Employer Web Portal
Getting Started

Get to know the KPERS EWP and learn how to perform all your pension-related tasks

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Navigation Features | 1

In this section you learn the ins and outs of the EWP's basic navigation features.

What does this button do? Can you tell me what a panel is? Where is that tab? In this section you'll learn about the navigational features of the Employer Web Portal and how to quickly find the information you're looking for. This includes definitions that may be helpful in later sections and the sheer basics of what the portal offers and where to find it.

Introduction to the Basics

The Employer Web Portal consists mostly of *lookup* and *maintenance* screens. A *lookup* screen is provided to find previously created records and to create new records. A *maintenance* screen is provided to view and modify information within a record.

The portal was designed using links and tabs for easy navigation. The main links are located on the left side of every screen and are titled: 'Site Menu' (see below for more detailed information about the Site Menu). Screens with a wide variety of information are split into a logical tab structure. You can easily navigate to more information by clicking on a tab name.

Each screen is comprised of multiple panels. A new panel is designated by a box with a green title bar. Panels are expandable and collapsible by clicking on the green title bar to assist you in hiding the information that you don't need and to more efficiently find the information that you need to complete your task.

Navigation Features

The Employer Web Portal has two major navigation features beyond links, tabs, buttons and panels. These features include the Site Menu and the Information Bar. This section describes each feature in detail.

Site Menu

The Site Menu is a set of related links provided for easy navigation down the left side of the screen. You can expand and collapse menu headers to assist you in finding the information you are looking for more quickly.

Site Menu Graphical Representation

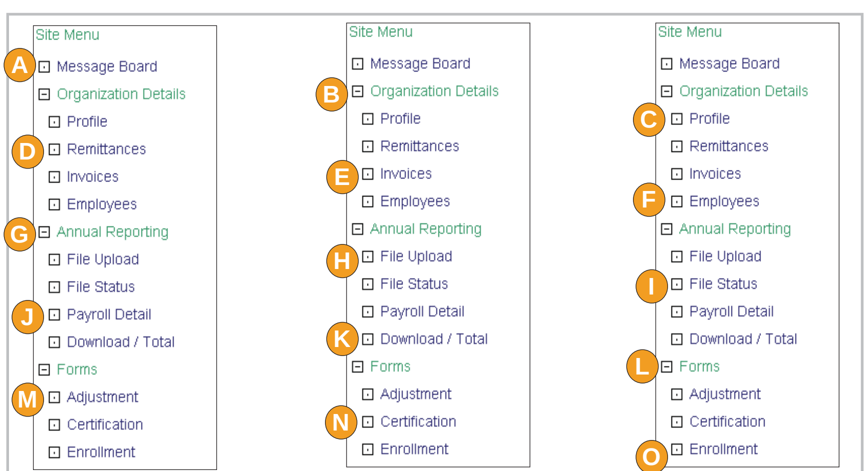

Figure 1: Site Menu

Site Menu Graphical Representation Definitions

Figure 1 A - **Message Board:** Clicking this link displays the 'Message Board' screen. The Message Board collects messages related to tasks/actions to be performed, news, and other information. You can view new messages, mark messages as read, and view old messages. This is the portal's primary communication feature (see Section 2: Communication Features for more information).

Figure 1 B - **Organization Details:** This is the heading for a group of links related specifically to information about your organization, including Profile, Remittances, Invoices, and Employees. You can expand and collapse headings to help you more easily navigate to the links you're looking for by clicking on the plus symbol next to the heading name. Note: Headings default as open so when you first enter the portal you can see all available links.

Figure 1 C - **Profile:** Clicking this link displays the 'Employer Profile' screen, which is also your default home page. The Employer Profile includes information about your specific organization such as addresses, contacts, and bank information (see Section 3: Organization Details for more information).

Figure 1 D - **Remittances:** Clicking this link displays the 'Remittance Lookup' screen. This screen was provided to help you find and view all current and previous remittances (see Section 3: Organization Details for more information).

Figure 1 E - **Invoices:** Clicking this link displays the 'Invoices Lookup' screen. This screen was provides to help you find and view all current and previous invoices (see Section 3: Organization Details for more information).

Figure 1 F - **Employees:** Clicking this link displays the 'Employees Lookup' screen. This screen was provided to help you find and view all current and previous employee information such as beneficiaries, service purchases, and employment history (see Section 3: Organization Details for more information).

Figure 1 G - **Annual Reporting:** This is the heading for a group of links related specifically to annual reporting, including File Upload, File Status, Payroll Detail, and Download/Total. You can expand and collapse headings to help you more easily navigate to the links you're looking for by clicking on the plus symbol next to the heading name. Note: Headings default as open so when you first enter the portal you can see all available links.

Figure 1 H - **File Upload:** Clicking this link displays the 'File Upload' screen. This screen was provided to browse for and upload pre-created and modified downloaded stub annual reports (see Section 4: Annual Reporting for more information).

Figure 1 I - **File Status:** Clicking this link displays the 'File Status' screen. This screen was provided to check the status of a previously uploaded file (see Section 4: Annual Reporting for more information).

Figure 1 J - **Payroll Detail:** Clicking this link displays the 'Payroll Detail Lookup' screen. This screen was provided for individual payroll detail entry, creating a new payroll detail for an employee that doesn't already have one, and to find and resolve uploaded report errors (see Section 4: Annual Reporting for more information).

Figure 1 K - **Download/Total:** Clicking this link displays the 'Download/Total' screen. This screen was provided to serve two major functions, entering of annual report totals and downloading a stub report to enter data for your annual report and re-upload to the portal (see Section 4: Annual Reporting for more information). Note: This is the current year's total page. To see the totals page from previous years, navigate to the Profile, click the Payroll tab, and select the year you wish to view.

Figure 1 L - **Forms:** This is the heading for a group of links related specifically to online forms you can submit using the portal, including Adjustments (KPERS-17), Certifications (Verification of Most Recent Contributions), and Enrollments (KPERS-1). You can expand and collapse headings to help you more easily navigate to the links you're looking for by clicking on the plus symbol next to the heading name. Note: Headings default as open so when you first enter the portal you can see all available links.

Figure 1 M - **Adjustments:** Clicking this link displays the 'Adjustments Lookup' screen.

This screen was provided to help you find previously submitted adjustments and create new adjustments (see Section 5: Online Forms for more information). Note: Submitting an adjustment using the portal is the same action as completing and mailing a KPERS-17 form.

Figure 1 N - **Certifications:** Clicking this link displays the 'Certification Lookup' screen. This screen was provided to help you find previously saved or submitted certification records. You can also lookup and open certifications pending for you to complete. You cannot create a new certification record; however, if a certification needs to be completed, KPERS will provide you with a stub, or pre-populated with data KPERS currently has, certification record to complete and submit (see Section 5: Online Forms for more information). Note: Submitting a certification using the portal is the same action as completing a mailing a Verification of Most Recent Contributions (V-Letter).

Figure 1 O - **Enrollments:** Clicking this link displays the 'Enrollment Lookup' screen. This screen was provided to help you find previously saved or submitted enrollment records and create a new enrollment record (see Section 5: Online Forms for more information). Note: Submitting an enrollment using the portal is the same action as completing and mailing a KPERS-1 form.

Information Bar

The Information Bar is the blue logo bar displayed across the top of the screen on every page. The Information Bar includes both informational only and action features.

Information Bar Graphical Representation

Figure 2: Information Bar

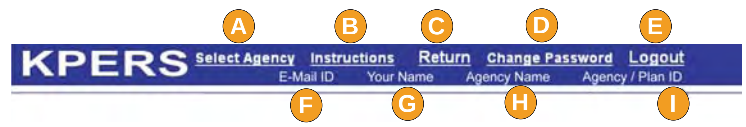

Figure 2 A - **Select Agency:** If you have access to multiple agencies, clicking this link will allow you to switch between each agency you have access to. If you only have access to one agency, this link doesn't have an action.

Figure 2 B - **Instructions:** Clicking this link will navigate you to the Employer Web Portal instructions.

Figure 2 C - **Return:** Clicking this link will navigate you to the last screen you were viewing.

Figure 2 D - **Change Password:** Clinking this link will navigate you to the 'Change Password' screen. This screen was provided to allow you to change your password whenever you wish. Note: The Employer Web Portal requires you to change your password upon enrollment.

Figure 2 E - **Logout:** Clicking this link will log you out of the entire portal. To log back in you will have to go through the login process (e.g. re-enter your e-mail ID and password).

Figure 2 F - **E-mail ID:** Displays your current E-mail ID. Note: This is the e-mail ID you use to login to the portal as well as the e-mail ID you will receive Employer Web Portal related e-mails at (informational only).

Figure 2 G - **Your Name:** Displays your first and last name (informational only).

Figure 2 H - **Agency Name:** Displays the name of the agency you are logged into (informational only).

Figure 2 I - **Agency / Plan ID:** Displays the agency and plan ID of the agency you are logged into (informational only).

General Lookup Screen Elements

The Employer Web Portal is made mostly of Lookup and Maintenance screens. Almost every task you perform using the Employer Web Portal will require interaction with a lookup screen in the first few steps. A lookup screen is provided for the following reasons:

-To find and/or open previously created, saved, or submitted records of a particular type
-To create new records of a particular type

Lookup Screen Basics

Each different process is associated with its own Lookup screen. The following outlines the typical steps for using a Lookup screen effectively.

1. Navigate to the Lookup screen for the process you wish to complete.
2. Enter search criteria in the fields provided (NOTE: The fields provided to search from are different for each process and are based on the information collected during each process)
3. Click the ‘Search’ button
4. Scroll to the ‘Results Grid’ panel to view the results
5. To open record:
   - -Check the check box next to the desired record and then click the ‘Open’ button
   - -Click the link associated with the desired record

   To open multiple records:
   - -Click the check box in the heading bar until all records have a check mark and then click the ‘Open’ button

   To navigate to more records: (NOTE: The Employer Web Portal only displays the first 10 records by default)
   - -Click on the page number link (1, 2, 3...) located beneath the heading

   To create a new record of this type:
   - -Click the ‘New’ button

Communication Features | 2

In this section you'll find out how to effectively use the portal by communicating with KPERS about your pension-related tasks.

How will I know I have a certification to submit for one of my employees? Did KPERS receive the form I submitted? Has someone at KPERS looked at the information I submitted? Who will notify me what I submitted was rejected? This section will answer all your questions regarding how you'll know what actions to perform and the result of those actions. This section includes the message board functionality and future automatic e-mail notification.

Message Board

The Message Board is the primary means of communication between you and KPERS using the Employer Web Portal. The Message Board is a screen that posts and achieves actions to be taken and helpful information to assist you in using the portal most effectively.

What You'll Learn

-How to retrieve a message
-What types of messages you may receive
-How to respond to a message
-How to mark a message as read

Before You Start

Before beginning this section it's important to know the difference between an informational message and an action message. An informational message is provided to tell you some useful bit of information, but doesn't require you to perform a task. For example, you may receive an informational message that says "KPERS has received your annual report." On the other hand, an action message does require you to perform a task. For example, you may receive an action message that says "Your annual report contains errors to be resolved." In the first scenario, KPERS is simply telling you that you correctly submitted your annual report and it's been received. In the second message, KPERS is telling you that you have the task of resolving errors on your annual report.

Quick Steps

1. Site Menu < Message Board
2. View all 'Action' messages
3. Check the read check box
4. Click the 'Mark as Read' button
5. Click the 'Information Messages' tab
6. View all 'Information' messages
7. Check the read check box
8. Click the 'Mark as Read' button

Detailed Flow

1. Site Menu < Message Board : From the Site Menu, click the 'Message Board' link to navigate to the 'Message Board' screen.

