

Employer Self-Service First Steps Quick Reference Guide

Department of Treasury

Tennessee Consolidated Retirement System

Concord Project



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For additional information, including the full ESS User Guide and ESS demonstration videos, please visit <http://tcrs.tn.gov> and click on the tab labeled “Concord”.

1. Your initial login to ESS

When logging into ESS for the first time, you will be prompted to enter the system-generated user ID and your temporary password and PIN. You will have up to 72 hours from receiving the email with your login credentials to log into ESS. After 72 hours, the temporary password and PIN become invalid and you will need to contact TCRS to reset your password and PIN.

Step 1: From the Self-Service screen, click the **Employers log in here** link.

Tennessee Consolidated
TCRS
Retirement System

[Login to your account](#)

Login

Log In To Your Account

User ID

Password

Next

[Need to register?](#)

[Forgot User ID or Password?](#)

Note: The information contained in this site is available via a secure connection.

Employers log in here

[Medical Advisors log in here](#)

Use **Self Service** to:

- View your payment details
- Change your address
- Request an income verification letter
- Check the status of correspondence

Step 2: On the Employer Self-Service Login screen, enter the **User ID** contained in one of the three emails you received.

[Login to your account](#)

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Login

Log In To Your Account

User ID

Password

[Next](#)

Need to register? Please contact your administrator or a retirement system representative.

[Forgot User ID](#) | [Forgot Password](#)

Note: The information contained in this site is available via a secure connection.

[Members log in here](#)
[Medical Advisors log in here](#)

Use Employer Services to:

- Submit your monthly report
- Change your payment accounts
- Give employees online access
- Estimate sick leave cost
- Download new member information
- Pay outstanding invoices

Step 3: Enter the temporary **password** contained in one of the three emails you received.

Tip: Copy and paste the temporary password from the email by either right-clicking and selecting copy, then paste, or use keyboard shortcuts <CTRL>+<C> to copy followed by <CTRL>+<V> to paste.

[Login to your account](#)

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Login

Log In To Your Account

User ID
sarafranklin

Password

Next

Need to register? Please contact your administrator or a retirement system representative.
[Forgot User ID](#) | [Forgot Password](#)

Note: The information contained in this site is available via a secure connection.

[Members log in here](#)
[Medical Advisors log in here](#)

Use Employer Services to:

- Submit your monthly report
- Change your payment accounts
- Give employees online access
- Estimate sick leave cost
- Download new member information
- Pay outstanding invoices

Step 4: Click [Next](#).

[Login to your account](#)

TCRS
Retirement System

Login

Log In To Your Account

User ID
sarafranklin

Password
.....

[Next](#)

Need to register? Please contact your administrator or a retirement system representative.

[Forgot User ID](#) | [Forgot Password](#)

Note: The information contained in this site is available via a secure connection.

[Members log in here](#)
[Medical Advisors log in here](#)

Use Employer Services to:

- Submit your monthly report
- Change your payment accounts
- Give employees online access
- Estimate sick leave cost
- Download new member information
- Pay outstanding invoices

Step 5: You will be prompted to change the initial password. Enter the current, temporary password from the email in the **Current Password** field.



Employer Self Service [Log Out](#)
Sara Franklin
White Bluff Town Of
[Change Your User ID And/Or Password](#)
Last Login: Thu, Jul 18 2013 1:02 PM [UserGuide](#)

-- Available Forms -- [Open](#)

Change Password

Step
1
of 3

Valid passwords are 8 to 16 characters long, are case sensitive, and should not contain spaces. Please use at least one uppercase letter, one number and one special character. The following characters are permissible: Aa-Zz, 0-9, (@, #, !, %, and \$).

Note: Maintaining the security of your login information is your responsibility. No one at the retirement system knows or can retrieve your password for you, and no TCRS representative will ever ask you for your password.

