

# Employer Self-Service User Guide

Department of Treasury

Tennessee Consolidated Retirement System

Concord Project



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## 1. Module Overview

Employer Self-Service (ESS) allows employers to perform monthly reporting, user administrative, and other member reporting functions. In order to access ESS, you must have a valid login name and password. For administrative users, this login information is generated and sent in three emails by TCRS. For subsequent users, the login information is requested through an employer's ESS Administrator, and then credentials are automatically generated and sent in three emails to the new user. Once logged in, you can access functionality based on assigned security roles. There are three security roles in ESS – administrative, monthly reporting, and staff. Each role has different security permissions within ESS. There are four tabs within ESS where the following tasks can be performed:

- **Reports**

- The **Submit Monthly Report** screen allows you to submit monthly detail information along with a monthly summary and payment information associated with the monthly contribution report. Typically, employers with less than 100 employees submit this information on the **Enter Report Details** screen. Larger employers submit this information using the upload detail file functionality which submits a file in the prescribed format. You can also use this module to correct any external errors which may have triggered on the contribution detail rows submitted. You can only submit the Monthly Summary and remit payment to TCRS once data is corrected
- The **Monthly Packet** screen allows you to view the contents of your monthly packet and provides you with reports that may need to be updated in subsequent reports. Each piece of the packet displays as a PDF. The Monthly Packet generates on the 25<sup>th</sup> of each month and you receive an email notification when your new monthly packet is available
- The **Download Member ID** screen allows you to download member IDs for either a particular member or a set of members based on defined search criteria. In addition, you can determine contribution group category and participation dates for members
- The **Invoices** screen allows you to view and remit payment for outstanding invoices. Each invoice is viewable in PDF form and the stored EFT or e-check payment account information can be used to remit payment for the invoices. Invoices must be paid in full

- **Services**

- The **Death Notice** screen allows you to enter death information for a deceased employee. Information entered on this screen is immediately transmitted and stored in the Concord database and can be viewed in the Concord system (Concord) by authorized TCRS staff. Additionally, the submission of death notice information generates a workflow to the TCRS Financial Services division to follow up; the date of death is recorded, but not verified in Concord until a death certificate is remitted
- The **Seminar Registration** screen allows you to register for seminars via ESS. These are seminars that are created internally via the counseling and scheduling modules
- The **Online Certification** screen allows you to certify refund, retirement, and service purchase applications received at TCRS and generated via **Member Self-Service**. Once certified by the employer, these processes are finalized by TCRS staff using Concord

- The **Employer Information** screen allows the user to view general information about the selected employer that is participating with TCRS. Current rates, reference employers, and plan provisions can be viewed using this screen
- The **Reports** screen allows you to generate ad-hoc reports using pre-defined parameters. Additionally employer fiscal year-end statement can be generated from this screen
- The **Message Center** screen allows you to view messages that have been sent from Concord's **Correspondence** module. Documents sent from Concord can be viewed as attachments to the messages. Additionally, an email notification alerting you to new message center content is sent to the contact person's listed email address
- **Account**
  - The **Change Password** screen allows you to change your ESS password
  - The **Change PIN** screen allows you to change your ESS PIN
  - The **Change Security Question** allows you to change your ESS security question
- **Admin**
  - The **Payment Accounts** screen allows you to maintain electronic payment accounts. You can enter and store EFT or e-check account information.
  - The **Office Locations** screen allows you to maintain office location information. You can add new office location information that can be assigned to particular contact persons
  - The **Contact Persons** screen allows you to identify employees within your organization who you want to set as contacts within the organization. Contact persons must be entered as contacts before they can be setup as an ESS user
  - The **Manage Users** screen allows employers to maintain user information for employees who require access to ESS. Role assignment as well as password maintenance is included on this screen. Only users in an administrative role in ESS have access to this functionality

## 1.1. What You Will Be Able To Do

At the end of this chapter, you will be able to:

- View, correct, submit and remit payment for reports
- Enroll in seminars
- Utilize the message center
- Perform bank account maintenance
- Manage ESS user accounts

## 2. Registering for Employer Self-Service

Staff for employers cannot register themselves for ESS. For the first administrative user for each employer, TCRS staff will create a username and the system will then create the necessary login credentials, including a temporary PIN and password. The temporary PIN and password are valid for 72 hours after TCRS emails them. Administrative users will receive three emails, one with each piece of information they need to log into ESS – user ID, password, and PIN. When an employer’s ESS administrator logs into ESS for the first time, they are prompted to enter a new password and PIN and select a security question.

For subsequent new users, the administrator creates the request for login credentials, which includes a temporary PIN and password, and ESS emails them to the new user. Just as with the administrative user, when the new user logs in to Self-Service, they are prompted to enter a new password and PIN and select a security question. The temporary PIN and password are valid for 72 hours after the administrative user emails them. Only in rare circumstances, such as the employer administrator locking themselves out of their account or the administrative user is unavailable, will TCRS staff create or update login credentials.

## 3. Logging into Employer Self-Service

After the administrative user has created your login user ID and the system has generated your password and PIN, you must log into ESS using your user ID, temporary password, and PIN.

### 3.1. Logging into Employer Self-Service for the First Time

When logging into ESS for the first time, a new user is prompted to enter the administrator-generated user ID and their temporary password and PIN. You have up to 72 hours from receiving the email with your login credentials to log into ESS. If you do not, the temporary password and PIN become invalid and you will need to contact the administrative user 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

[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 your user ID.

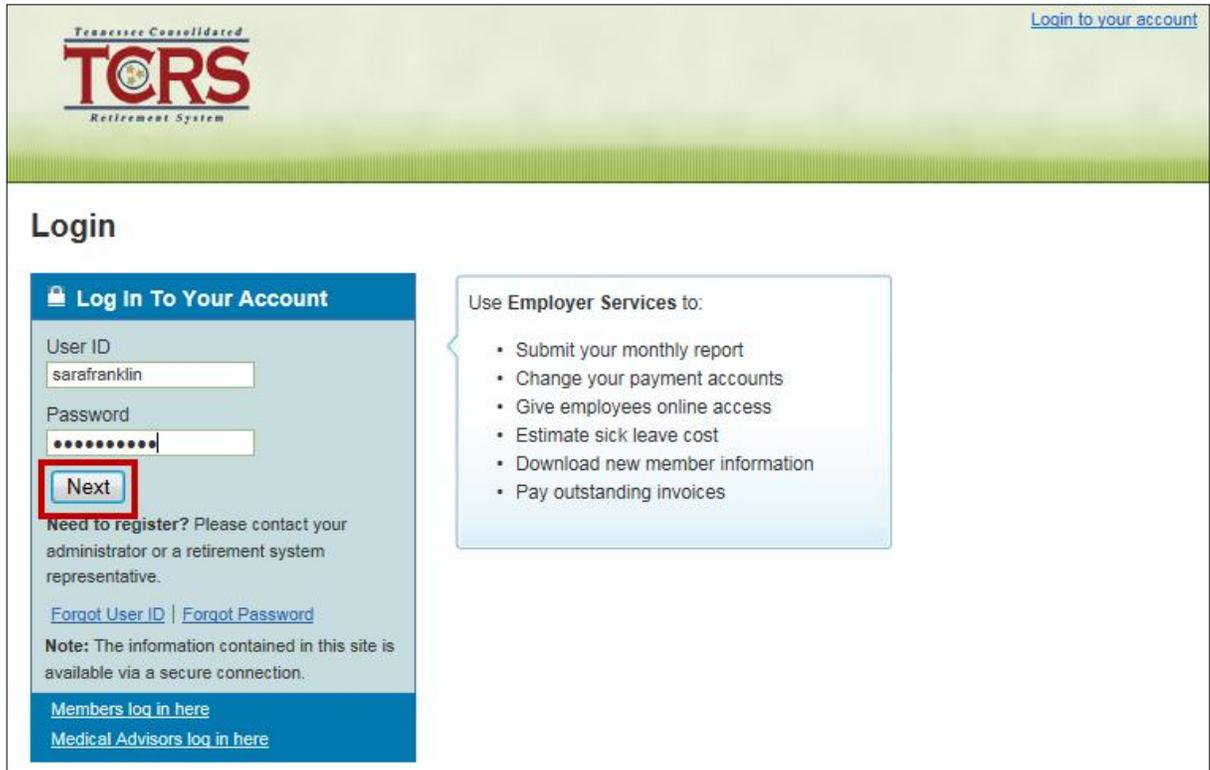
The screenshot shows the TCRS Retirement System login page. At the top left is the TCRS logo with the text "Tennessee Consolidated" above it and "Retirement System" below it. At the top right is a link "Login to your account". The main heading is "Login". Below this is a blue box titled "Log In To Your Account" containing a lock icon. Inside this box, the "User ID" field is highlighted with a red border. Below it is the "Password" field and a "Next" button. Text below the fields reads: "Need to register? Please contact your administrator or a retirement system representative." and "Note: The information contained in this site is available via a secure connection." At the bottom of the blue box are links for "Members log in here" and "Medical Advisors log in here". To the right of the login box is a light blue box titled "Use Employer Services to:" with a list of services: "Submit your monthly report", "Change your payment accounts", "Give employees online access", "Estimate sick leave cost", "Download new member information", and "Pay outstanding invoices".

**Step 3 --** Enter the temporary password.

**Note:** Copy and paste the temporary password from the email by either right clicking and selecting copy, then paste or using keyboard shortcuts <CTRL>+<C> then <CTRL>+<V>.

This screenshot is identical to the previous one, but the "Password" field in the "Log In To Your Account" box is now highlighted with a red border. The "User ID" field contains the text "sarafranklin".

Step 4 -- Click  .



Step 5 -- There will be prompts to change the initial password. Enter the current, temporary password in the **Current Password** field.



**Step 6 --** Enter a new password in the **Your New Password** field.

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

**Tennessee Consolidated TCRS Retirement System**

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

-- 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: 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 the new password in the **Retype Your New Password** field.

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

-- 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: sarafranklin

Current Password: \* [password field]

Your New Password: \* [password field] (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: \* [password field]

[Continue to Step 2](#)

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

**Employer Self Service**  
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Last Login: Thu, Jul 18 2013 1:02 PM [UserGuide](#) [Log Out](#)

-- 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: sarafranklin

Current Password: \* [password field]

Your New Password: \* [password field] (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: \* [password field]

[Continue to Step 2](#)

**Step 9 --** The next screen has prompts to change the initial PIN. Enter the current, temporary PIN in the **Current PIN** field.

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top left is the TCRS logo. At the top right, a user information box displays: "Employer Self Service", "Sara Franklin", "White Bluff Town Of", "Change Your User ID And/Or Password", "Last Login: Thu, Jul 18 2013 12:58 PM", and "UserGuide" with a "Log Out" button. Below this is a dropdown menu for "Available Forms" and an "Open" button. The main content area features a "Step 2 of 3" indicator. The form fields are: "Your User Name:" with the value "sarafranklin"; "Current Pin:" with a red asterisk and a red-bordered input field; "Your New Pin:" with a red asterisk and an input field, followed by the text "(4 characters, all numbers, no spaces)"; and "Retype Your New Pin:" with a red asterisk and an input field. A green "Continue to Step 3" button is at the bottom.

**Step 10 --** Enter a new PIN in the **Your New PIN** field.

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top left is the TCRS logo. At the top right, a user information box displays: "Employer Self Service", "Sara Franklin", "White Bluff Town Of", "Change Your User ID And/Or Password", "Last Login: Thu, Jul 18 2013 12:58 PM", and "UserGuide" with a "Log Out" button. Below this is a dropdown menu for "Available Forms" and an "Open" button. The main content area features a "Step 2 of 3" indicator. The form fields are: "Your User Name:" with the value "sarafranklin"; "Current Pin:" with a red asterisk and an input field containing four black dots; "Your New Pin:" with a red asterisk and a red-bordered input field, followed by the text "(4 characters, all numbers, no spaces)"; and "Retype Your New Pin:" with a red asterisk and an input field. A green "Continue to Step 3" button is at the bottom.

**Step 11 --** Re-enter the new PIN again in the **Retype Your New PIN** field.

The screenshot shows the TCRS Retirement System interface. At the top left is the TCRS logo. At the top right, a user information box displays: "Employer Self Service", "Sara Franklin", "White Bluff Town Of", "Change Your User ID And/Or Password", "Last Login: Thu, Jul 18 2013 12:58 PM", and "UserGuide" with a "Log Out" button. Below the header is a navigation bar with "-- Available Forms --" and an "Open" button. The main content area features a "Step 2 of 3" indicator. The form fields are: "Your User Name:" with the value "sarafranklin"; "Current Pin:" with a masked input field; "Your New Pin:" with a masked input field and a note "(4 characters, all numbers, no spaces)"; and "Retype Your New Pin:" with a masked input field highlighted by a red rectangular box. A green "Continue to Step 3" button is located below the fields.

**Step 12 --** Click **Continue to Step 3**.

This screenshot is identical to the one in Step 11, showing the TCRS Retirement System interface. The user information and navigation elements are the same. The "Retype Your New Pin" field is still highlighted with a red box. In this screenshot, the green "Continue to Step 3" button is highlighted with a red rectangular box, indicating the next action.

**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.

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

The screenshot displays the 'Update Security Question' page in the TCRS Employer Self Service portal. At the top, the TCRS logo is visible on the left, and the user's session information is on the right, including the name 'Sara Franklin' and a 'Log Out' button. Below the header, there is a navigation bar with a dropdown menu set to '-- Available Forms --' and an 'Open' button. The main content area features a 'Step 3 of 3' indicator and a form titled 'Update Security Question'. The form has three input fields: 'Security Question:', 'Answer:', and 'Retype Your Answer:'. The 'Security Question:' field is currently open, showing a dropdown menu with the following options: '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?', and 'Whom did you go to prom with?'. The dropdown menu is highlighted with a red border. At the bottom of the page, there is a footer with navigation links and a privacy notice.

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

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top left is the TCRS logo. At the top right, a user information box displays: "Employer Self Service", "Sara Franklin", "White Bluff Town Of", "Change Your User ID And/Or Password", "Last Login: Thu, Jul 18 2013 12:58 PM", and "UserGuide" with a "Log Out" button. Below the header is a navigation bar with "-- Available Forms --" and an "Open" button. The main heading is "Update Security Question". A blue arrow graphic indicates "Step 3 of 3". The "Security Question" section includes a dropdown menu with "What is your favorite sports team?". Below it are three input fields: "Answer:" (highlighted with a red box), "Retype Your Answer:", and a "Submit" button.

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

This screenshot is identical to the previous one, showing the "Update Security Question" page. In this step, the "Retype Your Answer:" input field is highlighted with a red box. The "Answer:" field now contains five black dots, indicating that the user has entered a password or answer. The "Submit" button remains visible at the bottom of the form.

Step 16 -- Click **Submit**.

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Last Login: Thu, Jul 18 2013 12:58 PM [UserGuide](#) [Log Out](#)

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

### Update Security Question

Step 3 of 3

**Security Question**

Security Question: \*

Answer: \*

Retype Your Answer: \*

**Submit**

Step 17 -- Click **Continue**. The **Employer Home** screen displays.

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Employer Self Service  
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White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Thu, Jul 18 2013 12:58 PM [UserGuide](#) [Log Out](#)

Employer Home Report Services Account Admin Logout

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

### Confirmation

Password and security question information saved

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

**Continue**

### 3.2. Logging into Employer Self-Service

After you have been registered for and have logged into ESS for the first time, you can log into ESS using the new password and PIN you created.

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

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**TCRS**  
Retirement System

[Login to your account](#)

## Login

**Log In To Your Account**

User ID

Password

[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 --** From the **Login** screen, enter the ESS user ID in the **User ID** field.

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[Login to your account](#)

## Login

**Log In To Your Account**

User ID

Password

**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.

[Employers log in here](#)

[Medical examiners 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 password associated with the **User ID**.

[Login to your account](#)

**Tennessee Consolidated**  
**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.

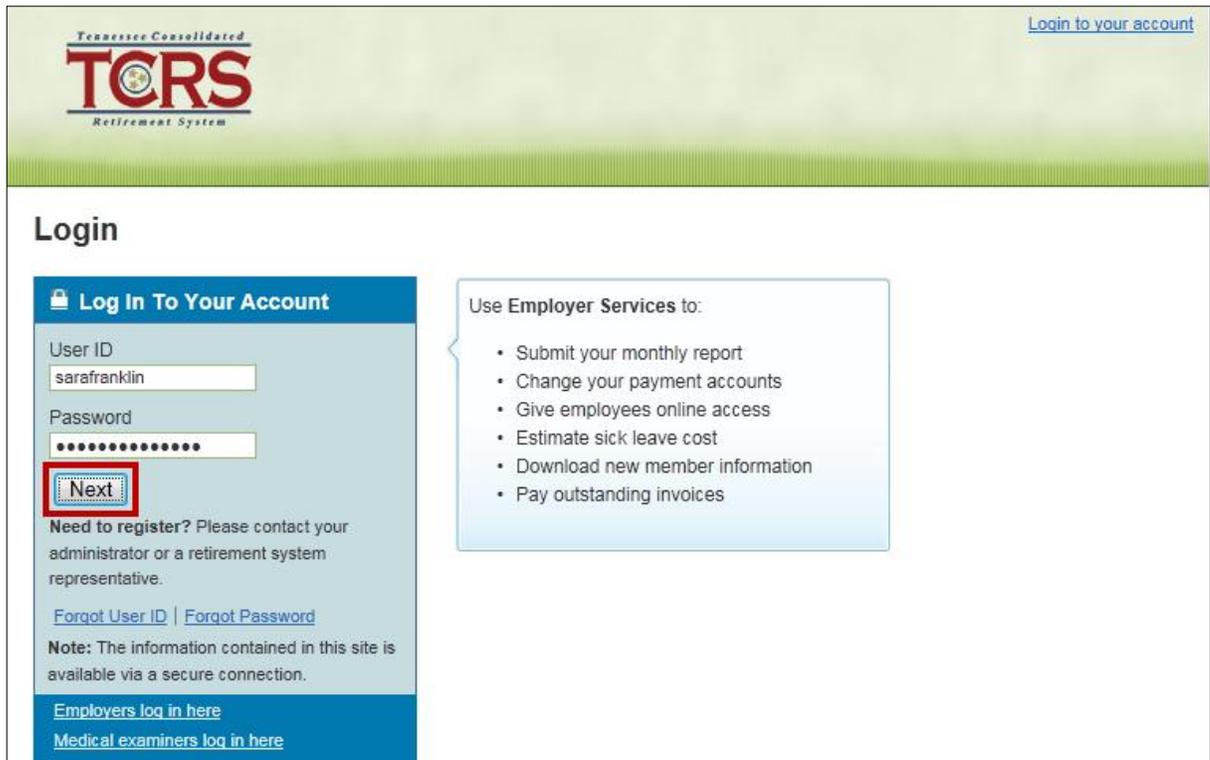
[Employers log in here](#)  
[Medical examiners log in here](#)

**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  .

**Note:** You are allowed five unsuccessful log in attempts before the account is locked. You will need to contact your system administrator to unlock your account. If you are the ESS Administrator, you will need to contact TCRS to unlock your account.



Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

## Login

**Log In To Your Account**

User ID  
sarafranklin

Password  
●●●●●●●●



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.

[Employers log in here](#)  
[Medical examiners 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 --** The **Home** screen displays.

**Tennessee Consolidated Retirement System**

**TCRS**

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

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

## 4. Resetting Password and Obtaining your User ID

Employer contacts who have forgotten their user ID or password can use links on the **Employer Self-Service Login** screen to have their information emailed to the email address on file for them.

**Note:** If the system administrator has forgotten their user ID or password or locked themselves out of their account, they will need to contact TCRS to obtain their user ID or reset their password and / or unlock their account. You will not need your PIN when contacting TCRS.

### 4.1. Reset a Forgotten User ID

To reset or obtain a User ID, follow the steps below.

**Step 1 --** From the **Self-Service** login 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

[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 --** Click the **Forgot User ID** link to reset user ID.

Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

## Login

**Log In To Your Account**

User ID

Password

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 employer code associated with the login credentials.

**Note:** Ensure the preceding zeros (00) are included in the **Employer Code** field.

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[Login to your account](#)

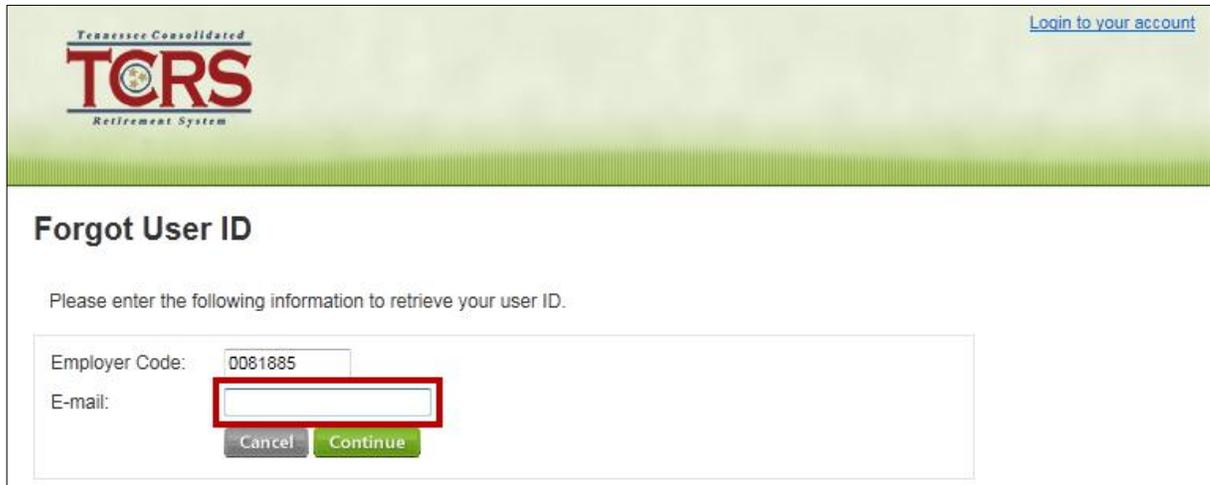
## Forgot User ID

Please enter the following information to retrieve your user ID.

Employer Code:

E-mail:

**Step 4 --** Enter the email address associated with the login credentials in the **E-mail** field.



Tennessee Consolidated  
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Retirement System

[Login to your account](#)

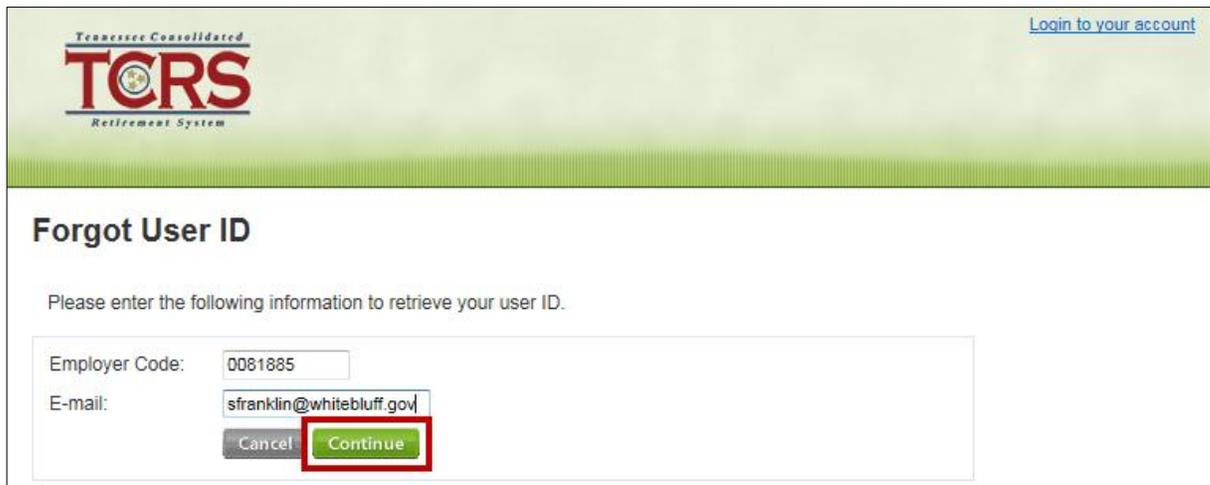
### Forgot User ID

Please enter the following information to retrieve your user ID.

Employer Code:

E-mail:

**Step 5 --** Click .



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Retirement System

[Login to your account](#)

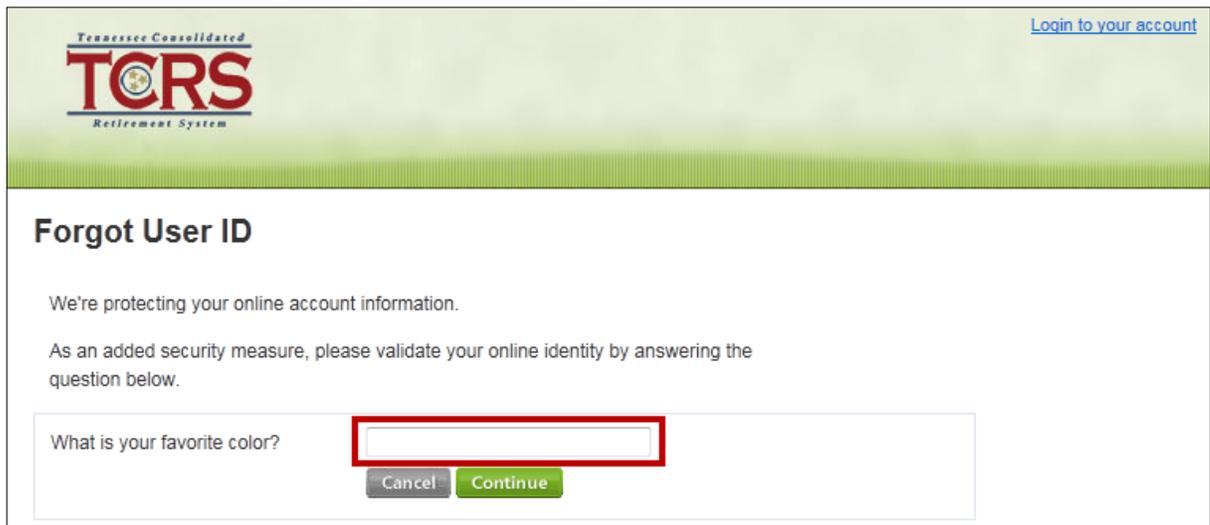
### Forgot User ID

Please enter the following information to retrieve your user ID.

Employer Code:

E-mail:

**Step 6 --** You will be prompted to answer the security question set up during initial log in. Answer the question correctly in the field corresponding to the security question.



Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

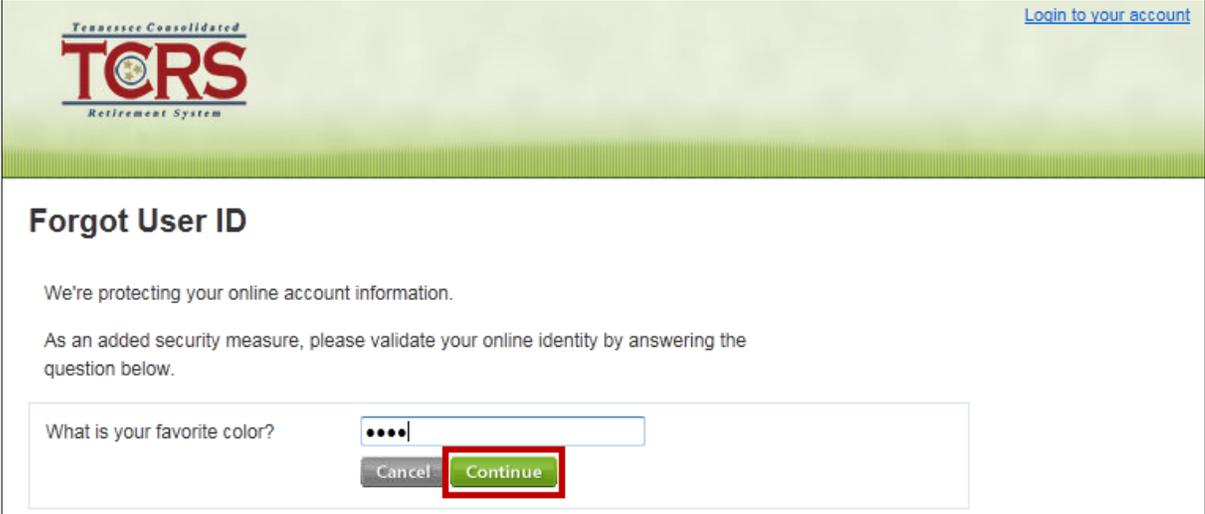
### Forgot User ID

We're protecting your online account information.

As an added security measure, please validate your online identity by answering the question below.

What is your favorite color?

Step 7 -- Click  .



Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

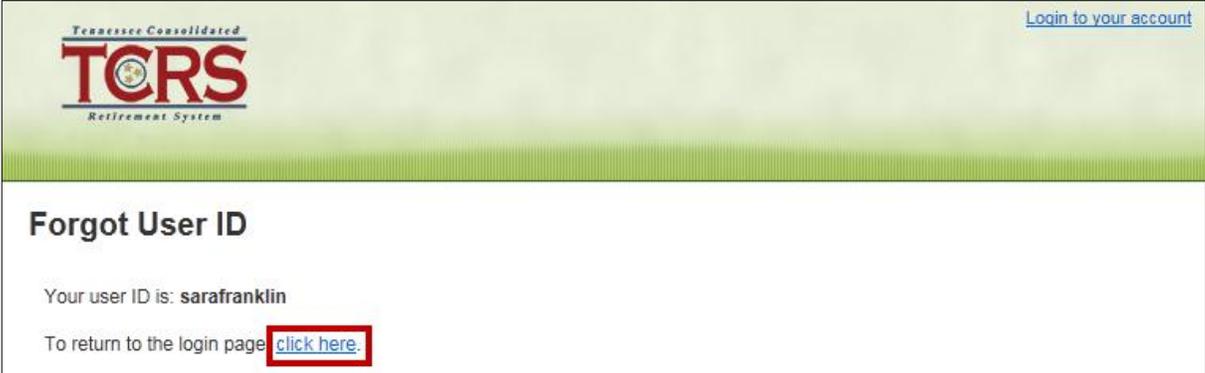
## Forgot User ID

We're protecting your online account information.