2. View all 'Action' messages : In the 'Messages and Alerts' panel, from the 'Action Required Messages' tab, view all 'Action' messages.

3. Check the read check box : If you are done completing any required actions, check the read check box.

4. Click the 'Mark as Read' button : Click the 'Mark as Read' button to move the read message(s) from the "Unread Messages" section to the "Read Messages" section.

5. Click the 'Information Messages' tab : In the 'Messages and Alerts' panel, click the 'Informational Messages' tab.

6. View all 'Information' messages : View all 'Information' messages

7. Check the read check box : If you are done completing any required actions, check the read check box.

8. Click the 'Mark as Read' button : Click the 'Mark as Read' button to move the read message(s) from the "Unread Messages" section to the "Read Messages" section.

Message Board Graphical Representation

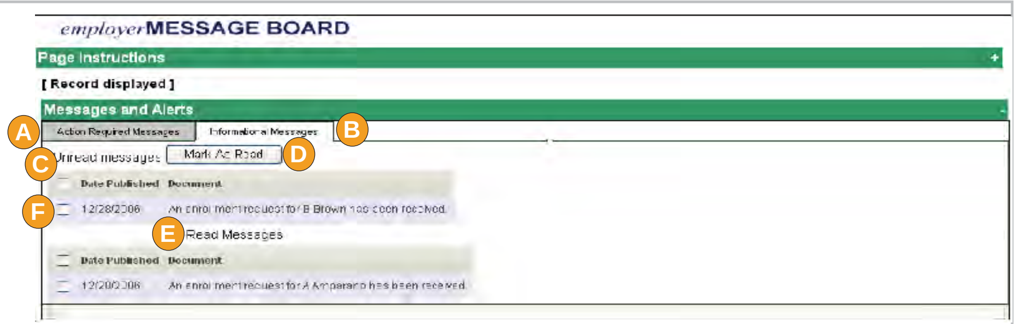

Figure 3: Message Board

Figure 3 A - **Action Required Messages Tab:** The messages displayed in this tab require some action from you.

Figure 3 B - **Informational Messages Tab:** The messages displayed in this tab are for informational purposes only and do not require action from you.

Figure 3 C - **Unread Messages Section Header:** The messages under this header have not been marked as read by you. These are typically new messages from KPERS or messages that you didn't mark as read so you would remember to do something with them in the future.

Figure 3 D - **Mark As Read Button:** Selecting a message and clicking this button will move messages from the Unread section to the read section of the panel.

Figure 3 E - **Read Messages Section Header:** The messages under this header have been marked as read by you. These are typically old messages or messages that you have previously responded to.

Figure 3 F - **Select Messages Check Box:** Click the check box next to the message to select the message. Select the message and click the 'Mark As Read' button to move messages from the Unread section to the Read section of the panel.

Organization Details 3

In this section you'll learn about all the Organization Detail functions on the EWP including your home page, the Employer Profile.

What is my contribution rate? Did I remember to update KPERS with my new bank information? Who else is a contact for my organization? In this section you'll learn where and how to find all the information you need to complete pension-related tasks.

Employer Profile

The 'Profile' screen on the Employer Web Portal is provided to display all the information about your organization that KPERS currently has documented. This screen was designed for easy navigation so you can find all the information you're looking for with the click of a button. You can also use this functionality to ensure that the information you provide to KPERS throughout the year is correct and updated when necessary as any changes to information will be immediately available for your review.

Employer Profile Graphical Representation

Figure 4: Employer Profile

Figure 4 A - **Organization Details Panel:** Displays general information about your organization including organization type, plan status, affiliation date, fiscal year information, contact information, etc.

Figure 4 B - **Employer Details Panel:** Displays a variety of tabs to split the information into logical sections. To view information associated with a specific tab, simply click on the tab name. Within some tabs (for example, addresses) you can navigate to more details by opening a record. To open a record either click the check box next to the record you wish to open and then click the 'Open' button OR click the record name link (underlined in blue). The Employer Details panel contains the following tabs:

Figure 4 C - **Addresses:** Displays current address information including primary and secondary addresses and allows you to open an addresses record to view more details. You cannot change, add or delete address information using the Employer Web Portal. To update addresses, complete and mail in a KPERS-2 to the KPERS office.

Figure 4 D - **Contacts:** Displays current contact information including those who do and don't have access to the Employer Web Portal and allows you to open a contact record to view more details. You cannot change, add or delete contact information using the employer web portal. To update contacts, complete and mail in a KPERS-2 to the KPERS office.

Figure 4 E - **Bank Info.:** Displays current bank information and allows you to open a bank information record to view more details. You cannot change, add or delete bank information using the Employer Web Portal. To update bank information, complete and mail in an EF-105 to the KPERS office.

Figure 4 F - **Payroll:** Displays general details about current and previously submitted annual payrolls directly from your totals page. Also allows you to navigate to current and previously submitted 'Download / Totals' screens by clicking on the appropriate year. NOTE: The 'Download / Totals' link from the Site Menu only allows you to navigate to the current year. The payroll tab from the 'Employer Profile' allows you to view all years submitted online. To access the current year, you may choose either option.

Figure 4 G - **Remittances:** Displays current and previous remittances and allows you to open a remittance record to view more details. You cannot change, add or delete remittance information using the Employer Web Portal. The remittance tab displays information from the last 20 remittances. If you wish to view remittances further back, navigate to the 'Remittance Lookup' screen by clicking 'Remittances' from the Site Menu.

Figure 4 H - **Fund Statement:** Displays current and previous fund statements and allows you to open, view and print fund statements. You cannot change, add or delete fund statement information using the Employer Web Portal.

Figure 4 I - **Member Type:** Displays current member type information for viewing purposes only.

Figure 4 J - **Contribution Rates:** Displays current and previous contributions rates for viewing purposes only.

Figure 4 K - **Insurance Rates:** Displays current and previous insurance rates for viewing purposes only.

Figure 4 L - **POS:** Displays current and previous period of service information for viewing purposes only.

Employer Profile Graphical Representation II

The following graphic represents the opening of an Address Detail record from the 'Employer Profile' screen. Anytime throughout the portal that you see a link (blue underlined text) there is a more detailed layer of information below. There are two methods to opening a record.

1. Click the check box next to the record you wish to view and click the 'Open' button
2. Click the link (usually the record name or number)

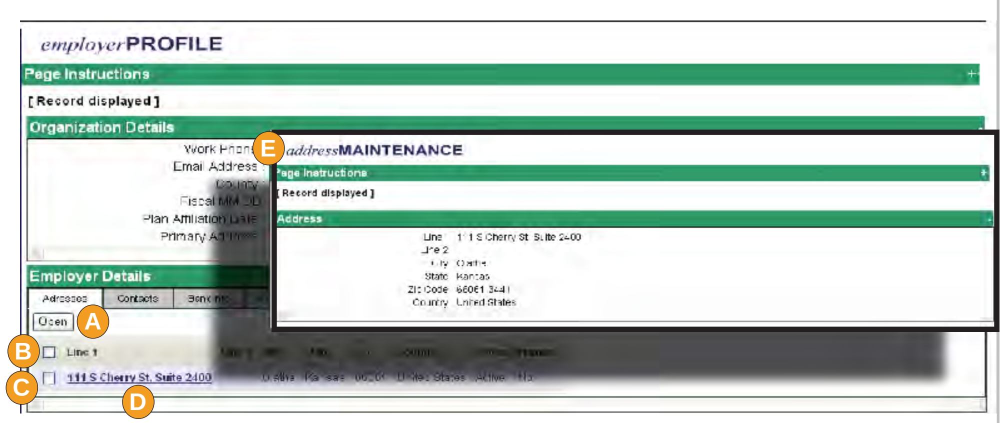

Figure 5: Employer Profile II

Figure 5 A - **‘Open’ Button:** Click the appropriate check box and then the ‘Open’ button to open records.

Figure 5 B - **Open All Check Box:** Click the open all check box and then the ‘Open’ button to open multiple records at one time. Then, use the ‘Next’ and ‘Previous’ buttons to navigate between each record.

Figure 5 C - **Open Record Check Box:** Click the record check box and then the ‘Open’ button to open a record.

Figure 5 D - **Record Link:** Click the record link (blue underlined text) to open a record.

Figure 5 E - **Address Details:** By opening the record, you navigate to the ‘Address Maintenance’ screen and are able to view more details about your organizations addresses.

Remittances

Clicking ‘Remittance’ from the Site Menu will navigate you to the ‘Remittance Lookup’ screen. Here, you can perform a search by entering search criteria and view all current and previous remittances. You can also view the last 20 remittances by clicking on the Remittance tab from the ‘Employer Profile’ screen.

Remittances Graphical Representation

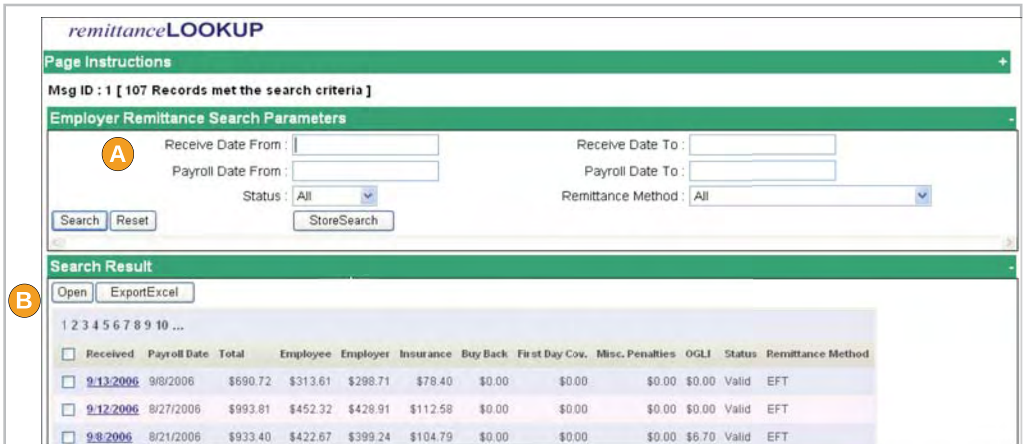

Figure 6 : Remittances

Figure 6 A - **Search Criteria Panel:** Enter search criteria into the provided criteria fields and click the ‘Search’ button for results.

Figure 6 B - **Search Results Grid:** Displays search results based on criteria entered

Remittance Graphical Representation II

This graphic represents the ‘Remittance Maintenance’ screen. To view this more detailed screen, open the remittance record from the ‘Remittance Lookup’ screen results grid.

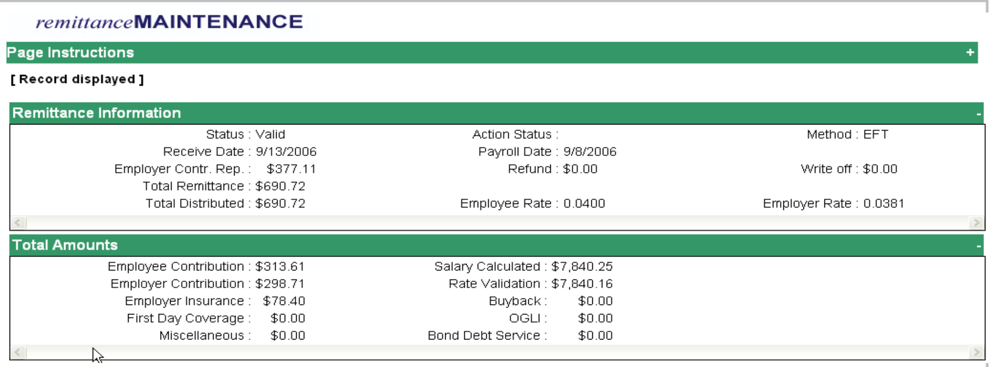

Figure 7: Remittances II

Invoices

Clicking ‘Invoices’ from the Site Menu will navigate you to the ‘Invoice Lookup’ screen. Here, you can perform a search by entering search criteria and view all current and past invoices.