Change Password

Your User Name:

Current Password: *

Your New Password: *

Retype Your New Password: *

[Continue to Step 2](#)

(8-16 characters, case sensitive; Aa-Zz, 0-9, (@, #, !, %, and \$) only; at least 1 uppercase letter, 1 number and 1 special character; no spaces)

Step 6: Enter your newly selected password in the **Your New Password** field.

Tip: Abide by the instructions to the right of the **Your New Password** field to create a new password.

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Change Password

Step 1 of 3

Valid passwords are 8 to 16 characters long, are case sensitive, and should not contain spaces. Please use at least one uppercase letter, one number and one special character. The following characters are permissible: Aa-Zz, 0-9, (@, #, !, %, and \$).

Note: Maintaining the security of your login information is your responsibility. No one at the retirement system knows or can retrieve your password for you, and no TCRS representative will ever ask you for your password.

Change Password

Your User Name: sarafranklin

Current Password: * [masked]

Your New Password: * [highlighted] (8-16 characters, case sensitive; Aa-Zz, 0-9, (@, #, !, %, and \$) only; at least 1 uppercase letter, 1 number and 1 special character; no spaces)

Retype Your New Password: *

[Continue to Step 2](#)

Step 7: Re-enter your newly selected password in the **Retype Your New Password** field.



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Change Password

Step
1
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Valid passwords are 8 to 16 characters long, are case sensitive, and should not contain spaces. Please use at least one uppercase letter, one number and one special character. The following characters are permissible: Aa-Zz, 0-9, (@, #, !, %, and \$).

Note: Maintaining the security of your login information is your responsibility. No one at the retirement system knows or can retrieve your password for you, and no TCRS representative will ever ask you for your password.

Change Password

Your User Name: sarafranklin

Current Password: *

Your New Password: *

Retype Your New Password: *

(8-16 characters, case sensitive; Aa-Zz, 0-9, (@, #, !, %, and \$) only; at least 1 uppercase letter, 1 number and 1 special character; no spaces)

[Continue to Step 2](#)

Step 8: Click [Continue to Step 2](#).

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Change Password

Step 1 of 3

Valid passwords are 8 to 16 characters long, are case sensitive, and should not contain spaces. Please use at least one uppercase letter, one number and one special character. The following characters are permissible: Aa-Zz, 0-9, (@, #, !, %, and \$).

Note: Maintaining the security of your login information is your responsibility. No one at the retirement system knows or can retrieve your password for you, and no TCRS representative will ever ask you for your password.

Change Password

Your User Name: sarafranklin

Current Password: *

Your New Password: * (8-16 characters, case sensitive; Aa-Zz, 0-9, (@, #, !, %, and \$) only; at least 1 uppercase letter, 1 number and 1 special character; no spaces)

Retype Your New Password: *

[Continue to Step 2](#)

Step 9: The next screen will prompt you to change the initial PIN. Enter the current, temporary PIN in the **Current PIN** field.

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Change PIN

Step 2 of 3

Your User Name: sarafranklin

Current Pin: *

Your New Pin: * (4 characters, all numbers, no spaces)

Retype Your New Pin: *

[Continue to Step 3](#)

Step 10: Enter your newly selected PIN in the **Your New PIN** field.

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Step 2 of 3

Your User Name: sarafranklin

Current Pin: *

Your New Pin: * (4 characters, all numbers, no spaces)

Retype Your New Pin: *

[Continue to Step 3](#)

Step 11: Re-enter your newly selected PIN again in the **Retype Your New PIN** field.

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Step 2 of 3

Your User Name: sarafranklin

Current Pin: *

Your New Pin: * (4 characters, all numbers, no spaces)

Retype Your New Pin: *

[Continue to Step 3](#)

Step 12: Click [Continue to Step 3](#).

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Step 2 of 3

Your User Name: sarafranklin

Current Pin: *

Your New Pin: * (4 characters, all numbers, no spaces)

Retype Your New Pin: *

[Continue to Step 3](#)

Step 13: The next screen updates the security question associated with specific login credentials. Select a security question from the **Security Question** drop down menu.

Tip: The security question and answer will be used if you ever need to reset your password or PIN.

