



# Understanding ERIS

PERA prohibits recording and distribution of this presentation.





# Today's Program

- Welcome to PERA
- What is ERIS?
- Creating Accounts
- Exploring the ERIS Menu
- Enroll & Update





# Welcome to PERA

## **PERA is a Pension**

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



## Eligibility

- 1) Minnesota public employees
- 2) Whose monthly pay from a single employer exceeds the salary threshold (\$425)
  - \$425.00 = **ineligible**
  - \$425.01 = **eligible**





Coordinated  
Plan

Employee  
Contributions

Employer  
Contributions

6.50%

7.50%



Police & Fire  
Plan

11.80%

17.70%



Correctional  
Plan

5.83%

8.75%



## Calculated on Three Factors

- Average Monthly Salary
- Years of Service
- Age





# What is ERIS?



## A secure, web-based platform where employers can:

- **Enroll** and **update** members' employment or personal data
- **Send salary** and **contribution data** for each pay period
- Complete **reports** to collect or validate member data



- Administrator
- Representative
- Contracted Payroll Provider



ERIS users are responsible for keeping their user names and passwords confidential

## ERIS System Administrator

- Two accounts allowed per agency
- Access to all features and reports
- Can create and set security level for ERIS Representative accounts



## ERIS Representative

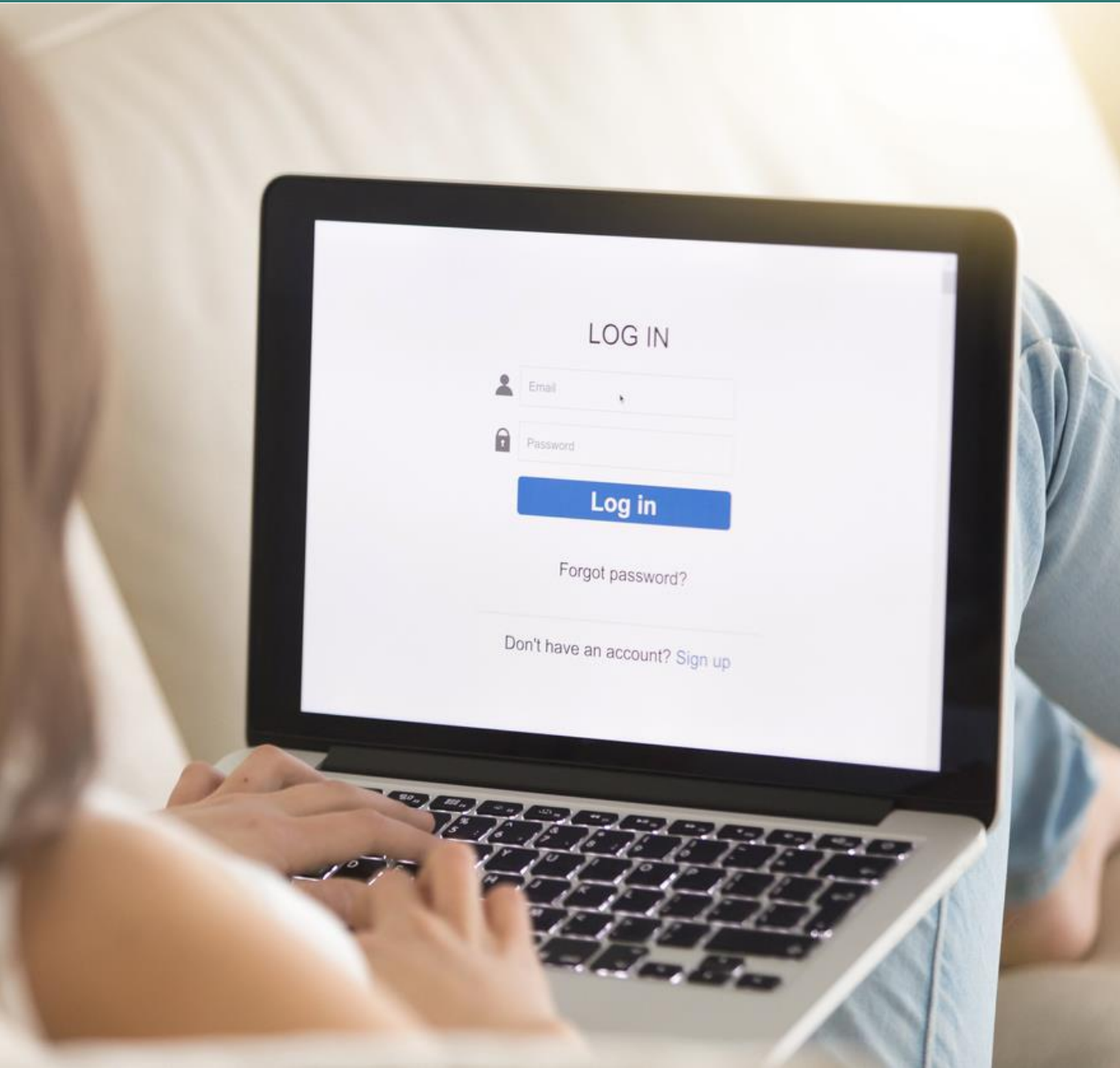
- Unlimited number of representative accounts per agency
- Account access based on security settings established by Administrator



