



# 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

## Resources

## Enrollment Data Collections

## Termination Data Collections

## Closing Remarks



# Resource Pages

MEMBERS
RETIREES
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 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.

**Data Collections:** Learn about how to find, update, and delete Postponed Data Collections

**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.

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](#)

**Quick Links**

[How do I address VAC Errors on the Wage Report Data Collection?](#)



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# Checklists

## Employer Checklists

for IMRF Employers



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
<b>Should this employee be enrolled in IMRF?</b>	
<b>Participation - Steps to enroll employees in IMRF</b>	
<b>Death Benefit Checklist</b>	
<b>Disability Checklist</b>	
<b>Termination Checklist</b>	
<b>Retirement Application Checklist</b> (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](#)

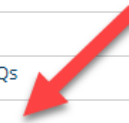
[Secure Messages](#)

[Employer Access FAQs](#)

[Employer Checklists](#)

[2026 Final Rate Notice Generator](#)

[2027 Preliminary Rate Notice Generator](#)



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# Videos

## Data Collections

Type of Data Collection	+ Add Record Format			Upload Specifications & Template Format	
Disability Return to Work	PDF	PPT		PDF	CSV
Employer Disability Certification	PDF	PPT	VIDEO	PDF	CSV
Enrollments	PDF	PPT	VIDEO	PDF	CSV
Insurance and Union Deductions	PDF	PPT	VIDEO Revise	PDF	CSV
			VIDEO Terminate		
Member Information Changes	PDF	PPT	VIDEO	PDF	CSV
Termination Information - Terminating IMRF participation	PDF	PPT	VIDEO	PDF	CSV
Wage Report	PDF	PPT	VIDEO	PDF	CSV
Wage Adjustment	PDF	PPT	VIDEO	PDF	CSV



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# Talking Points for Enrollment Data Collection

- **Social Security Information Issues**
- **Conflicting Names**
- **Address**
- **Email address (for member portal registration)**

# Basic Data Collection for Enrollment

Business Functions / Data Collections

## 00016 - Enrollments - 06-12-2026 - 1 TEST Example Ruby Grimes

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

### Data Collection Information

Data Type:\* Enrollments

Partner Code:\* 00016

Effective Date:\* 06-12-2026

Data Collection Name:\* 00016 - Enrollments - 06-12-2026 - 1 TEST Example Ruby Grimes

Owner: Administrator



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# Basic Data Collection for Enrollment

Employment Information ▲	
Enrollment Type*	New Enrollment ▼
Hire Date* ⓘ	06-12-2026 📅
Position* ⓘ	General position/Common Law Employee ▼
Position Effective Date* ⓘ	06-12-2026 📅
Payroll Calendar* ⓘ	All 12 Months Paid ▼
Pay Frequency*	Bi-weekly ▼
Expected Annual Hours*	600 ▼
Plan*	REG ▼
Enrollment Date* ⓘ	06-12-2026 📅



# Complete Steps 1-4

Business Functions / Data Collections

00016 - Enrollments - 06-12-2026 - 1 TEST Example Ruby Grimes Status: Action definition

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

SSN ▼	MemberID ▼	First Name ▼	Last Name ▼	Actions
No Results Found.				

**Validate** **Continue**

View Filter Action Required ▼

No action required







---

1 member No member with errors 1 member with warnings

No member without exceptions



# Scenario 1 – Hire Date not same as Effective/Enrollment Date

Enrollment Type*	New Enrollment
Hire Date* 	02-02-2026 
Position* 	General position/Common Law Employee
Position Effective Date* 	06-12-2026
Payroll Calendar* 	All 12 Months Paid
Pay Frequency*	Bi-weekly
Expected Annual Hours*	600
Plan*	REG
Enrollment Date* 	06-12-2026

# Warnings are not Errors

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

SSN ▼	MemberID ▼	First Name ▼	Last Name ▼	Action
1		Ruby	Grimes	

**Validate** **Continue**

View Filter Action Required ▼

Warning 1  
 There is a difference between the Enrollment Date and Hire Date.