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Update Security Question

Step 3 of 3

Security Question

Security Question: *
Answer: *
Retype Your Answer: *

- Select Security Question
- Select Security Question
- What color was your first car?
- What is the first name of your best friend from high school?
- What is the last name of your all-time favorite athlete?
- What is the name of your high school mascot?
- What is your favorite cartoon character?
- What is your favorite color?
- What is your favorite movie?
- What is your favorite sports team?
- What is your favorite vacation spot?
- What was the first phone number that you remember?
- What was the last name of your favorite teacher?
- What was the last name of your first teacher?
- Who is your favorite composer, singer, band?
- Who was your favorite childhood hero?
- Whom did you go to prom with?

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Home
Contact Us

...ase information, is collected, maintained and provided
...ade to keep such information accurate and up-to-date, the
...ormation herein that originates from third parties. The
...le for any actions taken or omissions made from reliance
...ny other consequences from any such reliance.

Step 14: Enter your answer to the security question in the **Answer** field.

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Update Security Question

Step 3 of 3

Security Question

Security Question: * What is your favorite sports team? ▼

Answer: *

Retype Your Answer: *

[Submit](#)

Step 15: Enter your answer to the security question in the **Retype Your Answer** field.

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Update Security Question

Step 3 of 3

Security Question

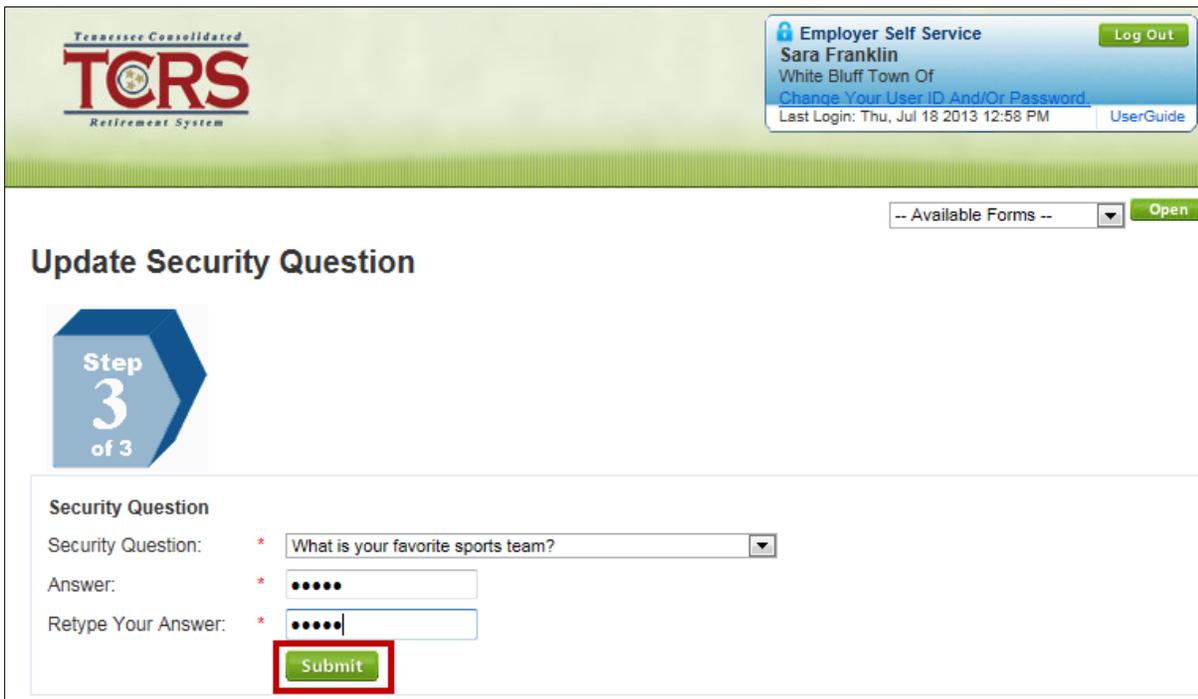
Security Question: * What is your favorite sports team? ▼

Answer: * ●●●●●

Retype Your Answer: *

[Submit](#)

Step 16: Click  .