Invoices Graphical Representation

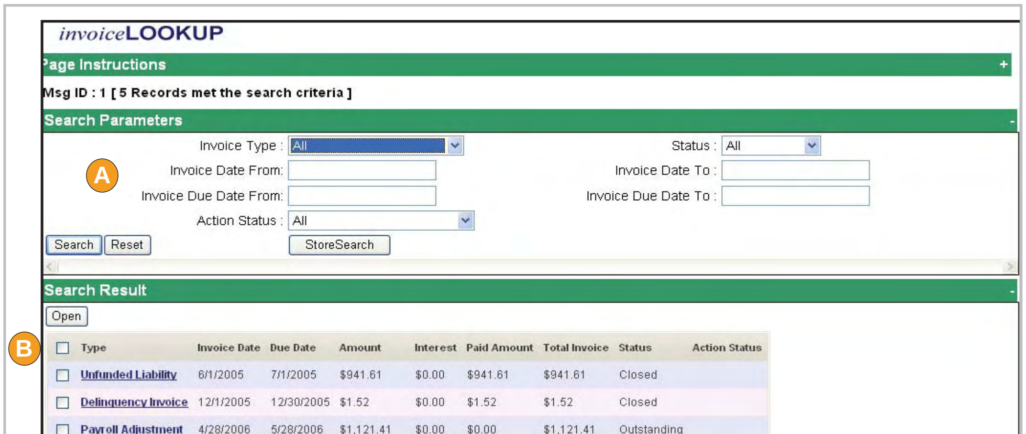

Figure 8: Invoices

Figure 6 A - **Search Criteria Panel:** Enter search criteria into the provided criteria fields and click the ‘Search’ button for results.

Figure 6 B - **Search Results Grid:** Displays search results based on criteria entered

Invoices Graphical Representation II

This graphic represents the ‘Invoices Maintenance’ screen. To view this more detailed screen, open the invoice record from the ‘Invoices Lookup’ screen results grid.

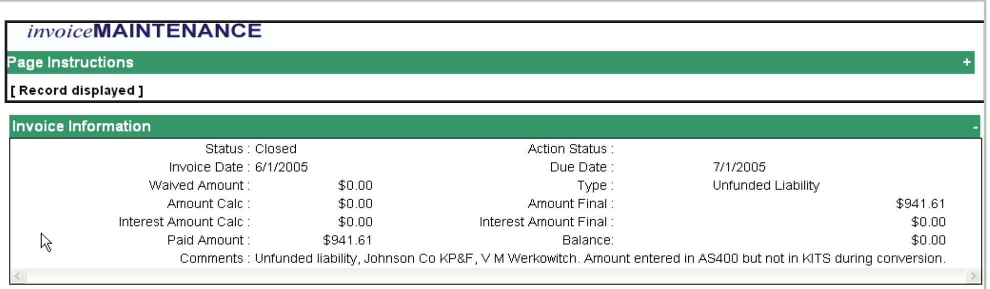

Figure 9: Invoices II

Employees

Clicking ‘Employees’ from the Site Menu will navigate you to the ‘Employee Lookup’ screen. Here you can perform searches by entering search criteria and view information about current and previous employees, including service purchases, employment history and beneficiaries.

Employees Graphical Representation

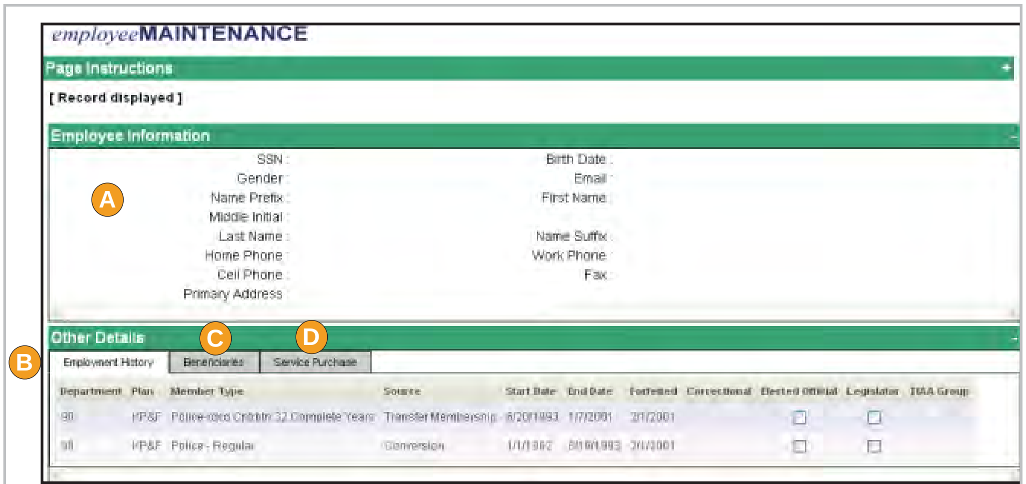

Figure 10: Employees

Figure 10 A - **Employee Information Panel:** Displays information specific to this employee, such as social security number, name, address, and other contact information.

Figure 10 B - **Employment History Tab:** Displays information related to current and past KPERS covered employment for this employee.

Figure 10 C - **Beneficiaries Tab:** Displays this employees beneficiary information including beneficiary names and relationship to members.

Figure 10 D - **Service Purchases:** Displays this employees current and past service purchases.

Annual Reporting

In this section you'll learn everything you need to know about submitting your annual report using the KPERS EWP.

What reporting options are available to me? What new errors will I have to resolve on my annual report? What's the difference between submitting my annual report using the old annual web contribution reporting system and the Employer Web Portal? In this section, you'll learn how to adequately prepare for completing your annual report and how to use the EWP in making choices that meet your work style and preferences. This section includes what you'll need before beginning and detailed process steps.

General Information

To accommodate multiple work styles and preferences, the employer web portal offers three different reporting methods. You can choose which method to use to complete your annual report based on the tools and resources available to you, as well as personal preferences and comfort levels. The methods available to you are as follows:

Method Name & Description:	Advantages:	Suggested for:
Single Payroll Detail Entry *Description: Login to the portal and individual enter payroll details for each employee.*	-Resolve errors on the spot OR save and resolve later -No time spent waiting to upload or download file -No other files to manage -Have someone else data enter and search for only records with errors to resolve	Agencies with less than 50 employees
Upload Pre-Created File using Personal File *Description: Create your own annual report file using the appropriate file format and upload to the portal.*	-Use your payroll system or other resources to create an annual report file that requires no data entry from you - Search for only records with errors to resolve	Agencies with more than 100 employees Agencies with the resources to create a Personal File
Upload Pre-Created File using Downloaded Stub *Description: Download a stub record (looks like a blank paper report) and do all your data entry offline. Then upload the file to the portal.*	-Do all your data entry offline -No need to waste time navigating through records -Leave and return to your work as you please	Agencies with between 25-100 employees Agencies without the resources to create a Personal File

Choose whichever reporting method is best for you and change your choice from year to year based on current circumstances and past experiences. The detailed instructions for each method are to follow later in this section.

Method 1 - Payroll Detail Entry

In this section you'll learn the process for completing your annual report using the payroll detail entry method. This method is also imperative to know for all other annual reporting methods because you will view and resolve errors for each payroll detail (line) by using this method.

What You'll Learn

-How to complete your annual report using the payroll detail entry method
-How to find and resolve errors for all reporting methods

Before You Start

This method is best suited for agencies under 50 employees.

Option 1 : Immediately Resolve Errors
Quick Steps

1. Site Menu < Annual Reporting: Payroll Detail
2. Search for Details
3. Open record
4. Enter data in all required fields (Note: some data is pre-populated such as SSN and name)
5. Click the 'Save And Validate' button
6. View Errors tab and resolve any errors
7. Click the 'Save And Validate' tab
8. Repeat 6-7 until all errors resolved

NOTE: When you've completed this process, navigate the the 'Download / Total' screen, enter your totals, and submit your report (the submit button is only present if the Annual Report is valid).

Detailed Flow

1. Site Menu < Annual Reporting: Payroll Detail : Navigate to the 'Payroll Detail Lookup' screen from the Site Menu under the Annual Reporting heading.

2. Search for Details : Search for the payroll detail you would like to complete by entering search criteria into the criteria fields and clicking the 'Search' button OR click 'Search' to see all payroll detail records and navigate using the 'Next' and 'Previous' button.

3. Open record : Open the desired record(s) by clicking the check box and then clicking the 'Open' button.

4. Enter data in all required fields : Enter data in all required fields. (Note: some data is pre-populated such as SSN and name)

5. Click the 'Save And Validate' button : Click the 'Save And Validate' button to save all the data you have entered.

6. View Errors tab and resolve any errors : View the 'Errors' tab and resolve any errors present.

7. Click the 'Save And Validate' tab : Click the 'Save And Validate' tab

8. Repeat 6-7 until all errors resolved : Repeat 6-7 until all errors are resolved.

Option 1: Immediately Resolve Errors Graphical Representation

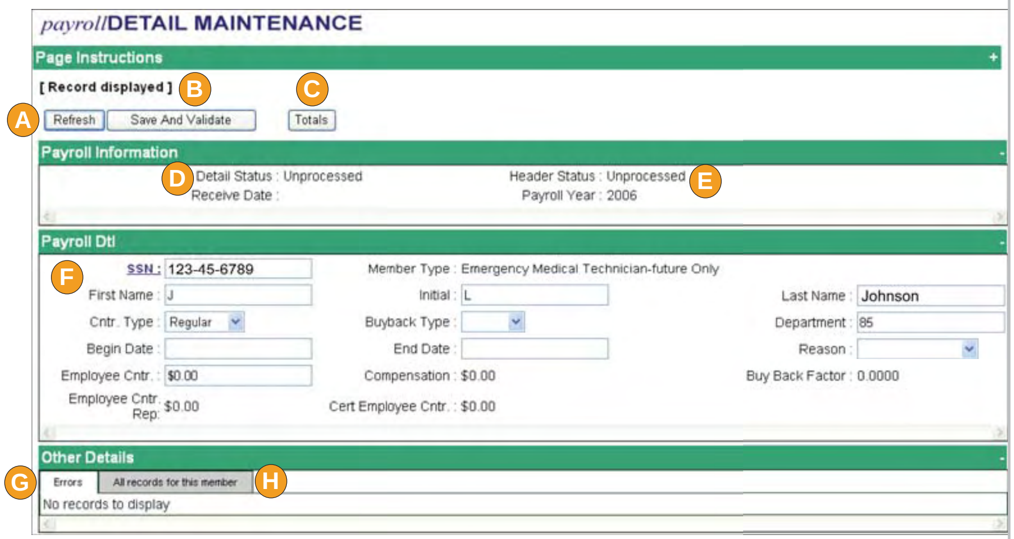

Figure 11 Immediately Resolve Errors

Figure 11 A - **'Refresh' Button:** Clicking this button will refresh all the data you have already entered and not saved.

Figure 11 B - **'Save And Validate' Button:** Clicking this button will save all data that you previously entered and validate the record to see if errors exist or have been resolved.

Figure 11 C - **'Totals' Button:** Clicking this button will navigate you to the 'Download / Total' screen where you can view and enter totals for your annual report.

Figure 11 D - **Detail Status:** This is the status of this particular detail record. The statuses can be the following:

- **Unprocessed:** The record was created by the system, but you have not entered any data into it yet.
- **Processed:** The entire annual report was submitted and this detail was successfully processed.
- **Review:** You have begun entering data into the record and have successfully saved at least once, but errors exist that need to be resolved. You will be unable to submit your annual report until all Detail Statuses are Valid.
- **Valid:** You have entered all the data into the record and have successfully saved at least once. There are no errors to be resolved and the record is pending your submission of your annual report.