---

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



# Select Action/Drop Down

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Business Functions / Data Collections

00016 - Enrollments - 06-12-2026 - 1 TEST

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

SSN ▼	MemberID ▼	First Name
1		Ruby

**Approval warning**

You have chosen to approve the following warnings. Please indicate a reason for each:

There is a difference between the Enrollment Date and Hire Date.

Member was in a non-qualifying position prior to Enrollment Date.

Member was in a qualifying position prior to enrollment date. Omitted Service Application is being submitted.

Elected official or City hospital worker elected to participate at a later date.

## Verification Stage

Sometimes IMRF staff must review the information you submitted before allowing it to update records in our system. When this is needed, the Data Collection will go to verification, which may apply to all or part of the Data Collection.

00016	Enrollments	00016 - Enrollments - 04-23-2025 - 2 (Verification Required)	Completed
-------	-------------	--	-----------

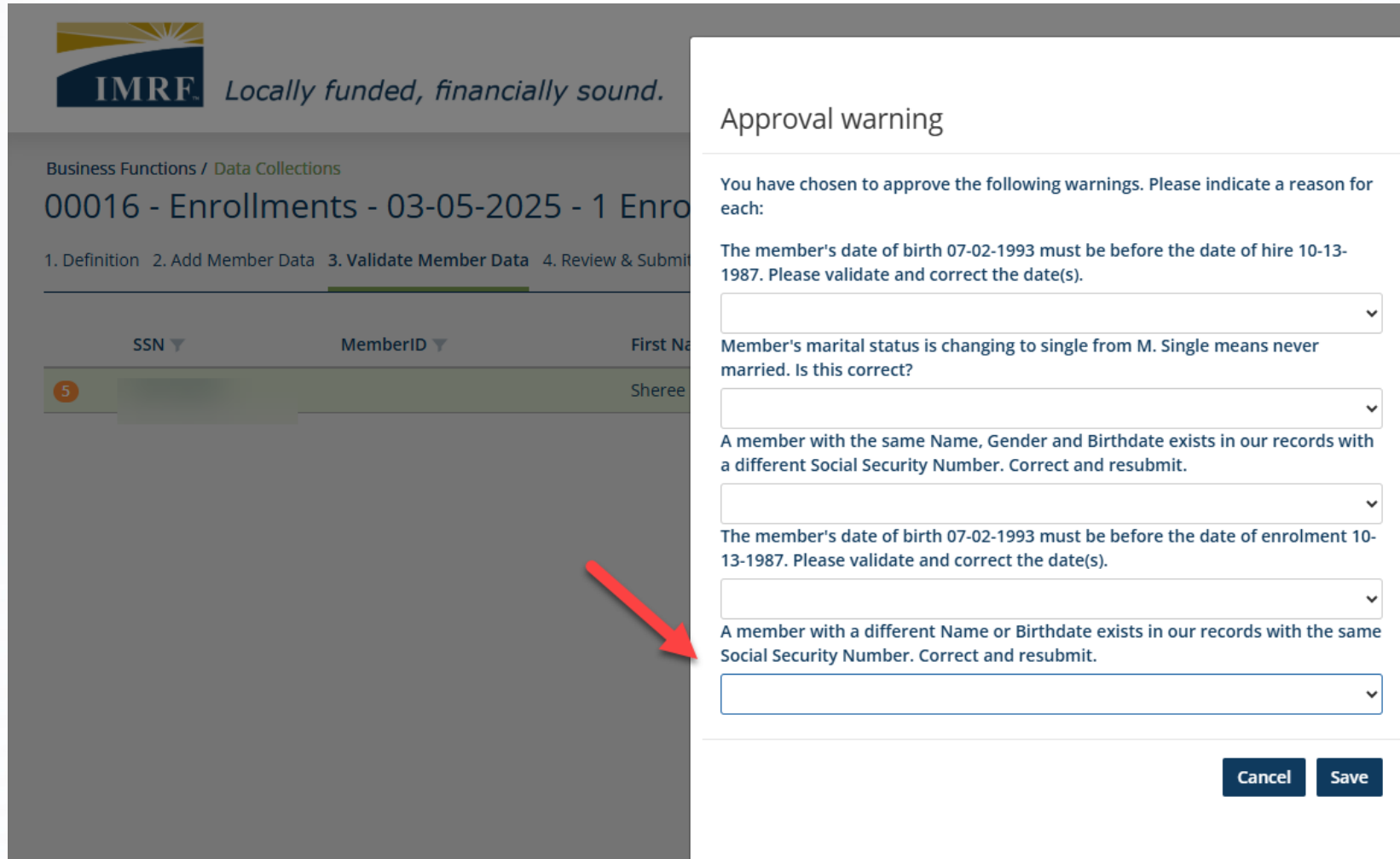


## Important to Remember

- The typical processing times for verifications is five business days. To avoid late fees, please submit your Data Collections in time for these verifications to be processed before the wage reporting due date of the 20th of the month.
- A common verification is related to **terminating members**. If you have terminated a member from IMRF participation, be sure to change the Final Wage Indicator to "Yes" in the final month the member's wages will be reported. This is typically the month the member's participation ended or the following month.



## Scenario 2 – Multiple Warnings



The screenshot shows the IMRF system interface. The background is a data collection screen for "00016 - Enrollments - 03-05-2025 - 1 Enro". The navigation bar includes "1. Definition", "2. Add Member Data", "3. Validate Member Data", and "4. Review & Submit". A table with columns "SSN", "MemberID", and "First Na" is visible, with a red circle containing the number "5" next to a row. An "Approval warning" dialog box is overlaid on the right side of the screen. The dialog box contains the following text and form elements:

**Approval warning**

You have chosen to approve the following warnings. Please indicate a reason for each:

The member's date of birth 07-02-1993 must be before the date of hire 10-13-1987. Please validate and correct the date(s).

Member's marital status is changing to single from M. Single means never married. Is this correct?

A member with the same Name, Gender and Birthdate exists in our records with a different Social Security Number. Correct and resubmit.