As an added security measure, please validate your online identity by answering the question below.

What is your favorite color?

Step 8 -- The username is revealed on the subsequent screen. Click the **click here** link to return to the log in screen.



Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

## Forgot User ID

Your user ID is: sarafranklin

To return to the login page [click here.](#)

## 4.2. Reset a Forgotten Password

To reset a forgotten password, follow the steps below.

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

[Login to your account](#)

**TCRS**  
Retirement System

### 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** -- Click the **Forgot Password** link to access password information.

[Login to your account](#)

**TCRS**  
Retirement System

### 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.

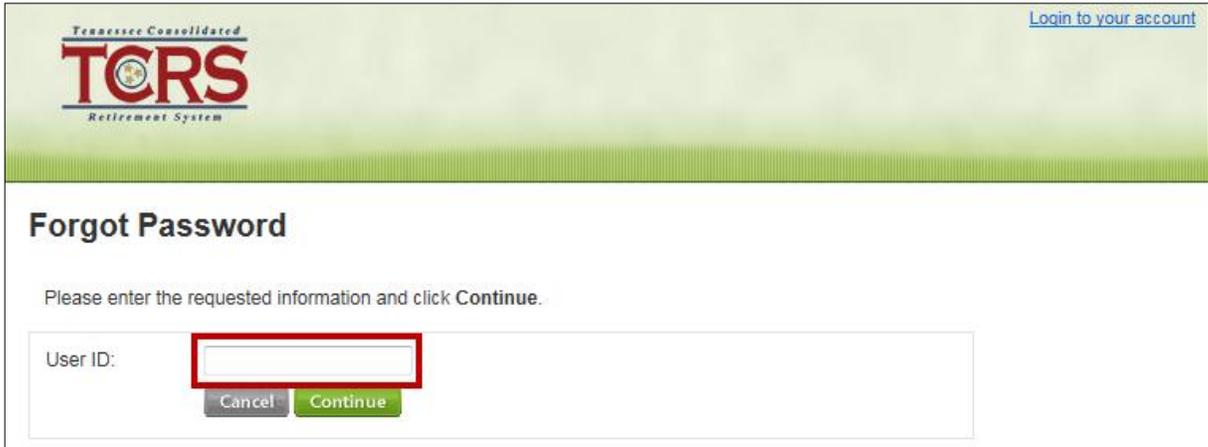
[Employers log in here](#)

[Medical examiners 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 your **User ID** in the corresponding field.



Tennessee Consolidated  
**TCRS**  
Retirement System

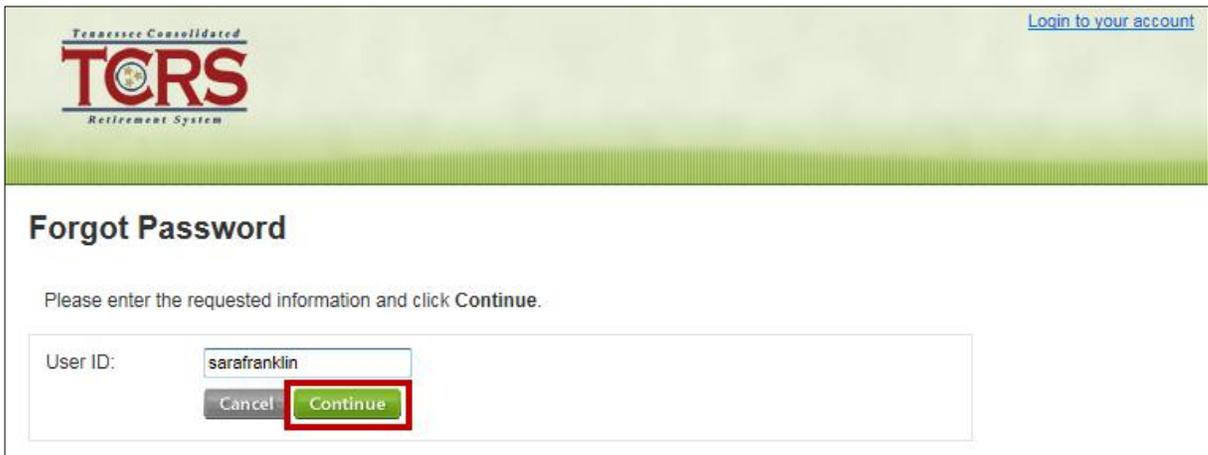
[Login to your account](#)

### Forgot Password

Please enter the requested information and click **Continue**.

User ID:

**Step 4 --** Click .



Tennessee Consolidated  
**TCRS**  
Retirement System

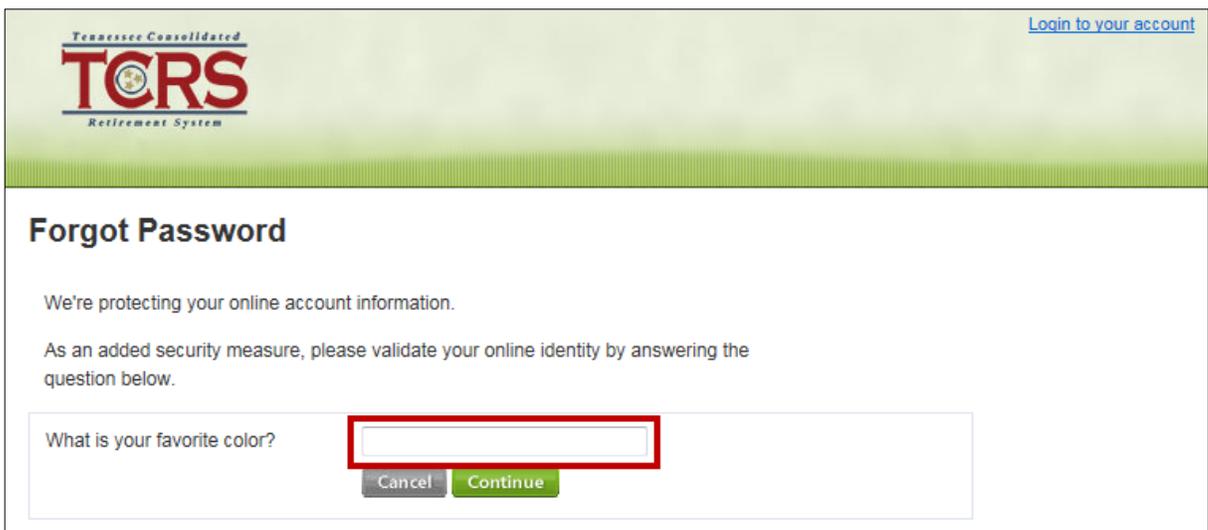
[Login to your account](#)

### Forgot Password

Please enter the requested information and click **Continue**.

User ID:

**Step 5 --** Answer the security question you set up when you initially logged into Employer Self-Service.



Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

### Forgot Password

We're protecting your online account information.

As an added security measure, please validate your online identity by answering the question below.

What is your favorite color?

Step 6 -- Click **Continue**.

Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

## Forgot Password

We're protecting your online account information.

As an added security measure, please validate your online identity by answering the question below.

What is your favorite color?

Step 7 -- Enter your PIN in the **PIN** field.

Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

## Forgot Password

Please provide your secure PIN.

PIN:

Step 8 -- Click **Continue**.

Tennessee Consolidated  
**TCRS**  
Retirement System

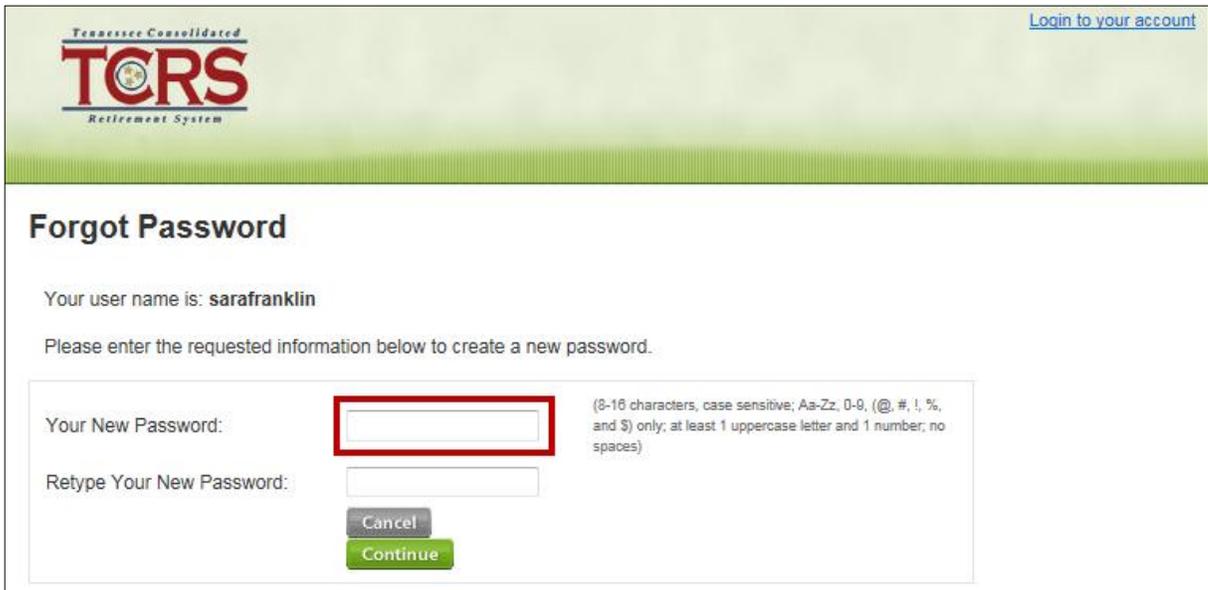
[Login to your account](#)

## Forgot Password

Please provide your secure PIN.

PIN:

**Step 9 --** Enter a new password in the **Your New Password** field following the instructions to the right of the field.



Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

### Forgot Password

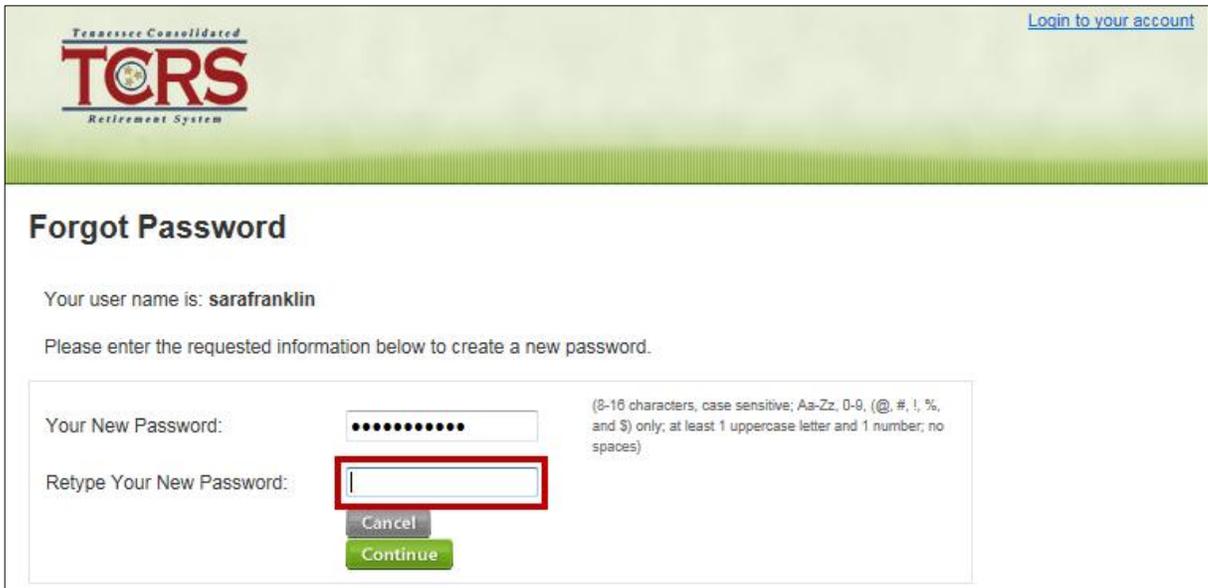
Your user name is: **sarafranklin**

Please enter the requested information below to create a new password.

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

Retype Your New Password:

**Step 10 --** Enter the new password again in the **Retype Your New Password** field.



Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

### Forgot Password

Your user name is: **sarafranklin**

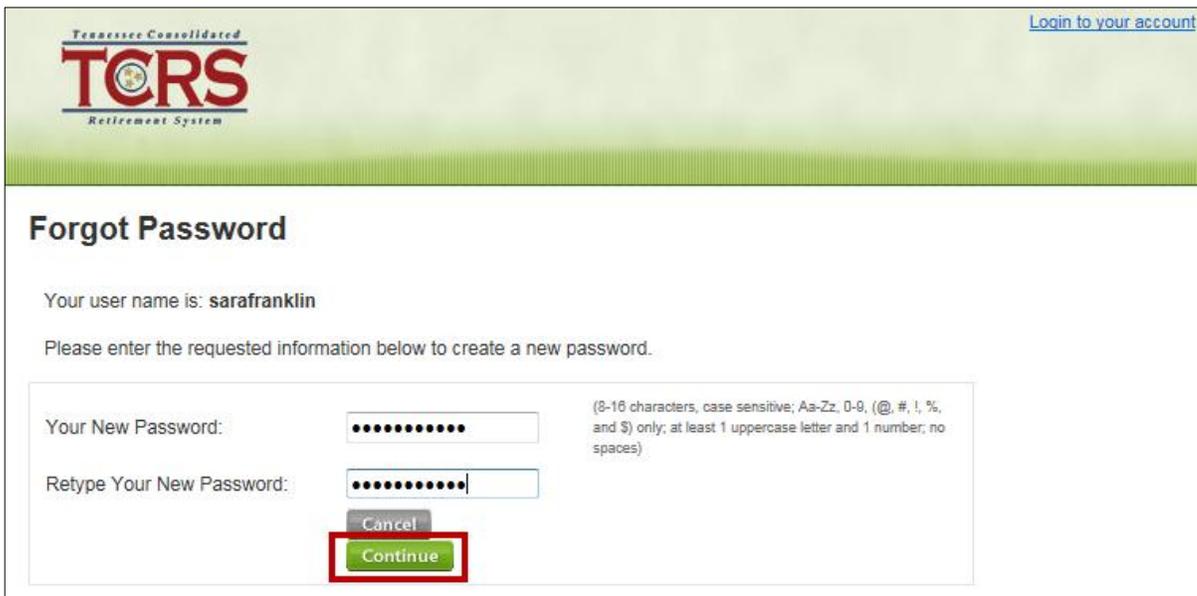
Please enter the requested information below to create a new password.

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

Retype Your New Password:

Step 11 -- Click .

**Note:** Clicking  will return you to the initial self-service log in screen.



Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

## Forgot Password

Your user name is: **sarafranklin**

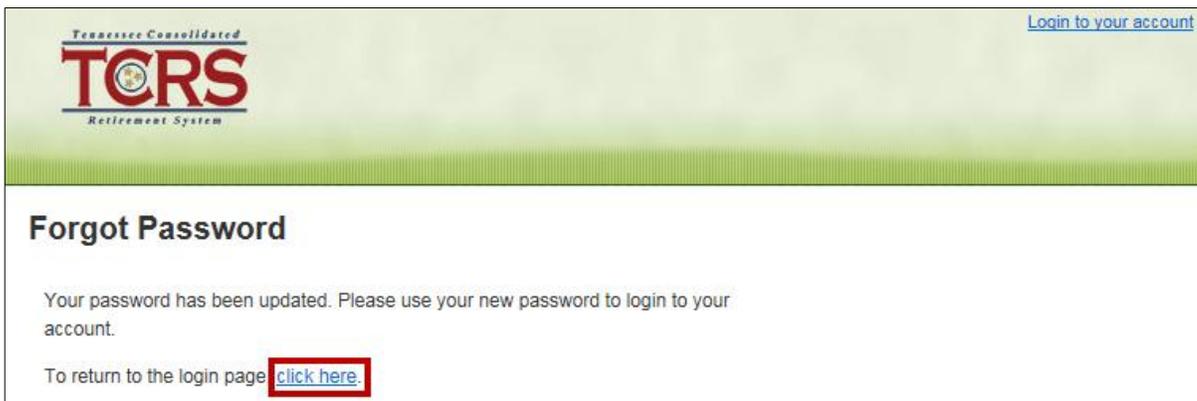
Please enter the requested information below to create a new password.

Your New Password:

Retype Your New Password:

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

Step 12 -- The password is changed and updated in the system. Click the **click here** link to return to the login screen.



Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

## Forgot Password

Your password has been updated. Please use your new password to login to your account.

To return to the login page [click here](#).

**Step 13 --** You are returned to the self-service log in screen. Click the **Employers log in here** link to access Employer Self-Service.

Tennessee Consolidated  
**TCRS**  
Retirement System

[Login to your account](#)

Please correct the following:

- You have been logged out, please log back in to access your information.

## Login

**Log In To Your Account**

User ID

Password

[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 examiners 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 14 --** Log in to Employer Self-Service using your new password.

The screenshot shows the TCRS Retirement System login page. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right is a link "Login to your account". Below the header, a red message states: "Please correct the following:" followed by a bullet point: "• You have been logged out, please log back in to access your information." Below this is a "Login" section. A blue box titled "Log In To Your Account" contains a lock icon, a "User ID" input field, a "Password" input field, and a "Next" button. To the right of this box is a light blue box titled "Use Employer Services to:" with a list of services: "Submit your monthly report", "Change your payment accounts", "Give employees online access", "Estimate sick leave cost", "Download new member information", and "Pay outstanding invoices". Below the login form, there is text: "Need to register? Please contact your administrator or a retirement system representative." followed by links "Forgot User ID" and "Forgot Password". A "Note" states: "The information contained in this site is available via a secure connection." At the bottom of the login area are links "Members log in here" and "Medical examiners log in here".

## 5. Home Screen

Once you have successfully logged into ESS, the **Home** screen displays. From the home screen you can navigate to the various screens of ESS by using the drop down menus at the top of the screen.

The screenshot shows the TCRS Retirement System Employer Self Service Home Screen. At the top left is the TCRS logo. At the top right, the user's name Sara Franklin is displayed along with a Log Out button and a last login timestamp. Below the logo is a navigation bar with tabs for Employer Home, Report, Services, Account, Admin, and Logout. The 'Report' tab is selected, and a dropdown menu is open, showing options: Submit Monthly Report, Monthly Packets, Download Member ID, and Invoices. The main content area includes a welcome message, a list of services, and a message from the Treasurer.

## 6. Submit Monthly Report

You are required to submit a monthly report with details and associated payments to TCRS. There are two methods to accomplish this – with a file adhering to the prescribed TCRS layout or by manually entering information using the **Enter Report Details** screen. Typically large employers (i.e., more than 100 employees) use file submission and smaller employers use the **Enter Reports Details** screen. This setting is selected by TCRS in Concord. You must contact TCRS to change the method of reporting. Employers may report for multiple department codes within one file. Employers submitting payment on behalf of another employer may only submit one summary for all employers for whom they remit payments.

Outstanding credit invoices are automatically applied to the monthly report if the amount of the credit invoice is not greater than the total amount due on the monthly report. If the amount of the credit invoice is greater than the amount due on the **Summary** screen, then the credit invoice will not be automatically applied.

Debit invoices may be manually applied to the monthly report. These reports consist of a details summary, payment information, and payment account information.

## 6.1. Submitting a Monthly Report with a File Template

**Note:** This only applies to those submitting a file. If the employer is submitting via online entry, go to Section 6.3, Submitting a Monthly Report using Report Details.

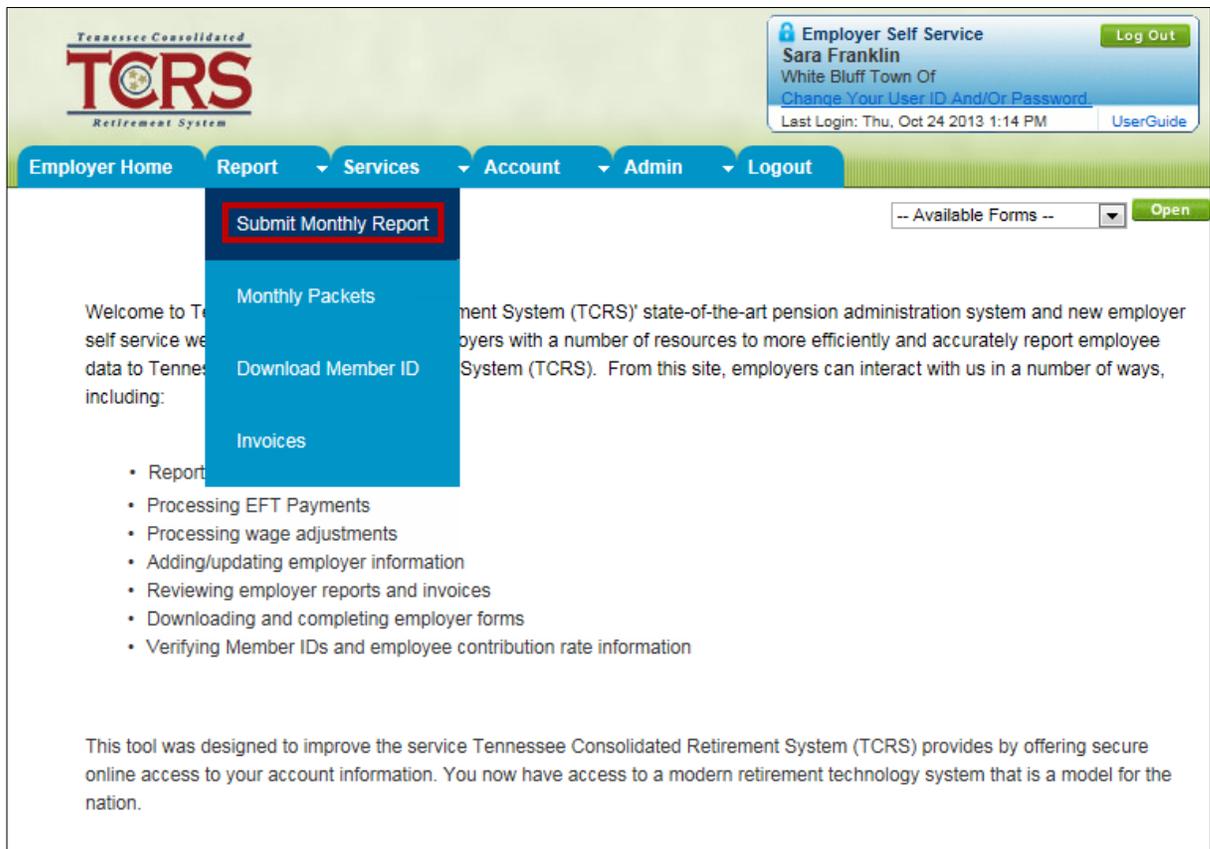
In order for employers to submit a monthly report, the appropriate monthly reporting template must be present. These templates serve as the starting point for an employer's contribution report. Templates include the summary information for all employers and detail information for employers that use the Enter Report Details module of ESS. Templates are generated automatically on the 25<sup>th</sup> of each month for all active employers whose prior month report is in POST status. POST indicates that the previous month's report is posted to TCRS' records. Once the current month's template is available, you can begin the monthly reporting process.

Using the template, you must upload and submit a file that meets the Concord naming conventions. If the file is rejected during the Load process, an alert is sent by email to you. If the file is accepted, the Edit validation process begins to run the submitted date. If 10% of the file or 500 records are in ERROR status, an email is sent to your primary reporting official alerting them that the file was rejected due to too many edit errors.

**Note:** These errors must be corrected in the employer payroll system before the file is accepted via ESS. Files that reject must be resubmitted.

**Step 1 --** To navigate to the **Submit Monthly Report** screen, click on the following menu options:  
**Report > Submit Monthly Report**

**Note:** If an employer is switching from manually entering details to uploading a file, they will be required to go through a file validation process with TCRS prior to submitting their first monthly report.



The screenshot displays the TCRS Employer Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". On the top right, a user profile box shows "Employer Self Service" for Sara Franklin, White Bluff Town Of, with a "Log Out" button and a "UserGuide" link. Below the logo is a navigation bar with tabs: "Employer Home", "Report", "Services", "Account", "Admin", and "Logout". The "Report" tab is selected, and a dropdown menu is open, with "Submit Monthly Report" highlighted in a red box. Other options in the dropdown include "Monthly Packets", "Download Member ID", and "Invoices". To the right of the dropdown is a search box labeled "-- Available Forms --" with an "Open" button. The main content area contains a welcome message and a list of services including "Report", "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 paragraph 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."

**Step 2 --** Click the **Report Month** link corresponding to an individual summary.

**Employer Self Service**  
**Sara Franklin**  
 Public Safety Bridge Fund  
[Change Your User ID And/Or Password](#)  
 Last Login: Thu, Oct 10 2013 11:58 AM [UserGuide](#) [Log Out](#)

**Employer Home** | **Report** | **Services** | **Account** | **Admin** | **Logout**

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

### Monthly Summary

The Submit Monthly Summary module allows employers to manage monthly reporting summary and payment information. The status of all summaries, including submitted monthly summaries, can be viewed from this screen. Employers can also view the monthly packet associated with the summary for that Report Type and Report Month. To view an individual summary, select the corresponding Report Type link.

**Report Summary** Last 6 Months ▾

Report Month	Details Approved	Summary Submitted	Payment Submitted	Summary Amount	Invoice Amount	Payment Amount	Report Status
<a href="#">12/2013</a>							Ready
<a href="#">09/2013</a>							Ready
<b><a href="#">08/2013</a></b>							Ready
<a href="#">07/2013</a>	<a href="#">10/10/2013</a>	<a href="#">09/17/2013</a>		\$110.00	\$278.00		Ready
<a href="#">06/2013</a>		<a href="#">06/01/2013</a>	<a href="#">06/01/2013</a>	\$436.08		\$436.08	Posted

**Step 3 --** The **Monthly Reporting Checklist** screen displays. Click [Get Started >>](#) at the bottom of the screen.

The screenshot shows the TCRS Employer Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, a user information box displays "Employer Self Service", "Sara Franklin", "Public Safety Bridge Fund", a link to "Change Your User ID And/Or Password", "Last Login: Thu, Oct 10 2013 11:22 AM", and a "Log Out" button. Below this is a blue navigation bar with "Employer Home", "Report", "Services", "Account", "Admin", and "Logout". A dropdown menu shows "-- Available Forms --" with an "Open" button. The main content area shows "Report Month: 7/1/2013" and "Report Status: Ready". A progress bar contains five steps: "Getting Started" (active), "Contrib. Details", "Report Summary", "Remit Payment", and "Finalize Report". Below the progress bar, a heading reads "Welcome to the Monthly Reporting Checklist!". A paragraph states: "The following screens will help guide you through the process for submitting your monthly payroll report and is comprised of 3 main sections:". Three circular icons are displayed: a checklist icon for "Contribution Details" (Report Monthly Contribution Details and Prior Period Adjustments), a document icon for "Report Summary" (Review Contribution Totals and Apply Outstanding Invoices), and a money bag icon for "Remit Payment" (Submit the Payment for your Monthly Report). A red-bordered box highlights a "Get Started >>" button at the bottom right.

Step 4 -- The **Contrib. Details** screen of the wizard displays.