Figure 11 E - **Header Status:** This is the status of the totals page. Once this status is valid you can submit your annual report. Once this status is processed you have completed your reporting for the year.

Figure 11 F - **Pre-Populated Information:** As with any other kind of stub record, the system pre-populated the record with the information that KPERS currently has documented. This includes all your employee's names, SSNs, and current departments. All of the information on the 'Payroll Detail' stub record is based on the most current enrollment (K-1).

Figure 11 G - **'Errors' Tab:** Review and resolve any issues with the data you entered in the 'Errors' panel. If you resolve an error, you must click the 'Save' button to refresh the list of current errors.

Figure 11 H - **'All Records for this Member' Tab:** Review and navigate to other payroll details for this employee including buy backs.

Option 2 : Complete All Data Entry Before Resolving Errors Quick Steps

1. Site Menu < Annual Reporting: Payroll Detail
2. Search for Details
3. Open multiple records simultaneously
4. Enter data in all required fields (Note: some data is pre-populated such as SSN and name)
5. Click the ‘Save and Next’ button
6. Repeat 4-5 until all data entry is complete
7. Site Menu < Annual Reporting: Payroll Detail
8. Search for Details in ‘Review’ status
9. Open records (either one at a time or multiple records)
10. View Errors tab and resolve any errors
11. Repeat 8-10 until all errors are resolved.

NOTE: When you’ve completed this process, navigate the the ‘Download / Total’ screen, enter your totals, and submit your report (the submit button is only present if the Annual Report is valid).

Detailed Flow

1. Site Menu < Annual Reporting : Payroll Detail : Navigate to the ‘Payroll Detail Lookup’ screen from the Site Menu under the Annual Reporting heading.

2. Search for Details : Search for the payroll detail you would like to complete by entering search criteria into the criteria fields and clicking the ‘Search’ button OR click ‘Search’ to see all payroll detail records and navigate using the ‘Next’ and ‘Previous’ button.

3. Open multiple records simultaneously : Click the check box located in the results grid heading so that all check boxes visible become checked and then click the ‘Open’ button.

4. Enter data in all required fields : Enter data in all required fields. (Note: some data is pre-populated such as SSN and name)

5. Click the ‘Save and Next’ button : Click the ‘Save and Next’ button located at the top of the screen to save the data you’ve entered and move to the next record without viewing errors.

6. Repeat 4-5 until all data entry is complete : Repeat 4-5 until all data entry is complete

7. Site Menu < Annual Reporting : Payroll Detail : Navigate to the ‘Payroll Detail Lookup’ screen from the Site Menu under the Annual Reporting heading.

8. Search for Details in ‘Review’ status : In the “Status” field drop down box, choose ‘Review’ and click the ‘Search’ button.

9. Open records (either one at a time or multiple records) : Check the check box next to the desired record and then click the ‘Open’ button; OR click the record link; OR click the check box located in the results grid heading so that all check boxes are checked and click the ‘Open’ button.

10. View Errors tab and resolve any errors : View the ‘Errors’ tab and resolve any errors present.

11. Repeat 8-10 until all errors are resolved : Repeat 8-10 until all errors are resolved

Complete All Data Entry Before Resolving Errors Graphical Representation

Tech Tip
After you've completed your data entry for a payroll detail, typing the enter button on your keyboard will have the same affect as clicking the 'Save and Next' button.

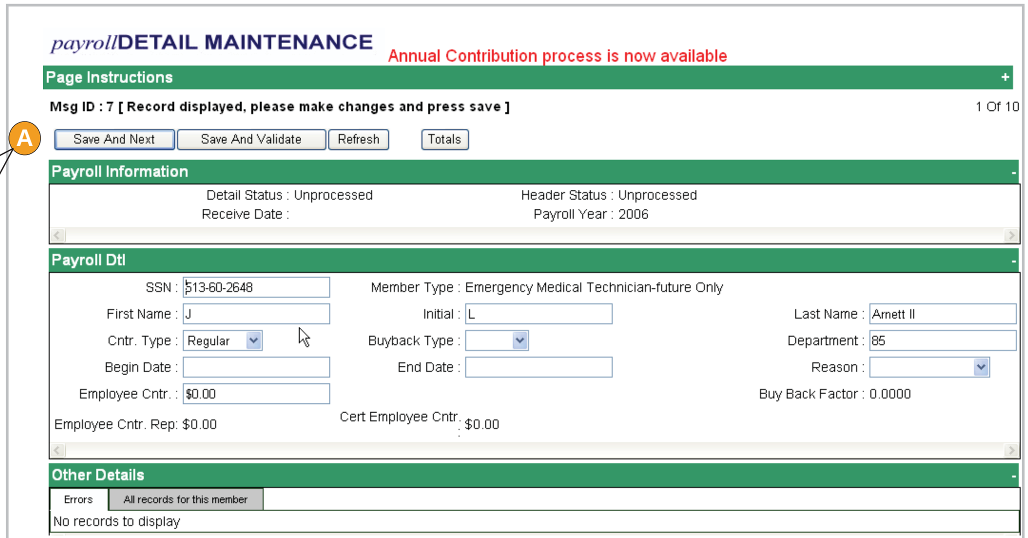

Figure 12 Complete All Data Entry Before Resolving Errors

Figure 12 A - **'Save and Next' Button:** Clicking this button will save all the information that you've entered and navigate you to the next record without showing you any errors.

NOTE: Refer to Figure 11 for all other screen elements on this screen.

Method 2 - Upload Pre-Created File Using Personal File

In this section you'll learn the process for uploading a pre-created annual report file. A pre-created file is a file you created on your own without help from KPERS using a payroll or other sub-system provided at your organization. This method is most useful for large agencies who would find it difficult to do a lot of data entry; although any sized agency can create their own annual report file and upload it to the Employer Web Portal.

What You'll Learn

-How to upload an annual report file
-How to check the status of an annual report file you've already uploaded

Before You Start

This year's file format has not changed. If you have used the upload file method in the past, you can continue to use the same format.

Quick Steps

1. Site Menu < Annual Reporting: Click 'File Upload'
2. Click 'Browse'
3. Choose file < Click 'Open'
4. View file name
5. Click 'Upload File'

Detailed Flow

1. Site Menu < Annual Reporting: Click 'File Upload' : From the Site Menu, navigate to the 'File Upload' link under the Annual Reporting heading.

2. Click 'Browse' : The File Upload screen displays. Click the 'Browse' button to locate the file from your
personal computer.

3. Choose file < Click 'Open' : Find the file and click the 'Open' button.

4. View file name : The file name appears in the upload file text box.

5. Click 'Upload File' : Click the 'Upload File' button.

After Upload

Once the upload is complete the system will process the file. You may navigate away from the screen or logout of the portal while the system is processing. Within 24 hours of uploading the file, you will receive a message that the file was processed. If there are errors within the file, you must navigate to the payroll detail and resolve. Please see the 'Check File Status' section of this manual for more information.

Upload Pre-Created File Using Personal File Graphical Representation

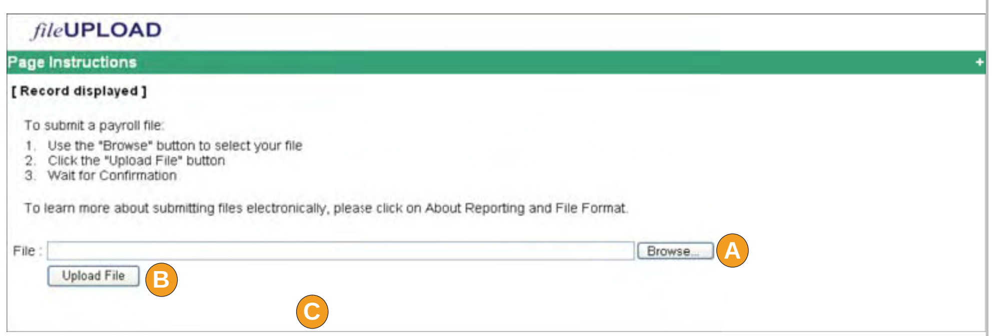

Figure 13 File Upload

Figure 13 A - **'Browse' Button:** Clicking this button will open a prompt to select a file. Find your file on your personal computer and click the 'Open' button.

Figure 13 B - **'Upload File' Button:** After you've browsed for and opened your annual report file, clicking this button will upload the file to KPERS.

Figure 13 C - **Success Message:** After you have successfully uploaded your annual report file, you will view a success message here. Please ensure you receive this message to confirm a successful upload.

Upload Troubleshooting

If you upload a file and see that it created 2 payroll details for a reason other than a buy-back during the payroll year, please contact KPERS to get the extra record deleted. This is most-likely due to the begin date from the KPERS-1 and the begin date from the uploaded file not matching.

Method 3 - Upload Pre-Created File Using Downloaded Stub

In this section you'll learn how to download a file that contains all the information KPERS currently has documented to use to create your annual report. Downloading a file with pre-populated data means less data entry for you; although you will still have to data enter the missing information (i.e. contributions, etc.). This method is best for those you do not have access to high-speed internet because you can perform all data entry offline and simply upload the file when you're done or for medium size agencies; although, any size agency can use this method.

What You'll Learn

-How to download a file with pre-populated annual report data from the portal
-How to upload your completed annual report file to the portal

Before You Start

This method is best suited for mid-sized agencies (50-500 employees) or large agencies (over 500 employees) that don't have access

Quick Steps

1. Site Menu < Annual Reporting: Click 'Download / Totals'
2. Click 'Download File'
3. Choose location
4. Complete data entry
5. Site Menu < Annual Reporting: Click 'File Upload'
6. Click 'Browse'
7. Choose file < Click 'Open'
8. View file name
9. Click 'Upload File'
10. Within 24 hours, receive notification regarding the status of your file (via the Message Board) OR check your file status (See the Check File Status information immediately following this section).

Detailed Flow

If you wish to download a stub file and modify by filling in the blank information, follow these steps:

1. Site Menu < Annual Reporting: Click 'Download / Totals' : Navigate to the Download / Total Page in one of two ways:

a. From the site menu, navigate to the 'Download / Total Page' link under the Annual Reporting heading (to get current year only)
b. From the Employer Profile screen, navigate to the payroll tab and click on the desired year (to get all years)

2. Click 'Download File' : Click the 'Download File' button.

3. Choose location : In the prompt dialogue box, choose where you would like to save the file and click the 'Save' button.

4. Complete data entry : Complete your annual report data entry

5. Site Menu < Annual Reporting: Click 'File Upload' : From the Site Menu, navigate to the 'File Upload' link under the Annual Reporting heading.

6. Click 'Browse' : The File Upload screen displays. Click the 'Browse' button to locate the file from your personal computer.

7. Choose file < Click 'Open' : Find the file and click the 'Open' button.

8. View file name : The file name appears in the upload file text box.

9. Click ‘Upload File’ : Click the ‘Upload File’ button.

After Upload

Once the upload is complete the system will process the file. You may navigate away from the screen or logout of the portal while the system is processing. Within 24 hours of uploading the file, you will receive a message that the file was processed. If there are errors within the file, you must navigate to the payroll detail and resolve. Please see the ‘Check File Status’ section of this manual for more information. Once the file has been processed, you can begin working on error resolution of the payroll details.

Check File Status (for Methods 2 & 3)

After uploading your annual report to the Employer Web Portal, you can check on the status of your report by navigating to the Site Menu under Annual Reporting and clicking the ‘File Status’ link. You are not required to check the status of your report as the Message Board will notify you when your file has completed processing and if there are any errors to resolve; however, if you wish to know where your file is in the process, please refer to the status definitions below.