## Contracted Payroll Provider

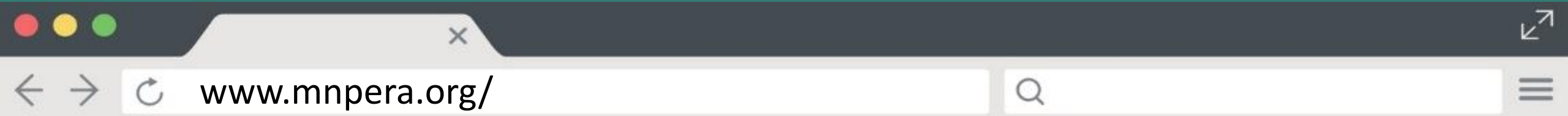
- One account per person—even if working for several entities
- Initial access is limited; will need to request access rights from the governmental unit to use all modules





# Creating Accounts



[MEMBERS](#)[BENEFIT RECIPIENTS](#)[EMPLOYERS](#)[RESOURCES](#)[FINANCIAL](#)[ABOUT](#)

## 2024 Benefit R Informat

[Learn more](#)[ERIS Login](#)[Online Services](#)[Reporting Basics](#)[Eligibility for Membership](#)[Contribution Reporting](#)[Contribution Rates](#)[When Employees Terminate](#)[Statewide Volunteer Firefighter  
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## Public Employees Retirement Association of MN

ERIS - Employer Reporting & Information System

The Employer Reporting and Information System provides local governmental agencies in Minnesota with a secure, effective way to fulfill the reporting requirements of the Public Employees Retirement Association. To access ERIS you must be an authorized user.

Enter your User ID and Password below, then click "Log In."

User Name

Password

[Trouble Logging In?](#)

[Log In](#)

[Forgot your password?](#)

If you are a new System Administrator and have not registered for online access, please click on "Request Access".

[Request Access](#)

If you are not a System Administrator, you need to request access from your authorized system administrator.



## Public Employees Retirement Association of MN

ERIS - Employer Reporting & Information System

### Register For ERIS Access - Pre-Qualifying Step

The Employer Reporting and Information System (ERIS) is available to payroll and personnel officers responsible for reporting employment and contribution information to the Public Employees Retirement Association of Minnesota. To use ERIS, an employer needs to register **one** employee as the **System Administrator** for the agency.

To request access on behalf of your employer, you must complete the on-line registration process. To begin, fill in the information requested below and click OK. If the system determines that access can be given, you will be presented with the on-line registration form for completion.