Tennessee Consolidated  
**TCRS**  
Retirement System

Employer Self Service  
Sara Franklin  
White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Wed, Aug 28 2013 2:37 PM [UserGuide](#) [Log Out](#)

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

Report Month: 8/1/2013 Report Status: Submitted

Getting Started **Contrib. Details** Report Summary Remit Payment Finalize Report

Please upload your monthly payroll file below:

Enter file information

Detail File: \*  [Browse...](#)

Supported file types are .zip and .tors  
Files are limited to 2 MB  
[Click here to download compression tool](#)

[Submit](#)

File History

Date Submitted	Status
	Ready

Step 5 -- Click

[Browse...](#)

Tennessee Consolidated  
**TCRS**  
Retirement System

Employer Self Service  
Sara Franklin  
White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Wed, Aug 28 2013 2:37 PM [UserGuide](#) [Log Out](#)

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

Report Month: 8/1/2013 Report Status: Submitted

Getting Started **Contrib. Details** Report Summary Remit Payment Finalize Report

Please upload your monthly payroll file below:

Enter file information

Detail File: \*  [Browse...](#)

Supported file types are .zip and .tors  
Files are limited to 2 MB  
[Click here to download compression tool](#)

[Submit](#)

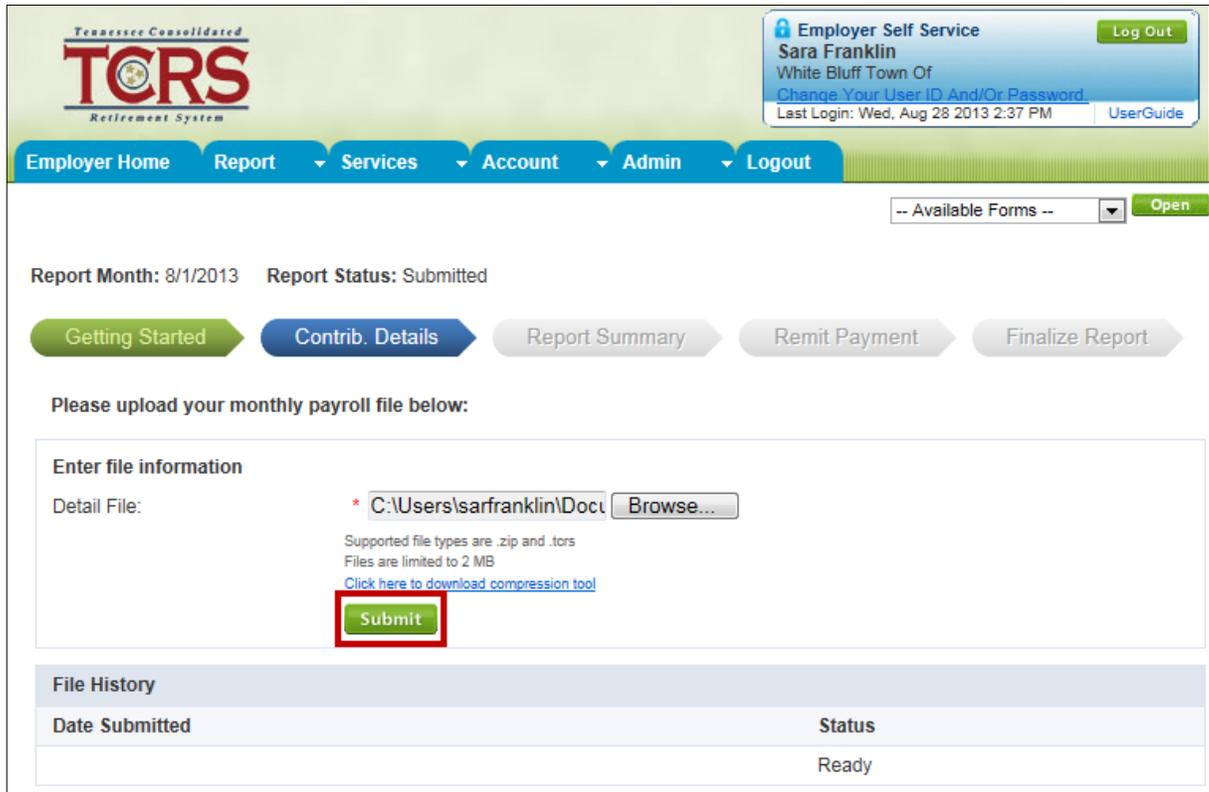
File History

Date Submitted	Status
	Ready

**Step 6** -- Select the appropriate file.

**Step 7** -- Click .

**Note:** If you submit a file with an incorrect file name or extension, the following message displays: "Detail file does not meet the proper naming conventions." If the file you submit is too large the following error message displays: "Detail Files cannot exceed 2 MB. Files exceeding 2 MB can be zipped before they are uploaded."



The screenshot shows the TCRS Employer Self Service interface. At the top left is the TCRS logo. At the top right, a user profile for Sara Franklin is displayed with a 'Log Out' button. Below the logo is a navigation menu with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A dropdown menu for 'Available Forms' is open, showing an 'Open' button. The main content area shows 'Report Month: 8/1/2013' and 'Report Status: Submitted'. A progress bar has five steps: 'Getting Started' (green), 'Contrib. Details' (blue), 'Report Summary' (grey), 'Remit Payment' (grey), and 'Finalize Report' (grey). Below the progress bar, it says 'Please upload your monthly payroll file below:'. There is a section for 'Enter file information' with a 'Detail File:' label, a text input field containing '\* C:\Users\sarfranklin\Docu', and a 'Browse...' button. Below the input field, it states 'Supported file types are .zip and .tors' and 'Files are limited to 2 MB'. There is a link to 'Click here to download compression tool'. A green 'Submit' button is highlighted with a red box. At the bottom, there is a 'File History' table with columns for 'Date Submitted' and 'Status'. The table shows one entry with 'Ready' status.

**Step 8** -- The file is processed. You receive an email when the file has been processed by the Concord Load batch.

**Note:** If an unforeseen error occurs during the load process, the file may need to be uploaded manually. To proceed with the file upload, contact TCRS. A staff member will be able to change a setting within Concord.

**Step 9 --** Once the file has been processed by TCRS, navigate to the **Contribution Details** screen of the wizard from the **Submit Monthly Report** screen. After the file has been accepted, the employer can review the feedback provided by TCRS in the Load and Edit batches. The **Contribution Details** screen provides you with a summarized view of the file history, file batch status, and where errors occurred.

**Note:** This screen does not display what the errors are; it displays a total count of the errors by category.

The screenshot displays the TCRS Employer Self-Service interface. At the top, the user is identified as Sara Franklin, Public Safety Bridge Fund, with a last login on Oct 10, 2013. The main navigation bar includes links for Employer Home, Report, Services, Account, Admin, and Logout. Below this, a progress bar shows the current step as 'Contrib. Details', with other steps being 'Getting Started', 'Report Summary', 'Remit Payment', and 'Finalize Report'. The 'Report Month' is 7/1/2013 and the 'Report Status' is 'Ready'. A table titled 'Employer Details' lists two employers: '0030075 - PUBLIC SAFETY BRIDGE FUND' and '0030076 - GROUP I STATE JUDGE'. The table columns include Employer, Total Records, Rejected Records, Records with Errors, Total Members, Total Salary, Total EECON, Total ERCON, and Status. At the bottom, there are two buttons: '<< Unsubmit Details' and 'Submit Details and Continue >>', with the latter highlighted by a red box.

Employer	Total Records	Rejected Records	Records with Errors	Total Members	Total Salary	Total EECON	Total ERCON	Status
<a href="#">0030075 - PUBLIC SAFETY BRIDGE FUND</a>	1	0	0	1	\$1,000.00	\$0.00	\$110.00	In Progress
<a href="#">0030076 - GROUP I STATE JUDGE</a>	0	0	0	0				In Progress

**Step 10 --** If there were any errors with the file, these errors must be corrected before submitting your payment. Click the employer's name link to access the errors.

Getting Started **Contrib. Details** Report Summary Remit Payment Finalize Report

**File History:**

Date Received	Total Batches	Rejected Batches	Report Status
<a href="#">08/29/2013</a>	1	0	Approved
<a href="#">08/29/2013</a>	1	0	Deleted
<a href="#">08/29/2013</a>	1	0	Deleted
<a href="#">08/29/2013</a>	1	0	Deleted
<a href="#">08/29/2013</a>	1	0	Deleted
<a href="#">08/29/2013</a>	1	0	Deleted
<a href="#">08/29/2013</a>	1	0	Deleted
<a href="#">08/29/2013</a>	1	0	Deleted
<a href="#">07/22/2013</a>	1	0	Deleted

**Employer Details:**

Employer	Total Records	Rejected Records	Records with Errors	Total Members	Total Salary	Total EECON	Total ERCON	Status
<input checked="" type="radio"/> <a href="#">0080080 - NORRIS</a>	8	0	5	8	\$727.36	\$94.16	\$72.76	In Progress

<< Return to File Upload

Unsubmit Details Submit Details and Continue >>

**Note:** If your file contains load errors, these errors will display as a grid below Employer Details as seen below.

<< Return to File Upload

**Employer Load Errors:**

Record Type	Posting Month	Contrib. Group	SSN	Member Id	Emp. Begin Dt.	Emp. End Dt.	Emp. End Reason	Position Status	Payroll Frequency
D	201312	051CONT		000000000	20050110	00000000		00	03

Next >>

**Step 11 --** Each record that contains an error is highlighted in yellow. Click the name of the member associated with the error record to access the detail information.

Getting Started **Contrib. Details** Report Summary Remit Payment Finalize Report

To view or edit member contribution information, select the corresponding (member) name link. To add a new record or adjust a previously reported transaction, click **Add Line Item**.

**Member Contributions**

Name:  Displays Records: 50  Show Errors Only  
 Member ID:  Payment Reason:  **Show**

**Add Line Item**      Displaying Records 1 to 8 of 8      Go To Page: 0

**Member Details**

Name	Member ID	Posting Month	Contrib. Group	Payment Reason	Salary	EECON	Service	Errors		
<a href="#">Afqhijkl_Qwertio</a>	1800917	10/2013	0080080-051CONT	Regular pay	\$446.40	\$50.00	1.0000	0		
<a href="#">Doe1000105_Jing</a>	000105	03/2013	0080080-051CONT	Regular pay	(\$264.56)	(\$26.46)	1.0000	2		
<a href="#">Phasesix_Testtwo</a>	1800918	10/2013	0080080-051CONT	Regular pay	\$446.40	\$50.00	1.0000	3		
<a href="#">Phasesix_Testtwo</a>	1800919	10/2013	0080080-051CONT	Regular pay	\$446.40	\$50.00	1.0000	5		
<a href="#">Phasesix_Testtwo</a>	1800920	10/2013	0080080-051CONT	Regular pay	\$446.40	\$50.00	1.0000	3		
<a href="#">Phasesix_Testtwo</a>	1800921	03/2013	0080080-051CONT	Regular Pay w/ Add Creditable Comp	(\$264.56)	(\$26.46)		1		
<a href="#">Phasesix_Testtwo</a>	1800922	03/2013	0080080-051CONT	Regular pay	(\$264.56)	(\$26.46)		2		
<a href="#">Phasesix_Testtwo</a>	1800923	03/2013	0080080-051CONT	Creditable Bonus Payment	(\$264.56)	(\$26.46)		1		

**Back (Enter Report)**

**Step 12 --** The **Member Contribution** screen displays with the associated error message that details what needs to be corrected.

Getting Started
Contrib. Details
Report Summary
Remit Payment
Finalize Report

### Member Contribution:

**Outstanding Errors:**

Error:	Severity:
Employment Begin Date is a required field for new hires, rehires and changes in contribution group, or position status. (ER0018)	EROR
Last name contains invalid characters. A valid last name must be provided to enroll a new member. (ER0111)	EROR

Override Warnings:

**Personal Information**

Prefix:  SSN: XXX-XX-0105

First Name:\*  Member ID: 1000105

Middle Name:

Last Name:\*

Suffix:

**Contribution Information**

Posting Month: 3/1/2013 Contribution Group:\*

[Eligibility Requirement Information](#)

Payment Reason:\*  Salary:\*

Salary that Exceeds IRS Limit:  Pre-Tax Employee Contribution:

Post-Tax Employee Contribution:  Employer Contribution:

Service:\*  Calculate Details:

**Employment Information**

Position Status:\*  Scheduled Hours Per Day:

Employment Begin Date:\*  Employment End Date:

Employment End Reason:  Payroll Frequency:\*

Type of Rate of Pay:\*  Rate of Pay:\*

Contract Months:

**Leave Information**

Accrued Sick leave days:

**Demographic Information**

**Step 13 -- Update the detail information for the record.**

Personal Information			
Prefix:	<input type="text" value="Select Prefix"/>	SSN:	XXX-XX-0105
First Name:*	<input type="text" value="Jing"/>	Member ID:	1000105
Middle Name:	<input type="text"/>		
Last Name:*	<input type="text" value="Doe1000105"/>		
Suffix:	<input type="text" value="Select Suffix"/>		
Contribution Information			
Posting Month:	3/1/2013	Contribution Group: *	<input type="text" value="0080080-051CONT"/>
Payment Reason:*	<input type="text" value="Regular pay"/>	<a href="#">Eligibility Requirement Information</a>	
Salary that Exceeds IRS Limit:	<input type="text"/>	Salary: *	<input type="text" value="-264.56"/>
Post-Tax Employee Contribution:	<input type="text" value="0.00"/>	Pre-Tax Employee Contribution:	<input type="text" value="-26.46"/>
Service: *	<input type="text" value="1.0000"/>	Employer Contribution:	<input type="text" value="-26.45"/>
		Calculate Details:	<input type="button" value="Calculate"/>
Employment Information			
Position Status: *	<input type="text" value="Part Time"/>	Scheduled Hours Per Day:	<input type="text" value="8.00"/>
Employment Begin Date:*	<input type="text" value="7/1/1988"/>	Employment End Date:	<input type="text"/>
Employment End Reason:	<input type="text" value="Select Reason"/>	Payroll Frequency: *	<input type="text" value="Monthly"/>
Type of Rate of Pay: *	<input type="text" value="Monthly"/>	Rate of Pay: *	<input type="text" value="26290.000"/>
Contract Months:	<input type="text"/>		
Leave Information			
Accrued Sick leave days:	<input type="text"/>		
Demographic Information			
Date of Birth: *	<input type="text" value="4/11/1975"/>		
Gender: *	<input type="text" value="Female"/>		
Primary Address Line:	<input type="text"/>		
	<small>Use for actual street address or post office box.</small>		
Secondary Address Line:	<input type="text"/>		
	<small>Use for Apartment, Building, Unit, Floor, Suite, etc.</small>		
City:	<input type="text"/>		
State:	<input type="text" value="Select State"/>		
Zip:	<input type="text"/> - <input type="text"/> (optional)		
International Address:	<input type="checkbox"/>		

Step 14 --

Click  at the bottom of the screen to update the entry.

Error:	Severity:
Employment Begin Date is a required field for new hires, rehires and changes in contribution group, or position status. (ER0018)	EROR
Last name contains invalid characters. A valid last name must be provided to enroll a new member. (ER0111)	EROR

Override Warnings:

### Personal Information

Prefix:	<input type="text" value="Select Prefix"/>	SSN:	XXX-XX-0105
First Name:*	<input type="text" value="Jing"/>	Member ID:	1000105
Middle Name:	<input type="text"/>		
Last Name:*	<input type="text" value="Doe"/>		
Suffix:	<input type="text" value="Select Suffix"/>		

### Contribution Information

Posting Month:	3/1/2013	Contribution Group: *	<input type="text" value="0080080-051CONT"/>
Payment Reason:*	<input type="text" value="Regular pay"/>	Salary: *	<input type="text" value="-264.56"/>
Salary that Exceeds IRS Limit:	<input type="text"/>	Pre-Tax Employee Contribution:	<input type="text" value="-26.46"/>
Post-Tax Employee Contribution:	<input type="text" value="0.00"/>	Employer Contribution:	-26.45
Service: *	<input type="text" value="1.0000"/>	Calculate Details:	<input type="button" value="Calculate"/>

[Eligibility Requirement Information](#)

### Employment Information

Position Status: *	<input type="text" value="Part Time"/>	Scheduled Hours Per Day:	<input type="text" value="8.00"/>
Employment Begin Date:*	<input type="text" value="7/1/1988"/>	Employment End Date:	<input type="text"/>
Employment End Reason:	<input type="text" value="Select Reason"/>	Payroll Frequency: *	<input type="text" value="Monthly"/>
Type of Rate of Pay: *	<input type="text" value="Monthly"/>	Rate of Pay: *	<input type="text" value="26290.000"/>
Contract Months:	<input type="text"/>		

### Leave Information

Accrued Sick leave days:	<input type="text"/>
--------------------------	----------------------

### Demographic Information

Date of Birth: *	<input type="text" value="4/11/1975"/>
Gender: *	<input type="text" value="Female"/>
Primary Address Line:	<input type="text"/>
<small>Use for actual street address or post office box.</small>	
Secondary Address Line:	<input type="text"/>
<small>Use for Apartment, Building, Unit, Floor, Suite, etc.</small>	
City:	<input type="text"/>
State:	<input type="text" value="Select State"/>
Zip:	<input type="text"/> - <input type="text"/> (optional)
International Address:	<input type="checkbox"/>

**Step 15 --** Continue to do so for each record with an error.

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To view or edit member contribution information, select the corresponding (member) name link. To add a new record or adjust a previously reported transaction, click **Add Line Item**.

**Member Contributions**

Name:  Displays Records:   Show Errors Only

Member ID:  Payment Reason:  Show

Add Line Item
Displaying Records 1 to 8 of 8
Go To Page:

Member Details										
Name	Member ID	Posting Month	Contrib. Group	Payment Reason	Salary	EECON	Service	Errors		
<a href="#">Afhikl, Qwertio</a>	1800917	10/2013	0080080-051CONT	Regular pay	\$446.40	\$50.00	1.0000	0		
<a href="#">Doe1000105, Jlng</a>	1000105	03/2013	0080080-051CONT	Regular pay	(\$264.56)	(\$26.46)	1.0000	2		
<a href="#">Phasesix, Testtwo</a>	1800918	10/2013	0080080-051CONT	Regular pay	\$446.40	\$50.00	1.0000	3		
<a href="#">Phasesix, Testtwo</a>	1800919	10/2013	0080080-051CONT	Regular pay	\$446.40	\$50.00	1.0000	5		
<a href="#">Phasesix, Testtwo</a>	1800920	10/2013	0080080-051CONT	Regular pay	\$446.40	\$50.00	1.0000	3		
<a href="#">Phasesix, Testtwo</a>	1800921	03/2013	0080080-051CONT	Regular Pay w/ Add Creditable Comp	(\$264.56)	(\$26.46)		1		
<a href="#">Phasesix, Testtwo</a>	1800922	03/2013	0080080-051CONT	Regular pay	(\$264.56)	(\$26.46)		2		
<a href="#">Phasesix, Testtwo</a>	1800923	03/2013	0080080-051CONT	Creditable Bonus Payment	(\$264.56)	(\$26.46)		1		

Back (Enter Report)

**Step 16 --** Once all errors have been addressed, click **Back (Enter Report)**. If all external errors have been addressed, the row will no longer be considered in error.

**Step 17 --** When the file is approved, the user will receive the automated email. After the updated data is reviewed, you must verify that the summarized report information is correct.

**Note:** Records in the *Errors* column should equal zero for all Employer Details batches.

**Step 18 --** Click the **Submit Details** button.

Step 19 --

Click

[Next >>](#)



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Report Month: 7/1/2013 Report Status: Posted

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**File History:**

Date Received	Total Batches	Rejected Batches	Report Status
<a href="#">08/01/2013</a>	1	0	Posted

**Employer Details:**

Employer	Total Records	Rejected Records	Records with Errors	Total Members	Total Salary	Total EECON	Total ERCON	Status
<input checked="" type="radio"/> <a href="#">0080160 - CLARKSVILLE MONT SCHS</a>	9	0	0	9	\$31,068.28	\$0.00	\$3,106.81	Posted

[<< Return to File Upload](#)

[Next >>](#)

**Step 20 --** The **Report Summary** screen displays. After the summary payment has been verified, small changes can be made and debit and credit invoices can be applied. Then the payment must be remitted. The employer is presented with a finalized list of all costs for the month, including any credits and debits that may have resulted from applied invoices. The total amount due must be allocated amongst the employer's various payment accounts prior to submission of the finalized reports.

**Note:** Updates (e.g., salary, EECON, or ERCON) within the 5% threshold are allowed. If there are updates outside of the 5% threshold, an error message displays when the summary is saved. If needed, you can select to apply any debit invoices. Follow step 21 to apply debit invoices. If no debit invoices need to be applied, continue to step 22. Credit invoices are automatically applied if the amount of the credit is less than the total of the report.

Report Month: 7/1/2013    Report Status: Ready    Total Contributions: \$110.00

Getting Started    Contrib. Details    **Report Summary**    Remit Payment    Finalize Report

**Regular Contributions:**

0030075 - PUBLIC SAFETY BRIDGE FUND	Salary	EECON	(%)	ERCON	(%)
0030075-275CONT	1000.00	0.00	(11.00)	110.00	(11.00)
0030176-047CONT	0.00	0.00	(10.00)	0.00	(10.00)
<b>Total</b>	<b>\$1,000.00</b>	<b>\$0.00</b>		<b>\$110.00</b>	
<b>Totals</b>	<b>\$1,000.00</b>	<b>\$0.00</b>		<b>\$110.00</b>	

**Adjustments:**

0030075 - PUBLIC SAFETY BRIDGE FUND	Salary	EECON	(%)	ERCON	(%)
0030075-275CONT	0.00	0.00	(11.00)	0.00	(11.00)
0030176-047CONT	0.00	0.00	(10.00)	0.00	(10.00)
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>	
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>	

**Apply Invoices:**

Apply	Invoice	Invoice Type	Date	Amount
<input type="checkbox"/>	973	Monthly Reporting	10/8/2013	\$200.00
<input type="checkbox"/>	970	Outstanding Employer Liabilities	10/8/2013	\$100.00
<input type="checkbox"/>	807	Ad Hoc Contributions	9/17/2013	\$500.00
<input type="checkbox"/>	575	Monthly Reporting	8/24/2013	(\$1,400.00)
<input type="checkbox"/>	385	Manual	7/29/2013	\$100.00
<input checked="" type="checkbox"/>	382	LEA Subsidy Repayment	5/5/2013	\$78.00
<input type="checkbox"/>	381	Monthly Reporting	7/2/2013	\$30.00
<input checked="" type="checkbox"/>	379	LEA Subsidy Repayment	5/1/2013	\$200.00
<input type="checkbox"/>	156	Overpayment Other	7/4/2013	\$45.00
<b>Total Amount Applied:</b>				<b>\$278.00</b>

<<       

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**Step 21 --** Select the **Apply** check box to the left of the debit invoice that needs to be applied.



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Report Month: 7/1/2013    Report Status: Ready    Total Contributions: \$110.00

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**Regular Contributions:**

0030075 - PUBLIC SAFETY BRIDGE FUND	Salary	EECON	(%)	ERCON	(%)
0030075-275CONT	1000.00	0.00	(11.00)	110.00	(11.00)
0030176-047CONT	0.00	0.00	(10.00)	0.00	(10.00)
<b>Total</b>	<b>\$1,000.00</b>	<b>\$0.00</b>		<b>\$110.00</b>	
<b>Totals</b>	<b>\$1,000.00</b>	<b>\$0.00</b>		<b>\$110.00</b>	

**Adjustments:**

0030075 - PUBLIC SAFETY BRIDGE FUND	Salary	EECON	(%)	ERCON	(%)
0030075-275CONT	0.00	0.00	(11.00)	0.00	(11.00)
0030176-047CONT	0.00	0.00	(10.00)	0.00	(10.00)
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>	
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>	

**Apply Invoices:**

Apply	Invoice	Invoice Type	Date	Amount
<input type="checkbox"/>	973	Monthly Reporting	10/8/2013	\$200.00
<input type="checkbox"/>	970	Outstanding Employer Liabilities	10/8/2013	\$100.00
<input type="checkbox"/>	807	Ad Hoc Contributions	9/17/2013	\$500.00
<input type="checkbox"/>	575	Monthly Reporting	8/24/2013	(\$1,400.00)
<input type="checkbox"/>	385	Manual	7/29/2013	\$100.00
<input checked="" type="checkbox"/>	382	LEA Subsidy Repayment	5/5/2013	\$78.00
<input type="checkbox"/>	381	Monthly Reporting	7/2/2013	\$30.00
<input checked="" type="checkbox"/>	379	LEA Subsidy Repayment	5/1/2013	\$200.00
<input type="checkbox"/>	156	Overpayment Other	7/4/2013	\$45.00

**Total Amount Applied:** **\$278.00**

Reset

<< Unsubmit and Review Details
Save and Proceed to Payment >>

Step 22 -- Click **Save and Proceed to Payment >>** to submit the summary.



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Report Month: 7/1/2013    Report Status: Ready    Total Contributions: \$110.00

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**Regular Contributions:**

	Salary	EECON	(%)	ERCON	(%)
0030075 - PUBLIC SAFETY BRIDGE FUND					
0030075-275CONT	1000.00	0.00	(11.00)	110.00	(11.00)
0030176-047CONT	0.00	0.00	(10.00)	0.00	(10.00)
<b>Total</b>	<b>\$1,000.00</b>	<b>\$0.00</b>		<b>\$110.00</b>	
<b>Totals</b>	<b>\$1,000.00</b>	<b>\$0.00</b>		<b>\$110.00</b>	

**Adjustments:**

	Salary	EECON	(%)	ERCON	(%)
0030075 - PUBLIC SAFETY BRIDGE FUND					
0030075-275CONT	0.00	0.00	(11.00)	0.00	(11.00)
0030176-047CONT	0.00	0.00	(10.00)	0.00	(10.00)
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>	
<b>Totals</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>	

**Apply Invoices:**

Apply	Invoice	Invoice Type	Date	Amount
<input checked="" type="checkbox"/>	973	Monthly Reporting	10/8/2013	\$200.00
<input type="checkbox"/>	970	Outstanding Employer Liabilities	10/8/2013	\$100.00
<input type="checkbox"/>	807	Ad Hoc Contributions	9/17/2013	\$500.00
<input type="checkbox"/>	575	Monthly Reporting	8/24/2013	(\$1,400.00)
<input type="checkbox"/>	385	Manual	7/29/2013	\$100.00
<input checked="" type="checkbox"/>	382	LEA Subsidy Repayment	5/5/2013	\$78.00
<input type="checkbox"/>	381	Monthly Reporting	7/2/2013	\$30.00
<input checked="" type="checkbox"/>	379	LEA Subsidy Repayment	5/1/2013	\$200.00
<input type="checkbox"/>	156	Overpayment Other	7/4/2013	\$45.00
<b>Total Amount Applied:</b>				<b>\$478.00</b>

Reset

<< Unsubmit and Review Details

Save and Proceed to Payment >>

**Step 23 --** The **Remit Payment** screen displays. Review the total amount due for the report and any associated invoices that have been applied to the report.

**Note:** All health insurance support invoices for LEAs are automatically applied to an employers report if it exists for the current reporting month.



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Report Month: 8/1/2013    Report Status: Ready    Total Contributions: \$110.00    Total With Invoices: \$110.00

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Review your report totals. To change totals on the report, return to the previous tabs. If you are remitting electronic payment, click the **Edit** link beside the appropriate payment account(s), enter the amount and click **Apply**. To submit the summary, enter your **PIN**, and click **Submit**.

**Review Your Payment Information:**

Expense Type	EECON	ERCON	Total
0030075 - PUBLIC SAFETY BRIDGE FUND	\$0.00	\$110.00	\$110.00
<b>Totals</b>	<b>\$0.00</b>	<b>\$110.00</b>	<b>\$110.00</b>

**Remit Your Payment:**

Pay From	Amount	
ABC - BANK OF AMERICA N.A., ...2211	\$0.00	<a href="#">Edit</a>
MYEFT - RBS CITIZENS, NATIONAL ASSOCIATION, ...1010	\$0.00	<a href="#">Edit</a>
TEST - RBS CITIZENS, NATIONAL ASSOCIATION, ...2345	\$0.00	<a href="#">Edit</a>
XYZ - RBS CITIZENS, NATIONAL ASSOCIATION, ...1110	\$0.00	<a href="#">Edit</a>

**Total Applied:** \$0.00

**Balance Remaining:** \$110.00

**Total Amount Due:** \$110.00

PIN: \*

<< Go Back
Submit Your Payment >>

**Step 24 --** Click the **Edit** link under the *Remit Your Payment* section to allocate the proper amount of payment.



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Report Month: 8/1/2013    Report Status: Ready    Total Contributions: \$110.00    Total With Invoices: \$110.00

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Review your report totals. To change totals on the report, return to the previous tabs. If you are remitting electronic payment, click the **Edit** link beside the appropriate payment account(s), enter the amount and click **Apply**. To submit the summary, enter your **PIN**, and click **Submit**.

**Review Your Payment Information:**

Expense Type	EECON	ERCON	Total
0030075 - PUBLIC SAFETY BRIDGE FUND	\$0.00	\$110.00	\$110.00
<b>Totals</b>	<b>\$0.00</b>	<b>\$110.00</b>	<b>\$110.00</b>

**Remit Your Payment:**

Pay From	Amount	
ABC - BANK OF AMERICA N.A., ...2211	\$0.00	<a href="#">Edit</a>
MYEFT - RBS CITIZENS, NATIONAL ASSOCIATION, ...1010	\$0.00	<a href="#">Edit</a>
TEST - RBS CITIZENS, NATIONAL ASSOCIATION, ...2345	\$0.00	<a href="#">Edit</a>
XYZ - RBS CITIZENS, NATIONAL ASSOCIATION, ...1110	\$0.00	<a href="#">Edit</a>
<b>Total Applied:</b>		\$0.00
<b>Balance Remaining:</b>		<b>\$110.00</b>
<b>Total Amount Due:</b>		<b>\$110.00</b>
PIN: *		<input style="width: 80px;" type="text"/>

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**Step 25 --** Allocate the proper amount of the payment to the appropriate bank accounts.



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Report Month: 8/1/2013    Report Status: Ready    Total Contributions: \$110.00    Total With Invoices: \$110.00

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Review your report totals. To change totals on the report, return to the previous tabs. If you are remitting electronic payment, click the **Edit** link beside the appropriate payment account(s), enter the amount and click **Apply**. To submit the summary, enter your **PIN**, and click **Submit**.

