

Search results

Partner Name	Partner Code
Fall City	00000

Final Steps to SAVE – Step 5

My Team

My Team

Basic Information

Partner Access

Add Partner

First Name:*
Last Name:*
Business Email:*
Business Phone:

Jack

Pumpkin

jpumpkin@fallcity.org

618-123-4567

Partner:
Profile:
Primary Contact:

00000

☐ **Do NOT check this box**

Deduction Org Admin
Deduction Org All Access
Deduction Org View Only
Employer Admin Do not select
Employer All Access
Employer Financial
Employer HR
Employer View Only
Reciprocal Admin
Reciprocal All Access

Removing Team Members – Step 6

My Team

My Team

[Add Team Member](#) View: By Partner ▾

Partner Code ▾	First Name ▾	Last Name ▾	Profile	Primary Contact	Executive Types	Portal Access ▾
	Jack	Pumpkin	Employer HR	☐		☒
	Jane	Doe	Employer Admin	☒		☒
	Tom	Turkey	Employer HR	☐		☒
	Lisa	Leaf	Employer All Access	☐		☒

Removing/Changing Team Member Access – Step 7

My Team

My Team

Basic Information

Partner Access

Add Partner

First Name:*
Last Name:*
Business Email:*
Business Phone:

Lisa
Leaf

lisaleaf@fallcity.org

Partner:
Profile:
Primary Contact:

