Maintaining Member Records

PERA prohibits recording and distribution of this presentation.

Today's Program

- Enrolling employees
- Updating accounts
- Periodic reports

Welcome to PERA

PERA is a Pension

a retirement plan paid into while working that provides future monthly lifetime income

PERA

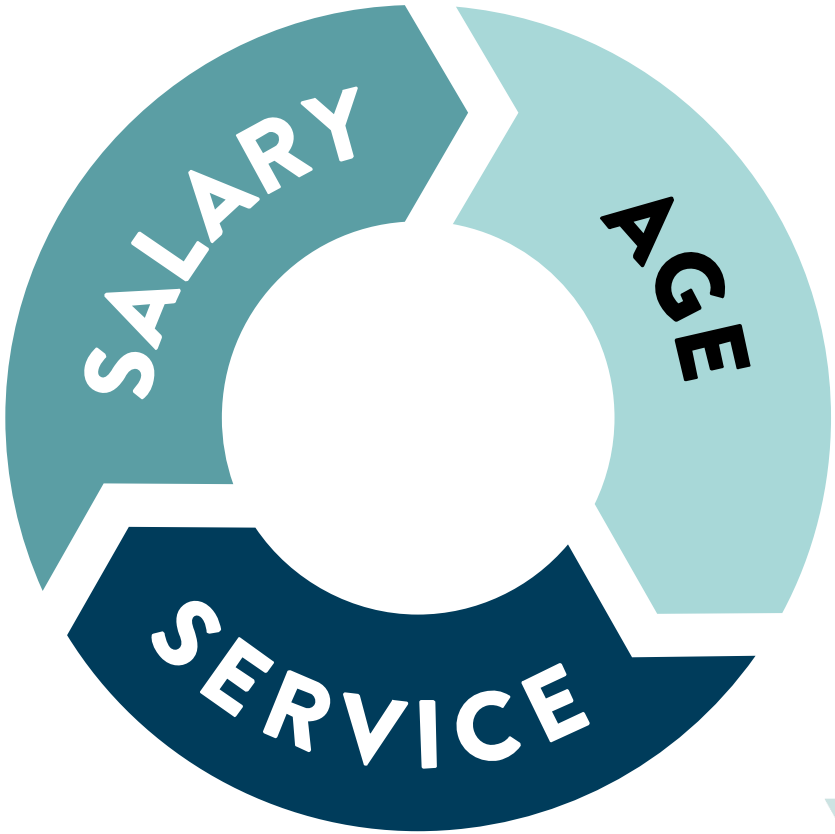
Paycheck Deductions

	Employee Contributions	Employer Contributions
Coordinated Plan	6.50%	7.50%
Police & Fire Plan	11.80%	17.70%
Correctional Plan	5.83%	8.75%

Pension Formula

Calculated on Three Factors

- Average Monthly Salary
- Years of Service
- Age



Enrolling Employees

Enrolling Members

Two ways to enroll members:

- Manual entry in ERIS
- Uploading a demographic record

New Enrollment

HOME
MEMBER ACCOUNT
SEARCH
Employee
Benefit Recipient
ENROLL MEMBER
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MAINTAIN EMPLOYER
Employer Contacts
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TRANSMIT TEST FILE
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New SDR
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SDR Summary Report
PENDING REPORTS
No Reports

ERIS Home Page

Broadcast Message

Electronic Funds Transfer for New Users

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No Reports

Enrollment Request

Please enter the following information to confirm your request.

Plan Name Coordinated ▼

- Coordinated
- Correctional
- DCP Elected Officials
- Exempt
- Police and Fire

SSN

ReEnter SSN

Submit

HOME

MEMBER ACCOUNT

SEARCH

Employee

Benefit Recipient

ENROLL MEMBER

New Enrollment

MAINTAIN EMPLOYER

Employer Contacts

TRANSMIT FILE

TRANSMIT TEST FILE

CHANGE PASSWORD

SDR REPORTING

New SDR

SDR History

SDR Summary Report

PENDING REPORTS

No Reports

New Enrollment Information

SSN: xxx-xx-4321

Plan: Coordinated

Personal

LastName	Bigelow
FirstName	Barb
M.I.	
Name Suffix	
Gender	
Birth Last Name	
Date of Birth	11/01/1981
Street 1	123 Main St
Street 2	
City	
State	
Zip	55002
Zip + 4	

PERA

Enrollment

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  - SDR Summary Report
- PENDING REPORTS
  - No Reports