**Review Your Payment Information:**

Expense Type	EECON	ERCON	Total
0030075 - PUBLIC SAFETY BRIDGE FUND	\$0.00	\$110.00	\$110.00
<b>Totals</b>	<b>\$0.00</b>	<b>\$110.00</b>	<b>\$110.00</b>

**Remit Your Payment:**

Pay From	Amount	
ABC - BANK OF AMERICA N.A., ...2211	* <input style="width: 80px;" type="text" value="0.00"/>	<a href="#">Save</a> <a href="#">Cancel</a>
MYEFT - RBS CITIZENS, NATIONAL ASSOCIATION, ...1010	\$0.00	<a href="#">Edit</a>
TEST - RBS CITIZENS, NATIONAL ASSOCIATION, ...2345	\$0.00	<a href="#">Edit</a>
XYZ - RBS CITIZENS, NATIONAL ASSOCIATION, ...1110	\$0.00	<a href="#">Edit</a>
<b>Total Applied:</b>		\$0.00
<b>Balance Remaining:</b>		<b>\$110.00</b>
<b>Total Amount Due:</b>		<b>\$110.00</b>
PIN: *		<input style="width: 80px;" type="text"/>

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Submit Your Payment >>



**Step 27 --** Once the balance remaining is equal to zero, enter your PIN.

**Note:** All costs must be paid in full. No partial payments are allowed.



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Report Month: 8/1/2013    Report Status: Ready    Total Contributions: \$110.00    Total With Invoices: \$110.00

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Review your report totals. To change totals on the report, return to the previous tabs. If you are remitting electronic payment, click the **Edit** link beside the appropriate payment account(s), enter the amount and click **Apply**. To submit the summary, enter your **PIN**, and click **Submit**.

**Review Your Payment Information:**

Expense Type	EECON	ERCON	Total
0030075 - PUBLIC SAFETY BRIDGE FUND	\$0.00	\$110.00	\$110.00
<b>Totals</b>	<b>\$0.00</b>	<b>\$110.00</b>	<b>\$110.00</b>

**Remit Your Payment:**

Pay From	Amount	
ABC - BANK OF AMERICA N.A., ...2211	\$110.00	<a href="#">Edit</a>
MYEFT - RBS CITIZENS, NATIONAL ASSOCIATION, ...1010	\$0.00	<a href="#">Edit</a>
TEST - RBS CITIZENS, NATIONAL ASSOCIATION, ...2345	\$0.00	<a href="#">Edit</a>
XYZ - RBS CITIZENS, NATIONAL ASSOCIATION, ...1110	\$0.00	<a href="#">Edit</a>
<b>Total Applied:</b>		\$110.00
<b>Balance Remaining:</b>		\$0.00
<b>Total Amount Due:</b>		<b>\$110.00</b>
PIN: *		

<< Go Back
Submit Your Payment >>

Step 28 --

Click

**Submit Your Payment >>**



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Report Month: 8/1/2013    Report Status: Ready    Total Contributions: \$110.00    Total With Invoices: \$110.00

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Review your report totals. To change totals on the report, return to the previous tabs. If you are remitting electronic payment, click the **Edit** link beside the appropriate payment account(s), enter the amount and click **Apply**. To submit the summary, enter your **PIN**, and click **Submit**.

**Review Your Payment Information:**

Expense Type	EECON	ERCON	Total
0030075 - PUBLIC SAFETY BRIDGE FUND	\$0.00	\$110.00	\$110.00
<b>Totals</b>	<b>\$0.00</b>	<b>\$110.00</b>	<b>\$110.00</b>

**Remit Your Payment:**

Pay From	Amount	
ABC - BANK OF AMERICA N.A., ...2211	\$110.00	<a href="#">Edit</a>
MYEFT - RBS CITIZENS, NATIONAL ASSOCIATION, ...1010	\$0.00	<a href="#">Edit</a>
TEST - RBS CITIZENS, NATIONAL ASSOCIATION, ...2345	\$0.00	<a href="#">Edit</a>
XYZ - RBS CITIZENS, NATIONAL ASSOCIATION, ...1110	\$0.00	<a href="#">Edit</a>
<b>Total Applied:</b>	<b>\$110.00</b>	
<b>Balance Remaining:</b>	<b>\$0.00</b>	
<b>Total Amount Due:</b>	<b>\$110.00</b>	
PIN: *	<input style="width: 50px;" type="password"/>	

<< Go Back
Submit Your Payment >>

**Step 29 --** The **Finalize Report** screen displays. Click **Finalize Monthly Report >>**. The payment summary screen displays, detailing the funds transmitted to TCRS.

The screenshot shows the TCRS Employer Self-Service interface. At the top, the user is identified as Sara Franklin, Public Safety Bridge Fund, with a last login of Thu, Oct 10 2013 11:58 AM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The main content area displays the following information:

- Report Month: 8/1/2013
- Report Status: Submitted
- Total Contributions: \$0.00
- Total With Invoices: \$0.00

A breadcrumb trail shows the following steps: Getting Started, Contrib. Details, Report Summary, Remit Payment, and Finalize Report. A message states: "Your monthly report has been submitted!". Below this, the report details are summarized in a table:

Report Details:	
Contribution Details Submitted:	1
Adjustments Submitted:	0
Submission Date:	10/10/2013 12:00:26 PM
Report Summary:	
Regular Payments:	\$110.00
Adjustments:	\$0.00
Submission Date:	10/10/2013 12:00:46 PM
Report Payment:	
Invoice Applies:	0
Invoice Amount:	\$110.00
Payment Date:	10/10/2013 12:00:46 PM

At the bottom of the page, there are buttons for "Print", "<< Go Back", and "Finalize Monthly Report >>". The "Finalize Monthly Report >>" button is highlighted with a red box.

## 6.2. Partially Submitted Files

In some instances, only one batch from an uploaded file may be rejected. Instead of rejecting the entire file, ESS will only reject the batch that exceeded the error threshold. Follow the steps below to correct and submit a partially rejected file.

**Note:** Should you have to return to a previous step, the information on those pages will be displayed in read-only format.

**Step 1 --** Follow steps 1 through 4 of Section 6.1, Submitting a Monthly Report with a File Template to navigate to the **Contributions Details** screen.

**Step 2 --** On the **Contribution Details** screen, a list of all partially accepted or rejected files displays. If the file is partially accepted, at least one of the batches in the file has passed the necessary Load and Edit validations, but at least one batch is in either a REJT (Load) or ERJT (Edit) status. You must correct the issues with the file and resubmit a full file, including batches that have already been successfully processed. Only the batches that were initially rejected will be processed at the time.

Employer Self Service  
Nikita Test  
Union City  
Change Your User ID And/Or Password  
Last Login: Fri, Oct 25 2013 8:16 AM  
UserGuide

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

Report Month: 11/1/2013 Report Status: Ready

Getting Started **Contrib. Details** Report Summary Remit Payment Finalize Report

File History:

Date Received	Total Batches	Rejected Batches	Report Status
<a href="#">08/01/2013</a>	2	0	Partially Processed

Employer Details:

Employer	Total Records	Rejected Records	Records with Errors	Total Members	Total Salary	Total EECON	Total ERCON	Status
<input checked="" type="radio"/> <a href="#">0080440 - UNION CITY</a>	4	0	0	4	\$1,409.20	\$150.00	\$137.42	In Progress
<input type="radio"/> <a href="#">0087823 - DAVIDSON COUNTY OFFICIALS</a>	0	0	0	0				Ready

<< Return to File Upload

Unsubmit Details Submit Details and Continue >>

**Step 3 --** If the file is rejected, you must return to the **Upload** screen and resubmit the entire file. The entire file is processed by the Load and Edit batches.

### 6.3. Submitting a Monthly Reporting using Report Details

**Note:** This functionality only applies to those submitting via online entry. If the employer is submitting via file, refer to Section 6.1, Submitting a Monthly Report with a File Template.

Submitting reports via online entry is done through a wizard format. If there are any errors in information entered on the **Enter Detail Reports** screen, an error message displays, and you must correct files before submitting. All details must be submitted and corrected before you can confirm your monthly summary. The monthly summary must be confirmed before a payment can be remitted and the report can be finalized. Once the payment is submitted, the report is ready for processing by TCRS.

**Note:** If a report has been submitted and you have to return to a previous step, the information on those pages will be displayed in read-only format.

**Step 1 --** To navigate to the **Submit Monthly Report** screen, click on the following menu options:

**Reporting > Submit Monthly Report**

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top left is the TCRS logo. At the top right, a user information box displays 'Employer Self Service', the user name 'Sara Franklin', the organization 'White Bluff Town Of', a link to 'Change Your User ID And/Or Password', the last login time 'Thu, Oct 24 2013 1:14 PM', and a 'Log Out' button. Below this is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Report' tab is selected, and a dropdown menu is open, with 'Submit Monthly Report' highlighted in a red box. Other options in the dropdown include 'Monthly Packets', 'Download Member ID', and 'Invoices'. To the right of the dropdown is a search box labeled '-- Available Forms --' with an 'Open' button. The main content area contains a welcome message, a list of services including 'Report', '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'. It also includes a paragraph about the system's design and a signature from David H. Lillard, Jr., Treasurer.

Step 2 -- Click the Report Month link.

**Employer Self Service**  
 Brandon Smith  
 Loudon Co  
[Change Your User ID And/Or Password](#)   
 Last Login: Tue, Oct 15 2013 1:47 PM [UserGuide](#) 

Employer Home Report Services Account Admin Logout

-- Available Forms -- 

## Report Monthly Summary

The Submit Monthly Summary module allows employers to manage monthly reporting summary and payment information. The status of all summaries, including submitted monthly summaries, can be viewed from this screen. Employers can also view the monthly packet associated with the summary for that Report Type and Report Month. To view an individual summary, select the corresponding Report Type link.

**Report Summary** Last 6 Months 

Report Month	Details Approved	Summary Submitted	Payment Submitted	Summary Amount	Invoice Amount	Payment Amount	Report Status
<b>09/2013</b>	<a href="#">08/29/2013</a>						Ready
<a href="#">08/2013</a>	<a href="#">09/04/2013</a>	<a href="#">08/15/2013</a>	<a href="#">08/01/2013</a>	\$600.00	\$600.03	\$1,000.00	Ready
<a href="#">07/2013</a>	<a href="#">08/15/2013</a>	<a href="#">08/15/2013</a>	<a href="#">08/15/2013</a>	\$200.00		\$200.00	Posted
<a href="#">06/2013</a>	<a href="#">07/31/2013</a>	<a href="#">07/31/2013</a>	<a href="#">07/31/2013</a>	\$600.00		\$800.00	Posted
<a href="#">05/2013</a>	<a href="#">08/07/2013</a>	<a href="#">08/07/2013</a>	<a href="#">08/07/2013</a>	\$400.00		\$400.00	Posted

Step 3 -- The **View Monthly Reports** screen displays. Click [Get Started >>](#).

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service  
Brandon Smith  
Loudon Co  
Change Your User ID And/Or Password  
Last Login: Tue, Oct 15 2013 1:47 PM  
Log Out  
UserGuide

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

## Report

Report Month: 9/1/2013 Report Status: Ready

Getting Started Contrib. Details Report Summary Remit Payment Finalize Report

Welcome to the Monthly Reporting Checklist!

The following screens will help guide you through the process for submitting your monthly payroll report and is comprised of 3 main sections:

-   
**Contribution Details**  
Report Monthly Contribution Details and Prior Period Adjustments
-   
**Report Summary**  
Review Contribution Totals and Apply Outstanding Invoices
-   
**Remit Payment**  
Submit the Payment for your Monthly Report

[Get Started >>](#)

**Step 4 --** The **Contrib. Details** screen displays. Click the **employer name** link to select the record you want to update for the monthly report.

**Note:** You may only see your organization’s records listed on this screen unless your organization reports for another employer.

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

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

## Report

Report Month: 9/1/2013    Report Status: Ready

[Getting Started](#)
[Contrib. Details](#)
[Report Summary](#)
[Remit Payment](#)
[Finalize Report](#)

**Employer Details:**

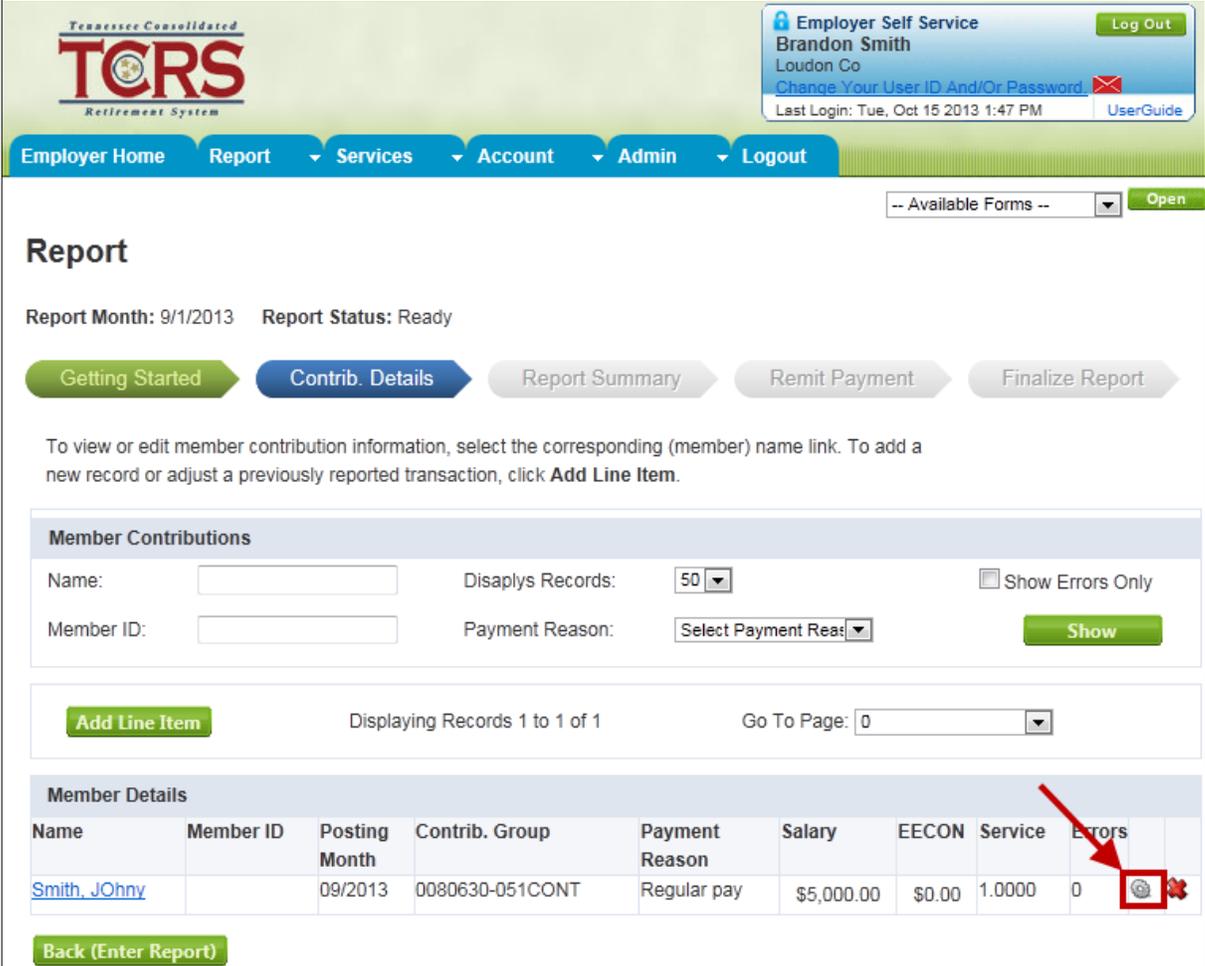
Employer	Total Records	Rejected Records	Records with Errors	Total Members	Total Salary	Total EECON	Total ERCON	Status
<a href="#">0080610 - LOUDON CO</a>	1	0	0	1	\$5,000.00	\$0.00	\$750.00	In Progress

[<< Unsubmit Details](#)
[Submit Details and Continue >>](#)

**Step 5** -- Click  to edit the Salary and Service fields within detail record. To edit the entire record, please refer to Steps 11 – 14 within the Submitting a Monthly Report with a File Template section above.

**Note:** You can also add new employees or delete existing employees by clicking

[Add Line Item](#)

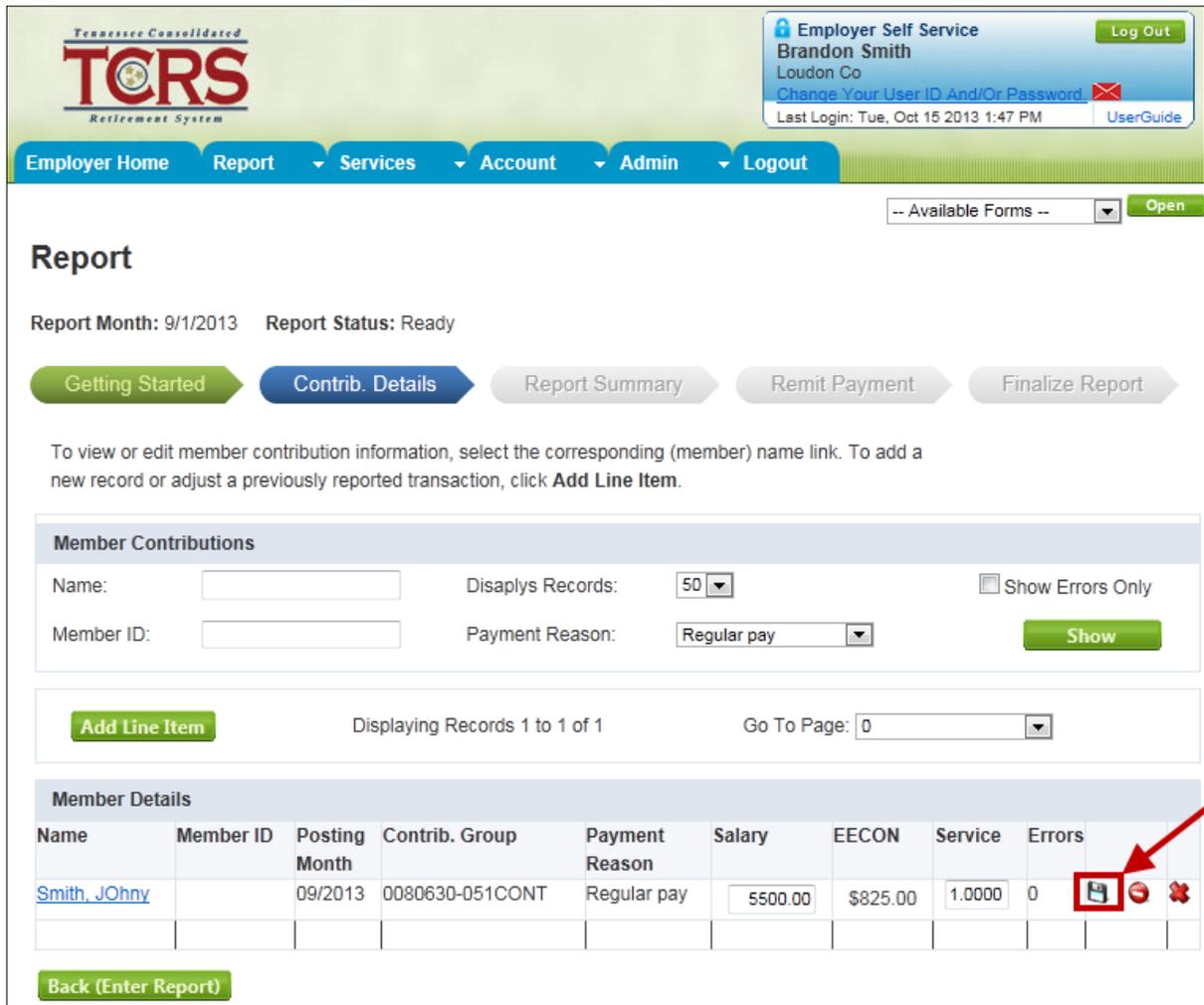


The screenshot shows the TCRS Employer Self Service interface. At the top, there is a navigation bar with tabs for Employer Home, Report, Services, Account, Admin, and Logout. A user profile box in the top right identifies the user as Brandon Smith from Loudon Co, with a last login of Tue, Oct 15 2013 1:47 PM. Below the navigation bar, the 'Report' section is active, showing a report for 9/1/2013 with a status of 'Ready'. A series of buttons allows navigation through the report process: Getting Started, Contrib. Details (selected), Report Summary, Remit Payment, and Finalize Report. Below these buttons, instructions state: 'To view or edit member contribution information, select the corresponding (member) name link. To add a new record or adjust a previously reported transaction, click **Add Line Item**.' The 'Member Contributions' section includes input fields for Name, Member ID, Disaplys Records (set to 50), and Payment Reason, along with a 'Show Errors Only' checkbox and a 'Show' button. Below this is an 'Add Line Item' button, a page indicator 'Displaying Records 1 to 1 of 1', and a 'Go To Page' dropdown set to 0. The 'Member Details' table contains one record for 'Smith, JOhny' with a salary of \$5,000.00 and service of 1.0000. In the 'Errors' column, the value is 0, and a gear icon with a red 'x' is visible, highlighted by a red arrow. A 'Back (Enter Report)' button is located at the bottom left of the table area.

Name	Member ID	Posting Month	Contrib. Group	Payment Reason	Salary	EECON	Service	Errors
<a href="#">Smith, JOhny</a>		09/2013	0080630-051CONT	Regular pay	\$5,000.00	\$0.00	1.0000	0

**Step 6** -- Click  to save the record row.

**Note:** After you save the record row, the record goes through the validation process automatically. If there are errors, you are immediately notified of them and prompted to correct them.



**Tennessee Consolidated TCRS Retirement System**

Employer Self Service  
 Brandon Smith  
 Loudon Co  
 Change Your User ID And/Or Password  
 Last Login: Tue, Oct 15 2013 1:47 PM

Employer Home | Report | Services | Account | Admin | Logout

Report

Report Month: 9/1/2013 Report Status: Ready

Getting Started | **Contrib. Details** | Report Summary | Remit Payment | Finalize Report

To view or edit member contribution information, select the corresponding (member) name link. To add a new record or adjust a previously reported transaction, click **Add Line Item**.

**Member Contributions**

Name:  Disaplys Records: 50  Show Errors Only  
 Member ID:  Payment Reason: Regular pay

Displaying Records 1 to 1 of 1 Go To Page: 0

**Member Details**

Name	Member ID	Posting Month	Contrib. Group	Payment Reason	Salary	EECON	Service	Errors		
<a href="#">Smith, JOhny</a>		09/2013	0080630-051CONT	Regular pay	5500.00	\$825.00	1.0000	0		 

**Step 7 --** Repeat steps 4 through 6 for all records that require updating.

**Note:** You can also update prior period information by using the **Add Line Item** functionality. Adding a line item prompts you for the member's SSN as well as the posting month for update. If a member record is returned, you can then update an existing record or add a new record for the same time period. If a member record is not returned, you can enter a new record for the member in a retroactive status.

**Step 8 --** Click **Back (Enter Report)** to return to the Monthly Reporting wizard.

The screenshot shows the TCRS Retirement System Employer Self Service interface. The user is logged in as Brandon Smith from Loudon Co. The 'Report' wizard is in progress, with the 'Contrib. Details' step selected. The report is for 9/1/2013 and is ready. A table displays member details for 'Smith, JOhny' with a rejected status. A 'Back (Enter Report)' button is highlighted with a red box.

Name	Member ID	Posting Month	Contrib. Group	Payment Reason	Salary	EECON	Service	Errors
<a href="#">Smith, JOhny</a>		09/2013	0080630-051CONT	Regular pay	\$ 5500.00	\$825.00	1.0000	0

**Step 9 --** Follow steps 16 through 29 of Section 6.1, Submitting a Monthly Report with a File Template, to complete submitting the report.

### 6.3.1. Add Line Item Details (Prior Period Adjustments, Load Rejects)

File submitters will have to add a line item when they have records rejected on load or when they are making prior period adjustments. For those employers using enter report details, you will have to add a line item when you have a new employee to report or when you have a prior period adjustment.

**Step 1 --** Follow steps 1 through 4 of Section 6.3, Submitting a Monthly Reporting using Report Details.

**Step 2** -- Click **Add Line Item**. The **Add Member Contribution** screen displays.

The screenshot shows the TCRS Retirement System interface. At the top left is the TCRS logo. At the top right, a user profile box displays "Employer Self Service", "Jim Jensen", "Nolensville Town Of", and "Last Login: Mon, Apr 07 2014 3:32 PM". Below this is a navigation bar with "Employer Home", "Report", "Services", "Account", "Admin", and "Logout". A dropdown menu shows "-- Available Forms --" with an "Open" button. The main content area shows "Report Month: 2/1/2014" and "Report Status: Ready". A progress bar has five steps: "Getting Started" (active), "Contrib. Details", "Report Summary", "Remit Payment", and "Finalize Report". The title "Add Member Contribution" is followed by a "Step 1 of 2" indicator and instructions: "Provide the member's SSN and contribution information below. When you have finished, click Continue to Step 2." The form section "Enter member's information" contains an SSN field (three empty boxes separated by dashes) and a "Posting Month" field with "Feb" and "2014" selected. "Cancel" and "Continue to Step 2" buttons are at the bottom.

**Step 3** -- Enter the member's SSN and the posting month of the entry.

This screenshot is identical to the previous one, but a red rectangular box highlights the SSN input fields and the "Posting Month" dropdown menu, indicating where the user should enter data.

Step 4 -- Click [Continue to Step 2](#)

Tennessee Consolidated  
**TCRS**  
Retirement System

Employer Self Service  
Jim Jensen  
Nolensville Town Of  
Last Login: Mon, Apr 07 2014 3:32 PM  
UserGuide

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

Report Month: 2/1/2014 Report Status: Ready

Getting Started Contrib. Details Report Summary Remit Payment Finalize Report

### Add Member Contribution

**Step 1 of 2** Provide the member's SSN and contribution information below.  
When you have finished, click **Continue to Step 2**.

Enter member's information

SSN: 111 - 11 - 1111

Posting Month: Aug 2014

Cancel **Continue to Step 2**

Step 5 -- Concord will pull forward any previously-reported lines from the selected posting month. To update the previous months contribution (prior period adjustment), select the first radio button. If you need to add a second line for the posting month, for an additional payment such as a bonus, select the second radio button.

Getting Started **Contrib. Details** Report Summary Remit Payment Finalize Report

### Add Member Contribution

**Step 1 of 2** Provide the member's SSN and contribution information below.  
When you have finished, click **Continue to Step 2**.

Enter member's information

SSN: 111 - 11 - 1111

Posting Month: Aug 2014

We've found one or more contributions matching your search criteria. Please select the correct contribution below.

Payment Reason	Contribution Group	Position	Position Status	Salary
<input checked="" type="radio"/> Regular Pay w/ Add Creditable Comp	Standard Contributing		Regular Full Time	\$4,150.28
<input type="radio"/> Create a new contribution with the information I entered above.				

Cancel **Continue to Step 2**

**Step 6 --** You can then update the member's detail record. Note: updating the record overwrites the previous information; therefore, you should update the record as if you are reporting it for the first time (rather than updating only the difference).

Prefix:	<input type="text" value="Select Prefix"/>	SSN:	XXX-XX-3728
First Name:*	<input type="text" value="Jane"/>	Member ID:	1093361
Middle Name:	<input type="text"/>		
Last Name:*	<input type="text" value="Doe"/>		
Suffix:	<input type="text" value="Select Suffix"/>		
<b>Contribution Information</b>			
Posting Month:	8/1/2014	Contribution Group: *	<input type="text" value="0088990-051CONT"/>
		<a href="#">Eligibility Requirement Information</a>	
Payment Reason:*	<input type="text" value="Regular Pay w/ Add"/>	Salary: *	<input type="text" value="4150.28"/>
Salary that Exceeds IRS Limit:	<input type="text"/>	Pre-Tax Employee Contribution:	<input type="text" value="207.52"/>
Post-Tax Employee Contribution:	<input type="text" value="0.00"/>	Employer Contribution:	135.71
Service:	<input type="text" value="1.0000"/>	Calculate Details:	<input type="button" value="Calculate"/>
<b>Employment Information</b>			
Position Status: *	<input type="text" value="Regular Full Time"/>	Scheduled Hours Per Day:	<input type="text" value="8.00"/>
Employment Begin Date:*	<input type="text" value="4/10/2010"/>	Employment End Date:	<input type="text"/>
Employment End Reason:	<input type="text" value="Select Reason"/>	Payroll Frequency: *	<input type="text" value="Bi-Weekly"/>
Type of Rate of Pay: *	<input type="text" value="Hourly"/>	Rate of Pay: *	<input type="text" value="13.530"/>
Contract Months:	<input type="text"/>		

**Step 7 --** Once you have finished making the desired updates, click **Submit**.

Report Month: 2/1/2014    Report Status: Ready

Getting Started    **Contrib. Details**    Report Summary    Remit Payment    Finalize Report

### Member Contribution:

**Personal Information**

Prefix:     SSN:    XXX-XX-0001  
First Name: \*     Member ID:    1000001  
Middle Name:   
Last Name: \*   
Suffix:

**Contribution Information**

Posting Month:    2/1/2014    Contribution Group: \*   
[Eligibility Requirement Information](#)  
Payment Reason: \*     Salary: \*   
Salary that Exceeds IRS Limit:     Pre-Tax Employee Contribution:   
Post-Tax Employee Contribution:     Employer Contribution:   
Service:     Calculate Details:

**Employment Information**

Position Status: \*     Scheduled Hours Per Day:   
Employment Begin Date: \*     Employment End Date:   
Employment End Reason:     Payroll Frequency: \*   
Type of Rate of Pay: \*     Rate of Pay: \*   
Contract Months:

**Leave Information**

Accrued Sick leave days:

**Demographic Information**

Date of Birth: \*   
Gender: \*   
Primary Address Line: \*   
Use for actual street address or post office box.  
Secondary Address Line:   
Use for Apartment, Building, Unit, Floor, Suite, etc.  
City: \*   
State: \*   
Zip: \*  -  (optional)  
International Address:

## 7. Monthly Packet

The monthly packet is similar to today's turnaround document. A monthly packet must be generated before you can submit your file for the current month.