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Update Security Question

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Security Question

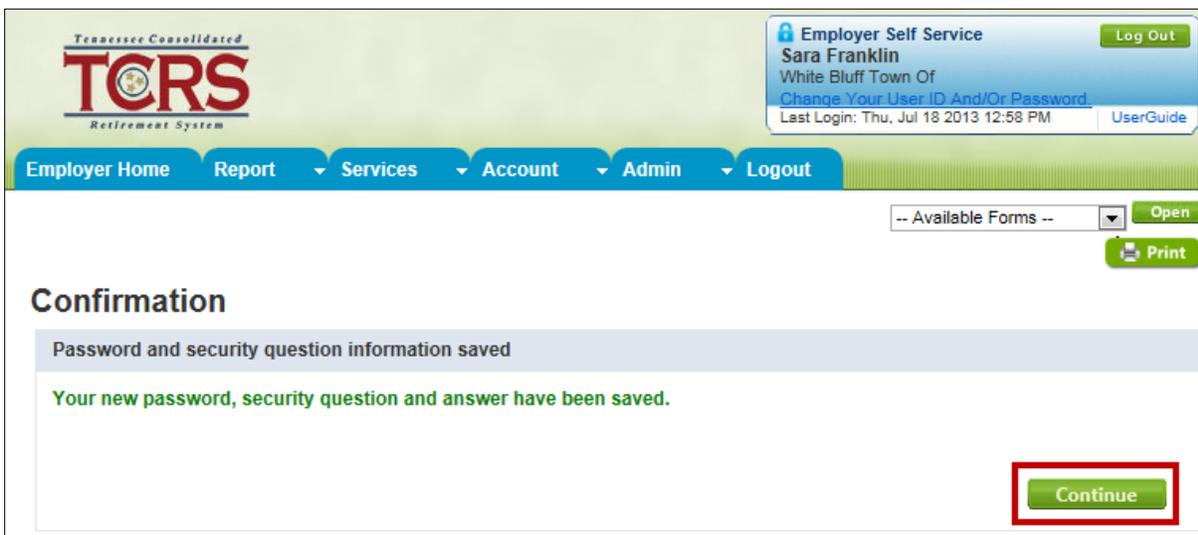
Security Question: *

Answer: *

Retype Your Answer: *

[Submit](#)

Step 17: Click  .



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[Employer Home](#) [Report](#) [Services](#) [Account](#) [Admin](#) [Logout](#)

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Confirmation

Password and security question information saved

Your new password, security question and answer have been saved.

[Continue](#)

Step 17: The Employer Home screen displays.

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Employer Home Report Services Account Admin Logout

-- Available Forms -- [Open](#)

Welcome to Tennessee Consolidated Retirement System (TCRS)' state-of-the-art pension administration system and new employer self service web site. This site provides employers with a number of resources to more efficiently and accurately report employee data to Tennessee Consolidated Retirement System (TCRS). From this site, employers can interact with us in a number of ways, including:

- Reporting wages and contributions
- Processing EFT Payments
- Processing wage adjustments
- Adding/updating employer information
- Reviewing employer reports and invoices
- Downloading and completing employer forms
- Verifying Member IDs and employee contribution rate information

This tool was designed to improve the service Tennessee Consolidated Retirement System (TCRS) provides by offering secure online access to your account information. You now have access to a modern retirement technology system that is a model for the nation.