Employer Unit

First Name

Last Name

## Request Access to ERIS

---

### User Information

Employer PERA Unit Number 999999 - UNKNOWN EMPLOYER

Last Name DOE

First Name JOHN

M.I.

Job Title:

Are you employed by this employer or contracted for payroll support?

Employee

Contracted Payroll Support

Department / Contractor Company Name

---

### Contact Information

Your address will be automatically formatted. You only need to enter the following:

• In Address 1, please enter only your street number and street name



\*\*\*\*\*TEST En  
This Email w  
This Email w  
[Tester@teste](mailto:Tester@teste)  
\*\*\*\*\*

**Note:** This is

Thank you fo  
to our system

PERA's Emp  
employees e  
features inclu

You will soon  
authority in y  
email, a temp

If you have questions or received this email in error, please call PERA's Employer Response Line at 651-296-3636 or 1-888-892-7372 and select option 4.

Sincerely,

Employer Services  
Public Employees Retirement Association

been added

ctive public  
ns. Other

u and an  
will send, via

## Submit Successful

Submission was successful. Click OK to continue.



**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

## ERIS Home Page

Employer ID: 999999 OPE COUNTY

Welcome, "DOE5692". Your password will expire on "08/09/2024".

### Broadcast Message

#### Electronic Funds Transfer for New Users

To simplify the process for new EFT users, we have created User IDs and Passwords for employers not already registered. If you want to start making your PERA payment electronically, access our EFT site and use the following entry keys:

- As the 'Employer ID' input your agency's six-digit PERA ID (without the dash, such as 123400)
- As the EFT 'Password' input the five-digit zip code of your entity's mailing address

Once in the EFT system, you can change your password if you wish. If you have trouble logging in with these instructions, call PERA at 651-296-3636 or 1-888-892-7372 (option 2).

Your User ID and Password have been validated. As an authorized user you may use this system to maintain information on employees of your agency that are members of the Minnesota Public Employees Retirement Association (PERA). By using this tool, you are certifying that the information you transmit is accurate. Certain member information accessible through ERIS is private and shall not be disclosed to any person or agency other than as provided in the Data Privacy laws of this state. For a complete list of terms and conditions for ERIS use, click [here](#).

For the ERIS Glossary, click [here](#).

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No Reports

## Employer Contact Information

Employer ID: 999999 OPE COUNTY

To find a specific contact person, enter a full or partial name and select 'Search'; or select the person from the list below of all current contacts, active ERIS users, and former ERIS users. Alternatively, you can use 'Contact Role' (and ERIS Account Status if authorized) to find all persons having the role you select.

Last Name

**Search**

First Name

Reset

Contact Role

ERIS Account Status

Add New Contact



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No Reports

**Contact Information****Last Name** SMITH**First Name** MARY

M.I.

Name Suffix 

Job Title Accounting Officer

**Email Address** Mary.Smith@ope.mn.us

Department Payroll

**Roles**

## Available Roles

  
Accounting Manager  
Contracted Payroll  
Data Processing/IS  
EFT Payments  
Fire Chief  
Fire Disability Contact

## Selected Roles

  
Payroll Contact**Phone** (651) 999-9999Extension Fax **Street 1** 60 Empire Dr

Street 2 Suite 200

City MINNEAPOLIS

State MN

**Zip** 55103

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No Reports

**ERIS Access Information**

ERIS Account Role Representative

ERIS User Name SMITH01

**ERIS Account Status** Active ▼

**Mother's Maiden Name** COOKING

Password Expiration Date 08/09/2024

Security Rights

Screen Name	Security Level
Enroll Member	No Rights ▼
Maintain Contact	Read Only ▼
Transmit File	Modify Rights ▼
Member Account	Modify Rights ▼
Member Employment	Modify Rights ▼
SDR History	Modify Rights ▼
New SDR	Modify Rights ▼
Exclusion Report	No Rights ▼
Contracted Service Contacts	Read Only ▼
Payroll Calendar Search	Read Only ▼
Update Enrollment	Modify Rights ▼
Pending Reports	Modify Rights ▼

Submit

Cancel

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No Reports

## Submit Successful

Web Access activated. Inform MARY SMITH of their User Name (SMIT1111)  
PERA will notify new account holder by email of their password. Click OK to continue.