The member's date of birth 07-02-1993 must be before the date of enrolment 10-13-1987. Please validate and correct the date(s).

A member with a different Name or Birthdate exists in our records with the same Social Security Number. Correct and resubmit.



A red arrow points from the dialog box back to the table in the background.

# Scenario 3 – Error is RED

Business Functions / Data Collections


00016 - Enrollments - 06-12-2026 - 2 Test Incorrect Address Status: Action definition

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

SSN ▼	MemberID ▼	First Name ▼	Last Name ▼	Actions
1		Michael	Hutcherson	 

[Validate](#) [Continue](#)

View Filter Action Required ▼

Complete Member Error 1 

The address could not be verified as entered. Correct and resubmit.

---

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

## Scenario 3 – Error is RED


**Member Summary** ✕

Severity: Complete Member Error  
Error ID: 2733  
Message: The address could not be verified as entered. Correct and resubmit.

[View Member Data](#)

[Postpone Member](#)

[Reject Member](#)



# Scenario 4 – Elected Official

The screenshot displays the IMRF enrollment interface. At the top left is the IMRF logo with the tagline "Locally funded, financially sound." The main header area includes "Business Functions / Data Collections" and "Enrollments - [redacted] Enro". Below this is a progress bar with steps: "1. Definition", "2. Add Member Data", "3. Validate Member Data", and "4. Review & Submit". A table with columns "SSN", "MemberID", and "First Na" is partially visible. A red circle with the number "1" is next to a row in the table. A white "Approval warning" dialog box is centered, containing the text: "You have chosen to approve the following warnings. Please indicate a reason for each:" followed by a message: "A request for the Election to Participate for Qualifying Position form will be sent by IMRF to the member. The member must return the completed election form before enrollment can complete." Below this is a dropdown menu with two options: "Form Election to Participate for Qualifying Position has already been sent." and "Form Election to Participate for Qualifying Position will be sent." A red arrow points from the dialog box to the "Member Summary" panel on the right. The "Member Summary" panel has a title bar with a close button (X) and displays the following information: Severity: Warning, Error ID: 4806, and Message: "A request for the Election to Participate for Qualifying Position form will be sent by IMRF to the member. The member must return the completed election form before enrollment can complete." Another red arrow points from the message text in the summary panel back to the dialog box. In the top right corner of the interface, there is a link "Go to imrf.org | Welcome Christine" and a "Sign O" button.