00000

Employer All Access

☐

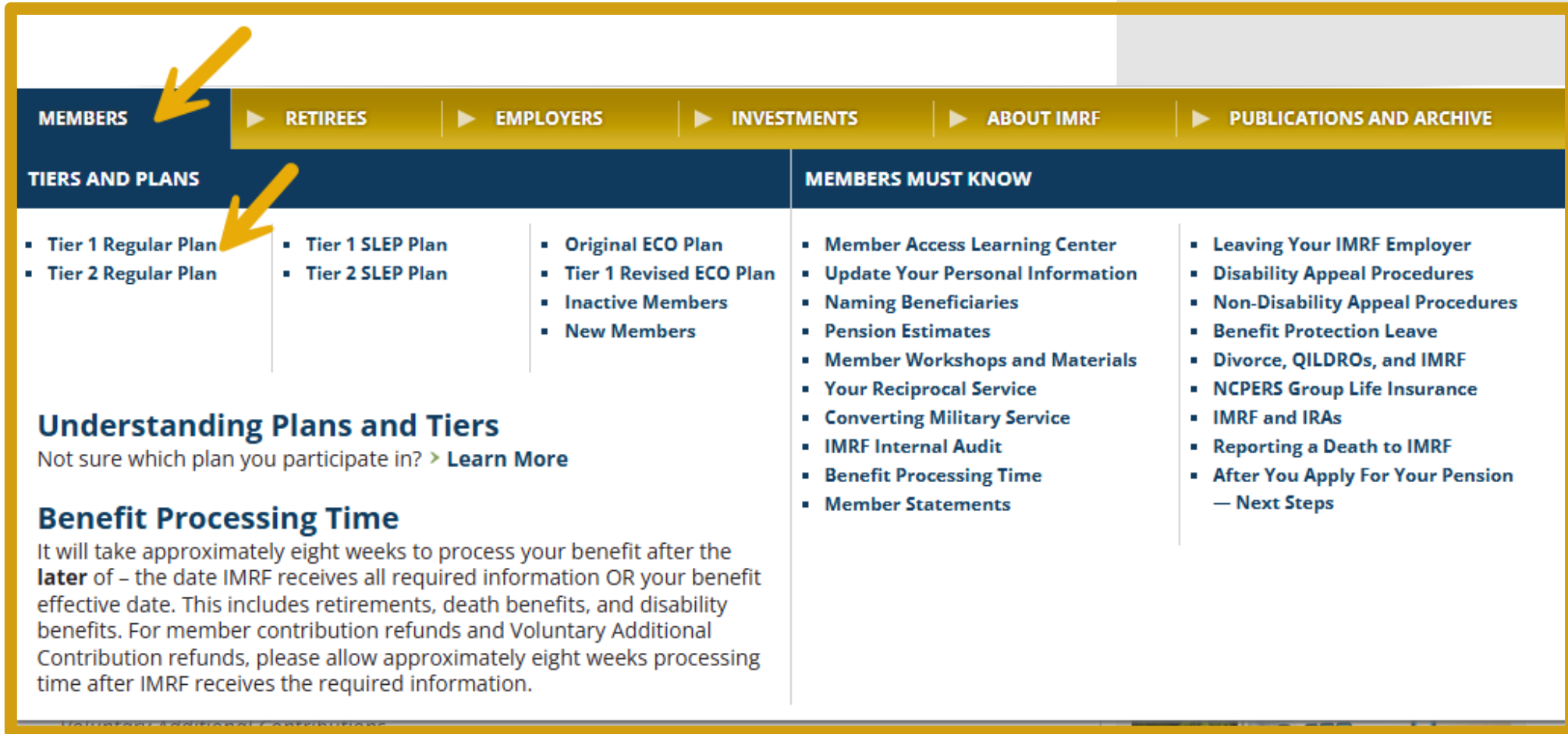
Save

Reset Password

Remove Access

Cancel

Member Resources



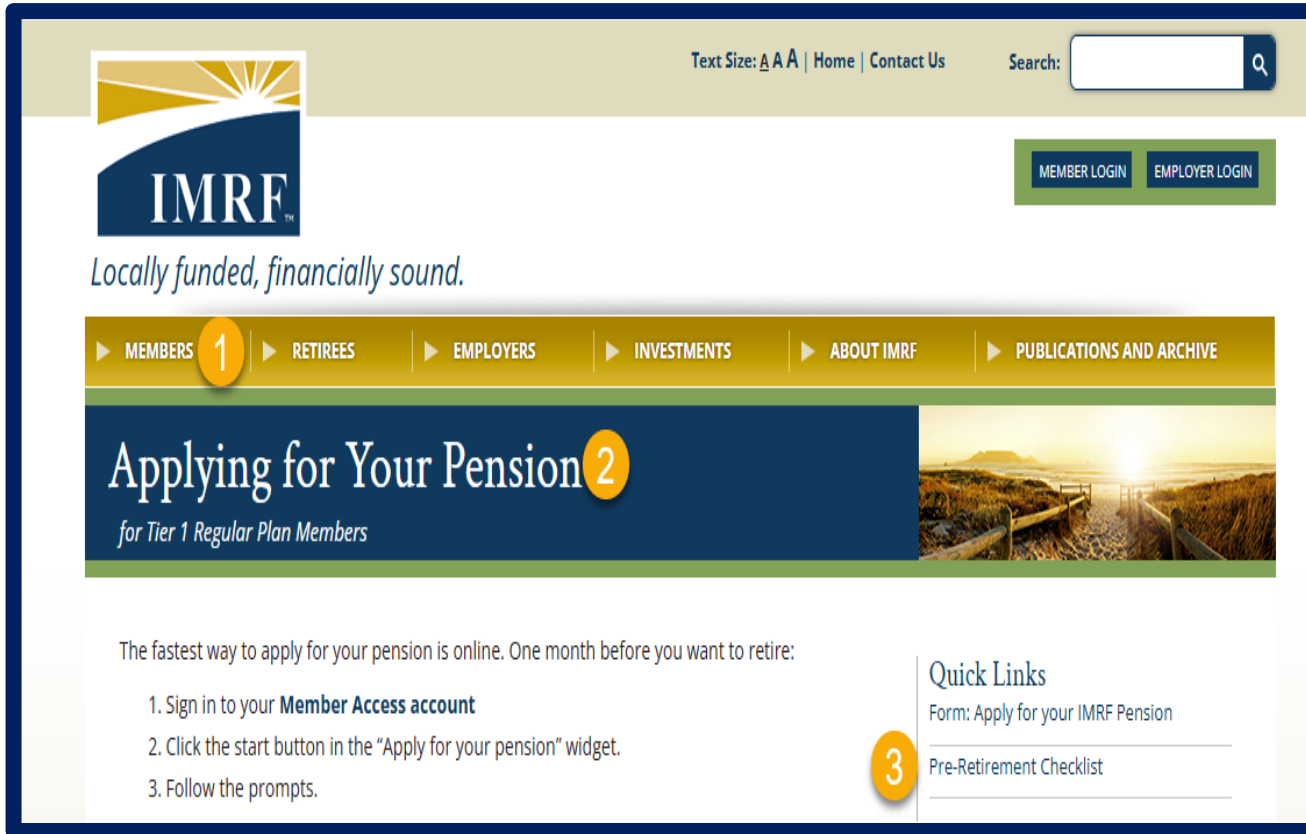
MEMBERS			RETIREES	EMPLOYERS	INVESTMENTS	ABOUT IMRF	PUBLICATIONS AND ARCHIVE
TIERS AND PLANS - Tier 1 Regular Plan - Tier 2 Regular Plan - Tier 1 SLEP Plan - Tier 2 SLEP Plan			- Original ECO Plan - Tier 1 Revised ECO Plan - Inactive Members - New Members		MEMBERS MUST KNOW - Member Access Learning Center - Update Your Personal Information - Naming Beneficiaries - Pension Estimates - Member Workshops and Materials - Your Reciprocal Service - Converting Military Service - IMRF Internal Audit - Benefit Processing Time - Member Statements - Leaving Your IMRF Employer - Disability Appeal Procedures - Non-Disability Appeal Procedures - Benefit Protection Leave - Divorce, QILDROs, and IMRF - NCPERS Group Life Insurance - IMRF and IRAs - Reporting a Death to IMRF - After You Apply For Your Pension — Next Steps		

Understanding Plans and Tiers
Not sure which plan you participate in? [Learn More](#)

Benefit Processing Time
It will take approximately eight weeks to process your benefit after the **later** of – the date IMRF receives all required information OR your benefit effective date. This includes retirements, death benefits, and disability benefits. For member contribution refunds and Voluntary Additional Contribution refunds, please allow approximately eight weeks processing time after IMRF receives the required information.