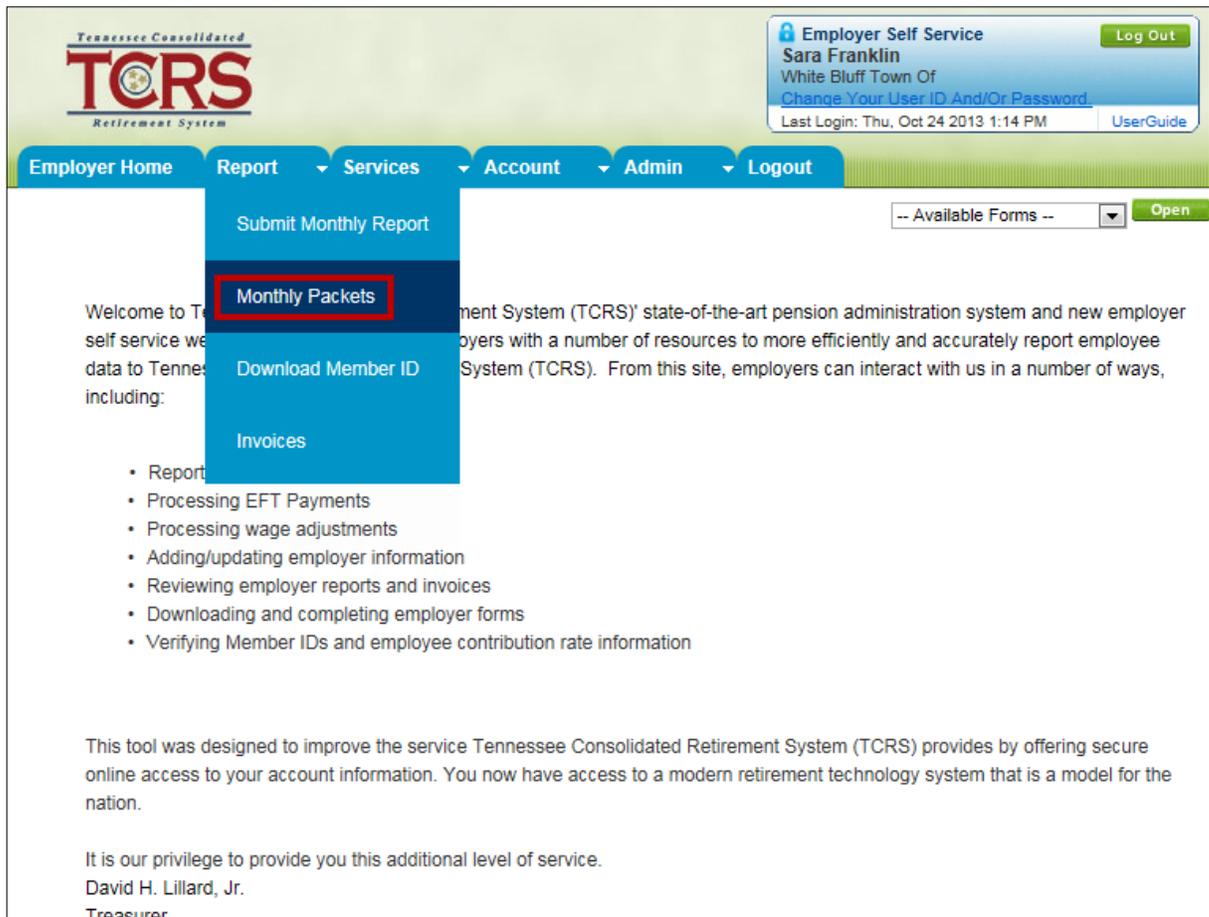
Monthly packets are generated on the 25<sup>th</sup> day of each month. Once the monthly packet is generated, the primary reporting official is alerted via email that the packet is ready to view. A monthly packet will not be generated if there are no error reports generated. Administrative and employer reporting users can view reports and correspondence that are a part of the monthly packet.

Monthly packets display if there is content included or at least one report given for a month. These packets are comprised of a Monthly Packet Alert Email and several reports including:

- Leave Without Pay Report
- Demographic Errors Report
- Missing Employment End Date Report
- Non-Participating Status Report
- Errors Not in Template Report

**Step 1** -- To navigate to the **Monthly Packets** screen, click on the following menu options:

**Report > Monthly Packets**



The screenshot displays the TCRS (Tennessee Consolidated Retirement System) Employer Self-Service portal. At the top left is the TCRS logo. The top right shows the user's session information: Sara Franklin, White Bluff Town Of, with a 'Log Out' button and a 'UserGuide' link. Below the logo is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Report' tab is selected, and a dropdown menu is open, showing options: 'Submit Monthly Report', 'Monthly Packets' (highlighted with a red box), 'Download Member ID', and 'Invoices'. Below the navigation bar, there is a section titled 'Welcome to TCRS' with a list of services including 'Report', '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, there is a message from David H. Lillard, Jr., Treasurer, stating that the tool was designed to improve the service TCRS provides by offering secure online access to account information.

**Step 2 --** Select the fiscal year and / or month from the drop down menus.

**Monthly Packets**

To view a monthly packet, please choose the Fiscal Year and Month Generated from the menus below.  
To view an individual report, select the appropriate link and the report will open in a new browser window.

**Please Note:** Reports are generated for the monthly packet as necessary based on the information reported in the previous month's contribution detail submission. Due to this, the number of monthly packet reports could vary from month to month.

Fiscal Year:  Month Generated:

REPORT NAME	RETIREMENT SYSTEM CODE
<a href="#">Missing Employment End Date Report</a>	TCRS

**Step 3 --** All monthly packets for the year and / or month displays.

**Note:** If no packet was generated, then no documents display.

**Monthly Packets**

To view a monthly packet, please choose the Fiscal Year and Month Generated from the menus below.  
To view an individual report, select the appropriate link and the report will open in a new browser window.

**Please Note:** Reports are generated for the monthly packet as necessary based on the information reported in the previous month's contribution detail submission. Due to this, the number of monthly packet reports could vary from month to month.

Fiscal Year:  Month Generated:

REPORT NAME	RETIREMENT SYSTEM CODE
<a href="#">Missing Employment End Date Report</a>	TCRS

**Step 4 --** Click the link to view a PDF of the monthly packet.

Tennessee Consolidated  
**TCRS**  
Retirement System

Employer Self Service  
Sara Franklin  
White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Wed, Aug 28 2013 2:37 PM [UserGuide](#) [Log Out](#)

Employer Home Report Services Account Admin Logout

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

### Monthly Packets

To view a monthly packet, please choose the Fiscal Year and Month Generated from the menus below.  
To view an individual report, select the appropriate link and the report will open in a new browser window.

**Please Note:** Reports are generated for the monthly packet as necessary based on the information reported in the previous month's contribution detail submission. Due to this, the number of monthly packet reports could vary from month to month.

Fiscal Year:  Month Generated:

REPORT NAME	RETIREMENT SYSTEM CODE
<a href="#">Missing Employment End Date Report</a>	TCRS

**Step 5 --** Click to view the PDF of the monthly packet.

Do you want to open or save **MissingEmploymentEndDateReport81229.pdf** (58.0 KB) from 10.233.0.30?

[Open](#) [Save](#) [Cancel](#) ×

## Step 6 -- The PDF of the monthly packet displays.

  
TENNESSEE CONSOLIDATED RETIREMENT SYSTEM

10/10/2013  
07:03 PM

DPASBatchUser(SOLUTIONS\DPASUser)  
Version: 5.0.1.0

### Missing Employment End Date Report

**Filter Conditions**  
Agency Code: 0089510 - NOLENSVILLE TOWN OF    Report Date: 09/01/2013

The following members were not reported for the previous month(s). Please submit contributions or an employment end date for each member listed below.

Name	Contribution Group	Member ID	Social Security Number	Employment Begin Date	Last Reported Contribution Date
Doeperson, Judith	Non-Participating	1000151	XXXX-XX-0151	7/1/2013	8/1/2013
Doedoe, Theodore	Non-Participating	1000293	XXXX-XX-0293	7/1/2013	8/1/2013
horse, secretariat	Non-Participating	1802572	XXXX-XX-1234	8/1/2013	8/1/2013
Wright, Jose L	Standard Contributing	1801570	XXXX-XX-1072	6/1/2013	8/1/2013
Beach, Sheila D	Standard Contributing	1802570	XXXX-XX-6013	1/1/2012	8/1/2013
Trotz, Barry	Standard Contributing	1802571	XXXX-XX-4567	8/1/2013	8/1/2013

Contributions were not received for the following member(s) for the last three months. Therefore Membership Status is being changed to Inactive. To ensure accuracy for the member's account please submit an Employment End Date.

Name	Contribution Group	Member ID	Social Security Number	Employment Begin Date	Last Reported Contribution Date
------	--------------------	-----------	------------------------	-----------------------	---------------------------------

Missing Employment End Date Report Page 1 of 1

## 8. Download Member IDs

You can use the **Download Member IDs** screen to download the member ID for a particular name or for a set of members using search criteria. You can search by:

- Newly Created Members
- Date of Employment
- Report Month
- SSN

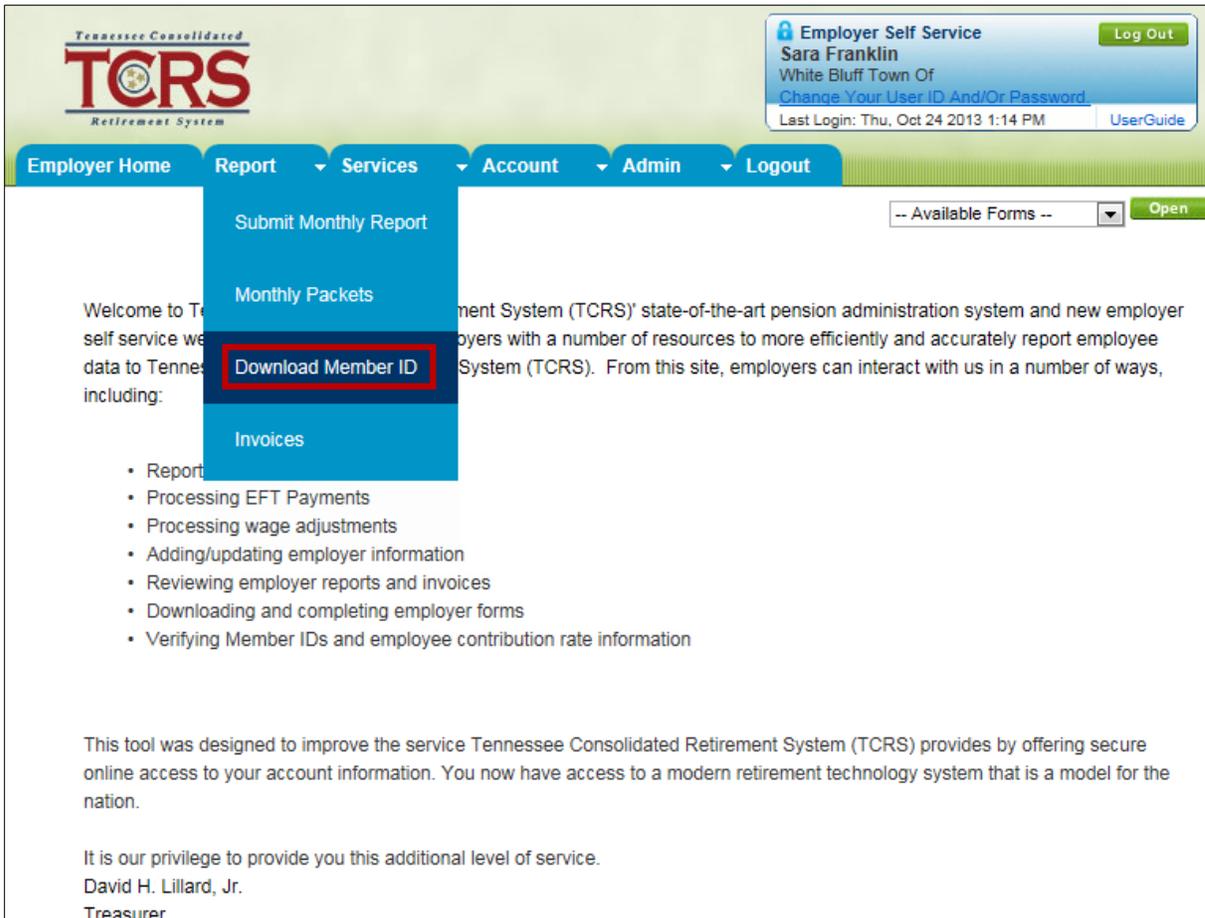
You can download the file and import it into your payroll to populate the member ID field. Currently, reporting member IDs within the monthly file is optional.

It is the employer's responsibility to download new employee's member IDs. TCRS suggests the following process: Prior to the submission of the monthly employer report, use the **Member ID** screen to produce a list of the new member IDs for the previous month's Employer Report. By waiting until just prior to submitting the current employer report, the employer retrieves the most up to date list of member IDs. Employers cannot download a member ID for a new employee who has not worked for an employer covered by TCRS.

**Note:** If you manually enter monthly reporting details, member IDs do not need to be downloaded via this screen for new employees. The new employee's member ID automatically displays on the **Enter Reporting Details** screen.

**Step 1 --** To navigate to the **Download Member ID** screen, click on the following menu options:

**Report > Download Member ID**



The screenshot shows the TCRS Retirement System Employer Self-Service interface. At the top left is the TCRS logo. At the top right, a user profile for Sara Franklin is displayed with a 'Log Out' button. Below the logo is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Report' tab is selected, and a dropdown menu is open, showing options: 'Submit Monthly Report', 'Monthly Packets', 'Download Member ID' (highlighted with a red box), and 'Invoices'. To the right of the dropdown is a search box labeled '-- Available Forms --' with an 'Open' button. The main content area contains a welcome message and a list of services including reporting, processing payments, and downloading forms. At the bottom, there is a signature block for David H. Lillard, Jr., Treasurer.

**Step 2 --** Select the method by which to search for a new employee from the **Search By** drop down menu. The options include:

- Newly Created Members
- Date of Employment
- Report Month
- SSN

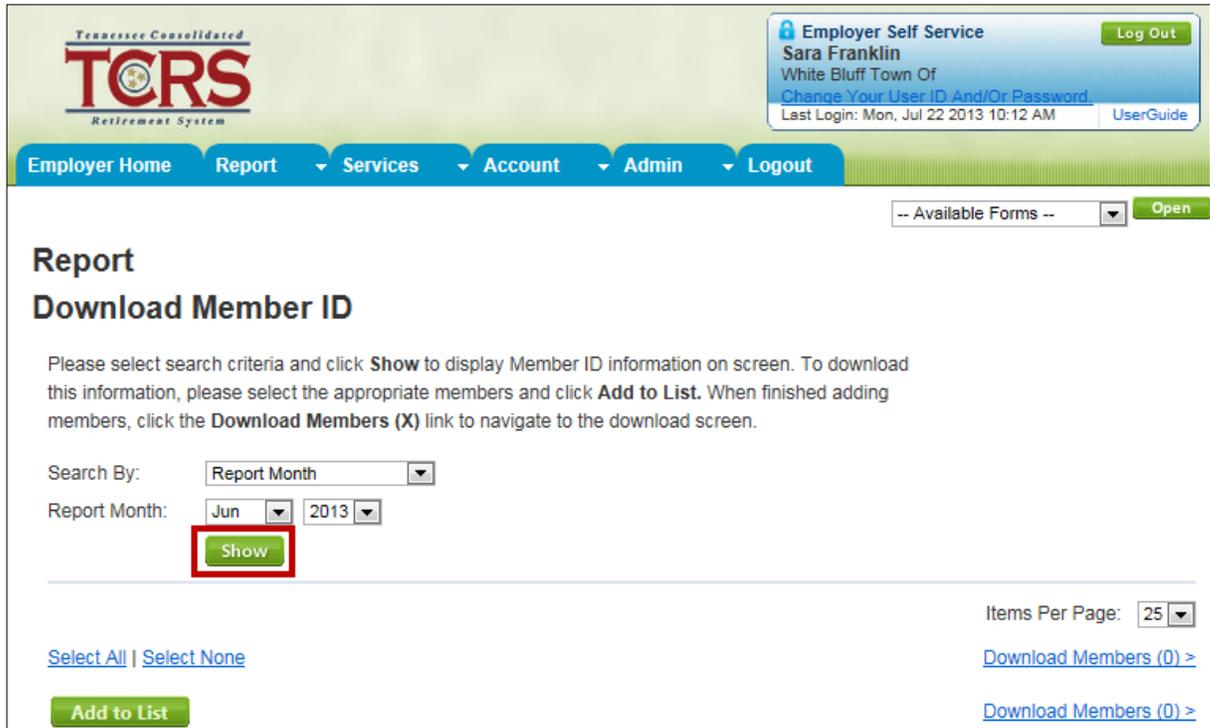
The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top, there is a navigation bar with links for Employer Home, Report, Services, Account, Admin, and Logout. A user information box in the top right identifies Sara Franklin, White Bluff Town Of, with a last login of Mon, Jul 22 2013 10:12 AM and a Log Out button. The main content area is titled 'Report' and 'Download Member ID'. It contains instructions: 'Please select search criteria and click **Show** to display Member ID information on screen. To download this information, please select the appropriate members and click **Add to List**. When finished adding members, click the **Download Members (X)** link to navigate to the download screen.' Below this, there is a 'Search By:' label and a dropdown menu. The dropdown menu is open, showing the following options: 'Select Search Type', 'Newly Created Members', 'Date of Employment', 'Report Month', and 'SSN'. To the right of the dropdown is an 'Items Per Page:' selector set to '25'. At the bottom left, there are links for 'Select All' and 'Select None', and a green 'Add to List' button. At the bottom right, there are two 'Download Members (0) >' links.

**Step 3 --** Enter the appropriate search criteria into the field(s). Search criteria for each **Search By** option are as follows:

- **Newly Created Members**
  - **Note:** No fields are displayed for this selection. The list generated for this search option allows you to build a list of members who have been reported since the **Download Member ID** file was last generated
- **Date of Employment**
  - **Start Date (mm/dd/yyyy)**
- **Report Month**
  - **Report Month**
    - **Month**
    - **Year**
- **SSN**
  - **SSN**

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top, the user is logged in as Sara Franklin from White Bluff Town Of, with a last login of Mon, Jul 22 2013 10:12 AM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The main content area is titled 'Report' and 'Download Member ID'. It contains instructions: 'Please select search criteria and click **Show** to display Member ID information on screen. To download this information, please select the appropriate members and click **Add to List**. When finished adding members, click the **Download Members (X)** link to navigate to the download screen.' The search criteria are set to 'Report Month' with sub-selects for 'Month' and 'Year'. A 'Show' button is visible. At the bottom, there are links for 'Select All', 'Select None', 'Add to List', and 'Download Members (0) >'.

Step 4 -- Click .



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White Bluff Town Of  
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Last Login: Mon, Jul 22 2013 10:12 AM [UserGuide](#) [Log Out](#)

Employer Home Report Services Account Admin Logout

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

## Report

### Download Member ID

Please select search criteria and click **Show** to display Member ID information on screen. To download this information, please select the appropriate members and click **Add to List**. When finished adding members, click the **Download Members (X)** link to navigate to the download screen.

Search By:

Report Month:

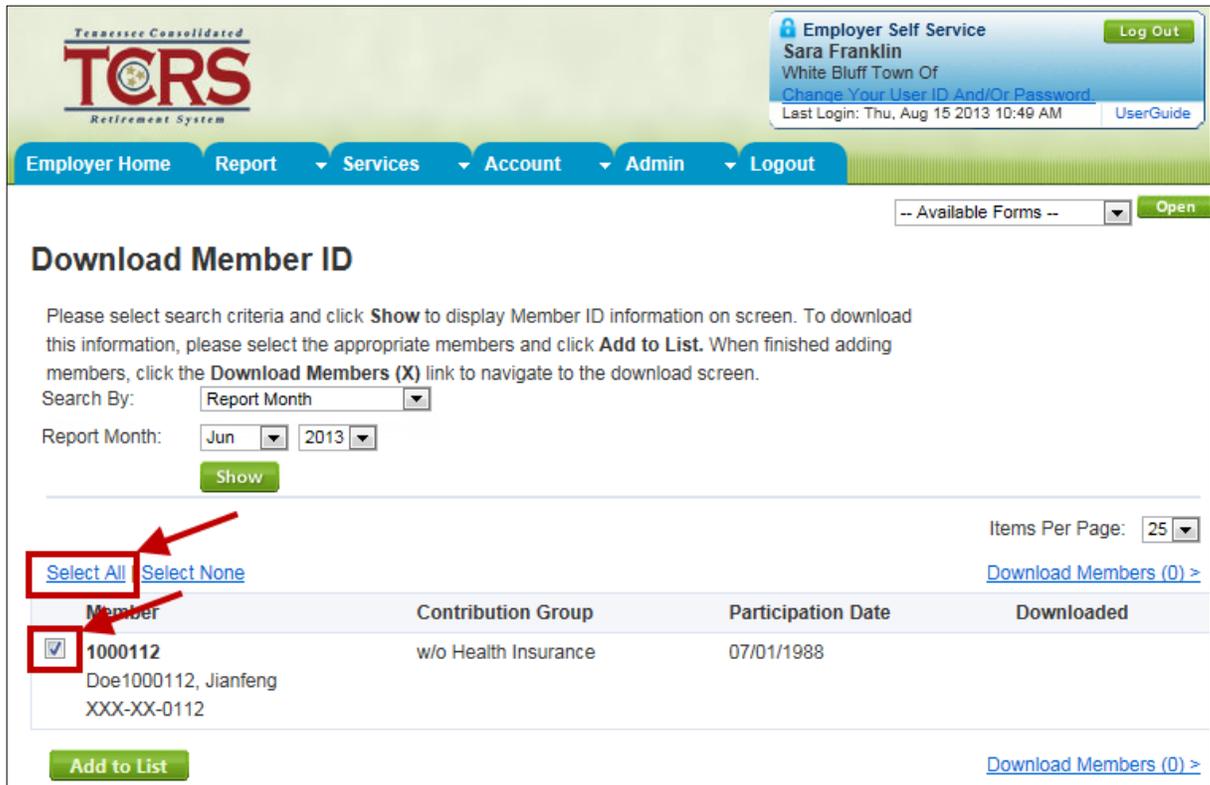
**Show**

Items Per Page:

[Select All](#) | [Select None](#) [Download Members \(0\) >](#)

[Add to List](#) [Download Members \(0\) >](#)

Step 5 -- The members who match your search criteria display at the bottom of the screen. You can either select the check box next to the member you want to add or click the **Select All** link to select all the members that display.



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Last Login: Thu, Aug 15 2013 10:49 AM [UserGuide](#) [Log Out](#)

Employer Home Report Services Account Admin Logout

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

## Download Member ID

Please select search criteria and click **Show** to display Member ID information on screen. To download this information, please select the appropriate members and click **Add to List**. When finished adding members, click the **Download Members (X)** link to navigate to the download screen.

Search By:

Report Month:

**Show**

Items Per Page:

[Select All](#) | [Select None](#) [Download Members \(0\) >](#)

Member	Contribution Group	Participation Date	Downloaded
<input checked="" type="checkbox"/> 1000112 Doe1000112, Jianfeng XXX-XX-0112	w/o Health Insurance	07/01/1988	

[Add to List](#) [Download Members \(0\) >](#)

Step 6 -- Click

**Add to List**

The screenshot shows the TCRS Retirement System interface. At the top right, the user is logged in as Sara Franklin, White Bluff Town Of, with a last login of Thu, Aug 15 2013 10:49 AM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. Below the menu, there is a dropdown for 'Available Forms' and an 'Open' button. The main heading is 'Download Member ID'. Below this, there is a search section with 'Search By:' set to 'Report Month' and 'Report Month:' set to 'Jun' for '2013'. A 'Show' button is present. Below the search section, there is a table with columns: Member, Contribution Group, Participation Date, and Downloaded. The table contains one row for member 1000112, Doe1000112, Jianfeng, XXX-XX-0112, with a contribution group of 'w/o Health Insurance' and a participation date of '07/01/1988'. A checkbox is checked for this member. Below the table, there is an 'Add to List' button highlighted with a red box. There are also links for 'Select All | Select None', 'Download Members (0) >', and 'Download Members (0) >'.

Step 7 -- Click the **Download Members** link.

The screenshot shows the TCRS Retirement System interface, similar to the previous one. The user is still Sara Franklin. The search section now has 'Search By:' set to 'Newly Created Members'. The 'Show' button is present. Below the search section, there is a table with columns: Member, Contribution Group, Participation Date, and Downloaded. The table contains one row for member 1000112, Doe1000112, Jianfeng, XXX-XX-0112, with a contribution group of 'w/o Health Insurance' and a participation date of '07/01/1988'. A checkbox is checked for this member. Below the table, there is an 'Add to List' button. The 'Download Members (1) >' link is highlighted with a red box. There are also links for 'Select All | Select None' and 'Download Members (1) >'.

**Step 8 --** The **Download Member ID** screen displays. Click **Download to File**.

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Employer Home Report Services Account Admin Logout

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

### Download Member ID

These are the members ready to download to file.

To remove a member from the list click **remove**.

To continue searching for members to download click **Continue Searching**.

[< Continue Searching](#) Items Per Page: 25

Member	Contribution Group	Participation Date	Downloaded
1000112 Doe1000112, Jianfeng XXX-XX-0112	w/o Health Insurance	07/01/1988	<a href="#">remove</a>

[< Continue Searching](#) **Download to File**

**Step 9 --** The member ID file is downloaded to your computer as a .txt file. Click **Open** to view the file.

**Note:** The .txt file contains only those members you selected in Step 5.

Do you want to open or save **0081220\_08152013.txt** (253 bytes) from 10.233.0.30? **Open** Save Cancel

0081220\_08152013.txt - Notepad

```
File Edit Format View Help
H008120081220_20130815 20130815
D00812001000112001000112JianFeng
F008120000000001
```

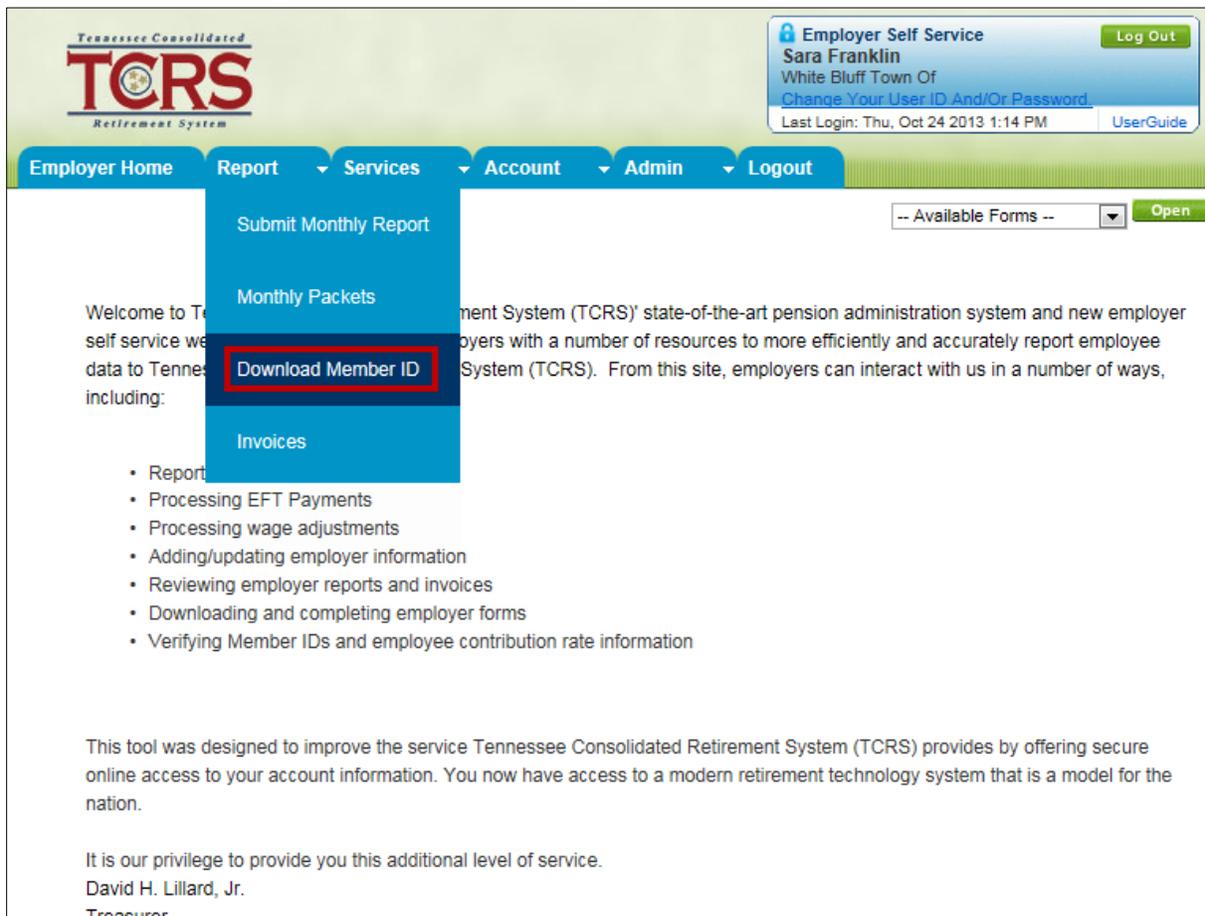
## 8.1. Member Plan Search (to determine Hybrid Plan or Legacy Plan)

You can use the **Member Plan Search** within the **Download Member ID** screen to verify which plan a new hire should be enrolled. You can search by:

- SSN
- Member ID

The **Member Plan Search** verifies the member's information based on the Hybrid Plan and Legacy Plan membership rules.