## Scenario 5 – Do Not Use for Omitted Service

Past Service & Earnings 

**Add**

Begin Date 	<input type="text"/>	
End Date 	<input type="text"/>	
Omitted Earnings Amount 	<input type="text"/>	
Worked Hours 	<input type="text"/>	

**Delete**

## Scenario 6 – Member is changing from REG Plan to SLEP Plan

- Do not use Member Information Change data collection
- New Enrollment will be required
- REG plan to be reported with termination data collection and final wages
- After submitted, member may be enrolled in SLEP plan

# Talking Points for Termination Data Collections


- **Be sure to check Events**
- **No longer in Qualifying Position**
- **Must submit termination data collection prior to final wage report**
- **Termination data collection revisions**
- **Communicate with members on termination date**

# Basic Termination Data Collection

Business Functions / Data Collections

00016 - Termination Information - 06-12-2026 - 1 Test Example Kimberly Soto

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

Member Information ▲	
Social Security Number* ⓘ	<input type="text"/>
Member ID ⓘ	<input type="text"/>
First Name* ⓘ	Kimberly
Last Name* ⓘ	Soto
Employment Information ▲	
Position* ⓘ	General position/Common Law Employee ▼
Termination Reason* ⓘ	Resignation ▼
Termination Date*	06-12-2026 
Payroll Information ▲	
Unused / Unpaid Sick Days*	0



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# Scenario 1 Termination Revision