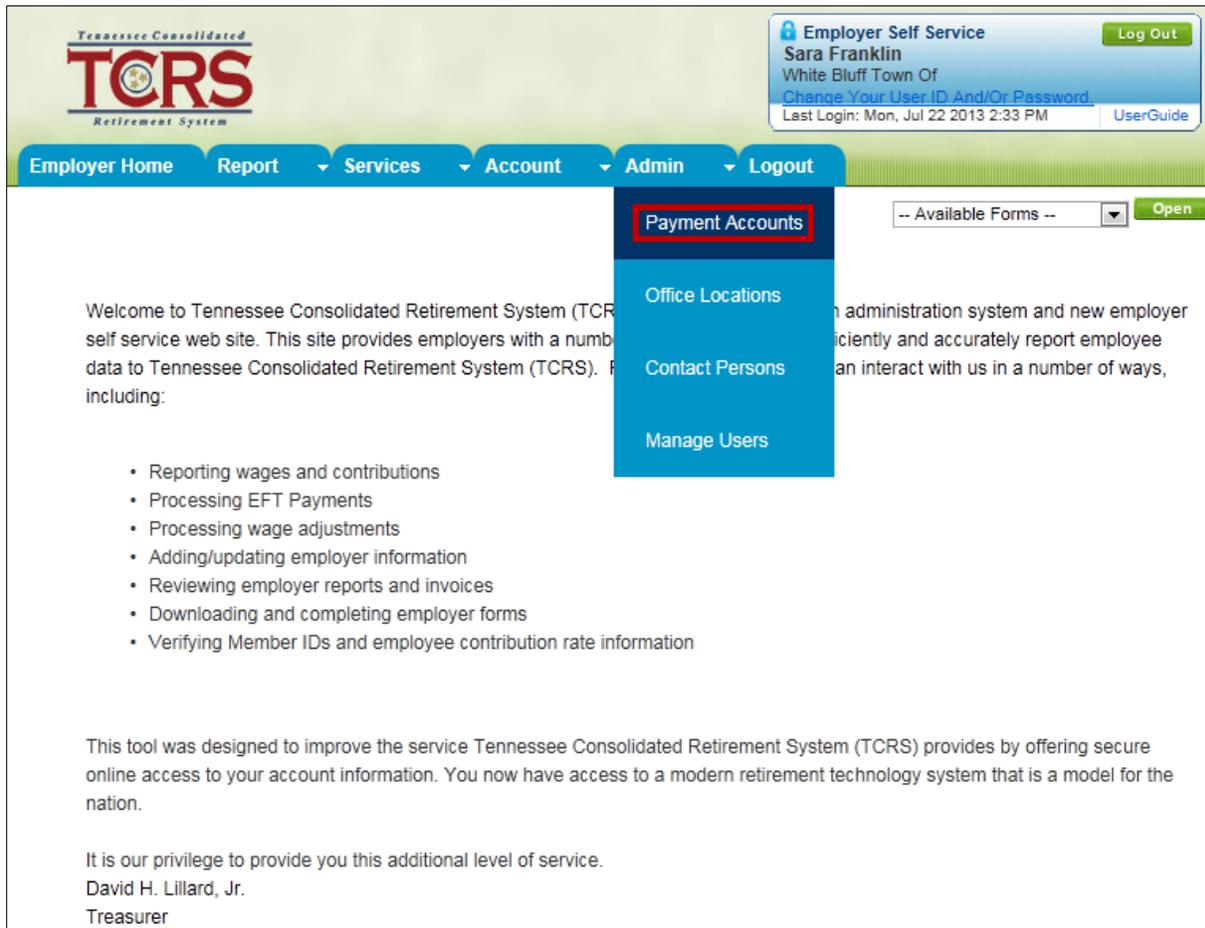
It is our privilege to provide you this additional level of service.
David H. Lillard, Jr.
Treasurer

2. Setting up your bank account information

You will not have the ability to submit your monthly contribution report until you have set up your bank account information.

Tip: Select employers will be paying via LGIP payment accounts. LGIP accounts will not display in ESS. TCRS pulls the appropriate payments via LGIP once the monthly report is submitted. If you need to pay via LGIP and have not previously contacted TCRS to set up this information, please call (615) 532-6111 or email TCRS.Contributions@tn.gov.