Valuable Resources for your members

Pre-retirement checklist and On-Demand webinars



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

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

Applying for Your Pension **2**

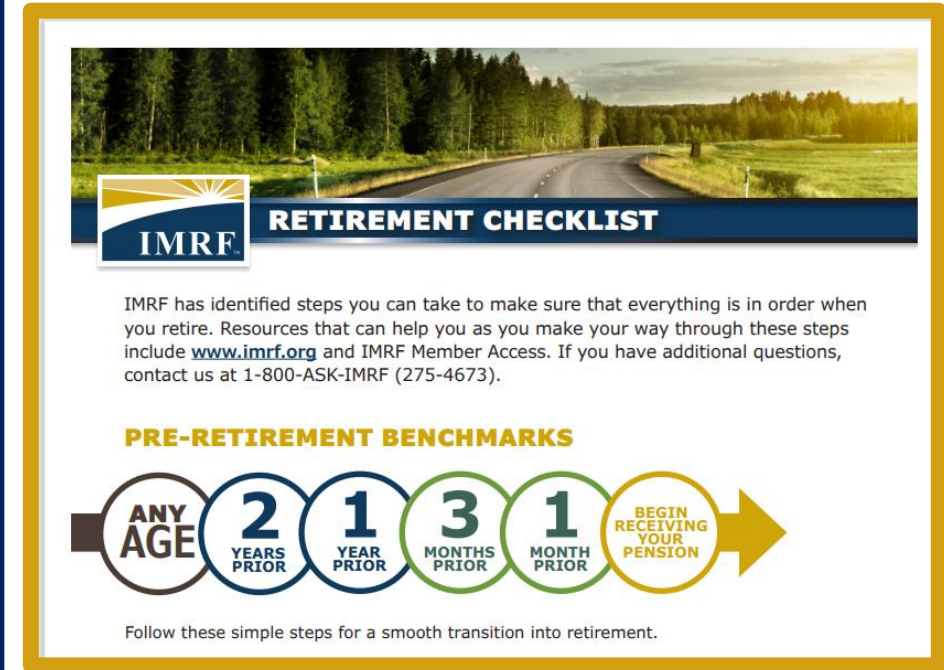
for Tier 1 Regular Plan Members

The fastest way to apply for your pension is online. One month before you want to retire:

1. Sign in to your **Member Access account**
2. Click the start button in the "Apply for your pension" widget.
3. Follow the prompts.

Quick Links

- Form: Apply for your IMRF Pension
- Pre-Retirement Checklist



IMRF RETIREMENT CHECKLIST

IMRF has identified steps you can take to make sure that everything is in order when you retire. Resources that can help you as you make your way through these steps include www.imrf.org and IMRF Member Access. If you have additional questions, contact us at 1-800-ASK-IMRF (275-4673).

PRE-RETIREMENT BENCHMARKS

ANY AGE 2 YEARS PRIOR 1 YEAR PRIOR 3 MONTHS PRIOR 1 MONTH PRIOR BEGIN RECEIVING YOUR PENSION

Follow these simple steps for a smooth transition into retirement.

On Demand Webinars and Materials

MEMBERS
RETIREES
EMPLOYERS
INVESTMENTS
ABOUT IMRF

Member Workshops and Materials

for Active IMRF Members

Your Benefits Roadmap: Understanding Your IMRF Benefits

If you want to better understand the nature of IMRF and why you are making contributions, this webinar is for you! An IMRF representative will explain how your pension is funded, your benefits as an IMRF member, and the importance of having more than one savings vehicle as you prepare for your eventual retirement.

Now offered online, on-demand on the IMRF website. You can view this recently recorded webinar at any time, when it is convenient for you.



YOUR BENEFITS ROADMAP PRESENTATION



Understanding Your IMRF Benefits /
Navegando Sus Beneficios con IMRF

View the presentation for Regular Tier 1 & Tier 2 and for SLEP Tier 1 & Tier 2.

Vea las presentaciones para el Plan Regular Tier 1 & Tier 2 y para el Plan SLEP Tier 1 & Tier 2.