Business Functions / Data Collections


Termination Information - Test Example Dave Compton - revise


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

Position\* 

Termination Reason\* 

Termination Date\* 

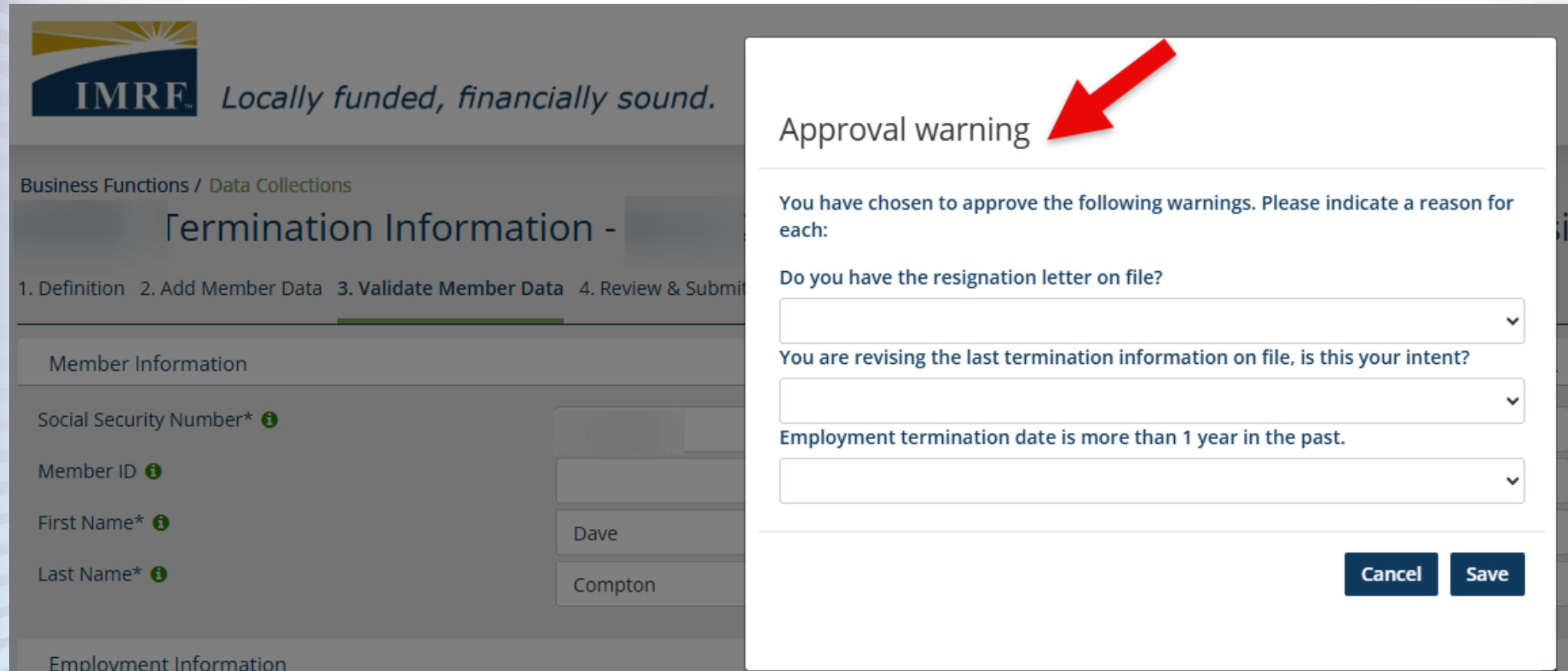
Payroll Information

Unused / Unpaid Sick Days\* 

63

*Note: Red arrows point to the Termination Date field (03-31-2025) and the Unused / Unpaid Sick Days field (63).*

# Warnings to be Addressed



The screenshot shows a web application interface for IMRF. The background is a form titled "Termination Information" with a progress bar showing steps: 1. Definition, 2. Add Member Data, 3. Validate Member Data, and 4. Review & Submit. The form includes fields for "Member Information" such as Social Security Number\*, Member ID, First Name\* (filled with "Dave"), and Last Name\* (filled with "Compton").

An "Approval warning" dialog box is overlaid on the right side of the screen, indicated by a red arrow. The dialog box contains the following text and controls:

Approval warning

You have chosen to approve the following warnings. Please indicate a reason for each:

Do you have the resignation letter on file?

You are revising the last termination information on file, is this your intent?

Employment termination date is more than 1 year in the past.

At the bottom right of the dialog box are two buttons: "Cancel" and "Save".

# Scenario 2

## Termination Non-Qualifying Position but still employed

Business Functions / Data Collections

### Termination Information

1. Definition 2. Add Member Data 3. Validate Member Data

**Member Information**

Social Security Number\* ⓘ

Member ID ⓘ

First Name\* ⓘ

Last Name\* ⓘ

**Employment Information**

Position\* ⓘ

Termination Reason\* ⓘ

Termination Date\* 06-12-2026

**Payroll Information**

Unused / Unpaid Sick Days\*

- Resignation
- Dismissal- Non-Medical
- Dismissal - Medical
- Retirement
- Continues to work for IMRF employer only in a non-qualifying position**
- Continues to work for IMRF employer but under another Illinois Public Retirement System
- Death
- Death - Job Related
- Change in position requires enrollment in new plan
- Elected official - Term expired
- Elected official - Resigned
- Amalgamation
- Military Leave
- Entered by IMRF - Termination not received

Continues to work for IMRF employer only in a non-qualifying position



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# Remember to Review Events

Members and Events / Events

## Events

View: In Progress ▾

Partner Code ▾	SSN ▾	Member ID ▾	First Name ▾	Last Name ▾	Event Type	Event Date	Event Status
	*****				Termination Information	07-16-2024	Started

Termination Information

Social Security Number: [Redacted]  
Member ID: [Redacted]  
First Name: [Redacted]  
Last Name: [Redacted]  
Event Type: Termination Information  
Event Date: 07-16-2024  
Status: Started  
Owner: Administrators  
Creation Date: 05-05-2026  
Partner Code: [Redacted]  
Partner Name: [Redacted]  
Case ID: [Redacted]

[View / Edit Event](#)



# Submitted Termination in Error?

## What do I do?

Members and Events / Events

Events

View: In Progress

Partner Code	SSN	Member ID	First Name	Last Name	Event Type	Event Date	Event Status
	*****				Termination Information	07-16-2024	Started

