# Enrollments

Once you, as the employer, have determined that an employee is eligible for membership in a pension plan administered by PERA, you must submit the following enrollment information to PERA before or at the very least with the first contribution payment:

- Employee SSN
- Employee Name (Last, First, Middle Initial and Suffix where applicable)
- Date of Birth
- Street Address
- Pay cycle for the position
- Job title of the position
- Appointment Classification (Full-time, part-time, etc.)
- Date of Hire (The date the employee began working in this position, which can be different from the original employment date the person has with your entity.)
- Eligibility Date for this position and plan
- Position Classification (such as police officer, administrator, etc.)
- Exclusion Code (required if the Eligibility date is after Hire date by 30 days or more)

Effective September, 2009, all employers who provide a computer with Internet access and a valid email address to the staff responsible for PERA reporting are required to report electronically, including enrollment data. Electronic reporting is done through PERA's Employer Reporting and Information System (ERIS) by either submitting demographic data files, or by using the Enroll Members module. Instructions for electronic reporting appear later in this document.

Employers not required to submit electronic data can submit enrollment information on paper forms. Instructions for paper reporting are on the second page of this fact sheet.

Additionally, there are certain positions, including, but not limited to, elected officials, for whom we must receive a signature of consent to participate in a PERA plan. In these instances, you must submit the appropriate paper enrollment form even if registering the employee electronically.

Likewise, in some circumstances, additional information is required in support of the enrollment data. For example, employers enrolling someone in the Correctional Plan must certify the eligibility through use of a Correctional Plan Certification. This can be done either with a paper form or electronically. Similarly, employers must pass a resolution to allow police officers

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who work less than full-time to be enrolled in the Police and Fire Plan. Sample resolutions are available from PERA's Web site, mnpera.org or by calling PERA.

### Employer Reporting and Information System (ERIS)
ERIS provides a convenient way to submit an employee's enrollment data to PERA over a secured Internet connection accessible from PERA's Web site, mnpera.org.

Registered users use one of two input methods:

1. Data entry
2. Upload data files (Demographic Data Files)

In the data entry method, employers input data directly to PERA's database using screens that emulate the enrollment form.

Employers who use a software provider to generate files (aka Demographic Data Files) or developed its own system for creating files use the 'Transmit File' function within ERIS to input data. Prior to sending an initial demographic file, PERA staff must receive and validate a test file to ensure that the formatted data will correctly transfer into PERA's system.

Using ERIS to enroll new members does not require any computer programming or data downloads by employers. An employer simply needs to complete the registration process.

When entering data through ERIS, the information is input directly into PERA's member database in real time. No cross-posting is necessary so as soon as the data is entered, it is available to view.

### Paper Enrollment Forms
If you do not have a computer at work with Internet access and email, you may enroll individuals by submitting the appropriate paper form.

PERA has different paper enrollment forms to use based on the type of position. In most situations, you will complete the Notice of Member Enrollment form as it is used for basically all non-elected employees eligible for the Defined Benefit Plan (Coordinated Plan, Police and Fire Plan, Correctional Plan, or the Basic Plan). However, we also have specific forms designated for enrolling elected officials, physicians, volunteer ambulance service personnel and city managers. Each of these employment types has special membership options and the separate enrollment forms reflect those choices.

Additionally, in some instances, PERA must have a signature on file indicating the person's desire to participate in a PERA plan or the law requires additional certifications from the employer. Thus, for certain positions you must submit an additional paper or electronic form in order to complete the full enrollment process for these special situations. The chart below identifies the various enrollment forms and when to use them:

| Form | Paper Reporting Rules | Electronic Reporting Rules |
|---|---|---|
| Notice of Member Enrollment | Use this form to enroll an eligible employee in the Defined Benefit Plan (Coordinated, Police and Fire, Correctional, or Basic). Do not use to enroll a physician, an elected official, or a city manager, or for any DCP enrollment. | If enrolling the employee electronically using ERIS, it is not necessary to submit this form. |
| Membership Election by Public Officials | Use this form to enroll an elected official in a PERA plan, except a County Sheriff who qualifies for the Police and Fire Plan coverage. This form replaces the Notice of Member Enrollment form. | Because a signature from the elected official is required for PERA enrollment, this form must be submitted to PERA even if enrollment data is sent electronically. |

| Form | Paper Reporting Rules | Electronic Reporting Rules |
|---|---|---|
| Membership Election by a Governmental Physician | Use this form to enroll a governmental physician in a PERA plan. This form replaces the Notice of Member Enrollment form. | Because a signature from the physician is required for DCP membership, this form must be submitted to PERA even if enrollment data is sent electronically. |
| Defined Contribution Plan Membership Certification for Certain Ambulance, Rescue or Volunteer Fire Fighter Positions | Use this form to enroll volunteer ambulance service or eligible rescue squad personnel into the DCP. This form replaces the Notice of Member Enrollment form. | Because a signature from ambulance service personnel is required, this form must be submitted to PERA even if enrollment data is sent electronically. |
| Membership Election by a City Manager | Use this form to enroll a city manager or city administrator in a PERA plan. This form replaces the Notice of Member Enrollment form. | Because a signature from the city manager is required for DCP membership, this form must be submitted to PERA even if enrollment data is sent electronically. |