YOUR ROAD TO RETIREMENT PRESENTATION



Navigating the Retirement Process /
Navegando el Proceso de Jubilación

View the presentation for Regular Tier 1 & Tier 2 and for SLEP Tier 1 & Tier 2.

Vea las presentaciones para el Plan Regular Tier 1 & Tier 2 y para el Plan SLEP Tier 1 & Tier 2.



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How to assist members with locating barcoded forms

[MEMBERS](#) | [RETIREES](#) | [EMPLOYERS](#) | [INVESTMENTS](#) | [ABOUT IMRF](#) | [PUBLICATIONS AND ARCHIVE](#)

Voluntary Additional Contributions

for Tier 1 Regular Plan Members

IMRF's Voluntary Additional Contribution (VAC) program is an easy way to help you save additional retirement income. Voluntary Additional Contributions:

- Are limited to a maximum of 10% of your IMRF reportable earnings.
- Are after tax, not tax-deferred.
- Are a separate individual account consisting only of your contributions and any interest you earn on them. **Employers do not make any contributions to your VA account.**
- Accrue interest differently than traditional saving accounts.
- Continue to earn interest for as long as they are left on deposit with IMRF

If you reach 40 years of service and choose to stop making IMRF contributions, you must also stop making Voluntary Additional Contributions.

Quick Links

[Form: Make or Change VAC](#)

[Form: Request Refund of VAC](#)

[Employers: Post This VAC Flyer For Your Members](#)



Helping Members with forms

The screenshot shows the IMRF website interface. At the top, there is a header with the IMRF logo, the tagline "Locally funded, financially sound.", and navigation links for "Text Size: A A A", "Home", and "Contact Us". A search bar is also present. Below the header, there is a navigation menu with links for "MEMBERS", "RETIREES", "EMPLOYERS", "INVESTMENTS", "ABOUT IMRF", and "PUBLICATIONS AND ARCHIVE". The "EMPLOYERS" link is highlighted with a yellow arrow. Below the navigation menu, there are two main sections: "FOR AUTHORIZED AGENTS" and "EMPLOYERS MUST KNOW". The "FOR AUTHORIZED AGENTS" section includes links for "Authorized Agents Manual", "Employer Access Learning Center", and "New Authorized Agent Information". The "EMPLOYERS MUST KNOW" section includes a list of links: "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", and "IMRF Employer Compliance Review". A yellow arrow points to the "Helping Members with Forms" link in the "EMPLOYERS MUST KNOW" section. Below the "FOR AUTHORIZED AGENTS" section, there is a section titled "Preliminary Rates for 2027" with the text: "Your 2027 Preliminary Rate information is available now in Employer Access! Learn how to access your rate information [here](#)."

Text Size: A A A | Home | Contact Us

Search:

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MEMBERS RETIREES EMPLOYERS INVESTMENTS ABOUT IMRF PUBLICATIONS AND ARCHIVE

FOR AUTHORIZED AGENTS

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

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

Preliminary Rates for 2027

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

Helping Members with forms

Scenario 1:

Member has a Member Access account but can't locate and/or print their form.

Scenario 2:

Member does not have a Member Access account.

Scenario 3:

Member is unable to create a Member Access account.



Documents that may help members

You can print these documents for members who need to:

- Produce a Pre-populated Form
- Register for Member Access

Here is another handout showing members how to find their forms.



How to find out if a member has an email address on file

To find out if a member has an email address on file, you'll need to create a wage report for the most recent month in which the member had service credit, and then check the "Missing Members Report" to see if that member has an email address on file. This **video** shows this process in more detail.

Where to Locate Member's Email

The screenshot shows a web application interface for managing member information. On the left is a dark blue sidebar with icons for user management (2782), analytics (2591), documents, email (28), help, and settings. The main area has a table of members with columns for Code, Employment Status, and Hire Date. The first row shows Code '00000', Status 'Active', and Hire Date '10/31/2007'. Below the table is a tabbed interface with 'MEMBER INFORMATION' selected. The 'Member Information' tab displays a list of fields on the left and their values on the right. The email field is highlighted with a yellow arrow.

Code	Employment Status	Hire Date
00000	Active	10/31/2007

< **MEMBER INFORMATION** EMPLOYMENT MEMBERSHIP EVENTS DEDUCTIONS ALERTS >

Member Information

First Name	Stacy
Last Name	Scarecrow
Prior Last Name	
Suffix Name	
Middle Name	
SSN	
Date of Birth	
Date of Death	
Gender	Female
Marital Status	Married
Phone Number	
Mobile Phone Number	
Email	Ilovehay@gmail.com
Preferred Language	English (United States)



Assisting Members with Barcoded forms

- ❑ Confirm member has ability to get on Member Access account
- ❑ Confirm members have email address on file
- ❑ Do not send in non barcoded forms
- ❑ Do not copy or reuse barcoded forms (member customized)

Questions?



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Closing Remarks