Termination Information

Social Security Number: [Redacted]  
Member ID: [Redacted]  
First Name: [Redacted]  
Last Name: [Redacted]  
Event Type: Termination Information  
Event Date: 07-16-2024  
Status: Started  
Owner: Administrators  
Creation Date: 05-05-2026  
Partner Code: [Redacted]  
Partner Name: [Redacted]  
Case ID: [Redacted]

View / Edit Event



# Answer: Secure Message

Message Center / Secure Messages

## Secure Messages

Example Employer

New Message

To: IMRF

Topic\*: Termination

Subject\*: Remove Termination MID XXX-XXXX

Oh my goodness --- I have incorrectly reported Mr. Ricky Bobby as being terminated last week. I terminated him on 6/4/2026 with 26 unused unpaid sick days. He is not terminated. Can you please remove this data collection?

## Tips for Termination

- ✓ **IMRF cannot process a benefit claim for a member remaining in your employment, so it is important to update IMRF when the member leaves service.**
- ✓ **When submitting this revision, use the final date the member was employed through as the Termination Date and the Termination Reason for them leaving employment. If applicable, be sure to include any unused, unpaid sick days, because this information will replace what was previously reported.**



## More Tips

- It is important to make sure the employee you are terminating is in the same **position** as when the member was enrolled.
- When unsure, this information can be viewed in the Employment Tab of the Member Profile in Employer Access.

< MEMBER INFORMATION	EMPLOYMENT	MEMBERSHIP	EVENTS	DEDUCTIONS
Employment Information				
Partner Code				
Partner Name		City Of		
Hire Date		06-05-2025		
Enrollment Date		06-05-2025		
Employment Status		Active		
Employment Status Effective Date				
Termination Date				
Reason of termination		Unknown		
Employment Type		Regular		
Position		General position/Common Law Employee		
Position Effective Date		06-05-2025		
Hourly Standard		600.00		



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## Reporting Final Wages

- When a member stops participating in IMRF, one of the most important pieces of information needed from employers, aside from Termination Information, is the Final Wages Indicator noted within your monthly wage report.
- When this field isn't submitted as "Yes" for members no longer participating and for which you are reporting for the last time, IMRF cannot finalize the benefit claim. If you missed changing this to "Yes" when you submitted your monthly wage report, follow wage adjustment procedures to notify IMRF that the last wages have been reported.



# More Workshops!



## Employer Access Workshops

**Enrollments and Terminations** **JUNE 17**

**Member Info Changes Procedure - Add Record** **JULY 15**

**Wage Reports & Reconciliation** **AUG 19**

**Disability** **SEP 16**

Workshops will be held from 10 AM to 11 AM.

IMRF will continue to host Employer Access Workshops to answer some of the most commonly asked questions.

Each session will review a specific topic with demonstrations from IMRF staff. Participants are encouraged to ask questions during the presentation and questions will only be viewed by workshop leaders.

Register for the workshop on an issue you would like to learn more about:

**Enrollments and Terminations**

June 17 from 10 AM to 11 AM

**Member Information Changes Procedure - Add Record**

July 15 from 10 AM to 11 AM

**Wage Reports & Reconciliation**

August 19 from 10 AM to 11 AM

**Disability**

September 16 from 10 AM to 11 AM



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**Thank you for joining us today.**



The graphic features the IMRF logo at the top center, which consists of a stylized sun rising over a blue horizon line. Below the logo, the text "EMPLOYER LINE" is written in a bold, blue, sans-serif font. Underneath that, the phone number "1-800-728-7971" is displayed in a large, bold, yellow font with a white outline. A thin horizontal line separates this from the text "Members call: 1-800-ASK-IMRF (275-4673)" in a smaller, blue font. At the bottom, there are four social media icons (Facebook, Twitter, LinkedIn, and YouTube) followed by the website address "www.imrf.org".

**IMRF**  
**EMPLOYER LINE**  
**1-800-728-7971**  
Members call: **1-800-ASK-IMRF (275-4673)**  
f | | | | [www.imrf.org](http://www.imrf.org)



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