What You’ll Learn

- How to check the status of a file you’ve uploaded
- What each file status means

Before You Start

Remember that you are not required to check the status of your file because the communication through your Message Board will alert you to when the file has completed processing and if there are errors to resolve. Please see Appendix B File Status Reference for more information.

Quick Steps

1. Site Menu < Annual Reporting: Click File Status
2. Search
3. View Results

Detailed Flow

1. Site Menu < Annual Reporting : Click File Status : From the Site Menu, navigate to the ‘File Status’ link under the Annual Reporting heading.

2. Search : The ‘File Status’ lookup screen appears. Enter search criteria and click the ‘Search’ button.

3. View Results : In the search results grid, locate the file and view the file status.

File Status Graphical Representation

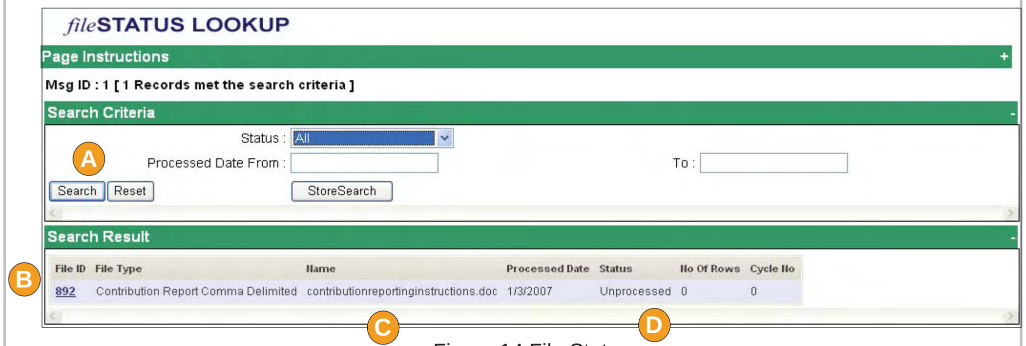

Figure 14 File Status

Figure 14 A - **Search:** Enter search criteria into the provided fields and click the ‘Search’ button to find a specific file OR simply click the ‘Search’ button to find ALL files.

Figure 14 B - **Search Results Grid:** After clicking the ‘Search’ button view the results grid for results.

Figure 14 C - **File Name:** View the file name to ensure you are looking at the correct file.

Figure 14 D - **File Status:** View the file status to see the progress of your file.

Description of Statuses

Ignored
This status is given if the you accidentally upload the wrong file and contact KPERS to asks that the file is ignore so you can upload a different file. The file will only receive this status if you contact KPERS and explicitly ask that the file is ignored.

Processed
This Status is given if the file was uploaded and ran successfully. You may still have errors, warnings or informational messages in the payroll detail record for a particular employee, but file format and other information was read and uploaded.

Processed w/ Warnings
This Status is given if some / most of the file was successfully upload, but a few payroll details / rows may have been ignored. For example, if you put xxx in the contribution field the system may ignore that row or that field depending on the field, but upload the other payroll detail records. For payroll details that were ignored, you will have to navigate to the record (Site Menu < Annual Reporting: Click ‘Payroll Detail) and manually enter the ignored information.

Review
This status is given if the Employer Web Portal couldn’t read the file at all and nothing from the file is uploaded. You will have to fix the file or make a new file and re-upload to get any information in the system.

Uploaded
This status is given if you have uploaded a file and the Employer Web Portal hasn’t done anything with it yet. This is the first status it will be in after a file is uploaded. This means that you have done everything to this point correctly and the file is waiting for processing.

Note: There are a variety of staging statuses as well. These status are a description of what happens to the file between the beginning and ending of processing and will only last a few seconds to a few minutes. It’s unlikely you’ll run across such statuses.

Once Your Report is Complete (Totals Page)

No matter the method you've used to get your annual report information/data into the system, when you feel you are complete and all payroll detail records are valid, navigate to the 'Download / Total' screen to complete your totals page and submit your report. NOTE: You can also save and print a paper version of your report once you've submitted.

What You'll Learn

In this section you will learn how to complete your totals page using the Employer Web Portal and submit your report. You'll also learn how to save and print a paper version of your report for your own documentation purposes.

Before You Start

Before you can submit your report the payroll header must be at a valid status. To find the status of the payroll header, navigate to the 'Download / Total' screen and view the status. If the status is 'Review,' review and resolve any errors in the 'Errors' panel. If the status is 'Valid' the report is read to be submitted. NOTE: The 'Submit' button is only present when the payroll header status is 'Valid.' If the payroll header status is 'Review' you will NOT see the 'Submit' button.

NOTE: Refer to 'KPERS Employer Reporting Manual found at www.kpers.org under publications in the Designated Agent section for more specific information regarding your totals page.

Quick Steps

1. Complete your annual report using one of the three methods described earlier in this section
2. Navigate to the 'Download / Total' screen
3. Enter totals for Period 1 and Period 2
4. Click 'Save'
5. Review and resolve errors
6. Click 'Submit'

Detailed Flow

1. Complete your annual report using one of the three methods described earlier in this section

2. Navigate to the 'Download / Total' page by:
   - Annual Reporting: Download / Total
   - Click 'Totals' button from a payroll detail record
   - Organization Detail: Profile < Payroll Tab < Click desired year

3. Enter totals for Period 1 and Period 2

4. Click 'Save': Click the 'Save' button located at the top of your screen.

5. Review and resolve errors: In the 'Errors' panel, review and resolve any errors present. If errors are present your payroll header status will be 'Review'. If no errors are present, your payroll header status will be 'Valid' and the 'Submit' button will appear for you to submit your annual report to KPERS.

6. Click 'Submit': Click the 'Submit' button

THIS SECTION IS STILL UNDER CONSTRUCTION. MORE DETAILS TO FOLLOW.

Online Forms

5

In this section you'll learn everything you need to complete and submit adjustments, certifications and enrollments using the Employer Web Portal.

What's the difference between filling out a paper adjustment and mailing it versus submitting an adjustment online? How do I know I need to complete a certification? What are the advantages to enrolling someone online? In this section, you'll learn about the online forms you can complete using the Employer Web Portal and how to accurately complete and submit online forms. This section includes what you'll need before beginning and detailed process steps.

Adjustments (KPERS-17) Form

The Employer Web Portal offers the functionality to submit an adjustment anytime throughout the year. Submitting an adjustment using the Employer Web Portal has the same result as completing a KPERS-17 and mailing the paper form to KPERS. There are many advantages to using the Employer Web Portal for adjustment submission over mailing a paper form, such as:

- Immediate notification and resolution of any errors
- Eliminates duplicate data entry, which reduces the risk for more errors
- Immediate results since you don't have to spend time waiting for the mail or someone to enter the information
- Ease and convenience offered by the Employer Web Portal

What You'll Learn

-How to submit an Adjustment (KPERS-17) using the Employer Web Portal

-When and why to use the Employer Web Portal to submit an adjustment

Before You Start

Unlike completing a paper adjustment, when using the Employer Web Portal you don't have to manually determine the type of adjustment form (OPT or EPD); nor are you required to send along a letter with an explanation of the adjustment. The reason you don't have to make the correct choice manually is because the system determines the type of adjustment based on your selection of a question describing the situation.

For 'Employer Only' arrearages, the member has the option to pay their 4% KPERS deductions; if it's not paid, the member will not receive service credit. The member may purchase this arrearage at a later date as a service credit purchase, but the amount will be higher due to the actuarial cost.

For 'Employer Paid' arrearages, the employer is required to pay BOTH the employee and employer contributions and insurance. An interest penalty will be assessed for the arrearage period to employers. The employer must pay the actuarial cost or the retirement benefit if the member retires within 24 months of arrearage payment. The member will receive service credit and compensation only (employee contributions are not credited to the members account). Kansas statue requires that the member must not pay any part of the arrearage.

Quick Steps

1. Site Menu < Forms: Click 'Adjustments'
2. Click 'New'
3. Select Reason

4. ‘Payroll Adjustment information’ Panel: Enter information
5. Click ‘Save’
6. Adjustment Detail Panel: Click ‘New’
7. Enter information
8. Click ‘Save’
9. Click ‘Return’
10. Repeat 6-9, if needed
11. ‘Errors’ Panel: Review & resolve
12. Click ‘Submit’

Detailed Flow

1. Site Menu < Forms: Click ‘Adjustments’ : Navigate to the adjustments lookup screen by clicking the ‘Adjustments’ link under Forms from the Site Menu.

2. Click ‘New’ : Click the ‘New’ button located under the search criteria panel. The system displays the ‘Adjustments Maintenance’ screen.

3. Select Reason : In the ‘Reasons’ panel, choose a question that best describes the reason for the adjustment by clicking the radio button next to the question you can answer “yes” to.

4. ‘Payroll Adjustment information’ Panel : Enter information : In the ‘Payroll Adjustment Info’ panel, enter the following fields:
- SSN
- Payroll Year
- Employer Contribution
- Employer Insurance (if necessary)

5. Click ‘Save’: Click the ‘Save’ button to save all the work you’ve completed thus far.

6. Adjustment Detail Panel: Click ‘New’ : In the ‘Adjustment Details’ panel, click the ‘New’ button to create the adjusted payroll detail. The Adjustments Detail screen is displayed.

7. Enter information : On the Adjustments Detail screen, enter the following information:
- Department Number
- Contribution Type
- Begin Date (if member began employment during year you are correcting)
- End Date (if member ended employment ended during year you are correcting)
- Reason Code (if you entered an end date)
- Corrected Contributions

8. Click ‘Save’ : Click the ‘Save’ button to save all ‘Adjustments Detail’ information before navigating away from the screen.

9. Click ‘Return’ : Click the ‘Return’ link to return to the ‘Adjustment Maintenance’ screen.

10. Repeat 6-9 : Repeat steps 6-9 if you are adjusting multiple contribution types for the same payroll year and same member until all payroll details are completed.

11. ‘Errors’ Panel: Review & resolve : View the ‘Errors’ panel. If any errors exist they must be resolved before submitting the adjustment record.

12. Click ‘Submit’ : If no errors exist, the adjustment record is complete, and the record status is ‘Valid’, click the ‘Submit’ button. The system will show a confirmation message verifying that you want to submit the record. If you wish to submit the record, click ‘OK’. *Note: Once an adjustment record is submitted to KPERS the status becomes ‘Read-Only’. This means that you can not change the information*.