OK



# Exploring ERIS



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## Change Your Password

Please enter your old (current) password, **once**, and your new password, **twice**.

Your new password must be 8 to 30 characters long and include at least 1 Upper Case Alpha and 1 Number (i.e. "Passw9rd").

Passwords will be case sensitive ("Passw0rd" is different from "PASSW0RD")

Passwords will expire in six months and you will have to create a new one here.

For your security, we prevent you from reusing passwords.

Old Password

New Password

Confirm Password

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## Member Account

Employer ID: 999999 OPE COUNTY

Enter a single SSN to go directly to the member's information.

Submit



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## Individual Benefit Recipient Search

Employer ID: 999999 OPE COUNTY

Enter a SSN to search the entire PERA system to determine if the specified individual is receiving a monthly disability or retirement benefit.

SSN

Search

Reset

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## Employer Contact Information

Employer ID: 999999 OPE COUNTY

To find a specific contact person, enter a full or partial name and select 'Search'; or select the person from the list below of all current contacts, active ERIS users, and former ERIS users. Alternatively, you can use 'Contact Role' (and ERIS Account Status if authorized) to find all persons having the role you select.

Last Name

Search

First Name

Reset

Contact Role

All ▼  
All

ERIS Account Status

▼  
Active Representatives  
Inactive Representatives  
All Representatives  
LIT Payments  
Fire Chief  
Accounting Manager  
Police Disability Contact  
Fire Disability Contact  
SVF Representative

Add New Contact

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## Employer Contact Information

Employer ID: 999999 OPE COUNTY

To find a specific contact person, enter a full or partial name and select 'Search'; or select the person from the list below of all current contacts, active ERIS users, and former ERIS users. Alternatively, you can use 'Contact Role' (and ERIS Account Status if authorized) to find all persons having the role you select.

Last Name

Search

First Name

Reset

Contact Role

ERIS Account Status

Showing 1 to 1 of 1 results

Show:  results per page

Results Page: 1 of 1

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Last Name	First Name	MI	ERIS Account Role	ERIS Account Status
SMITH	MARY	G	Representative	Active

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## Contact Information

Last Name	SMITH
First Name	MARY
M.I.	
Name Suffix	
Job Title	Accounting Officer
Email Address	Mary.Smith@ope.mn.us
Department	Payroll

## Roles

### Available Roles

Accounting Manager  
Contracted Payroll  
Data Processing/IS  
EFT Payments  
Fire Chief  
Fire Disability Contact



### Selected Roles

Payroll Contact

Phone	(651) 999-9999	Extension	
Fax			
Street 1	60 Empire Dr		
Street 2	Suite 200		
City	MINNEAPOLIS		
State	MN		
Zip	55103		

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**ERIS Access Information**

ERIS Account Role Representative

ERIS User Name SMIT1111

**ERIS Account Status** Active ▾

**Mother's Maiden Name** COOKING

Password Expiration Date 08/09/2024

Security Rights

Screen Name	Security Level
Enroll Member	Modify Rights ▾
Maintain Contact	No Rights
Transmit File	Modify Rights ▾
Member Account	Modify Rights ▾
Member Employment	Modify Rights ▾
SDR History	Modify Rights ▾
New SDR	Modify Rights ▾
Exclusion Report	No Rights ▾
Contracted Service Contacts	Read Only ▾
Payroll Calendar Search	Read Only ▾
Update Enrollment	Modify Rights ▾
Pending Reports	Modify Rights ▾

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## Transmit File

Employer ID: 999999 OPE COUNTY

Select the file you wish to submit to PERA or [Transmit Test File](#) or [Annual Leave Transmit](#)

Type of File :  SDR or Demographic File - File must contain suffix .sdr in approved File Format  
 Exclusion Reporting File - File must meet Format Requirements  
 Secure Document Upload - Use to submit private data. Not for transmitting reports.