Employment

Pay Cycle

Job Title

Position Classification

HireDate

Eligibility Date

PositionTitle

Exclusion Code

-- No Selection --
001-Full-time Student
002-Receiving PERA Disability
003-Receiving PERA Annuity
004-Foreign Citizen
005-Federal Service Exclusion
006-Degree or Residency Program
007-Student Internship
008-Patient and Inmate Personnel
009-Independent Contractors
010-Federal or State Grant Empl.
011-Supp. and Work-study Pos.
012-Trade Worker w/ Union Cov.
101-Temp < 6 Mos Employees
102-Emergency Employees
103-Part-time Teaching Service
104-Vol. Ambulance Personnel
105-Electn Officers (Judges)
106-Seasonal Positions
107-Elected Official excl. > 7/02

301-Earn Less Than $425 ▼

Submit Cancel

Additional Enrollment Paperwork

Part-time P&F Resolution

- Certifies part-time employee's eligibility for P&F Plan coverage
- Required for every new employee—even if there's a blanket resolution on file

Additional Enrollment Paperwork

DCP Election Forms

- Confirms an employee's decision to participate in DCP
- Submit completed election forms to PERA **as soon as possible**

Additional Enrollment Paperwork

Correctional Plan Certification

- Certifies an employee's eligibility for Correctional Plan coverage
- Can be completed via a paper form or through ERIS using an online form

Correctional Plan Certification

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Correctional Plan Certification

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Employee Search

Use the fields below to view a listing of current and/or former employees OF YOUR AGENCY UNDER THIS ID who have been reported to PERA

SSN

SSN - Last 4

Last Name: JOHNSON

First Name: JOEY

Middle Initial

Birth Name

Plan: All

Status: All

Additional Search

Search | Reset | Print

Results Page: 1 of 1 **Back | Next**

SSN	Name	Plan	Employment Status	Status Date
xxx-xx-6789	JOHNSON, JOEY	Correctional	New	12/02/2024

Correctional Plan Certification

Position Class: Full-Time

Exclusion Code:

Pay Schedules

Available: Bi-Weekly, Quarterly

Selected: Semi-Monthly

Select Enrollment History: -- No Selection --, 08/05/2024

View Enrollment History | View Status History

Submit | Cancel | Submit Certification

Correctional Plan Certification

Correctional Plan Certification

Public Employees Retirement Association, 60 Empire Dr, Ste. 200, St. Paul MN 55103

I place this electronic notice on file with PERA to certify that the below-named employee is eligible for Correctional Plan coverage as defined in MS §353E.02 on the date indicated.

Name of Employee	JOHNSON, JOEY
Social Security No.	Xxx-xx-6789
Eligibility or Hire Date	12/02/2024

I confirm that the employee holds a position in either a) a county correctional institution as a guard, officer, joint jailer/dispatcher or equivalent position; or as a supervisor of guards, officers, or joint jailers/dispatchers; or b) the Hennepin County Medical Center as a protection officer. I further state that the employee is expected to respond to any incidents within the correctional institution or medical center (as applicable) as part of the regular employment duties and is trained to do so.

Authorized Employer Rep.	SMITH, BETH
Employer Agency	EDEN CREEK COUNTY
Employer PERA ID	001100
Date	2/27/2025

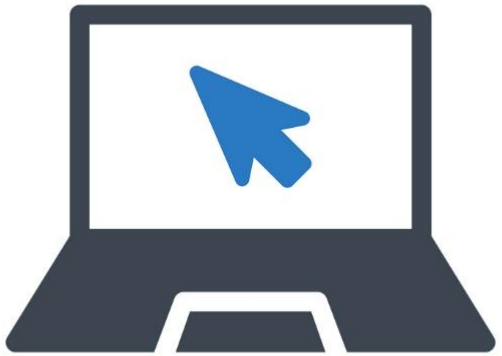
Print | Authorize Submission | Cancel

Updating Member Accounts

Updating Member Accounts

Data to Update

- Personal data
- Employment data
  - Position classification
  - Employment status



Updating Member Accounts

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Updating Member Accounts

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SSN

SSN - Last 4

Last Name: BIGELOW

First Name: BARB

Middle Initial

Birth Name

Plan: All

Status: All

Additional Search

Search | Reset | Print

Results Page: 1 of 1 **Back | Next**

SSN	Name	Plan	Employment Status	Status Date
xxx-xx-4321	BIGELOW, BARB	Coordinated	New	02/03/2024

Updating Personal Data

Member Account Information

Last Name	BIGELOW
First Name	BARB
MI	
Title	-- No Selection --
Birth Last Name	
Date Of Birth	11/01/1981
Gender	Female