Adjustments Graphical Representation

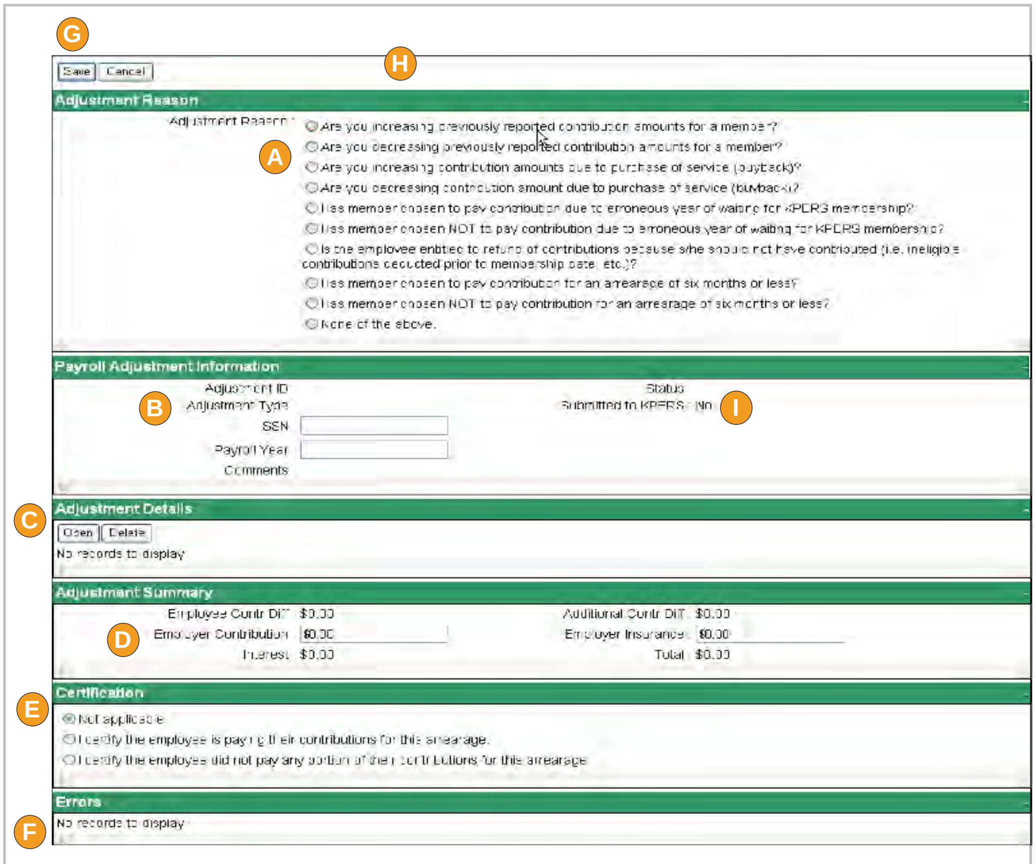

Figure 15: Adjustments

Figure 15 A - **Adjustment Reason:** Select an adjustment reason so the system can automatically determine the type of adjustment. Note: This is a required step. The system will not let you continue if you don't select a reason.

Figure 15 B - **Payroll Adjustment Information Panel:** Enter employee and year information. After you've selected a reason and completed entering this information, click the 'Save' button to continue.

Figure 15 C - **Adjustments Details' Panel:** Enter details about the adjustment. Click the 'New' button to navigate to the 'Adjustment Details Maintenance' screen. Note: If you do not see a 'New' button, click the 'Save' button located at the top of the screen. You cannot create a new adjustment detail unless you save the reason and payroll adjustment information.

Figure 15 D - **Adjustments Summary Panel:** Complete the data entry by entering employee and / or employer contributions.

Figure 15 E - **Certification Statement:** Select a certification statement that best describes your situation.

Figure 15 F - **Errors Panel:** Review and resolve any issues with the data you entered in the 'Errors' panel. If you resolve an error, you must click the 'Save' button to refresh the list of current errors.

Figure 15 G - **'Save' Button:** Click the 'Save' button multiple times throughout your entry to ensure all changes are saved before submitting the record to KPERS.

Figure 15 H - **'Submit' Button:** If no errors exist and the record status is 'Valid' the 'Submit' button will appear here. Click the 'Submit' button when your are ready to submit the record to KPERS. Once you submit a record, the record becomes read-only and you can no longer make changes. Note: The 'Submit' button only appears if the record is ready for submission.

Figure 15 I - **Record Status:** If the system determines the record is ready to submit, the status field will show as 'Valid'; otherwise the status field will show as 'Review'. If the status is in 'Review' some information is missing or incorrect. Please view the 'Errors' panel for assistance in correcting or completing the data. The record status can also be 'Rejected.' This means that a KPERS staff member has reviewed your adjustment and found an issue with it. If the field status is 'Rejected' comments will appear at the bottom of the 'Payroll Adjustment Information' panel. There is also a 'Submitted to KPERS' status that can either state 'Yes' or 'No'. If you have clicked the 'Submit' button, this status field is 'Yes'; otherwise it's 'No'. If the record was rejected by KPERS, the 'Submitted to KPERS' status becomes 'No' and the record because edit-able again.

Certifications (Verification of Most Recent Contributions) Form

If KPERS requires a last day on payroll and certified money amounts for a member due to retirement, a stub certification record will be created and pending for action from you. You will receive a message board action, or 'Verification of Most Recent Contributions' letter from KPERS requesting you to complete a certification.

What You'll Learn

-How to submit a Certification using the Employer Web Portal
-When and why KPERS will request you complete a Certification

Before You Start

The employee's account is only updated through December 31 of the previous year. When KPERS receives an application for retirement, we will send to the you a 'Verification of Most Recent Contributions' letter (V-Letter). On the V-Letter we request the member's current year's contributions and official end date. The KPERS office will send the V-Letter to you on the 10th of the month prior to the member's retirement date.

KPERS will have salary information for years prior to the retirement year. For employees with a KPERS membership date prior to July 1, 1993 or for employees in their year of service prior to membership in a KPERS covered position on July 1, 1993, report any additional pay (add-ons), the amount of any lump-sum payments for unused sick, annual leave and comp time which have been converted to salary and had KPERS contributions withheld. Membership dates on or after July 1, 1993 do not report amounts under additional pay.

Quick Steps

1. Receive notification request
2. Site Menu < Forms: Click 'Certifications'
3. Perform Search
4. Open record
5. 'Certification Details" Panel: Click 'New'
6. Enter Certification Detail Information
7. Click 'Save'
8. Click 'Return'
9. Repeat 5-8, as needed
10. 'Certification Add-Ons' Panel: Click 'New'
11. Enter Add-On Information
12. Click 'Save'
13. Click 'Return'
14. Repeat 10-13, as needed
15. 'Errors' Panel: Review & resolve
16. Click 'Submit'

Detailed Flow

1. Receive notification request : Via Message Board functionality, receive notification from KPERS requesting you to complete a certification for a specific member.

2. Site Menu < Forms: Click 'Certifications' : From the Site Menu, in the section labeled Forms, click on the 'Certifications' link.

3. Perform Search : The 'Certification Lookup' screen appears. Perform a search for the certification you would like to work by either searching by SSN (if you're only planning on submitting one certification) or by a status of Submitted 'No' (if you are planning on submitting multiple certifications). Searching by a status of Submitted ‘No’ will return all certifications that need to be completed.

4. Open record : The search results are displayed in the results grid. Choose the member for which you would like to complete a certification by clicking the appropriate link OR marking the check box and clicking the open button OR open all the members for which you would like to complete a certification for by clicking on the ‘Open All’ check box and clicking the open button. If you open multiple records, you can use the ‘Next’ and ‘Previous’ buttons to navigate through all the opened records.

5. ‘Certification Details” Panel: Click ‘New’ : The ‘Certification Maintenance’ screen is displayed and you are currently viewing the certification stub record (meaning a record with blank fields for you to complete). In the ‘Certification Details’ panel, click the new button.

6. Enter Certification Detail Information : The ‘Certification Detail Maintenance’ screen is displayed. Enter the year you are certifying, the contribution type and the department number. Also enter the employment begin date if it was in the year you are certifying and the employment end date if it was in the year you are certifying. If you enter an end date, you are also required to enter a reason code for why the member’s employment ended. Finally, enter the annual employee contributions.

7. Click ‘Save’ : Click the ‘Save’ button.

8. Click ‘Return’ : Click the ‘Return’ link to return to the ‘Certification Maintenance’ screen.

9. Repeat 5-8 : If you have multiple years OR contribution types to certify, repeat steps 5-8 until all are completed.

10. Click ‘New’ : If you have additional compensation (add-ons) to report, in the ‘Certification Add-On’ panel, click the ‘New’ button.

11. Enter Add-On Information : The ‘Certification Add-On Maintenance’ screen is displayed. Enter the year the additional compensation was paid, the add-on type and the amount. Note: You can report additional compensation for any year. It doesn’t just have to be the year that you are certifying.

12. Click ‘Save’ : Click the ‘Save’ button.

13. Click ‘Return’ : Click the ‘Return’ link to return to the ‘Certification Maintenance’ screen.

14. Repeat 10-13: If you have multiple years to report additional compensation for, repeat steps 10-13 until all years are reported.

Note: You can open and delete certification details and add-ons by selecting the appropriate check box and clicking the appropriate button (‘Open’ or ‘Delete’).

15. ‘Errors’ Panel: Review & Resolve : View the ‘Errors’ panel. If any errors exist they must be resolved before submitting the certification record.

16. Click ‘Submit’ : If no errors exist, the adjustment record is complete, and the record status is ‘Valid’, click the ‘Submit’ button. The system will show a confirmation message verifying that you want to submit the record. If you wish to submit the record, click ‘OK’.

Certifications Graphic Representation

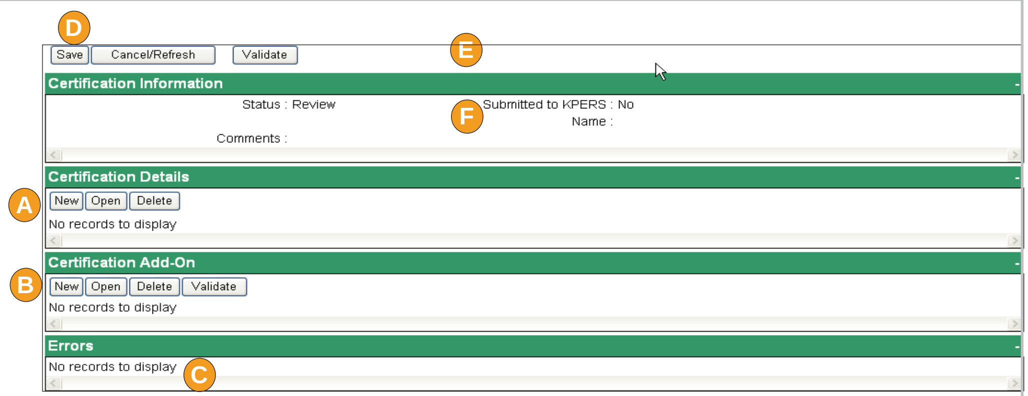

Figure 16: Certification Maintenance Screen (Stub Record)

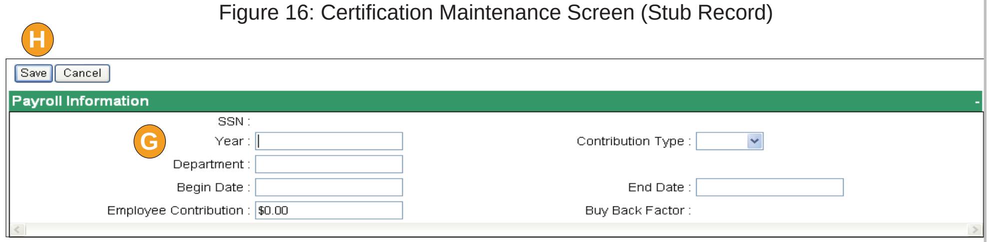

Figure 17: Certification Detail Maintenance Screen

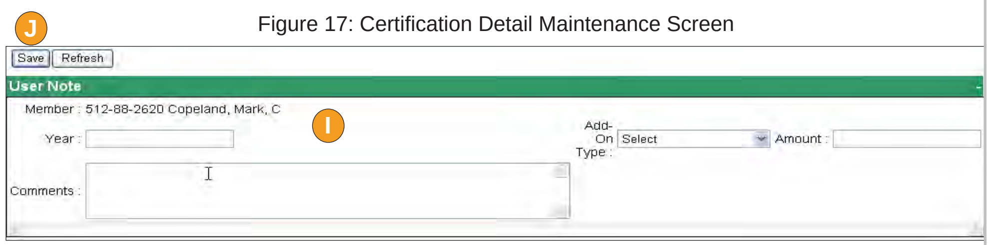

Figure 18: Certification Add-On Maintenance Screen

Figure 16 A - **Certification Details Panel:** Click the 'New' button in the 'Certification Details' panel to navigate to the Certification Detail Maintenance screen and enter certification detail information. You can also open or delete previously created records from this panel.