Choose File No file chosen

Submit

Note to Mac Users: Please use Safari or Firefox web browsers when sending files on this page. You will need to log out and log in with the recommended browsers.

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## Transmit Test File

Employer ID: 999999 OPE COUNTY

Select the Test file you wish to submit to PERA. This file will not be processed in PERA's production environment. Its contents will be evaluated against the format standards and you will be informed of the results.

Type of File :  SDR or Demographic File - File must contain suffix .sdr in approved File Format

Exclusion Reporting File - File must meet Format Requirements

Secure Document Upload - Use to submit private data. Not for transmitting reports.

No file chosen

Note to Mac Users: Please use Safari or Firefox web browsers when sending files on this page. You will need to log out and log in with the recommended browsers.

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## New SDR


Employer ID: 999999 OPE COUNTY


Use the Fields below to create your Salary Deduction Report

Pay Schedule

Payroll Calendar  Regular  
 Supplement

Plan

Paid Date  

Begin Date  

End Date  

Pay Type

Sort Option

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## SDR History Search

Employer ID: 999999 OPE COUNTY


Use the fields below to view a listing of Salary Deduction Reports of your agency that have been saved and/or submitted to PERA.


SDR Status

Search

Pay Schedule

Reset

Paid From Date  

Paid To Date  

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## SDR Contribution Summary Report


Employer ID: 999999 OPE COUNTY

Use the fields below to view and print a listing of the Salary Deduction Report (SDR) Contributions by plans that have been received by PERA.

Select SDR Paid Date or SDR Received Date range to generate the appropriate SDR Summary information.

The From & To Date range must not exceed 24 months.


Paid From Date


Paid To Date

Received From Date

Received To Date

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**ANNUAL LEAVE REPORT**

Enter Report Data  
Transmit Data File

## Missing Enrollments

Employer ID: 999999 OPE COUNTY

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:  results per page

Results Page: 1 of 1

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	Name of Employee	SSN (Last 4)	PERA ID	Plan	Coverage Date
<a href="#">Update Enrollment</a>	CLARK, BOB	XXX-XX-1134	1122441	Coordinated	01/14/2024
<a href="#">Update Enrollment</a>	SMALLS, LINDA	XXX-XX-1289	1002097	Coordinated	01/14/2024

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## Annual Leave Transmit

Employer ID: 999999 OPE COUNTY

Select the file you wish to upload. Once uploaded, this report will be processed by PERA.

No file chosen

Note to Mac Users: Please use Safari or Firefox web browsers when sending files on this page. You will need to log out and log in with the rec



# Enroll and Update



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## ERIS Home Page

Employer ID: 999999 OPE COUNTY

Welcome, "DOE5692". Your password will expire on "08/09/2024".

### Broadcast Message

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- As the 'Employer ID' input your agency's six-digit PERA ID (without the dash, such as 123400)
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Once in the EFT system, you can change your password if you wish. If you have trouble logging in with these instructions, call PERA at 651-296-3636 or 1-888-892-7372 (option 2).

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## Enrollment Request

Employer ID: 999999 OPE COUNTY

Please enter the following information to confirm your request.

Plan Name

SSN

Coordinated  
Coordinated  
Correctional  
DCP Elected Officials  
Exempt

ReEnter SSN

Police and Fire

Submit



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## Individual Benefit Recipient Search

Employer ID: 999999 OPE COUNTY

Enter a SSN to search the entire PERA system to determine if the specified individual is receiving a monthly disability or retirement benefit.

SSN

Search

Reset

Not a PERA Benefit Recipient. Enroll in PERA if eligibility requirements are met.

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No Reports

## Enrollment Request

Employer ID: 999999 OPE COUNTY

Please enter the following information to confirm your request.