Step 1: To access the Manage Payment Accounts screen, navigate to **Admin > Payment Accounts**



The screenshot displays the TCRS Employer Self Service web interface. At the top left is the TCRS logo. The top right shows the user's session information: Sara Franklin, White Bluff Town Of, with links for 'Change Your User ID And/Or Password' and 'UserGuide', and a 'Log Out' button. The navigation menu includes 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Admin' dropdown menu is open, showing 'Payment Accounts' (highlighted with a red box), 'Office Locations', 'Contact Persons', and 'Manage Users'. Below the navigation, a welcome message states: 'Welcome to Tennessee Consolidated Retirement System (TCRS) self service web site. This site provides employers with a number of services to efficiently and accurately report employee data to Tennessee Consolidated Retirement System (TCRS). You can interact with us in a number of ways, including:' followed by a bulleted list of services: Reporting wages and contributions, Processing EFT Payments, Processing wage adjustments, Adding/updating employer information, Reviewing employer reports and invoices, Downloading and completing employer forms, and Verifying Member IDs and employee contribution rate information. At the bottom, a message from David H. Lillard, Jr., Treasurer, states: 'This tool was designed to improve the service Tennessee Consolidated Retirement System (TCRS) provides by offering secure online access to your account information. You now have access to a modern retirement technology system that is a model for the nation. It is our privilege to provide you this additional level of service.'

Step 2: To add a new payment account, click

[Add a Payment Account](#)

The screenshot shows the TCRS Retirement System interface. At the top left is the TCRS logo. At the top right is the user profile for Sara Franklin, White Bluff Town Of, with a 'Log Out' button. Below the logo is a navigation menu with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A dropdown menu is open under 'Account', showing '-- Available Forms --' and an 'Open' button. The main heading is 'Manage Payment Accounts'. Below this is a paragraph explaining the module. A table titled 'Existing Payment Accounts' contains one row with columns for Nickname, Bank Name, Bank Account Number, and Receipt Type. A 'Delete' link is next to the row. At the bottom left, the 'Add a Payment Account' button is highlighted with a red box.

Existing Payment Accounts

Nickname	Bank Name	Bank Account Number	Receipt Type
BofA	BANK OF AMERICA, N.A.	...6789	EFT

[Delete](#)

[Add a Payment Account](#)

Step 3: Enter all required information on the screen:

- **Receipt Type**
- **Nickname**
- **Bank Routing or ABA Number**
- **Bank Account Number**
- **Retype Bank Account Number**



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[Log Out](#)

[Employer Home](#) [Report](#) [Services](#) [Account](#) [Admin](#) [Logout](#)

-- Available Forms -- [Open](#)

Add a Payment Account

Step 1 of 2

Provide your bank account information below. Refer to your checkbook for the routing and account number (see illustration).

When you have finished, click **Continue**.

Payment Account Details

Receipt Type: *

Nickname: (e.g. My Checking Account) *

Bank routing or ABA number: *

Bank Account number: *

Retype Bank Account number: *

[Cancel](#) [Continue](#)



Routing Number or ABA Number

Account Number

For money market or other accounts, please check with your financial institution to obtain the information you should use for routing and account number.

Step 4: Click Continue.



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 **Employer Self Service**
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Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

Add a Payment Account

Step
1
of 2

Provide your bank account information below. Refer to your checkbook for the routing and account number (see illustration).

When you have finished, click **Continue**.

Payment Account Details

Receipt Type:	*	<input type="text" value="EFT"/>		
Nickname: (e.g. My Checking Account)	*	<input type="text" value="Police"/>		
Bank routing or ABA number:	*	<input type="text" value="031000053"/>		
Bank Account number:	*	<input type="text" value="123456789"/>		
Retype Bank Account number:	*	<input type="text" value="123456789"/>		

CancelContinue



Routing Number or ABA Number **Account Number**

For money market or other accounts, please check with your financial institution to obtain the information you should use for routing and account number.

Step 5: Enter your **PIN**.



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Log Out

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

Add a Payment Account

Step 2 of 2

Please review the information you have entered then click **Submit**.
To make changes, click **Edit**.
To cancel without saving, click **Cancel**.