Figure 16 B - **Certification Add-On Panel:** Click the 'New' button in the 'Certification Add-On' panel to navigate to the Certification Add-On Maintenance screen and enter additional compensation information. You can also open or delete previously created records from this panel.

Figure 16 C - **Errors Panel:** Review and resolve any issues with the data you entered in the 'Errors' panel. If you resolve an error, you must click the 'Save' button to refresh the list of current errors.

Figure 16 D - **'Save' Button:** Click the 'Save' button multiple times throughout your entry to ensure all changes are saved before submitting the record to KPERS.

Figure 16 E - **'Submit' Button:** If no errors exist and the record status is 'Valid' the 'Submit' button will appear here. Click the 'Submit' button when you're ready to submit the record to KPERS. Once you submit a record, the record becomes read-only and you can no longer make changes. NOTE: The 'Submit' button only appears if the record is ready for submission.

Figure 16 F - **Record Status:** If the system determines the record is ready to submit, the status field will show as 'Valid'; otherwise the status field will show as 'Review'. If the status is in 'Review' some information is missing or incorrect. Please view the 'Errors' panel for assistance in correcting or completing the data. The record status can also be 'Rejected.' This means that a KPERS staff member has reviewed your adjustment and found an issue with it. If the field status is 'Rejected' comments will appear at the bottom of the 'Certification Information' panel. There is also a 'Submitted to KPERS' status that can either state 'Yes' or 'No'. If you have clicked the 'Submit' button, this status field is 'Yes'; otherwise it's 'No'. If the record was rejected by KPERS, the 'Submitted to KPERS' status becomes 'No' and the record because edit able again.

Figure 17 G - **Payroll Information Panel:** Once you've navigated to the Certification Detail Maintenance screen, enter all appropriate details in the 'Payroll Information' panel.

Figure 17 H - **'Save' Button:** If all detail information is entered, click the 'Save' button and then the 'Return' link to return to the Certification Maintenance screen.

Figure 18 I - **User Note Panel:** Once you've navigated to the Certification Add-On Maintenance screen, enter all appropriate details in the 'User Note' panel.

Figure 18 J - **'Save' Button:** If all add-on information is entered, click the 'Save' button and then the 'Return' link to return to the Certification Maintenance screen.

Enrollments (KPERS-1) Form

The Employer Web Portal offers the functionality to submit an enrollment anytime throughout the year (not just at annual reporting time). Submitting an enrollment record using the Employer Web Portal has the same result as filling out and mailing a KPERS-1. The purpose of enrollments is to notify KPERS of employees in KPERS covered positions that are new members, transfer members, members returning to payroll or members who have dual employment.

What You'll Learn

-How to submit an Enrollment (KPERS-1) using the employer web portal
-What kind of Enrollments you can submit using the employer web portal
-When and why to submit Enrollments using the employer web portal

Before You Start

The Employer Web Portal offers the functionality to submit an enrollment anytime throughout the year. Submitting an enrollment using the Employer Web Portal has the same result as completing a KPERS-1 and mailing the paper form to KPERS. There are many advantages to using the Employer Web Portal for enrollment submission over mailing a paper form, such as:

- Immediate notification and resolution of any errors
- Eliminates duplicate data entry, which reduces the risk for more errors
- Immediate results since you don't have to spend time waiting for the mail or someone to enter the information
- Ease and convenience offered by the Employer Web Portal

Quick Steps

1. Site Menu < Forms: Click 'Enrollments'
2. Click 'New'
3. Select type & enter information
4. Click 'Save'
5. 'Validation Info' Panel: Review & resolve
6. Click 'Submit'

Detailed Flow

1. Site Menu < Forms: Click 'Enrollments' : From the Site Menu, in the section labeled Forms, click on the 'Enrollments' link.

2. Click 'New' : The 'Enrollments Lookup' screen appears. Click the 'New' button located under the search criteria panel.

Note: The lookup screen was designed to facilitate searches – meaning that you can find previous submitted or saved adjustments here. To use the lookup, enter search criteria into some or all of the search fields and click the search button. To create a new adjustment, continue with the Detailed Flow.

3. Select type & enter information : The system displays the 'Enrollments Maintenance' screen. Select the Enrollment Type and complete all required information. The following information is required regardless of Enrollment or Member Type.

- Enrollment Type
- SSN
- Hire Date
- Membership Date
- Date of Birth
- Gender

4. Click 'Save' : Click the 'Save' button.

5. 'Errors' / 'Validation Info' Panel: Review & resolve : View the 'Errors' / 'Validation Info' panel. If any errors exist they must be resolved before submitting the enrollment record.

6. Click 'Submit' : If no errors exist, the enrollment record is complete, and the record status is 'Valid', click the 'Submit' button. The system will show a confirmation message verifying that you want to submit the record. If you wish to submit the record, click 'OK'.

Note: Once an enrollment record is submitted to KPERS the status becomes read-only. This means that you can not change the information.

Enrollments Graphical Representation

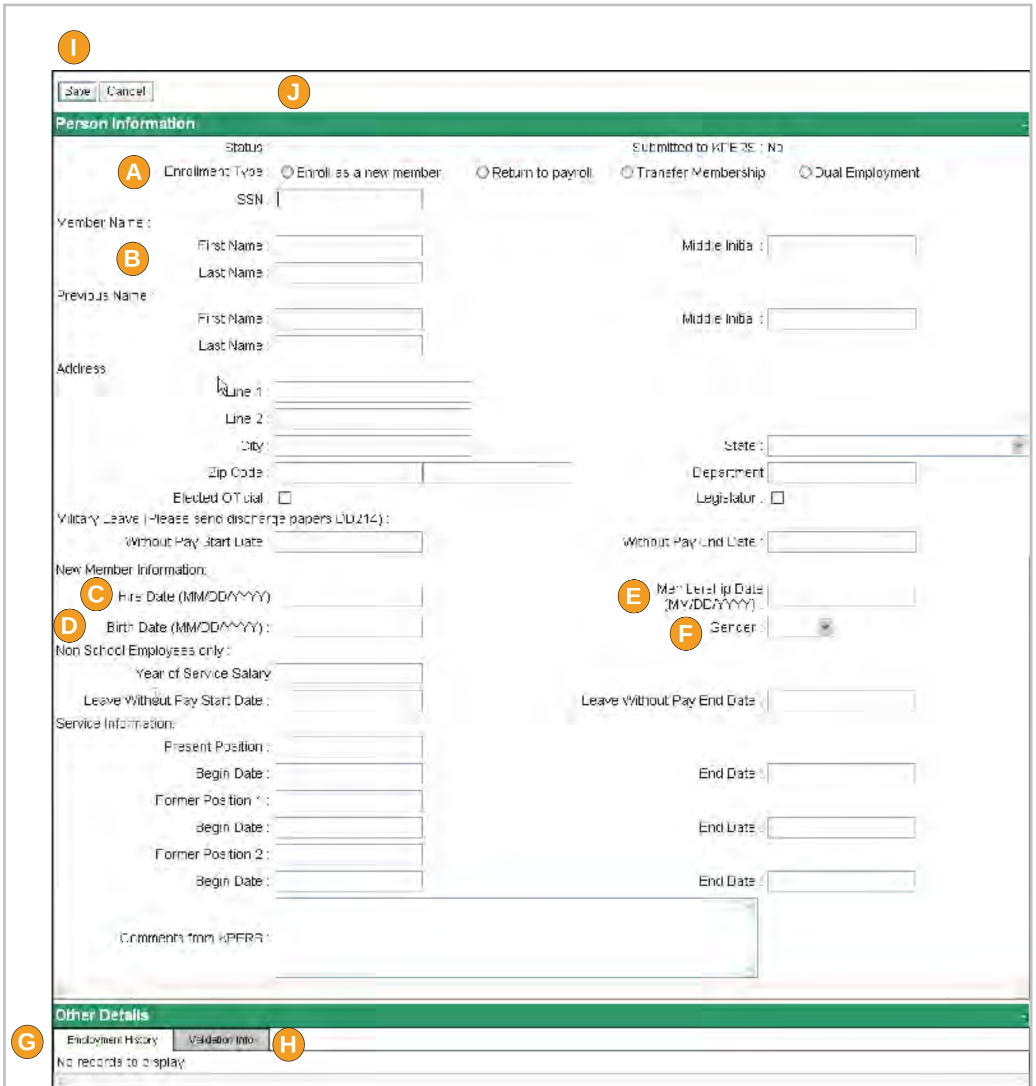

Figure 19 Enrollments

Figure 19 A - **Enrollment Type:** There are 4 different enrollment types to choose from. In most cases, you will select 'Enroll as New Member' or 'Transfer Membership". 'Enroll as New Member' is selected if the employee has never worked in a KPERS covered position previously OR worked in a KPERS covered position and withdrew their monies. 'Transfer Membership' means that the last position the employee worked was a KPERS covered position. 'Dual Employment' means that the employee is in 2 KPERS covered positions at the same time. 'Return to Payroll' means that the employee previously was in a KPERS covered position at your agency and is now returning to work in a KPERS covered position at your agency without having been in another KPERS covered position in between.

Figure 19 B - **Name:** Enter the employees first and last name.

Figure 19 C - **Hire Date:** Enter the date in which the employee was hired to work for your agency.

Figure 19 D - **DOB:** Date of Birth is a required field and you will not be able to save the form if it has not been entered. Please enter the date of birth in MM/DD/YYYY format.

Figure 19 E - **Membership Date:** The membership date for a new enrollment is typically 365 days after the member's hire date. If you are enrolling a new member and that membership date is greater than 365 days from the hire date, there are other fields you must complete. If you are completing a different type of enrollment, such as dual employment, transfer membership or return to payroll, then the membership date and the hire date should be the same date. Note: Only new enrollments have a year of waiting for membership.

Figure 19 F - **Gender:** Use the drop down box provided to select the gender of the member you are enrolling.

Figure 19 G - **Employment History Tab:** After entering all the required information and clicking the 'Save' button, the Employment History tab will populate with any employment history data KPERS currently for that SSN match.

Figure 19 H - **Validation Info Tab:** Review and resolve any issues with the data you entered in the 'Validation Info' tab. If you resolve an error, you must click the 'Save' button to refresh the list of current validations.

Figure 19 I - **'Save' Button:** Click the 'Save' button multiple times throughout your entry to ensure all changes are saved before submitting the record to KPERS.

Figure 19 J - **'Submit' Button:** If no errors exist and the record status is 'Valid' the 'Submit' button will appear here. Click the 'Submit' button when you're ready to submit the record to KPERS. Once you submit a record, the record becomes read-only and you can no longer make changes. Note: The 'Submit' button only appears if the record is ready for submission.

Frequent Questions

1. How do I change my contacts / people at my agency with access to the portal? Can I use the portal to add, view and delete contacts?

You cannot use the portal to add, modify or delete contacts because contact information directly affects portal security. If you wish to add, modify (including changing an emaiil address) or delete a contact to/from your agency complete and mail a KPERS-2 to the KPERS office. To view your current contacts, navigate to the Organization Detail – Employer Profile and click on the ‘Contacts’ tab.

2. Can I / How do I use the portal to change my address information?

You cannot use the portal to add, modify or delete address information. If you wish to make changes to your physical address, send a change request to KPERS@KPERS.org.

3. Can I / How do I use the portal to change my bank information?

You cannot use the portal to add, modify or delete bank information. To make bank information changes, please complete and mail in an EF-105. To view your current address(es) information, navigate to the Organization Detail – Employer Profile and click on the ‘Bank Info’ tab.

4. When can I start working on / submit my annual report?

This year, you can start working on / submitting your annual report as of January 8, 2007.