Plan Name	<input type="text" value="Coordinated"/>
SSN	<input type="text" value=""/>
ReEnter SSN	<input type="text" value=""/>

Coordinated

Coordinated

Correctional

DCP Elected Officials

Exempt

Police and Fire

Submit



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## New Enrollment Information

Employer ID: 999999 OPE COUNTY

SSN: xxx-xx-6789

Plan: Coordinated

### Personal

LastName

FirstName

M.I.

Name Suffix

Gender

Birth Last Name

Date of Birth

Street 1

Street 2

City

State

Zip

Zip + 4

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## Employment

Pay Cycle

Semi-Monthly  
Bi-Weekly  
Quarterly

Job Title

PROJECT MANAGER

Position Classification

Full-time

HireDate

03/03/2024



Eligibility Date

03/03/2024



PositionTitle

Other

Exclusion Code

-- No Selection --

Submit

Cancel

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## Employment

Pay Cycle

Semi-Monthly  
Bi-Weekly  
Quarterly

Job Title

CASHIER

Position Classification

Part-time

HireDate

02/21/2024



Eligibility Date

04/15/2024



PositionTitle

101-Temp < 6 Mos

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.

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## ERIS Home Page

Employer ID: 999999 OPE COUNTY

Welcome, "DOE5692". Your password will expire on "08/09/2024".

### Broadcast Message

#### Electronic Funds Transfer for New Users

To simplify the process for new EFT users, we have created User IDs and Passwords for employers not already registered. If you want to start making your PERA payment electronically, access our EFT site and use the following entry keys:

- As the 'Employer ID' input your agency's six-digit PERA ID (without the dash, such as 123400)
- As the EFT 'Password' input the five-digit zip code of your entity's mailing address

Once in the EFT system, you can change your password if you wish. If you have trouble logging in with these instructions, call PERA at 651-296-3636 or 1-888-892-7372 (option 2).

Your User ID and Password have been validated. As an authorized user you may use this system to maintain information on employees of your agency that are members of the Minnesota Public Employees Retirement Association (PERA). By using this tool, you are certifying that the information you transmit is accurate. Certain member information accessible through ERIS is private and shall not be disclosed to any person or agency other than as provided in the Data Privacy laws of this state. For a complete list of terms and conditions for ERIS use, click [here](#).

For the ERIS Glossary, click [here](#).

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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 First Name Middle Initial Birth Name Plan Status Additional Search 

Showing 1 to 1 of 1 results

Show:  results per page

SSN	Name	Plan	Employment Status	Status Date
xxx-xx-6789	JONES, BOB	Coordinated	New	03/03/2024


Results Page: 1 of 1

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## Member Account Information

SID 123456    Employer ID: 999999    OPE COUNTY

Last Name	<input type="text" value="JONES"/>
First Name	<input type="text" value="BOB"/>
MI	<input type="text"/>
Title	<input type="text" value="-- No Selection --"/>
Birth Last Name	<input type="text"/>
Date Of Birth	<input type="text" value="03/14/1960"/> 
Gender	<input type="text" value="-- No Selection --"/>

Street 1	<input type="text" value="123 Robert Rd"/>
Street 2	<input type="text"/>
City	SAINT PAUL
State	MN
Zip	<input type="text" value="55103"/>
Zip + 4	<input type="text"/>

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**Employment**

Plan

Coordinated

Enrollment Date

03/03/2024

Current Employment Status

New

Current Status Effective Date

03/03/2024

**New Status**

New Status Date

Position Title

Hire Date

Eligibility Date

Position Class

Exclusion Code

**Pay Schedules**

Available


Selected

  
  
  
  
  
  
  
  
  
**Submit**

Cancel

- ERIS is a secure, online system for maintaining data on employees and completing PERA reporting duties
- Three types of ERIS users:
  - Administrators
  - Representatives
  - Contracted payroll providers
- Do not share usernames and passwords. **You are responsible** for any actions made under your account





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:

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

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[employer.reps@mnpera.org](mailto:employer.reps@mnpera.org)

651.296.3636

1.888.892.7372