Street 1	123 Main St
Street 2	
City	
State	MN
Zip	55002
Zip + 4	3284

Updating Position Class

Retirement Form

Plan	Coordinated
Enrollment Date	02/03/2024
Current Employment Status	New
Current Status Effective Date	02/03/2024
New Status	
New Status Date	mm/dd/yyyy
Position Title	Other
Hire Date	12/03/2023
Eligibility Date	02/03/2024
Position Class	Full-Time
Exclusion Code	

Full-Time
Intermittent/On-call
Other
Part-Time
Seasonal

Pay Schedules

Available: Quarterly

Selected: Bi-Weekly

> <

Updating Employment Status

Retirement Form

Plan	Coordinated
Enrollment Date	02/03/2024
Current Employment Status	New
Current Status Effective Date	02/03/2024
New Status	
New Status Date	
Position Title	
Hire Date	
Eligibility Date	
Position Class	
Exclusion Code	

- Authorized Leave
- Death
- Indefinite Layoff
- Layoff
- Maternity / Paternity Leave
- Medical Leave
- Military Leave
- Terminated
- Workers' Comp

Pay Schedules

Available		Selected
Quarterly	>	Bi-Weekly
	<	

Updating Employment Status

Retirement Form

Plan	Coordinated
Enrollment Date	02/03/2024
Current Employment Status	New
Current Status Effective Date	02/03/2024
New Status	Terminated
New Status Date	
Position Title	
Hire Date	
Eligibility Date	
Position Class	
Exclusion Code	

- Authorized Leave
- Death
- Indefinite Layoff
- Layoff
- Maternity / Paternity Leave
- Medical Leave
- Military Leave
- Terminated
- Workers' Comp

Pay Schedules

Available		Selected
Quarterly	>	Bi-Weekly
	<	

PERA

Periodic Reports

Status Verification Report

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Status Verification Report

Period Under Review 03/01/2023 – 03/31/2024
Report Create Date 12/26/2024
Report Due Date 02/09/2025
Report ID 16247

Name Search

Save – Do not Submit to PERA | Print
Save – Submit to PERA | Export to Excel

A. Active Members without Salary | B. Members on Layoff | C. Members on Leave of Absence

The members listed below are Active Members who have 8 or More Months without Salary or Contributions in one or more Defined Benefit Plans. The members listed below have a gap in earnings for the retirement plan noted that falls within the period under review. Provide updated employment status data that explains the reason for the gap. If the person is employed but did not work in the period under review, record an employment status of "No Change".

Name	SSN	PERA Plan	Last pay period with plan contributions	Contributions after gap	Employment Status	Effective Date	Updated
ANDREWS, ANA	1212	CORD	02/28/2023 - 03/15/2023				
HAMBERT, HAL	4884	CORD	04/18/2023 – 05/01/2023				
LIVELY, LOLA	2468	CORD	04/04/2023 - 04/17/2023	03/06/2023 - 03/26/2023			
MOORE, MIKE	5665	CORD	05/16/2023 - 06/05/2023				
NGUYEN, NICK	1111	CORR	09/16/2023 - 10/05/2023				
WALLS, WALLY	7272	CORD	05/16/2023 - 06/05/2023				

Employment Status options:
No Change
Authorized Leave
Death
Indefinite Layoff
Layoff
Maternity / Paternity Leave
Medical Leave
Military Leave
Terminated
Workers' Comp

Missing Enrollments Report

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Missing Enrollments

We need additional information to complete the enrollment of the employee(s) named below.

We are receiving payroll contributions from your agency on behalf of the employee(s); however, we are missing personal or employment data that are critical for PERA processing. The missing data includes all or some of the following elements: the person's date of birth, mailing address, date of hire or rehire, date of PERA eligibility, position class and exclusion information. Click on "Update Enrollment" and complete the fields and click on Submit to complete the enrollment.

We appreciate your prompt attention to this request and any future steps you can take to provide complete enrollment data before or with the first submission of a member's contribution.

Showing 1 to 2 of 2 results Show: 20 results per page

Results Page: 1 of 1 **Back | Next**

	Name of Employee	SSN	PERA ID	Plan	Coverage Date
Update Enrollment	TEFERI, TINA	0909	1234567	Coordinated	11/18/2024
Update Enrollment	YOUNG, YANCY	2228	1234321	Coordinated	11/18/2024

Results Page: 1 of 1 **Back | Next**

Missing Enrollments Report

Update Enrollment

Enter the missing enrollment information below and Submit. If this enrollment for 11/18/2024 Coverage Date is invalid, select “Invalid Enrollment”, enter an Explanation and Submit.