**Step 1 --** To navigate to the **Member Plan Search** screen, click on the following menu options: **Report > Download Member ID**



The screenshot displays the TCRS (Tennessee Consolidated Retirement System) Employer Self Service interface. At the top left is the TCRS logo. The top right shows the user's login information: Sara Franklin, White Bluff Town Of, with a 'Log Out' button and a 'UserGuide' link. Below the logo is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Report' tab is selected, and a dropdown menu is open, listing 'Submit Monthly Report', 'Monthly Packets', 'Download Member ID' (highlighted with a red box), and 'Invoices'. To the right of the dropdown is a search box labeled '-- Available Forms --' with an 'Open' button. The main content area contains a welcome message and a list of services including reporting, processing payments, and verifying member IDs.

**Step 2 --** Select the method by which to search for a new employee from the **Search By** drop down menu. The options include:

- SSN
- Member ID

The screenshot displays the TCRS Retirement System Employer Self Service interface. At the top, the user is logged in as Sara Franklin, White Bluff Town Of, with a last login time of Thu, Jul 10 2014 7:41 AM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The main content area is titled 'Download Member ID' and contains instructions for selecting search criteria and adding members to a list. A 'Search By' dropdown menu is present, which is highlighted with a red box in the image. The dropdown menu is open, showing the following options: 'Select Search Type', 'SSN', and 'Member ID'. Other visible elements include an 'Add to List' button, 'Items Per Page' set to 25, and 'Download Members (0) >' links.

**Step 3** -- Type in the member's information and click the **Show** button.

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service Sara Franklin White Bluff Town Of Log Out  
Last Login: Thu, Jul 10 2014 7:41 AM UserGuide

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

### Download Member ID

Please select search criteria and click **Show** to display Member ID information on screen. To download this information, please select the appropriate members and click **Add to List**. When finished adding members, click the **Download Members (X)** link to navigate to the download screen.

Search By:

Select All | Select None Items Per Page: 25

[Download Members \(0\) >](#)  
[Download Members \(0\) >](#)

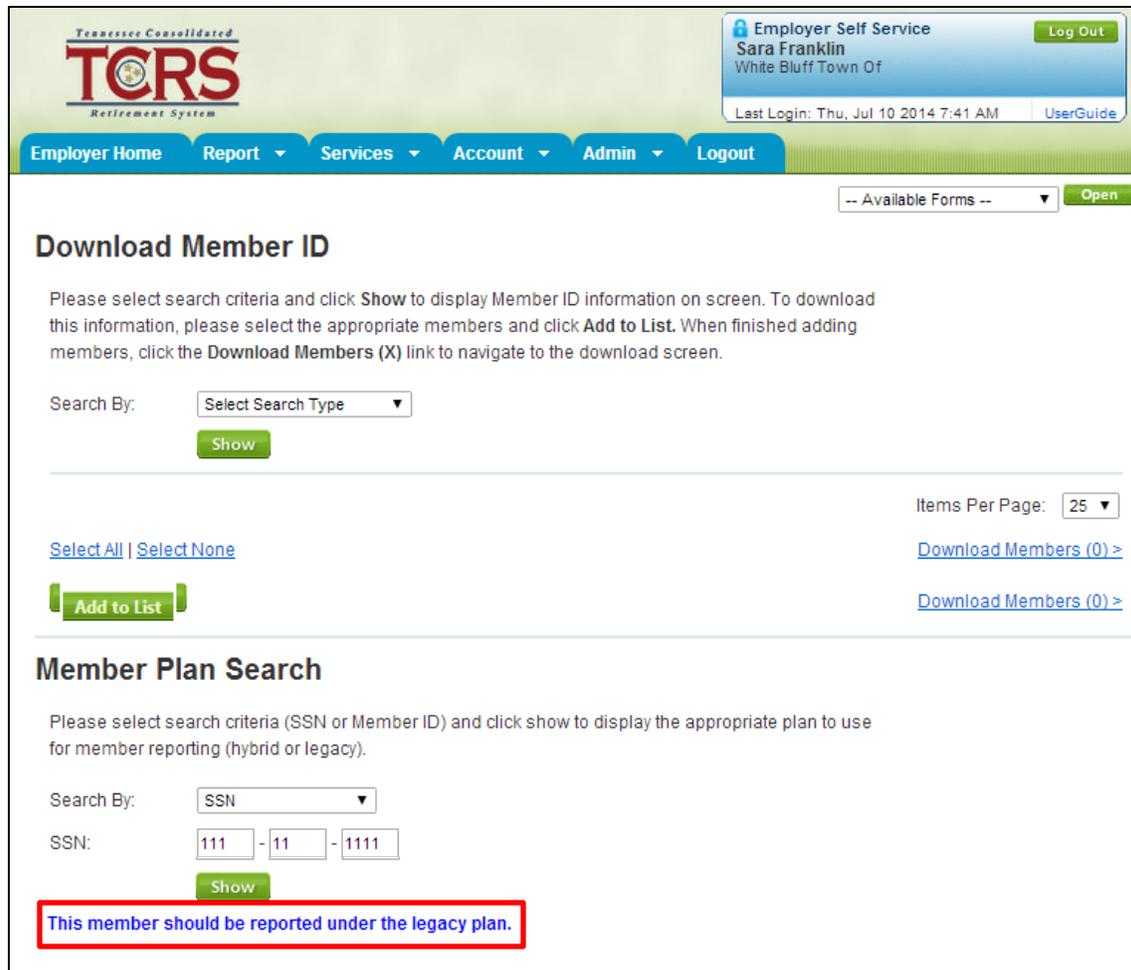
### Member Plan Search

Please select search criteria (SSN or Member ID) and click show to display the appropriate plan to use for member reporting (hybrid or legacy).

Search By:

SSN:  -  -

**Step 4 --** The plan determination will display.



The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top right, the user is identified as Sara Franklin, White Bluff Town Of, with a last login of Thu, Jul 10 2014 7:41 AM. The main navigation bar includes links for Employer Home, Report, Services, Account, Admin, and Logout. Below this, there is a section for 'Download Member ID' with instructions on how to search and download member information. A search form is present with a 'Select Search Type' dropdown and a 'Show' button. Below the search form, there are links for 'Select All', 'Select None', and 'Add to List'. To the right, there is a 'Items Per Page' dropdown set to 25 and two 'Download Members (0) >' links. Below this is the 'Member Plan Search' section, which also has instructions and a search form with a 'Search By' dropdown set to 'SSN' and an SSN input field containing '111 - 11 - 1111'. A 'Show' button is located below the SSN field. A red rectangular box highlights a message at the bottom of the search section: 'This member should be reported under the legacy plan.'

## 9. Invoices

Invoices generated by TCRS display in the **Process Invoices** screen for administrative and employer reporting users to view and pay. From this screen, you have the option of remitting payment for invoices outside of the monthly reporting process.

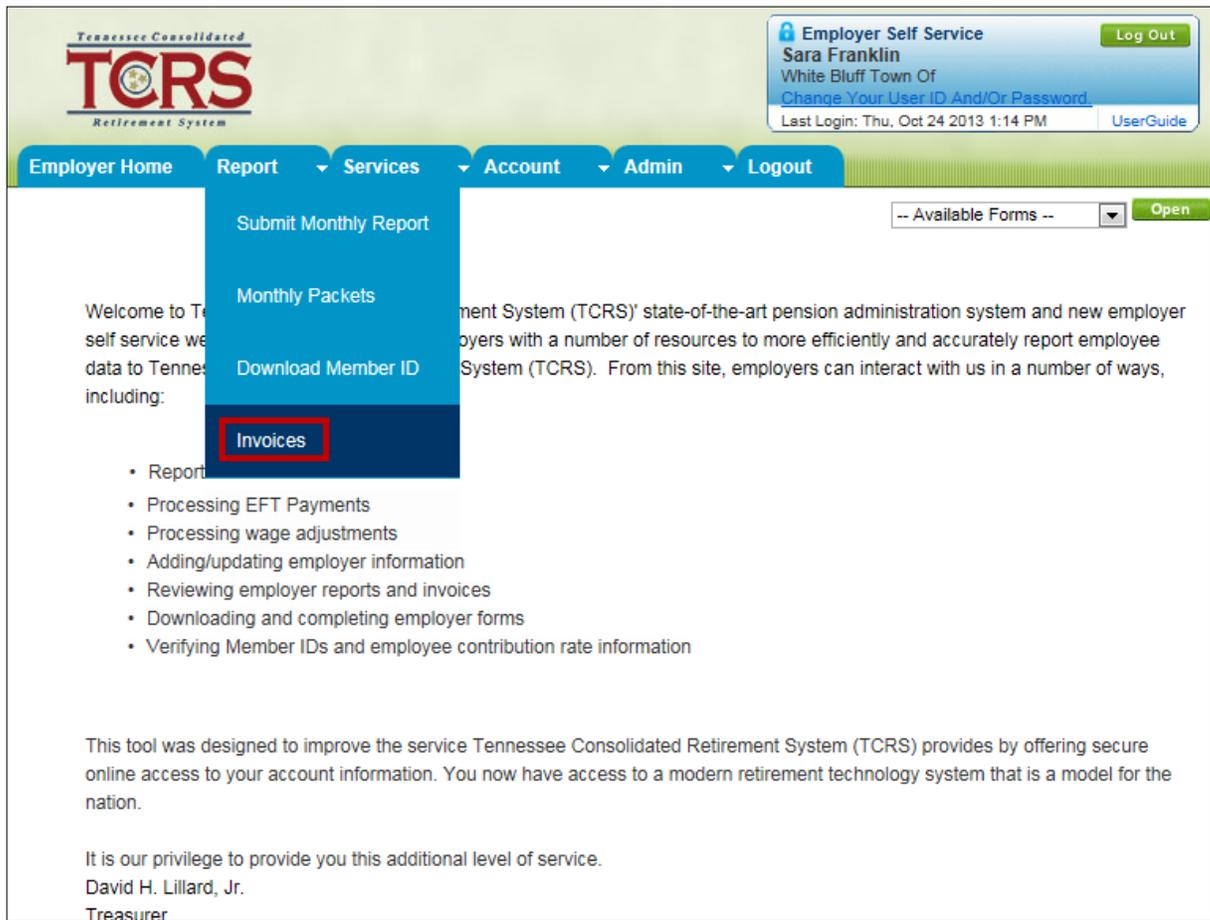
**Note:** Credit invoices do not display on the **Process Invoices** screen.

### 9.1. Paying an Invoice

To pay an invoice, follow the steps below.

**Step 1 --** To navigate to the **Invoices** screen, click on the following menu options:

**Report > Invoices**



The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top left is the TCRS logo. At the top right, a user profile for Sara Franklin is displayed with a 'Log Out' button. Below the logo is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Report' tab is selected, and a dropdown menu is open, listing 'Submit Monthly Report', 'Monthly Packets', 'Download Member ID', and 'Invoices'. The 'Invoices' option is highlighted with a red rectangular box. To the right of the dropdown is a search box labeled '-- Available Forms --' with an 'Open' button. The main content area contains a welcome message and a list of services including 'Report', '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, there is a message from David H. Lillard, Jr., Treasurer.

**Step 2 --** The most recent unpaid invoices display on the screen. Invoices with a status of Cancel or Write Off do not display here.

**Note:** If you want to view both paid and unpaid invoices, select the **Show All Invoices** check box. Search for an invoice by recent invoices or by date range.

**Note:** Employers who have a different balancing employer than themselves will not see monthly reporting.

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top, there is a navigation menu with options: Employer Home, Report, Services, Account, Admin, and Logout. A user profile box in the top right identifies Sara Franklin, White Bluff Town Of, with a last login of Wednesday, August 28, 2013, at 2:37 PM. Below the navigation is a section titled "Invoices" with a sub-header "Invoices". A descriptive paragraph explains that the module allows employers to manage invoices and provides instructions on how to pay or view an invoice. Below this, there are search filters: "Recent Invoices" (set to "--Select--"), "Date Range" (mm/dd/yyyy to mm/dd/yyyy), "Type" (Select Invoice Type), and a "Show Paid Invoices" checkbox. A table of invoices is displayed, with a red border around it. The table has the following data:

Invoice	Invoice Type	Date	Due Date	Amount	Balance Due	Status
<a href="#">631</a>	Reinstatement	9/5/2013	10/05/2013	\$300.00	\$300.00	Unpaid
<a href="#">633</a>	Penalty - Monthly Reporting	9/5/2013	10/05/2013	\$500.00	\$500.00	Unpaid
<a href="#">600</a>	Monthly Reporting	8/28/2013	09/27/2013	(\$600.00)	(\$600.00)	Pending
<a href="#">580</a>	Monthly Reporting	8/27/2013	09/26/2013	(\$285.00)	(\$285.00)	Pending
<a href="#">565</a>	Monthly Reporting	8/22/2013	09/21/2013	\$120.00	\$120.00	Pending
<a href="#">492</a>	Penalty - Monthly Reporting	8/15/2013	09/14/2013	\$0.01	\$0.01	Pending
<a href="#">471</a>	Penalty - Monthly Reporting	8/12/2013	09/11/2013	\$0.03	\$0.03	Pending
<a href="#">424</a>	Penalty - Monthly Reporting	8/1/2013	08/31/2013	\$600.00	\$600.00	Pending

At the bottom of the table area, there is a "Pay Invoice" button.

**Step 3 --** Select the check box to the left of the invoice that you want to pay.

The screenshot shows the TCRS Retirement System Employer Self-Service interface. At the top right, the user is identified as Sara Franklin, White Bluff Town Of, with a last login of Wed, Aug 28 2013 2:37 PM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. Below the menu, there is a section for Invoices with a dropdown for 'Available Forms' and an 'Open' button. The Invoices section contains a text block explaining the module and a table of invoices. The table has columns for Invoice, Invoice Type, Date, Due Date, Amount, Balance Due, and Status. A red box highlights the checkbox next to invoice 631, and a red arrow points to it. Below the table is a 'Pay Invoice' button.

**Invoices**

The Invoices module allows employers to manage invoices. To pay an invoice, select the invoices and click **Pay Invoice**. To view an individual invoice, click the appropriate link and the invoice will open in a new browser window.

**Invoices**

Recent Invoices:  --Select--  Type:

Date Range:  to

Invoice	Invoice Type	Date	Due Date	Amount	Balance Due	Status
<input checked="" type="checkbox"/> <a href="#">631</a>	Reinstatement	9/5/2013	10/05/2013	\$300.00	\$300.00	Unpaid
<input type="checkbox"/> <a href="#">633</a>	Penalty - Monthly Reporting	9/5/2013	10/05/2013	\$500.00	\$500.00	Unpaid
<a href="#">600</a>	Monthly Reporting	8/28/2013	09/27/2013	(\$600.00)	(\$600.00)	Pending
<a href="#">580</a>	Monthly Reporting	8/27/2013	09/26/2013	(\$285.00)	(\$285.00)	Pending
<a href="#">565</a>	Monthly Reporting	8/22/2013	09/21/2013	\$120.00	\$120.00	Pending
<a href="#">492</a>	Penalty - Monthly Reporting	8/15/2013	09/14/2013	\$0.01	\$0.01	Pending
<a href="#">471</a>	Penalty - Monthly Reporting	8/12/2013	09/11/2013	\$0.03	\$0.03	Pending
<a href="#">424</a>	Penalty - Monthly Reporting	8/1/2013	08/31/2013	\$600.00	\$600.00	Pending

Step 4 -- Click

**Pay Invoice**



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**Log Out**

**Employer Home** | **Report** | **Services** | **Account** | **Admin** | **Logout**

-- Available Forms -- **Open**

## Invoices

The Invoices module allows employers to manage invoices. To pay an invoice, select the invoices and click **Pay Invoice**. To view an individual invoice, click the appropriate link and the invoice will open in a new browser window.

**Invoices**

Recent Invoices:  Type:

Date Range:  to  **Show**  Show Paid Invoices

Invoice	Invoice Type	Date	Due Date	Amount	Balance Due	Status
<input checked="" type="checkbox"/> <a href="#">631</a>	Reinstatement	9/5/2013	10/05/2013	\$300.00	\$300.00	Unpaid
<input type="checkbox"/> <a href="#">633</a>	Penalty - Monthly Reporting	9/5/2013	10/05/2013	\$500.00	\$500.00	Unpaid
<a href="#">600</a>	Monthly Reporting	8/28/2013	09/27/2013	(\$600.00)	(\$600.00)	Pending
<a href="#">580</a>	Monthly Reporting	8/27/2013	09/26/2013	(\$285.00)	(\$285.00)	Pending
<a href="#">565</a>	Monthly Reporting	8/22/2013	09/21/2013	\$120.00	\$120.00	Pending
<a href="#">492</a>	Penalty - Monthly Reporting	8/15/2013	09/14/2013	\$0.01	\$0.01	Pending
<a href="#">471</a>	Penalty - Monthly Reporting	8/12/2013	09/11/2013	\$0.03	\$0.03	Pending
<a href="#">424</a>	Penalty - Monthly Reporting	8/1/2013	08/31/2013	\$600.00	\$600.00	Pending

**Pay Invoice**

**Step 5** -- Click the **Edit** link to apply payments to the invoice.

**Pay Invoice**

**Step 1 of 2**

To apply payment to selected invoice(s), click the **Edit** link beside the appropriate payment account(s), enter the amount and click **Apply**. When Balance Remaining is equal to \$0.00, click **Continue to Step 2**.

Do you want to [add a new payment account?](#)

Pay From	Amount
Auburn Bank - AUBURN BANKING CO., ...6345	\$0.00 <a href="#">Edit</a>

Total Applied: \$0.00  
**Balance Remaining: \$300.00**  
Invoice [#631](#) \$300.00  
**Total Amount Due: \$300.00**

\* Scheduled payments are usually drafted within 2-4 business days.

**Step 6 --** Enter the amount to be paid. You can also add a new payment account to pay the invoice. See Section 18.1, Adding a Payment Account.

**Note:** The amounts should add up to the total amount due.

**Pay Invoice**

**Step 1 of 2**

To apply payment to selected invoice(s), click the **Edit** link beside the appropriate payment account(s), enter the amount and click **Apply**. When Balance Remaining is equal to \$0.00, click **Continue to Step 2**.

Do you want to [add a new payment account?](#)

Pay From	Amount	
Auburn Bank - AUBURN BANKING CO., ...6345	<input type="text" value="0.00"/>	<a href="#">Apply</a> <a href="#">Cancel</a>

Total Applied: \$0.00

**Balance Remaining:** \$300.00

Invoice [#631](#) \$300.00

**Total Amount Due:** \$300.00

[Cancel](#) [Continue to Step 2](#)

\* Scheduled payments are usually drafted within 2-4 business days.

**Step 7 --** Click the **Apply** link.

**Note:** If amounts do not total, then the following message displays: “Total Amount Allocated must be equal to the Total Amount Due”

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top, the TCRS logo is on the left, and the user's session information is on the right, including the name Sara Franklin and the town White Bluff. A navigation menu contains links for Employer Home, Report, Services, Account, Admin, and Logout. Below the menu is a dropdown for 'Available Forms' and an 'Open' button. The main heading is 'Pay Invoice'. A circular icon indicates 'Step 1 of 2'. The instructions state: 'To apply payment to selected invoice(s), click the Edit link beside the appropriate payment account(s), enter the amount and click Apply. When Balance Remaining is equal to \$0.00, click Continue to Step 2.' Below this, a question asks 'Do you want to add a new payment account?'. A table lists a payment from 'Auburn Bank - AUBURN BANKING CO., ...6345' with an amount of '300.00'. To the right of the amount is a red-bordered 'Apply' button and a 'Cancel' link. Below the table, a summary shows 'Total Applied: \$0.00', 'Balance Remaining: \$300.00', 'Invoice #631: \$300.00', and 'Total Amount Due: \$300.00'. At the bottom of the summary are 'Cancel' and 'Continue to Step 2' buttons. A footer note states: '\* Scheduled payments are usually drafted within 2-4 business days.'

Pay From	Amount
Auburn Bank - AUBURN BANKING CO., ...6345	300.00

Total Applied: \$0.00  
Balance Remaining: \$300.00  
Invoice #631: \$300.00  
Total Amount Due: \$300.00

Step 8 -- To continue, click **Continue to Step 2**.

**Note:** Click **Cancel** to cancel the invoice process.

**Pay Invoice**

Step 1 of 2

To apply payment to selected invoice(s), click the **Edit** link beside the appropriate payment account(s), enter the amount and click **Apply**. When Balance Remaining is equal to \$0.00, click **Continue to Step 2**.

Do you want to [add a new payment account?](#)

Pay From	Amount
Auburn Bank - AUBURN BANKING CO., ...6345	\$300.00 <a href="#">Edit</a>

Total Applied: \$300.00  
Balance Remaining: \$0.00  
Invoice [#631](#): \$300.00  
Total Amount Due: \$300.00

\* Scheduled payments are usually drafted within 2-4 business days.

**Step 9 --** Verify the payment details, and then enter your PIN number.

**Note:** To process an invoice, you must enter a valid PIN. If you do not enter a valid PIN, you will be unable to process the invoice.

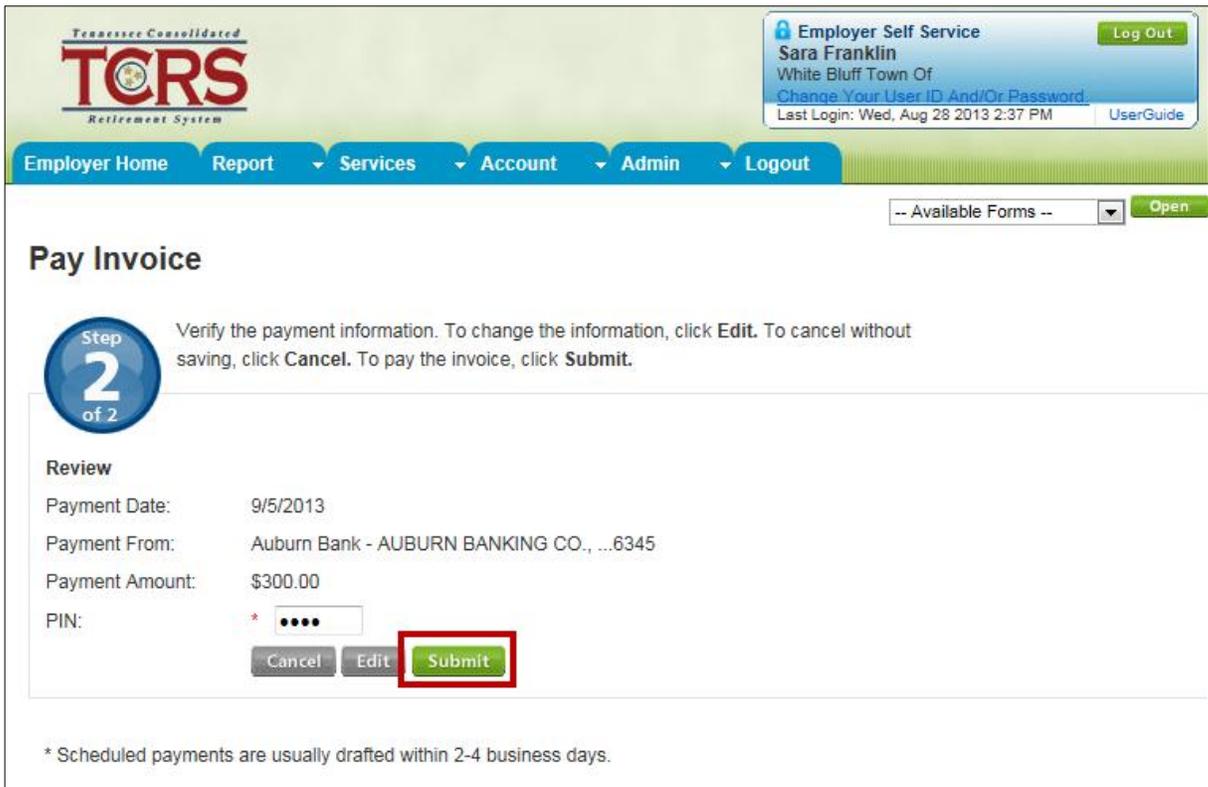
The screenshot shows the TCRS Retirement System Employer Self-Service interface. At the top right, the user is logged in as Sara Franklin, White Bluff Town Of, with a last login of Wed, Aug 28 2013 2:37 PM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The main content area is titled 'Pay Invoice' and indicates 'Step 2 of 2'. The instructions state: 'Verify the payment information. To change the information, click **Edit**. To cancel without saving, click **Cancel**. To pay the invoice, click **Submit**.' The payment details are as follows:

Review	
Payment Date:	9/5/2013
Payment From:	Auburn Bank - AUBURN BANKING CO., ...6345
Payment Amount:	\$300.00
PIN:	* <input type="text"/>

Below the PIN field are three buttons: 'Cancel', 'Edit', and 'Submit'. A red box highlights the PIN input field. At the bottom, a note states: '\* Scheduled payments are usually drafted within 2-4 business days.'

**Step 10 --** Click **Submit** to submit the invoice.

**Note:** You can only submit the invoice if the total amount due for the select invoice is equal to the total payment applied. Click **Cancel** to cancel the invoice process.



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Employer Self Service  
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White Bluff Town Of  
Change Your User ID And/Or Password  
Last Login: Wed, Aug 28 2013 2:37 PM  
Log Out  
UserGuide

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-- Available Forms -- Open

### Pay Invoice

**Step 2 of 2**

Verify the payment information. To change the information, click **Edit**. To cancel without saving, click **Cancel**. To pay the invoice, click **Submit**.

**Review**

Payment Date: 9/5/2013  
Payment From: Auburn Bank - AUBURN BANKING CO., ...6345  
Payment Amount: \$300.00  
PIN: \* [.....]

Cancel Edit **Submit**

\* Scheduled payments are usually drafted within 2-4 business days.

## 9.2. Adding a New Payment Account

While paying an invoice, you can also add a new payment account.

**Note:** A new payment account can be added from the home screen without having to access the **Invoices** screen of ESS. Refer to Section 9, Invoices for further instruction.

**Step 1 --** Follow steps 1 through 4 from Section 9.1, Paying an Invoice.

**Step 2 --** On the **Pay Invoice** screen, click the **Add a new payment account** link.

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Employer Home Report Services Account Admin Logout

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

## Pay Invoice

**Step 1 of 2**

To apply payment to selected invoice(s), click the **Edit** link beside the appropriate payment account(s), enter the amount and click **Apply**. When Balance Remaining is equal to \$0.00, click **Continue to Step 2**.

Do you want to [add a new payment account?](#)

Pay From	Amount	
Auburn Bank - AUBURN BANKING CO., ...6345	\$0.00	<a href="#">Edit</a>
Total Applied:		\$0.00
<b>Balance Remaining:</b>		<b>\$500.00</b>
Invoice <a href="#">#633</a>		\$500.00
<b>Total Amount Due:</b>		<b>\$500.00</b>

[Cancel](#) [Continue to Step 2](#)

\* Scheduled payments are usually drafted within 2-4 business days.

**Step 3 --** The **Add a Payment Account** screen displays. Enter the new payment account information.

**Tennessee Consolidated TCRS Retirement System**

**Employer Self Service**  
Sara Franklin  
White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Wed, Aug 28 2013 2:37 PM [UserGuide](#) [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**.

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service Sara Franklin White Bluff Town Of  
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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: \* EFT  
Nickname: (e.g. My Checking Account) \* Fifth Third Bank  
Bank routing or ABA number: \* 064103833  
Bank Account number: \* 123456789  
Retype Bank Account number: \* 123456789

Cancel **Continue**

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 in the corresponding field.

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service Sara Franklin White Bluff Town Of  
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Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

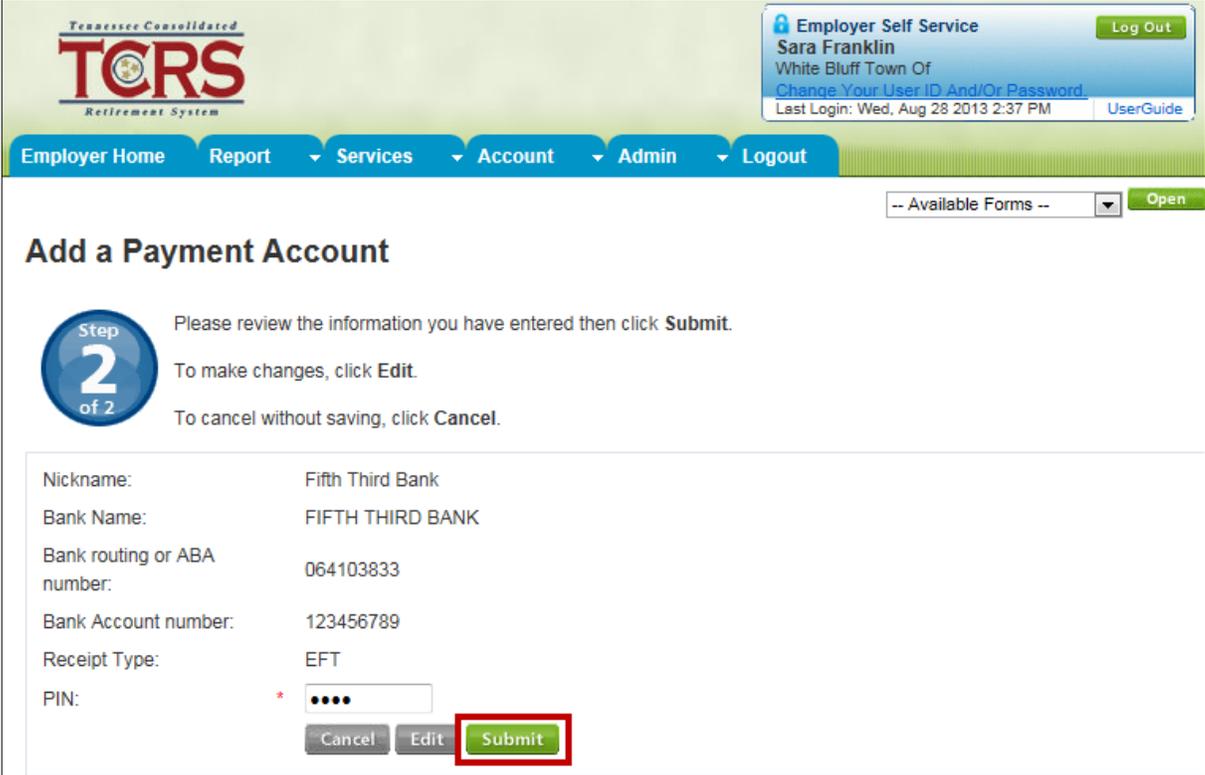
### Add a Payment Account

**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: Fifth Third Bank  
Bank Name: FIFTH THIRD BANK  
Bank routing or ABA number: 064103833  
Bank Account number: 123456789  
Receipt Type: EFT  
PIN: \*

Cancel Edit **Submit**

**Step 6 --** Click . The new payment account is added to ESS.



The screenshot shows the 'Add a Payment Account' page in the TCRS Employer Self Service interface. The page header includes the TCRS logo and user information for Sara Franklin. The main content area displays a form with the following fields and values:

Nickname:	Fifth Third Bank
Bank Name:	FIFTH THIRD BANK
Bank routing or ABA number:	064103833
Bank Account number:	123456789
Receipt Type:	EFT
PIN:	****

At the bottom of the form, there are three buttons: 'Cancel', 'Edit', and 'Submit'. The 'Submit' button is highlighted with a red box.