5. Our agency has an employee who is not on the report, how do I add their record?

If you are reporting by “Single Payroll Detail Entry” navigate to Payroll Detail (Site Menu, Annual Reporting heading, Payroll Detail) screen and click the ‘New’ button. Enter all information and click the ‘Save’ button. From the errors panel, view the error that says K-1 required and click the link. The link will bring you to the enrollments screen. Enter all enrollment information and click the ‘Save’ button. If all errors are resolved, submit the enrollment request by clicking the ‘Submit’ button.

If you are reporting by a different method, navigate to the Payroll Detail and search for the payroll detail record. From the errors panel, view the error that says K-1 required and click the link. The link will bring you to the enrollments screen. Enter all enrollment information and click the ‘Save’ button. If all errors are resolved, submit the enrollment request by clicking the ‘Submit’ button.

6. Our agency affiliated for Optional Group Life Insurance and First Day Coverage. Should I include these amounts in the insurance field on the total page?

No, you do not include these amounts in the insurance field.

7. Our agency submitted KPERS-17 adjustments to correct contributions for a prior year (prior to 2006). Should these monies be reflected on the report?

No, you only report money for the current year. You are not required to include monies from previous years on the current report.

8. How do I / Can I login from home?

You can login from home just like you login from work. Navigate to the portal by going to the KPERS.org site and clicking on the Employer Web Portal link. Then enter your regular Email ID. The system will ask you a challenge question to verify your identity from the questions you answered when you enrolled. Then enter your regular password.

9. What are the time constraints for the portal being open?

TBD

10. How do I / Can I report for different plans in the same report?

You have to create a separate report for each member type (i.e. KPERS, KP&F, Judge, Working after Retirement). Each report should only include members of that type. If you are reporting for multiple member types, you must create multiple reports and login to the correct agency and plan ID to upload (i.e. The designated agent for agency 0080 has to login to 0080-1 (for KPERS) and 0080-3 (for KP&F) and upload the KPERS report on 0080-1 and upload the KP&F report on 0080-3. NOTE: The login information is the same; to switch between agencies, click the ‘Select Agency’ link.)

11. I don’t want to use the Employer Web Portal to submit my report. How can I do it by paper?

You aren’t required to submit your report using the Employer Web Portal. If you wish, you can navigate to the portal and print your own report to complete OR KPERS can print the report for you and mail it to you. This year, no reports were pre-printed and mailed out. Reports are only printed by request.

12. Our agency has a retired employee and the contribution amount on the report is incorrect. How do I report the correct amount to KPERS?

You will need to complete an adjustment either using the web portal by navigating to ‘Online Forms’ and then to ‘Adjustments’ and clicking the ‘New’ button OR print, complete and mail in a KPERS-17 from www. KPERS.org.

13. Our agency didn’t withhold to correct contributions for an employee’s service purchase. How do I report the correct amount?

You will need to complete an adjustment either using the web portal by navigating to ‘Online Forms’ and then to ‘Adjustments’ and clicking the ‘New’ button OR print, complete and mail in a KPERS-17 from www. KPERS.org.

14. Our agency paid the employee KPERS contributions on an arrearage. Would I include this amount in the contributions report?

No, you don’t include this amount on the report. You only report if money was deducted from an employee’s compensation.

15. Our agency has an employee who terminated and then withdrew their KPERS account and the contributions reported are incorrect. How do I correct the KPERS contributions?

You can't change amounts after a withdrawal. If you collected too much or not enough money from your employee, you need to work out the difference with the employee directly. A withdrawal is final.

16. How do I report an employee who went to a non-covered position during the year?

You'll need to enter an end date on the report and choose the reason code of "Termination". You will also need to notify KPERS via phone or mail that the employee went to a non-covered position.

17. How do I report contributions for an employee with multiple records on the contribution report?

Whether you're reporting on paper or through the employer web portal, you will need to address both payroll details. The most common reason for multiple payroll details is that your agency didn't terminate the employee in a prior year. Determine if money needs to be reported for both records. If not, give a prior year end date and only report money in one year.

18. What are the processes for entering my payroll data?

There are three methods for getting your annual reporting information into the Employer Web Portal.

Method Name & Description:	Advantages:	Navigation Steps
Single Payroll Detail Entry *Description: Login to the portal and individual enter payroll details for each employee.*	-Resolve errors on the spot OR save and resolve later -No time spent waiting to upload or download file -No other files to manage -Have someone else data enter and search for only records with errors to resolve	From the Site Menu, click "Payroll Detail" under the Annual Reporting heading. Perform a search and select employee(s) to enter for. Open records, enter information, and save. Resolve errors or move onto the next record. When all is entered, navigate to "Download / Total Page", enter information and click "Submit".

Method Name & Description:	Advantages:	Navigation Steps
Upload Pre-Created File using Personal File *Description: Create your own annual report file using the appropriate file format and upload to the portal.*	-Use your payroll system or other resources to create an annual report file that requires no data entry from you - Search for only records with errors to resolve	From the Site Menu, click “File Upload” under the Annual Reporting heading. Click the Browse button to find your file and then click the “Upload” button to upload the file to KPERS. Come back in 24 hours to resolve any errors and submit the report. When all errors are resolved, navigate to “Download / Total Page”, enter information and click “Submit”. Note: You can also check the status of your record by clicking the “File Status” link on the Site Menu and searching for the file.
Upload Pre-Created File using Downloaded Stub *Description: Download a stub record (looks like a blank paper report) and do all your data entry offline. Then upload the file to the portal.*	-Do all your data entry offline -No need to waste time navigating through records -Leave and return to your work as you please	From the Site Menu, click “Download / Total Page” under Annual Reporting heading. Click the “Download File (Comma Delimited)” button. Save the file to your local computer. Open the file and enter / save all information. From the Site Menu, click “File Upload” under the Annual Reporting heading. Click the Browse button to find your file and then click the “Upload” button to upload the file to KPERS. Come back in 24 hours to resolve any errors and submit the report. When all errors are resolved, navigate to “Download / Total Page”, enter information and click “Submit”. Note: You can also check the status of your record by clicking the “File Status” link on the Site Menu and searching for the file.

Appendix A: Button Reference

7

Almost every screen on the Employer Web Portal has a button. A button is provided to perform an action; for example, clicking the ‘Save’ button saves the data you’ve entered, whereas clicking the ‘Submit’ button submits the data you entered to KPERS. A button is designated by a gray rectangular box and labeled with an action verb. This section describes in detail the action associated with all the buttons you could possibly encounter using the portal. Some buttons are very common and can be found on most screens, whereas other buttons are uncommon and can only be found in one place in the portal. This section does not describe where a button can be found unless it’s a specialized scenario.

Button Labels & Action Descriptions

Save: Clicking the ‘Save’ button will save all new data entered allowing you to move to the next step or return to the record later. The information will NOT be sent to KPERS. Use this button while working to save information before navigating away from a screen as not to lose work you’ve completed.

Submit: Clicking the ‘Submit’ button will send the information to KPERS. After submitting information you are not allowed to change it or re-submit it unless the KPERS rejects it. You will know a record was submitted by looking at the record status and viewing the words “read-only” in the upper, right of the screen.

Open: Clicking the ‘Open’ button opens the selected record(s). Note: You must select at least one record to open by clicking the check box next to the record name or number.

Next: If you open multiple records at one time, clicking the ‘Next’ button will allow you to navigate forward between the opened records.

Previous: If you open multiple records at one time, clicking the ‘Previous’ button will allow you to navigate back to the previous record.

Verify: Clicking the ‘Verify’ button will check the record for errors and completeness. Suggestion: Always click the ‘Verify’ button submitting a record to ensure you are seeing the most current errors.

Refresh: Clicking the ‘Refresh’ button will eliminate data you entered but have not yet saved and refresh the entire screen. For example, you entered data into 3 fields and then realized you were entering information for the wrong employee. Click the ‘Refresh’ button instead of going to each field and deleting the information to refresh the record and begin again.

Search: Clicking the ‘Search’ button will initiate the system to search for a record based on criteria you’ve entered. ‘Search’ buttons are found only on lookup screens. By entering search criteria and clicking the ‘Search’ button the system will display found results in the search results grid at the bottom of the screen.

Reset: Clicking the ‘Reset’ button will reset an search criteria you’re entered to blank. ‘Reset’ buttons are found only on lookup screens. If you already performed one search and would like to perform another, clicking the ‘Reset’ button clears all search fields to allow you to start from a blank screen.

StoreSearch: Clicking the ‘StoreSearch’ button will store all the search criteria you’ve entered for use in later searches. ‘StoreSearch’ buttons are found only on lookup screens. If you often perform the same or similar search, you can enter search criteria and click the ‘StoreSearch’ button so that the same criteria is displayed every time you open the lookup screen. If you wish to eliminate a search you have previously stored, click the ‘Reset’ button and ‘StoreSearch’ button again and a blank search will be stored.

New: Clicking the ‘New’ button creates a new record or row.

Delete: Clicking the ‘Delete’ button deletes a record or row. Note: You must select at least one record to delete by clicking the check box next to the record name or number and then clicking the ‘Delete’ button.

Browse: Clicking the ‘Browse’ button allows you to locate and upload your annual report file. The ‘Browse’ button is only found on the ‘File Upload’ screen.

Upload File: Clicking the ‘Upload File’ button will upload the file you selected to KPERS. The ‘Upload File’ button is only found on the ‘File Upload’ screen.

Totals: Clicking the ‘Totals’ button will navigate you to the ‘Download / Total’ screen. The ‘Totals’ button is found on the ‘Payroll Detail Maintenance’ screen so that you can switch between the payroll detail for each employee and the annual report totals page.

New Detail: Clicking the ‘New Detail’ button will create a blank payroll detail and allow you to enter an enrollment for an employee you have not yet reported. The ‘New Detail’ button is found on the ‘Download / Total’ screen.

Download File: Clicking the ‘Download File’ button will prompt you to download and save an annual report file with all the information included that KPERS currently has on file for your agency and employees. The ‘Download File’ button is found on the ‘Download / Total’ screen.

Appendix B File Status Reference

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After uploading your annual report to the Employer Web Portal, you can check on the status of your report by navigating to the Site Menu under Annual Reporting and clicking the ‘File Status’ link. You are not required to check the status of your report as the Message Board will notify you when your file has completed processing and if there are any errors to resolve; however, if you wish to know where your file is in the process, please refer to the status definitions below.

Description of Statuses

Ignored
This status is given if the you accidentally upload the wrong file and contact KPERS to asks that the file is ignore so you can upload a different file. The file will only receive this status if you contact KPERS and explicitly ask that the file is ignored.

Processed
This Status is given if the file was uploaded and ran successfully. You may still have errors, warnings or informational messages in the payroll detail record for a particular employee, but file format and other information was read and uploaded.

Processed w/ Warnings
This Status is given if some / most of the file was successfully upload, but a few payroll details / rows may have been ignored. For example, if you put xxx in the contribution field the system may ignore that row or that field depending on the field, but upload the other payroll detail records. For payroll details that were ignored, you will have to navigate to the record (Site Menu < Annual Reporting: Click ‘Payroll Detail) and manually enter the ignored information.

Review
This status is given if the Employer Web Portal couldn’t read the file at all and nothing from the file is uploaded. You will have to fix the file or make a new file and re-upload to get any information in the system.

Uploaded
This status is given if you have uploaded a file and the Employer Web Portal hasn’t done anything with it yet. This is the first status it will be in after a file is uploaded. This means that you have done everything to this point correctly and the file is waiting for processing.

Note: There are a variety of staging statuses as well. These status are a description of what happens to the file between the beginning and ending of processing and will only last a few seconds to a few minutes. It’s unlikely you’ll run across such statuses.