

In this section you'll learn everything you need to complete and submit adjustments 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 statute 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

The screenshot shows a web-based form for entering adjustment information. It is divided into several sections:

- Adjustment Reason (A):** A list of radio button options for selecting a reason for the adjustment, such as "Are you increasing previously reported contribution amounts for a member?"
- Payroll Adjustment Information (B):** Fields for "Adjustment ID", "Adjustment Type", "SEN", "Payroll Year", and "Comments". A "Status" field shows "Submitted to KPERS: (N)".
- Adjustment Details (C):** A section with "Open" and "Delete" buttons and the text "No records to display".
- Adjustment Summary (D):** A table showing contribution amounts:

Employee Contr Dft	\$0.00	Additional Contr Dft	\$0.00
Employer Contribution	\$0.00	Employer Insurance	\$0.00
Interest	\$0.00	Total	\$0.00
- Certification (E):** Radio button options for certifying the employee's contribution status for an arrearage.
- Errors (F):** A section with the text "No records to display".

Callouts G and H point to the "Save" and "Submit" buttons at the top of the form, respectively.

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 you 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 becomes edit-able again.

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

The screenshot shows the 'Person Information' section of the KPERS enrollment form. It includes fields for status, enrollment type, member name, previous name, address, and various dates. Callouts A through J highlight specific elements: A (Enrollment Type), B (Member Name fields), C (Fire Date), D (Birth Date), E (Marital Status Date), F (Gender), G (Employment History/Validation Info tabs), and H (Validation Info tab). The form is titled 'Person Information' and has a 'Save' button at the top left. The status is 'Submitted to KPERS: No'. The enrollment type is 'Enroll as a new member'. The member name fields are empty. The address fields are also empty. The fire date is empty. The birth date is empty. The marital status date is empty. The gender is 'M'. The employment history and validation info tabs are visible at the bottom.

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.