**Step 7 --** To complete the pay invoice process, complete steps 5 through 9 in Section 9.1, Paying an Invoice.

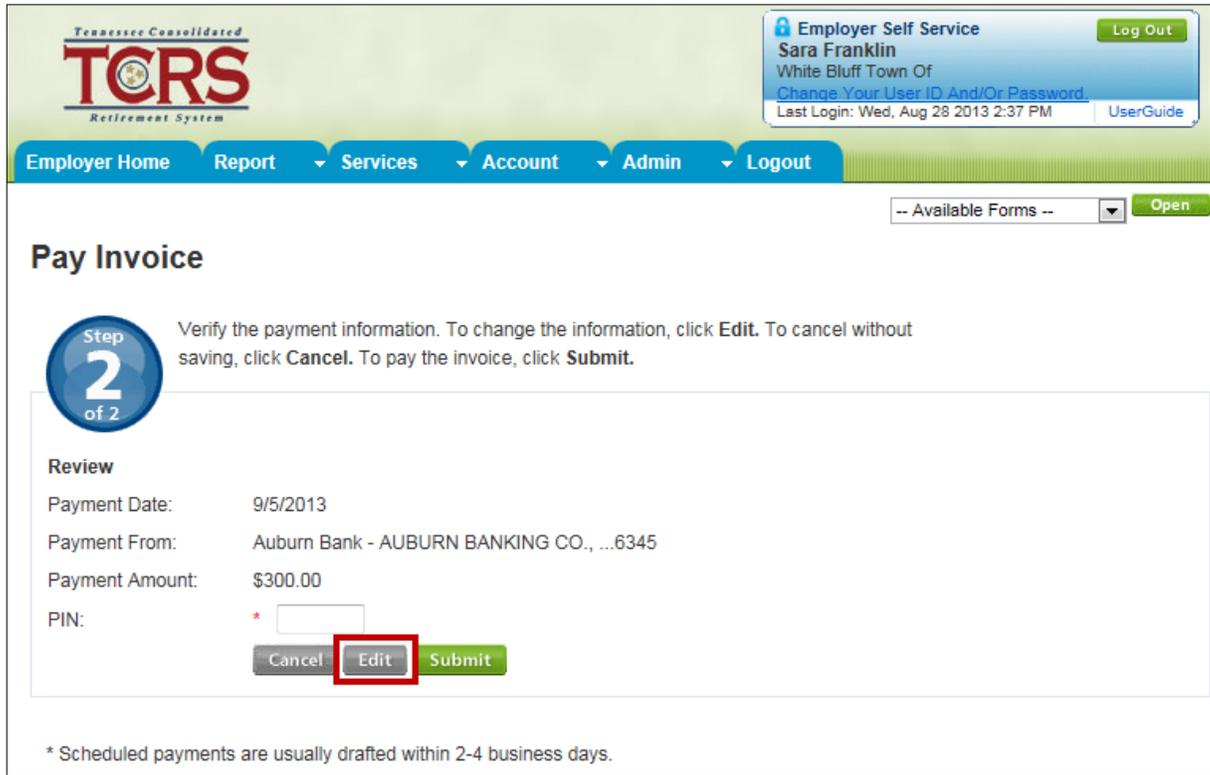
### 9.3. Editing Payment Details

While paying an invoice, you can edit certain payment details.

**Note:** A payment account can be edited from the home screen without having to access the **Invoices** screen of ESS. Refer to Section 9, Invoices for further instruction.

**Step 1 --** Follow steps 1 through 5 of section 9.1, Paying an Invoice.

Step 2 -- Click  to edit the payment details.



**Tennessee Consolidated TCRS Retirement System**

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Employer Home Report Services Account Admin Logout

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

## Pay Invoice

**Step 2 of 2** Verify the payment information. To change the information, click **Edit**. To cancel without saving, click **Cancel**. To pay the invoice, click **Submit**.

**Review**

Payment Date: 9/5/2013  
Payment From: Auburn Bank - AUBURN BANKING CO., ...6345  
Payment Amount: \$300.00  
PIN: \*

[Cancel](#) [Edit](#) [Submit](#)

\* Scheduled payments are usually drafted within 2-4 business days.

**Step 3 --** Click the **Edit** link to modify the payment information.

**Step 4 --** Follow steps 6 through 10 of Section 9.1, Paying an Invoice.

## 10. Member Death Notice

All those with ESS access (administrative, employer reporting, and staff) can use the **Death Notice** screen to report an employee's death. Information submitted here generates a workflow for the appropriate TCRS staff person to work.

**Note:** As the representative of a specific employer, the ESS staff member may only report the deaths of those individuals who were active or retired members of the employer's retirement system. The SSN entered in this process is compared to the enrollments for the member. If the member does not have an active or inactive enrollment with the organization, then the death cannot be reported.

**Step 1 --** To navigate to the **Death Notice** screen, click on the following menu options:

**Services > Death Notice**

The screenshot shows the TCRS Employer Self Service interface. At the top left is the TCRS logo. At the top right, a user profile box displays 'Employer Self Service', 'Sara Franklin', 'White Bluff Town Of', and 'Last Login: Thu, Aug 15 2013 9:35 AM'. A navigation bar contains 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Services' dropdown menu is open, with 'Death Notice' highlighted in a red box. Other menu items include 'Seminars', 'Employer Certification', 'Member Information', 'Employer Information', 'Reports', and 'Message Center'. A search box labeled '-- Available Forms --' with an 'Open' button is visible. The main content area contains a welcome message and a list of services: Reporting wages and, Processing EFT Paym, Processing wage adju, Adding/updating empl, Reviewing employer r, Downloading and com, and Verifying Member IDs.

**Step 2 --** Enter the deceased employee's **SSN**.

The screenshot displays the TCRS Retirement System Employer Self-Service interface. At the top, the user is logged in as Sara Franklin, White Bluff Town Of, with a last login of Thu, Aug 15 2013 9:35 AM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. A dropdown menu for 'Available Forms' is open, showing an 'Open' button. The main content area is titled 'Death Notice' and contains the following text: 'The Death Notice module allows the user to submit death information to Retirement Systems electronically. Death information can only be submitted if the employee has worked for the logged in employer. The user must enter a valid SSN to retrieve the member information, complete the death notice information and then click **Submit**.'

The 'Death Notification' section contains the following fields:

- SSN: \* [ ] - [ ] - [ ] Search
- Member Name:
- Date of Death: \* mm/dd/yyyy
- Deceased's Marital Status: Select Marital Status
- Comments: Enter any comments related to the member's death.

An information icon indicates: 'Please complete and mail Form 6800 if the death occurred in the line of duty (ILOD).'

The 'Primary Contact Information' section contains the following fields:

- Name: [ ]
- Relationship: EMPLOYER
- Phone Number: [ ]
- International Address:
- Address Line 1: [ ]  
Use for actual street address of post office box.
- Address Line 2 (optional): [ ]  
Use for Apartment, Building, Unit, Floor, Suite, etc.
- City: [ ]
- State: Select State
- Zip Code: [ ] - [ ] (optional)

Buttons for 'Cancel' and 'Submit' are located at the bottom of the form.

Step 3 -- Click





Employer Self Service  
Sara Franklin  
White Bluff Town Of  
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Last Login: Wed, Aug 28 2013 2:37 PM [UserGuide](#)

Log Out

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

## Death Notice

The Death Notice module allows the user to submit death information to Retirement Systems electronically. Death information can only be submitted if the employee has worked for the logged in employer. The user must enter a valid SSN to retrieve the member information, complete the death notice information and then click **Submit**.

### Death Notification

SSN: \* 881 - 80 - 0490 **Search**

Member Name: \_\_\_\_\_

Date of Death: \* mm/dd/yyyy \_\_\_\_\_

Deceased's Marital Status: **Select Marital Status** ▼

Comments:

**i** Please complete and mail Form 6800 if the death occurred in the line of duty (ILOD).

### Primary Contact Information

If known, please provide contact information for the deceased member.

Name: \_\_\_\_\_

Relationship: **EMPLOYER** ▼

Phone Number: \_\_\_\_\_

International Address:

Address Line 1: \_\_\_\_\_  
Use for actual street address of post office box.

Address Line 2 (optional): \_\_\_\_\_  
Use for Apartment, Building, Unit, Floor, Suite, etc.

City: \_\_\_\_\_

State: **Select State** ▼

Zip Code: \_\_\_\_\_ - \_\_\_\_\_ (optional)

**Step 4 --** The employee's information displays. Enter the death related information.



**Employer Self Service**  
Sara Franklin  
White Bluff Town Of  
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Last Login: Wed, Aug 28 2013 2:37 PM [UserGuide](#) [Log Out](#)

**Employer Home** | **Report** | **Services** | **Account** | **Admin** | **Logout**

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

## Death Notice

The Death Notice module allows the user to submit death information to Retirement Systems electronically. Death information can only be submitted if the employee has worked for the logged in employer. The user must enter a valid SSN to retrieve the member information, complete the death notice information and then click **Submit**.

**Death Notification**

SSN: \* 881 - 80 - 0490 [Search](#)

Member Name: JON DOE

Date of Death: \* mm/dd/yyyy

Deceased's Marital Status: [Select Marital Status](#)

Comments: Enter any comments related to the member's death.

**i** Please complete and mail Form 6800 if the death occurred in the line of duty (ILOD).

**Primary Contact Information**

If known, please provide contact information for the deceased member.

Name:

Relationship: [EMPLOYER](#)

Phone Number:

International Address:

Address Line 1:

Use for actual street address of post office box.

Address Line 2 (optional):

Use for Apartment, Building, Unit, Floor, Suite, etc.

City:

State: [Select State](#)

Zip Code:  -  (optional)

[Cancel](#) [Submit](#)

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**Step 5 --** Click **Submit**. The Active Death Processing workflow launches in Concord for TCRS to process.

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top right, a user is logged in as Sara Franklin, White Bluff Town Of, with a last login on Wed, Aug 28 2013 2:37 PM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. A dropdown menu for 'Available Forms' is open, showing an 'Open' button. The main heading is 'Death Notice'. Below this is an introductory paragraph: 'The Death Notice module allows the user to submit death information to Retirement Systems electronically. Death information can only be submitted if the employee has worked for the logged in employer. The user must enter a valid SSN to retrieve the member information, complete the death notice information and then click **Submit**.'

The 'Death Notification' section contains the following fields:

- SSN: \* 881 - 80 - 0490 (with a Search button)
- Member Name: JON DOE
- Date of Death: \* 9/1/2013
- Deceased's Marital Status: Married (dropdown menu)
- Comments: Member passed away on 9/1 (text area)

An information icon indicates: 'Please complete and mail Form 6800 if the death occurred in the line of duty (ILOD).'

The 'Primary Contact Information' section includes:

- Name: JON DOE
- Relationship: EMPLOYER (dropdown menu)
- Phone Number: 615-555-1234
- International Address:
- Address Line 1: 424 Church Street (with a note: 'Use for actual street address of post office box.')
- Address Line 2 (optional): Apt. 1301 (with a note: 'Use for Apartment, Building, Unit, Floor, Suite, etc.')
- City: Nashville
- State: Tennessee (dropdown menu)
- Zip Code: 37203 - (optional)

At the bottom of the form are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red box.

## 11. Maintain Seminars

All those with ESS access (administrative, employer reporting, and staff) can sign up for a TCRS-sponsored seminar through the **Register** screen.

### 11.1. Registering for a Seminar

You can register yourself or others from your organization, even those without ESS access, for a TCRS-sponsored seminar.

**Step 1 --** To navigate to the **Seminar** screen, click on the following menu options:

**Services > Seminars**

The screenshot displays the TCRS Employer Self Service web application interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, a user information box shows "Employer Self Service", "Sara Franklin", "White Bluff Town Of", and "Last Login: Thu, Aug 15 2013 9:35 AM". Below the logo is a navigation bar with tabs: "Employer Home", "Report", "Services", "Account", "Admin", and "Logout". The "Services" tab is expanded, showing a dropdown menu with the following options: "Death Notice", "Seminars" (highlighted with a red box), "Employer Certification", "Member Information", "Employer Information", "Reports", and "Message Center". To the right of the dropdown menu is a search box labeled "-- Available Forms --" with an "Open" button. The main content area contains a welcome message and a list of services including "Reporting wages and", "Processing EFT Paym", "Processing wage adju", "Adding/updating empl", "Reviewing employer r", "Downloading and com", and "Verifying Member IDs". At the bottom, there is a message from David H. Lillard, Jr., Treasurer.

**Step 2 --** To find upcoming seminars with available seats you can either select an option from the **Upcoming Dates** drop down menu or enter information in the **Date Range** or **Filter** fields.

**Note:** The **Seminars** screen defaults to display all upcoming seminars.

**Seminars**

To register to attend a retirement Employer Education Seminar, please select the seminar and click **Register**. To cancel a previous registration for a seminar, select the seminar and click **Cancel Registration**.

**Seminars**

Upcoming Dates: Next 15 Days
 Date Range: from  to

Filter By:

Date	Seminar	Time	Location	
<b>AUG</b> 16	Employer Regional Seminar TEST 3 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	<input type="button" value="Register"/>
<b>AUG</b> 19	Employer Regional Seminar TEST 4 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	<input type="button" value="Register"/>
<b>AUG</b> 20	Employer Regional Seminar TEST 3 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	<input type="button" value="Register"/>
<b>AUG</b> 21	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	<input type="button" value="Register"/>
<b>AUG</b> 23	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	<input type="button" value="Register"/>
<b>AUG</b> 26	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	<input type="button" value="Register"/>
<b>AUG</b> 27	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	<input type="button" value="Register"/>
<b>AUG</b> 28	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	<input type="button" value="Register"/>
<b>AUG</b> 30	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	<input type="button" value="Register"/>

**Step 3 --** All seminars with available seats that meet your search criteria display. Click  next to the seminar for which you want to register.



**TCRS**  
Retirement System

**Employer Self Service** Log Out

Sara Franklin  
White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Thu, Aug 15 2013 9:35 AM [UserGuide](#)

Employer Home
Report
Services
Account
Admin
Logout

-- Available Forms -- Open

### Seminars

To register to attend a retirement Employer Education Seminar, please select the seminar and click **Register**. To cancel a previous registration for a seminar, select the seminar and click **Cancel Registration**.

**Seminars**

Upcoming Dates: Next 15 Days Filter By: Select Session Type  
 Date Range: from  to  Show

Date	Seminar	Time	Location	
<b>AUG 16</b>	Employer Regional Seminar TEST 3 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	
<b>AUG 19</b>	Employer Regional Seminar TEST 4 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	
<b>AUG 20</b>	Employer Regional Seminar TEST 3 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	
<b>AUG 21</b>	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	
<b>AUG 23</b>	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	
<b>AUG 26</b>	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	
<b>AUG 27</b>	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	
<b>AUG 28</b>	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	
<b>AUG 30</b>	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX 12345</a>	

**Step 4 --** The **Seminar Registration** screen displays. Enter the number of attendees for this seminar.

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service Sara Franklin White Bluff Town Of  
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Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

### Seminar Registration

Please select the number of attendees, provide a name and email address for each and click **Add Attendee**. When finished entering information for all attendees, click **Submit**.

**Registration Information**

Session: Employer Regional Seminar  
Topic: TEST  
Date: Friday, August 16 2013  
Time: 12:30 PM - 1:30 PM  
Location: TESTING SEMINARS  
[D Strings](#)  
[NASHVILLE, TX 12345](#) ↗

Seats Available: 3

Number of Attendees: \*  (Select the number of attendees, then add their names and emails below)

**Attendees**

Name	E-mail	
<input type="text" value="Enter attendee's name"/>	<input type="text" value="Enter attendee's e-mail"/>	<a href="#">Add Attendee</a>

No attendees have been added. Please provide names and e-mails for the people who will be attending this seminar.

**Step 5 --** Enter the **Name** and **E-mail** address of an attendee in the corresponding fields.

**Tennessee Consolidated TCRS Retirement System**

**Employer Self Service**  
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White Bluff Town Of  
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[Employer Home](#) [Report](#) [Services](#) [Account](#) [Admin](#) [Logout](#)

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

## Seminar Registration

Please select the number of attendees, provide a name and email address for each and click **Add Attendee**. When finished entering information for all attendees, click **Submit**.

**Registration Information**

Session: Employer Regional Seminar  
Topic: TEST  
Date: Friday, August 16 2013  
Time: 12:30 PM - 1:30 PM  
Location: TESTING SEMINARS  
[D Strings](#)  
[NASHVILLE, TX 12345](#) [↗](#)

Seats Available: 3  
Number of Attendees: \*  (Select the number of attendees, then add their names and emails below)

**Attendees**

Name	E-mail	
<input type="text"/>	<input type="text"/>	<a href="#">Add Attendee</a>

No attendees have been added. Please provide names and e-mails for the people who will be attending this seminar.

Step 6 -- Click the **Add Attendee** link.

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service Sara Franklin White Bluff Town Of  
Change Your User ID And/Or Password  
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Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

### Seminar Registration

Please select the number of attendees, provide a name and email address for each and click **Add Attendee**. When finished entering information for all attendees, click **Submit**.

**Registration Information**

Session: Employer Regional Seminar  
Topic: TEST  
Date: Friday, August 16 2013  
Time: 12:30 PM - 1:30 PM  
Location: TESTING SEMINARS  
[D Strings](#)  
[NASHVILLE, TX 12345](#)

Seats Available: 3  
Number of Attendees: \*  (Select the number of attendees, then add their names and emails below)

**Attendees**

Name	E-mail	
<input type="text" value="Sara Franklin"/>	<input type="text" value="sfranklin@whitebluff.gov"/>	<a href="#">Add Attendee</a>

No attendees have been added. Please provide names and e-mails for the people who will be attending this seminar.

Step 7 -- Repeat steps 5 and 6 for each attendee.

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service Sara Franklin White Bluff Town Of  
Change Your User ID And/Or Password  
Last Login: Thu, Aug 15 2013 10:11 AM UserGuide

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

### Seminar Registration

Please select the number of attendees, provide a name and email address for each and click **Add Attendee**. When finished entering information for all attendees, click **Submit**.

**Registration Information**

Session: Employer Regional Seminar  
Topic: TEST  
Date: Friday, August 16 2013  
Time: 12:30 PM - 1:30 PM  
Location: TESTING SEMINARS  
[D Strings](#)  
[NASHVILLE, TX 12345](#)

Seats Available: 3  
Number of Attendees: \*  (Select the number of attendees, then add their names and emails below)

**Attendees**

Name	E-mail	
<input type="text" value="Ron Swanson"/>	<input type="text" value="swanson@whitebluff.gov"/>	<a href="#">Add Attendee</a>
1. Sara Franklin (sfranklin@whitebluff.gov)		<a href="#">remove</a>

**Step 8** -- Click **Submit**. A confirmation message displays at the bottom of the screen to confirm that you successfully registered for the seminar.

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service Sara Franklin White Bluff Town Of  
Change Your User ID And/Or Password  
Last Login: Thu, Aug 15 2013 10:11 AM UserGuide

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

### Seminar Registration

Please select the number of attendees, provide a name and email address for each and click **Add Attendee**. When finished entering information for all attendees, click **Submit**.

**Registration Information**

Session: Employer Regional Seminar  
Topic: TEST  
Date: Friday, August 16 2013  
Time: 12:30 PM - 1:30 PM  
Location: TESTING SEMINARS  
[D Strings](#)  
[NASHVILLE, TX 12345](#)

Seats Available: 3  
Number of Attendees: \* 2 (Select the number of attendees, then add their names and emails below)

**Attendees**

Name	E-mail	
<input type="text" value="Enter attendee's name"/>	<input type="text" value="Enter attendee's e-mail"/>	<a href="#">Add Attendee</a>
1. Sara Franklin (sfranklin@whitebluff.gov)		<a href="#">remove</a>
2. Ron Swanson (rswanson@whitebluff.gov)		<a href="#">remove</a>

## 11.2. Removing Attendees for a Seminar

If you or another staff member can no longer attend the seminar, you can remove yourself or them as an attendee.

**Step 1 --** From the **Register** screen, find the seminar from which you want to remove attendees.

The screenshot displays the 'Seminars' page in the TCRS Employer Self-Service system. At the top, there is a navigation bar with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A user profile for Sara Franklin is visible in the top right corner. Below the navigation bar, there is a dropdown menu for 'Available Forms' and an 'Open' button. The main content area is titled 'Seminars' and includes instructions on how to register or cancel registration. Below the instructions, there are filter options for 'Upcoming Dates' (set to 'Next 15 Days') and 'Filter By' (set to 'Select Session Type'). A 'Date Range' filter is also present with a 'Show' button. The main part of the page is a table listing seminars from August 16th to August 30th. Each row includes the date, seminar name, time, location, and a 'Register' button. The first row, for August 16th, is highlighted with a red box and includes a note: '(You are currently registered for this seminar. To cancel, click here) Cancel Registration'. The table also shows the number of seats available for each seminar.

Date	Seminar	Time	Location	Register
AUG 16	Employer Regional Seminar	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX</a> <a href="#">12345</a>	Register (You are currently registered for this seminar. To cancel, click here) <a href="#">Cancel Registration</a>
AUG 19	Employer Regional Seminar	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX</a> <a href="#">12345</a>	Register
AUG 20	Employer Regional Seminar	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX</a> <a href="#">12345</a>	Register
AUG 21	Employer Regional Seminar	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX</a> <a href="#">12345</a>	Register
AUG 23	Employer Regional Seminar	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX</a> <a href="#">12345</a>	Register
AUG 26	Employer Regional Seminar	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX</a> <a href="#">12345</a>	Register
AUG 27	Employer Regional Seminar	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX</a> <a href="#">12345</a>	Register
AUG 28	Employer Regional Seminar	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX</a> <a href="#">12345</a>	Register
AUG 30	Employer Regional Seminar	12:30 PM - 1:30 PM	TESTING SEMINARS <a href="#">D Strings</a> <a href="#">NASHVILLE, TX</a> <a href="#">12345</a>	Register

**Step 2 --** Click the **Cancel Registration** link next to the attendee you want to remove from the seminar. The attendee(s) is / are removed from the seminar.

The screenshot shows the TCRS Retirement System Employer Self-Service interface. At the top, there is a navigation bar with links for Employer Home, Report, Services, Account, Admin, and Logout. A user profile box in the top right corner identifies the user as Sara Franklin, White Bluff Town Of, with a last login time of Thu, Aug 15 2013 10:11 AM. Below the navigation bar, there is a section titled "Seminars" with a sub-header "Seminars". A message states: "To register to attend a retirement Employer Education Seminar, please select the seminar and click Register. To cancel a previous registration for a seminar, select the seminar and click Cancel Registration." Below this message are filters for "Upcoming Dates" (set to "Next 15 Days") and "Date Range" (with "Show" button). A "Filter By" dropdown is set to "Select Session Type". The main content is a table of seminars with columns for Date, Seminar, Time, Location, and actions. The first row, for August 16, shows "Employer Regional Seminar" with a "Cancel Registration" link highlighted in a red box. The other rows show similar seminars for dates from August 19 to August 30, each with a "Register" button.

Date	Seminar	Time	Location	Actions
AUG 16	Employer Regional Seminar TEST 1 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS D Stringos NASHVILLE, TX 12345	Register <b>Cancel Registration</b>
AUG 19	Employer Regional Seminar TEST 4 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS D Stringos NASHVILLE, TX 12345	Register
AUG 20	Employer Regional Seminar TEST 3 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS D Stringos NASHVILLE, TX 12345	Register
AUG 21	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS D Stringos NASHVILLE, TX 12345	Register
AUG 23	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS D Stringos NASHVILLE, TX 12345	Register
AUG 26	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS D Stringos NASHVILLE, TX 12345	Register
AUG 27	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS D Stringos NASHVILLE, TX 12345	Register
AUG 28	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS D Stringos NASHVILLE, TX 12345	Register
AUG 30	Employer Regional Seminar TEST 5 seats available	12:30 PM - 1:30 PM	TESTING SEMINARS D Stringos NASHVILLE, TX 12345	Register

## 12. Employer Certification

ESS allows employers to certify employee requests through the self service module instead of filling out and signing paper forms. A certification will only appear when an employee or former employee has initiated a request with TCRS for a retirement, refund, or service purchase. On the **Certification** screen, only certifications in pending status display. Administrative and employer reporting users can use the **Certification** screen to approve or reject these processes.

### 12.1. Certifying a Member's Prior Service Purchase

Service Purchase requests are initiated by a member using either **Member Self-Service** or by submitting a form to TCRS. If the member submits the request via **Member Self-Service**, a request is automatically created in Concord. If the member submits the request using a form, TCRS staff must create a request in Concord. Once the request is created, it appears in **Employer Self-Service** for certification. After you have approved the Service Purchase request, TCRS staff completes the process using Concord.

**Note:** Service credit reported must be between 0 and 1.34 months. Service credit must be reported in allowable amounts. Service credit must be rounded to the nearest 1/8 of a month based on the member's reported salary and rate of pay.

**Step 1 --** To navigate to the **Certifications** screen, click on the following menu options:

**Services > Employer Certification**

The screenshot displays the TCRS Employer Self-Service web application. At the top left is the TCRS Retirement System logo. The top right shows the user's name, Sara Franklin, and their organization, White Bluff Town Of, along with a 'Log Out' button and the last login time: Tue, Apr 22 2014 9:36 AM. A 'UserGuide' link is also present. The main navigation bar includes 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Services' dropdown menu is open, listing options: Death Notice, Seminars, **Employer Certification** (highlighted with a red box), Member Information, Employer Information, Reports, and Message Center. Below the navigation, there is a section for 'Available Forms' with an 'Open' button. The main content area contains a welcome message and a list of services including Reporting wages and Processing EFT Payments. At the bottom, there is a message from David H. Lillard, Jr., Treasurer, regarding the new retirement technology system.

**Step 2 --** All pending retirement, refund, and prior service purchase records display on the **Certifications** screen.

The screenshot shows the TCRS Retirement System Employer Self-Service interface. At the top right, the user is identified as Sara Franklin from White Bluff Town Of, with a last login of Thu, Oct 10 2013 8:35 AM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The main heading is 'Employer Certification'. Below this, there are sections for 'Member Retirement Request:', 'Member Prior Service Requests:', and 'Member Refund Requests:'. The 'Member Prior Service Requests:' section contains a table with 11 rows of pending requests, all with a status of 'Pending ESS Certification'. A page number '12' is visible at the bottom of the table area.

Member ID:	Member Name:	Request Date:	Service Type:	Status:
<a href="#">1800465</a>	TESTTWO PHASESIX	8/19/2013	Military Service	Pending ESS Certification
<a href="#">1800605</a>	gucci versace	8/20/2013	Military Service	Pending ESS Certification
<a href="#">1800459</a>	TESTTWO PHASESIX	8/20/2013	Refunded Local Teaching Service	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Probationary	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Probationary	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	General Assembly Service	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Back Payment of Reinstated Member - Wrongful Term	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Temporary Disability	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Refunded Local Teaching Service	Pending ESS Certification
<a href="#">1800459</a>	TESTTWO PHASESIX	8/27/2013	PC 801 Service	Pending ESS Certification

**Step 3 --** Click on the member ID to view the prior service purchase information.



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Employer Home
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Services
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Admin
Logout

## Employer Certification

Member Retirement Request:

Member Prior Service Requests:

Member ID:	Member Name:	Request Date:	Service Type:	Status:
<a href="#">1800465</a>	TESTTWO PHASESIX	8/19/2013	Military Service	Pending ESS Certification
<a href="#">1800605</a>	gucci versace	8/20/2013	Military Service	Pending ESS Certification
<a href="#">1800459</a>	TESTTWO PHASESIX	8/20/2013	Refunded Local Teaching Service	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Probationary	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Probationary	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	General Assembly Service	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Back Payment of Reinstated Member - Wrongful Term	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Temporary Disability	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/26/2013	Refunded Local Teaching Service	Pending ESS Certification
<a href="#">1800459</a>	TESTTWO PHASESIX	8/27/2013	PC 801 Service	Pending ESS Certification

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Member Refund Requests:

**Step 4 --** To certify the prior service purchase, enter the start date and end date for the service purchase request or verify that the prepopulated information is correct.