Nickname:	Police
Bank Name:	PNCBANK, NATIONAL ASSOCIATION
Bank routing or ABA number:	031000053
Bank Account number:	123456789
Receipt Type:	EFT
PIN:	<input type="text"/>

Cancel Edit Submit

Step 6: Click **Submit**. The payment account updated successfully message displays to confirm that payment account was saved.

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Employer Self Service
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White Bluff Town Of
[Change Your User ID And/Or Password](#)
Last Login: Mon, Jul 22 2013 3:27 PM [UserGuide](#) **Log Out**

Employer Home Report Services Account Admin Logout

-- Available Forms -- **Open**

Add a Payment Account

Step 2 of 2 Please review the information you have entered then click **Submit**.
To make changes, click **Edit**.
To cancel without saving, click **Cancel**.

Nickname: Police
Bank Name: PNCBANK, NATIONAL ASSOCIATION
Bank routing or ABA number: 031000053
Bank Account number: 123456789
Receipt Type: EFT
PIN: * [masked]

Submit Edit Cancel

Step 7: Click **Continue** to return to the Manage Payment Accounts screen.

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[Change Your User ID And/Or Password](#)
Last Login: Mon, Jul 22 2013 3:27 PM [UserGuide](#) **Log Out**

Employer Home Report Services Account Admin Logout

-- Available Forms -- **Open** **Print**

Confirmation

Account Added

Payment account added successfully.

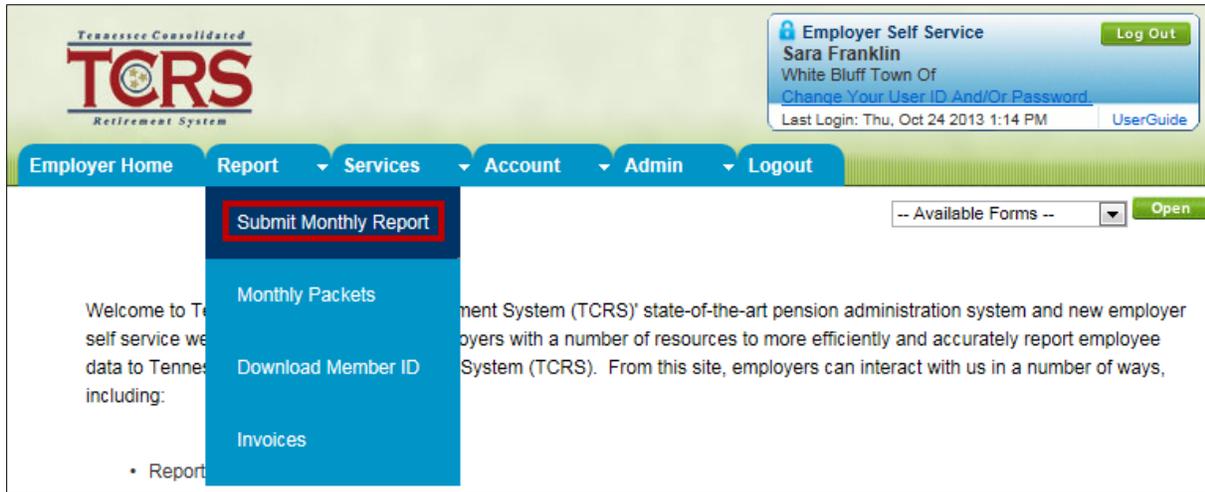
Continue

Tip: You have the ability to add multiple bank accounts. Follow the same steps to add additional accounts.

3. Submitting your monthly contribution report

Once you have logged in and set up your bank account information, TCRS will generate your monthly template, which will allow you to submit your monthly contribution report. You will receive an email notifying you when your template is generated.

Step 1: To begin the contribution reporting process, navigate to **Report > Submit Monthly Report**.



To complete the remaining steps needed to submit your report, refer to the ESS User Guide or the ESS demonstration videos available via <http://tcrs.tn.gov> within the "Concord" tab.