Member Name	TEFERI, TINA
SSN	xxx-xx-0909
Gender	
Date of Birth	mm/dd/yyyy
Street 1	
Street 2	
City	
State	-- No Selection --
Zip	
Zip + 4	

Missing Enrollments Report

Employment

Position -- No Selection --

Classification

HireDate mm/dd/yyyy

Eligibility Date mm/dd/yyyy

PositionTitle -- No Selection --

Exclusion Code -- No Selection --

☐ Invalid Enrollment – Contributions for 11/18/2024 Coverage Date Sent in Error

Explanation

Submit Cancel

Police and Fire Certification

PERA

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Police and Fire Certification

Police & Fire Certification Report

Reporting Year	2024
Request Date	02/05/2025
Report Due Date	03/06/2025

This report is requesting position information on current and former employees who paid into the Police and Fire (P&F) plan in 2024. This information helps us calculate the amount of employer contributions paid to the PERA P&F Plan for which your municipality may be entitled to receive Police State Aid next fall for police officers as defined in Minnesota Statutes 353.64.

Below you will find information about PERA members whose employment and pension plan eligibility we are seeking to clarify. For each employee listed, verify the data; if Position Title should be different, update to the correct title. If Position Classification should be different, update to the correct classification. If no changes are needed, select "No Changes - All PERA Data is Correct" and Submit.

Save – Do Not Submit to PERA | Save – Submit to PERA | Export to Excel

☑ No Changes - All PERA Data is Correct

Name Search | Search | Reset

SSN (Last 4)	Name of Employee	Position Title	Position Class
6527	NELSON, NICOLE	Fire Fighter	Full-Time

Position Title options: Fire Fighter, Police Officer, Other

Position Class options: Full-Time, Intermittent/On-call, Part-Time, Seasonal

Save – Do Not Submit to PERA | Sa…ERA

Verification of Termination

PERA

- HOME
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  - Benefit Recipient
- ENROLL MEMBER
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  - New SDR
  - SDR History
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  - No Reports

Employee Search

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SSN

SSN - Last 4

Last Name: BIGELOW

First Name: BARB

Middle Initial

Birth Name

Plan: All

Status: All

Additional Search

Search | Reset | Print

Results Page: 1 of 1 — Back | Next

SSN	Name	Plan	Employment Status	Status Date
xxx-xx-4321	BIGELOW, BARB	Coordinated	New	02/03/2024

Verification of Termination

Retirement Form

Plan	Coordinated
Enrollment Date	02/03/2024
Current Employment Status	New
Current Status Effective Date	02/03/2024
New Status	
New Status Date	mm/dd/yyyy
Position Title	Other
Hire Date	12/03/2023
Eligibility Date	02/03/2024
Position Class	
Exclusion Code	

Pay Schedules

Available		Selected
Quarterly	>	Bi-Weekly
	<	

Verification of Termination

Verification of Termination - Response

Employer ID: 001100 EDEN CREEK COUNTY

xxx-xx-4321 BIGELOW, BARB Coordinated Plan

Is there, or will there be, any verbal or written agreement for rehire (this includes independent contractor work) in effect prior to termination?

(●) No **Termination Date:** 02/22/2025

( ) Yes

Cancel Next

Contributions after Termination

Contributions after Termination Report

- Generates when PERA receives contributions *after* an employee's termination date
  - Incorrect termination date
  - Incorrect contribution coverage dates
  - Contract payouts for school employees

Member DOB and Address

PERA

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  - Benefit Recipient
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  - New Enrollment
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SSN

SSN - Last 4

Last Name

First Name

Middle Initial

Birth Name

Plan: All

Status: All

Additional Search: Missing DOB

- Benefit Recipient
- Missing DOB
- Missing Correspondence Address

Search | Reset | Print

Results Page: 1 of 1 — Back | Next

SSN	N		mployment Status	Status Date
xxx-xx-0101	MILLER, MARV	Coordinated	Pre-Enroll	12/03/2024

Recap

- Enrolling employees
- Updating member accounts
- Periodic reports

PERA is governed by Minnesota Statutes; especially chapters 11A, 353, 353A, 353D, 353E, 353F, 353G, 356 and 356A.

Changes to PERA's plans, including benefit provisions and contribution rates, are made through the introduction and passage of legislation by the Minnesota Legislature.

Disclaimer

Disclaimer:

Our programs are intended to provide general information; the rights and obligations of PERA members are governed by state and federal laws, rules, and regulations. The Minnesota Legislature or the federal government may change the statutes, rules, and regulations governing PERA at any time. If there is a discrepancy between the law governing PERA and the information contained in this presentation, the statutes and regulations will govern.

Wrap-up and questions

www.mnpera.org
employer.reps@mnpera.org
651.296.3636
1.888.892.7372