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Employer Home Report Services Account Admin Logout

### Prior Service Certification

[Back to Dashboard](#)

Member ID: 1800465 Member Name: TESTTWO PHASESIX Service Type: Military Service

Start Date	End Date	Actions				
<input type="text" value="07/29/2001"/>	<input type="text" value="08/07/2002"/>	<a href="#">Edit</a> <a href="#">Delete</a>				

[Add New Entry](#)

Contribution Details:

Start Date	End Date	Salary	Months Worked	Days Worked	Contract Months	Part Time %
<input type="text" value="07/29/2001"/>	<input type="text" value="06/30/2002"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="07/01/2002"/>	<input type="text" value="08/07/2002"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>

[Save](#)

[Reject Request](#) [Submit Certification](#)

**Step 5 --** Make any necessary updates based on the final salary breakdown.

**Tennessee Consolidated TCRS Retirement System**

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### Prior Service Certification

[Back to Dashboard](#)

Member ID: 1800465 Member Name: TESTTWO PHASESIX Service Type: Military Service

Start Date	End Date	Actions				
<input type="text" value="07/29/2001"/>	<input type="text" value="08/07/2002"/>	<a href="#">Edit</a> <a href="#">Delete</a>				

[Add New Entry](#)

Contribution Details:

Start Date	End Date	Salary	Months Worked	Days Worked	Contract Months	Part Time %
<input type="text" value="07/29/2001"/>	<input type="text" value="06/30/2002"/>	<input type="text" value="14999.98"/>	<input type="text" value="11"/>	<input type="text" value="220"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="text" value="07/01/2002"/>	<input type="text" value="08/07/2002"/>	<input type="text" value="15500.00"/>	<input type="text" value="14"/>	<input type="text" value="280"/>	<input type="text"/>	<input type="text" value="0"/>

[Save](#)

[Reject Request](#) [Submit Certification](#)

Step 6 -- Click  .



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### Prior Service Certification

[Back to Dashboard](#)

<b>Member ID:</b>	1800465	<b>Member Name:</b>	TESTTWO PHASESIX	<b>Service Type:</b>	Military Service
-------------------	---------	---------------------	------------------	----------------------	------------------

Start Date	End Date	Actions
<input type="text" value="07/29/2001"/>	<input type="text" value="08/07/2002"/>	<a href="#">Edit</a> <a href="#">Delete</a>

Contribution Details:

Start Date	End Date	Salary	Months Worked	Days Worked	Contract Months	Part Time %
<input type="text" value="07/29/2001"/>	<input type="text" value="06/30/2002"/>	<input type="text" value="14999.98"/>	<input type="text" value="11"/>	<input type="text" value="220"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="text" value="07/01/2002"/>	<input type="text" value="08/07/2002"/>	<input type="text" value="15500.00"/>	<input type="text" value="14"/>	<input type="text" value="280"/>	<input type="text"/>	<input type="text" value="0"/>

**Step 7 --** Click **Submit Certification** to submit the information to TCRS for additional processing.

**Note:** If the prior service purchase request should be rejected, follow steps in Section 12.4, Rejecting a Member's Prior Service Purchase.

The screenshot shows the TCRS Employer Self-Service interface. At the top, there is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A user profile box in the top right corner identifies the user as Sara Franklin, Shiloh Reg Lib, with a last login time of Thu, Oct 10 2013 9:59 AM. A message at the top of the main content area states 'Contribution Details successfully Saved.' Below this, the page title is 'Prior Service Certification'. A 'Back to Dashboard' link is visible in the top right. The main content area displays member information: Member ID: 1800465, Member Name: TESTTWO PHASESIX, and Service Type: Military Service. Below this is a table with columns for Start Date, End Date, and Actions. The first row shows a start date of 07/29/2001 and an end date of 08/07/2002, with an 'Edit Delete' link. An 'Add New Entry' button is located to the right of the table. Below the table, there is a section for 'Contribution Details' with a table containing columns for Start Date, End Date, Salary, Months Worked, Days Worked, Contract Months, and Part Time %. The first row shows a start date of 07/29/2001, end date of 06/30/2002, salary of 14999.98, 11 months worked, 220 days worked, and 0% part time. The second row shows a start date of 07/01/2002, end date of 08/07/2002, salary of 15500.00, 14 months worked, 280 days worked, and 0% part time. At the bottom of the page, there are two buttons: 'Reject Request' and 'Submit Certification'. The 'Submit Certification' button is highlighted with a red border.

## 12.2. Certifying a Member's Retirement

Retirement requests are initiated by a member using either Member **Self-Service** or submitting a retirement application to TCRS. If the member submits the request via **Member Self-Service**, a request is automatically created in Concord. If the member submits the request using a form, TCRS staff must create a request in Concord. Depending on the status of the application, it appears in ESS for approval. After you have approved the application, TCRS staff completes the process using Concord.

**Step 1 --** All pending retirement, refund, and prior service purchase records display on the **Certifications** screen.

<b>Employer Certification</b>				
<b>Member Retirement Request:</b>				
<b>Member ID:</b>	<b>Member Name:</b>	<b>Request Date:</b>	<b>Approved Date</b>	
<a href="#">1800488</a>	TESTTWO PHASESIX	7/17/2013	08/09/2013	
<a href="#">1800488</a>	TESTTWO PHASESIX	7/17/2013	08/22/2013	
<a href="#">1800640</a>	Ron Doe	7/18/2013	08/09/2013	
<a href="#">1800305</a>	John Doe Sixty-two	7/22/2013	08/20/2013	
<a href="#">1800503</a>	TESTTWO PHASESIX	7/22/2013	08/21/2013	
<a href="#">1800295</a>	John Doe Fifty-two	7/22/2013	08/22/2013	
<a href="#">1800298</a>	John Fiftyfive	7/22/2013		
<a href="#">1800488</a>	TESTTWO PHASESIX	7/23/2013	08/22/2013	
<a href="#">1800454</a>	Testtwo Phhhhhh	7/24/2013		
<a href="#">1801729</a>	Jonathan Vazquez	7/24/2013	08/15/2013	
1 2 3 4 5 6 7 8 9 10 ...				
<b>Member Prior Service Requests:</b>				
<b>Member ID:</b>	<b>Member Name:</b>	<b>Request Date:</b>	<b>Service Type:</b>	<b>Status:</b>
<a href="#">1800456</a>	TESTTWO PHASESIX	7/23/2013	Military Service	Pending ESS Certification
<a href="#">1800298</a>	John Fiftyfive	8/1/2013	Probationary	Pending ESS Certification
<a href="#">1800298</a>	John Fiftyfive	8/1/2013	PC 801 Service	Pending ESS Certification
<a href="#">1800298</a>	John Fiftyfive	8/1/2013	Educational Leave	Pending ESS Certification
<a href="#">1800298</a>	John Fiftyfive	8/1/2013	Back Payment of Reinstated Member - Wrongful Term	Pending ESS Certification
<a href="#">1800465</a>	TESTTWO PHASESIX	8/5/2013	Educational Leave	Pending ESS Certification
<a href="#">1800298</a>	John Fiftyfive	8/5/2013	Military Service	Pending ESS Certification
<a href="#">1800298</a>	John Fiftyfive	8/5/2013	Military Service	Pending ESS Certification
<a href="#">1800298</a>	John Fiftyfive	8/5/2013	Military Service	Pending ESS Certification
<a href="#">1800298</a>	John Fiftyfive	8/5/2013	Military Service	Pending ESS Certification
<a href="#">1800298</a>	John Fiftyfive	8/5/2013	Military Service	Pending ESS Certification
1 2 3 4 5				
<b>Member Refund Requests:</b>				

**Step 2 --** Click on the member ID to view the retirement request information.

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### Employer Certification

Member Retirement Request:

Member ID:	Member Name:	Request Date:	Approved Date
<a href="#">1800488</a>	TESTTWO PHASESIX	7/17/2013	08/09/2013
<a href="#">1800488</a>	TESTTWO PHASESIX	7/17/2013	08/22/2013
<a href="#">1800640</a>	Ron Doe	7/18/2013	08/09/2013
<a href="#">1800305</a>	John Doe Sixty-two	7/22/2013	08/20/2013
<a href="#">1800503</a>	TESTTWO PHASESIX	7/22/2013	08/21/2013
<a href="#">1800295</a>	John Doe Fifty-two	7/22/2013	08/22/2013
<a href="#">1800298</a>	John Fiftyfive	7/22/2013	
<a href="#">1800488</a>	TESTTWO PHASESIX	7/23/2013	08/22/2013
<a href="#">1800454</a>	Testtwo Phhhhhh	7/24/2013	
<a href="#">1801729</a>	Jonathan Vazquez	7/24/2013	08/15/2013

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) ...

**Step 3 --** To certify the retirement request, enter the last employment date in the **Last Date of Paid Employment** field.



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## Retirement Certification

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Member ID: 1800298
Member Name: John Fiftyfive

Last Date of Paid Employment:

Calculate final salary breakdown based on the last month's contributions ?

**Breakdown of Final Salary**

*Please list all payroll that the member will appear on from the date this application is completed to the employee's last payroll. Any longevity, career ladder, bonus or leave payment should be added as separate line item in the grid below.*

Posting Month	Payment Reason	Salary	Pre Tax EECON	Post Tax EECON	Service Credit
<input type="checkbox"/>	<input type="text"/>				

**Final Salary Certification:**

Total Salary (Year-to-Date):	<input type="text"/>	Service Credit (Year-to-Date)	<input type="text" value="0 Months"/>
Contract Months:	<input type="text" value="N/A"/>		
Unused Sick Leave Days at Retirement :	<input type="text"/>		
Sick Leave Accrued 2 Years Ago :	<input type="text"/>		
Sick Leave Accrued Last Year :	<input type="text"/>		
Sick Leave Accrued Year-to-Date:	<input type="text"/>		

Step 4 -- Click .



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## Retirement Certification

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Member ID: 1800298      Member Name: John Fiftyfive

Last Date of Paid Employment:       Calculate final salary breakdown based on the last month's contributions ?

### Breakdown of Final Salary

*Please list all payroll that the member will appear on from the date this application is completed to the employee's last payroll. Any longevity, career ladder, bonus or leave payment should be added as separate line item in the grid below.*

Posting Month	Payment Reason	Salary	Pre Tax EECON	Post Tax EECON	Service Credit
<input type="checkbox"/>	<input type="text"/>				

### Final Salary Certification:

Total Salary (Year-to-Date):	<input type="text"/>	Service Credit (Year-to-Date)	<input type="text" value="0 Months"/>
Contract Months:	<input type="text" value="N/A"/>		
Unused Sick Leave Days at Retirement :	<input type="text"/>		
Sick Leave Accrued 2 Years Ago :	<input type="text"/>		
Sick Leave Accrued Last Year :	<input type="text"/>		
Sick Leave Accrued Year-to-Date:	<input type="text"/>		

**Step 5 --** Make any necessary updates based on the final salary breakdown.



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## Retirement Certification

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**Member ID:** 1800298      **Member Name:** John Fiftyfive

Last Date of Paid Employment:       Calculate final salary breakdown based on the last month's contributions ?

**Breakdown of Final Salary**

*Please list all payroll that the member will appear on from the date this application is completed to the employee's last payroll. Any longevity, career ladder, bonus or leave payment should be added as separate line item in the grid below.*

☐	Posting Month	Payment Reason	Salary	Pre Tax EECON	Post Tax EECON	Service Credit
<input type="checkbox"/>	<input type="text" value="04/2013"/>	<input type="text" value="Please select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text" value="05/2013"/>	<input type="text" value="Please select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text" value="06/2013"/>	<input type="text" value="Please select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text" value="07/2013"/>	<input type="text" value="Please select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text" value="08/2013"/>	<input type="text" value="Please select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Final Salary Certification:**

Total Salary (Year-to-Date):	<input type="text"/>	Service Credit (Year-to-Date)	<input type="text" value="0 Months"/>
Contract Months:	<input type="text" value="N/A"/>		
Unused Sick Leave Days at Retirement :	<input type="text"/>		
Sick Leave Accrued 2 Years Ago :	<input type="text"/>		
Sick Leave Accrued Last Year :	<input type="text"/>		
Sick Leave Accrued Year-to-Date:	<input type="text"/>		

Step 6 -- Click .

**Note:** If your agency has the sick leave plan provision and allows your employees to claim unused sick leave as retirement credit, please certify the unused sick leave on this screen.



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## Retirement Certification

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**Member ID:** 1800298      **Member Name:** John Fiftyfive

Last Date of Paid Employment:       Calculate final salary breakdown based on the last month's contributions ?

**Breakdown of Final Salary**

*Please list all payroll that the member will appear on from the date this application is completed to the employee's last payroll. Any longevity, career ladder, bonus or leave payment should be added as separate line item in the grid below.*

	Posting Month	Payment Reason	Salary	Pre Tax EECON	Post Tax EECON	Service Credit
<input type="checkbox"/>	<input type="text" value="04/2013"/>	Regular pay	<input type="text" value="5000"/>	<input type="text" value="500.0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>
<input type="checkbox"/>	<input type="text" value="05/2013"/>	Regular pay	<input type="text" value="5000"/>	<input type="text" value="500.0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>
<input type="checkbox"/>	<input type="text" value="06/2013"/>	Regular pay	<input type="text" value="5000"/>	<input type="text" value="500.0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>
<input type="checkbox"/>	<input type="text" value="07/2013"/>	Regular pay	<input type="text" value="5000"/>	<input type="text" value="500.0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>
<input type="checkbox"/>	<input type="text" value="08/2013"/>	Regular pay	<input type="text" value="5000"/>	<input type="text" value="500.0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>

**Final Salary Certification:**

Total Salary (Year-to-Date):	<input type="text"/>	Service Credit (Year-to-Date)	<input type="text" value="0 Months"/>
Contract Months:	<input type="text" value="N/A"/>		
Unused Sick Leave Days at Retirement :	<input type="text"/>		
Sick Leave Accrued 2 Years Ago :	<input type="text"/>		
Sick Leave Accrued Last Year :	<input type="text"/>		
Sick Leave Accrued Year-to-Date:	<input type="text"/>		

Step 7 -- Click **Complete Certification** to submit the information to TCRS for additional processing.

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Salary Breakdown successfully Saved.

## Retirement Certification

[Back to Dashboard](#)

Member ID: 1800298 Member Name: John Fiftyfive

Last Date of Paid Employment: 8/9/2013 Calculate final salary breakdown based on the last month's contributions ?

**Breakdown of Final Salary**

Please list all payroll that the member will appear on from the date this application is completed to the employee's last payroll. Any longevity, career ladder, bonus or leave payment should be added as separate line item in the grid below.

Posting Month	Payment Reason	Salary	Pre Tax EECON	Post Tax EECON	Service Credit
<input type="checkbox"/> 04/2013	Regular pay	5000.00	500.00	0.00	1.0000
<input type="checkbox"/> 05/2013	Regular pay	5000.00	500.00	0.00	1.0000
<input type="checkbox"/> 06/2013	Regular pay	5000.00	500.00	0.00	1.0000
<input type="checkbox"/> 07/2013	Regular pay	5000.00	500.00	0.00	1.0000
<input type="checkbox"/> 08/2013	Regular pay	5000.00	500.00	0.00	1.0000

**Final Salary Certification:**

Total Salary (Year-to-Date):  Service Credit (Year-to-Date) 0 Months  
 Contract Months: N/A  
 Unused Sick Leave Days at Retirement :   
 Sick Leave Accrued 2 Years Ago :   
 Sick Leave Accrued Last Year :   
 Sick Leave Accrued Year-to-Date:

### 12.3. Certifying a Member's Refund

Refund applications are initiated by a member using either **Member Self-Service** or submitting a refund request form to TCRS. If the member submits the request via **Member Self-Service**, a request is automatically created in Concord. If the member submits the request using a form, TCRS staff must create a request in Concord. Once the request information is processed by TCRS, you can view the refund request in **Employer Self-Service**. After you have approved the application, TCRS staff completes the process using Concord.

**Step 1 --** All pending retirement, refund, and prior service purchase records display on the **Certifications** screen.

<b>Employer Certification</b>					
<b>Member Retirement Request:</b>					
Member ID:	Member Name:	Request Date:	Approved Date		
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013			
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013			
<a href="#">1801842</a>	Patricia Krueger	8/26/2013	10/15/2013		
<a href="#">1802062</a>	Dustin Johnson	8/28/2013			
<a href="#">1802063</a>	Walter Reynolds	8/28/2013			
<a href="#">1802279</a>	Daniel Durante	9/4/2013			
<a href="#">1802279</a>	Daniel Durante	9/4/2013			
<a href="#">1802277</a>	Larry Santacruz	9/6/2013			
<a href="#">1801729</a>	Jonathan Vazquez	9/6/2013			
<a href="#">1801729</a>	Jonathan Vazquez	9/10/2013			
1 2 3 4					
<b>Member Prior Service Requests:</b>					
Member ID:	Member Name:	Request Date:	Service Type:	Status:	
<a href="#">1803072</a>	Edward Osburn	9/26/2013	Enrollment Service	Pending ESS Certification	
<a href="#">1803078</a>	Jason Cline	9/27/2013	Educational Leave	Pending ESS Certification	
<a href="#">1803349</a>	Rosalinda Sutton	10/1/2013	Back Payment of Reinstated Member - Wrongful Term	Pending ESS Certification	
<a href="#">1801698</a>	Daniel Stanley	10/2/2013	Delinquent Contributions	Pending ESS Certification	
<a href="#">1802490</a>	Teresa Revell	10/4/2013	Probationary	Pending ESS Certification	
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	PC 801 Service	Pending ESS Certification	
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	Delinquent Contributions	Pending ESS Certification	
<a href="#">1803349</a>	Rosalinda Sutton	10/7/2013	PC 801 Service	Pending ESS Certification	
<a href="#">1803367</a>	David Ross	10/7/2013	Enrollment Service	Pending ESS Certification	
<a href="#">1803589</a>	Shanell Johnson	10/8/2013	Educational Leave	Pending ESS Certification	
1 2					
<b>Member Refund Requests:</b>					
Member ID:	Member Name:	Request Date:	Last Contribution Date:	Employment End Date:	Employment End Reason:
1804327	Nathan Kaufman	10/15/2013	<input type="text"/>	10/2/2013	
					<input type="button" value="Certify"/>
					<input type="button" value="Reject"/>
1804366	Sara Knox	10/15/2013	<input type="text"/>	<input type="text"/>	
					<input type="button" value="Certify"/>
					<input type="button" value="Reject"/>

**Step 2 --** To certify the refund request, enter the last contribution date and employment date for the member.

### Employer Certification

Member Retirement Request:			
Member ID:	Member Name:	Request Date:	Approved Date
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801842</a>	Patricia Krueger	8/26/2013	10/15/2013
<a href="#">1802062</a>	Dustin Johnson	8/28/2013	
<a href="#">1802063</a>	Walter Reynolds	8/28/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802277</a>	Larry Santacruz	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/10/2013	

[1](#) [2](#) [3](#) [4](#)

Member Prior Service Requests:				
Member ID:	Member Name:	Request Date:	Service Type:	Status:
<a href="#">1803072</a>	Edward Osburn	9/26/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803078</a>	Jason Cline	9/27/2013	Educational Leave	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/1/2013	Back Payment of Reinstated Member - Wrongful Term	Pending ESS Certification
<a href="#">1801698</a>	Daniel Stanley	10/2/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1802490</a>	Teresa Revell	10/4/2013	Probationary	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/7/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803367</a>	David Ross	10/7/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803589</a>	Shanell Johnson	10/8/2013	Educational Leave	Pending ESS Certification

[1](#) [2](#)

Member Refund Requests:					
Member ID:	Member Name:	Request Date:	Last Contribution Date:	Employment End Date:	Employment End Reason:
1804327	Nathan Kaufman	10/15/2013	<input type="text"/>	<input type="text" value="10/2/2013"/>	
1804366	Sara Knox	10/15/2013	<input type="text"/>	<input type="text"/>	

**Step 3 -- Make any necessary updates.**

### Employer Certification

Member Retirement Request:			
Member ID:	Member Name:	Request Date:	Approved Date
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801842</a>	Patricia Krueger	8/26/2013	10/15/2013
<a href="#">1802062</a>	Dustin Johnson	8/28/2013	
<a href="#">1802063</a>	Walter Reynolds	8/28/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802277</a>	Larry Santacruz	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/10/2013	

1 2 3 4

Member Prior Service Requests:				
Member ID:	Member Name:	Request Date:	Service Type:	Status:
<a href="#">1803072</a>	Edward Osburn	9/26/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803078</a>	Jason Cline	9/27/2013	Educational Leave	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/1/2013	Back Payment of Reinstated Member - Wrongful Term	Pending ESS Certification
<a href="#">1801698</a>	Daniel Stanley	10/2/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1802490</a>	Teresa Revell	10/4/2013	Probationary	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/7/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803367</a>	David Ross	10/7/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803589</a>	Shanell Johnson	10/8/2013	Educational Leave	Pending ESS Certification

1 2

Member Refund Requests:					
Member ID:	Member Name:	Request Date:	Last Contribution Date:	Employment End Date:	Employment End Reason:
1804327	Nathan Kaufman	10/15/2013	<input type="text" value="10/11/2013"/>	<input type="text" value="10/2/2013"/>	
1804366	Sara Knox	10/15/2013	<input type="text"/>	<input type="text"/>	

**Step 4 --** Click  to submit the information to TCRS for additional processing.

**Note:** If the refund request should be rejected, follow steps in Section 12.5, Rejecting a Member's Refund.

### Employer Certification

Member Retirement Request:			
Member ID:	Member Name:	Request Date:	Approved Date
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801842</a>	Patricia Krueger	8/26/2013	10/15/2013
<a href="#">1802062</a>	Dustin Johnson	8/28/2013	
<a href="#">1802063</a>	Walter Reynolds	8/28/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802277</a>	Larry Santacruz	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/10/2013	

[1](#) [2](#) [3](#) [4](#)

Member Prior Service Requests:				
Member ID:	Member Name:	Request Date:	Service Type:	Status:
<a href="#">1803072</a>	Edward Osburn	9/26/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803078</a>	Jason Cline	9/27/2013	Educational Leave	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/1/2013	Back Payment of Reinstated Member - Wrongful Term	Pending ESS Certification
<a href="#">1801698</a>	Daniel Stanley	10/2/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1802490</a>	Teresa Revell	10/4/2013	Probationary	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/7/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803367</a>	David Ross	10/7/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803589</a>	Shanell Johnson	10/8/2013	Educational Leave	Pending ESS Certification

[1](#) [2](#)

Member Refund Requests:					
Member ID:	Member Name:	Request Date:	Last Contribution Date:	Employment End Date:	Employment End Reason:
1804327	Nathan Kaufman	10/15/2013	<input type="text" value="10/11/2013"/>	<input type="text" value="10/2/2013"/>	
1804366	Sara Knox	10/15/2013	<input type="text"/>	<input type="text"/>	

## 12.4. Rejecting a Member's Prior Service Purchase

In some instances, you may need to reject a member's Service Purchase request.

**Step 1** -- Follow steps 1 through 3 from Section 12.1, Certifying a Member's Prior Service Purchase.

**Step 2** -- If the details for the prior service purchase request do not match your records, click

The screenshot shows the TCRS Retirement System Employer Self-Service interface. The user is Sara Franklin, logged in as Sara Franklin, Public Safety Bridge Fund. The page title is "Prior Service Certification". The form displays the following details:

Member ID:	1800298	Member Name:	John Fiftyfive	Service Type:	Educational Leave
Start Date	06/18/2000	End Date	06/18/2002	Actions	<a href="#">Edit</a> <a href="#">Delete</a>

Below the form, there are buttons for "Add New Entry", "Save", "Submit Certification", and "Reject Request". The "Reject Request" button is highlighted with a red box.

**Step 3** -- The Confirmation window displays. Select the denial reason from the drop down menu.

The screenshot shows a "Confirmation" dialog box with the text "Please select the denial reason". A dropdown menu is open, showing the following options:

- Employer does not have employment records for member
- Employer does not have employment records for member
- Governing resolution for service is not on file
- Member did not work for the employer

The first two options are highlighted in blue. The "Confirm" button is visible at the bottom right of the dialog box.

**Step 4** -- Click  .

**Confirmation**

Please select the denial reason

## 12.5. Denying a Member's Refund

In some instances, you may need to reject a member's Refund application. After you reject the member's Refund application, a TCRS refund rejection workflow is created. This cancels the existing internal TCRS refund work item, creates an appropriate journal entry noting that the refund was cancelled, and sends the appropriate correspondence to the member alerting them of the refund cancellation.

**Step 1** -- Follow steps 1 through 3 from Section 12.3, Certifying a Member's Refund.

Step 2 -- If the details for the refund request do not match your records, click .

### Employer Certification

Member Retirement Request:			
Member ID:	Member Name:	Request Date:	Approved Date
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801842</a>	Patricia Krueger	8/26/2013	10/15/2013
<a href="#">1802062</a>	Dustin Johnson	8/28/2013	
<a href="#">1802063</a>	Walter Reynolds	8/28/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802277</a>	Larry Santacruz	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/10/2013	

[1](#) [2](#) [3](#) [4](#)

Member Prior Service Requests:				
Member ID:	Member Name:	Request Date:	Service Type:	Status:
<a href="#">1803072</a>	Edward Osburn	9/26/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803078</a>	Jason Cline	9/27/2013	Educational Leave	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/1/2013	Back Payment of Reinstated Member - Wrongful Term	Pending ESS Certification
<a href="#">1801698</a>	Daniel Stanley	10/2/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1802490</a>	Teresa Revell	10/4/2013	Probationary	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/7/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803367</a>	David Ross	10/7/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803589</a>	Shanell Johnson	10/8/2013	Educational Leave	Pending ESS Certification

[1](#) [2](#)

Member Refund Requests:					
Member ID:	Member Name:	Request Date:	Last Contribution Date:	Employment End Date:	Employment End Reason:
1804327	Nathan Kaufman	10/15/2013	<input type="text"/>	10/2/2013	
					<input type="button" value="Certify"/> <input type="button" value="Reject"/>
1804366	Sara Knox	10/15/2013	10/9/2013	10/2/2013	
					<input type="button" value="Certify"/> <input type="button" value="Reject"/>

**Step 3 --** The record is removed from the **Certification** screen. A request is launched in Concord to cancel the correspondence refund work item. A journal entry is automatically created for the member in Concord and a letter is sent to the member notifying them of the refund cancellation. The request will no longer be reflected in ESS.

### Employer Certification

Member Retirement Request:			
Member ID:	Member Name:	Request Date:	Approved Date
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801729</a>	Jonathan Vazquez	8/22/2013	
<a href="#">1801842</a>	Patricia Krueger	8/26/2013	10/15/2013
<a href="#">1802062</a>	Dustin Johnson	8/28/2013	
<a href="#">1802063</a>	Walter Reynolds	8/28/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802279</a>	Daniel Durante	9/4/2013	
<a href="#">1802277</a>	Larry Santacruz	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/6/2013	
<a href="#">1801729</a>	Jonathan Vazquez	9/10/2013	

1 2 3 4

Member Prior Service Requests:				
Member ID:	Member Name:	Request Date:	Service Type:	Status:
<a href="#">1803072</a>	Edward Osburn	9/26/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803078</a>	Jason Cline	9/27/2013	Educational Leave	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/1/2013	Back Payment of Reinstated Member - Wrongful Term	Pending ESS Certification
<a href="#">1801698</a>	Daniel Stanley	10/2/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1802490</a>	Teresa Revell	10/4/2013	Probationary	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803490</a>	Rachel Bellantoni	10/5/2013	Delinquent Contributions	Pending ESS Certification
<a href="#">1803349</a>	Rosalinda Sutton	10/7/2013	PC 801 Service	Pending ESS Certification
<a href="#">1803367</a>	David Ross	10/7/2013	Enrollment Service	Pending ESS Certification
<a href="#">1803589</a>	Shanell Johnson	10/8/2013	Educational Leave	Pending ESS Certification

1 2

Member Refund Requests:					
Member ID:	Member Name:	Request Date:	Last Contribution Date:	Employment End Date:	Employment End Reason:
1804327	Nathan Kaufman	10/15/2013	<input type="text"/>	10/2/2013	

## 13. Member Information

All those with ESS access (administrative, employer reporting, and staff) can view salary and contribution history information about selected members using the **Member Information** screen. You can use this information to counsel potential retirees on various aspects of the retirement process. You can view salary and contribution information for members who either currently work for or have worked for your organization in the past. If a member was employed with a different employer that is a part of TCRS, the member's salary for that employer displays, but the fields are masked. Service information also displays on the **Member Information** screen.

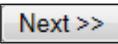
**Step 1 --** To navigate to the **Member Information** screen, click on the following menu options:

**Services > Member Information**

The screenshot displays the TCRS Retirement System Employer Self-Service interface. At the top left is the TCRS logo. At the top right, a user profile box shows 'Employer Self Service' for Sara Franklin, White Bluff Town Of, with a 'Log Out' button and 'Last Login: Tue, Apr 22 2014 9:36 AM' and a 'UserGuide' link. Below the logo is a navigation bar with tabs: 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Services' tab is selected, and a dropdown menu is open, listing: 'Death Notice', 'Seminars', 'Employer Certification', 'Member Information' (highlighted with a red box), 'Employer Information', 'Reports', and 'Message Center'. To the right of the menu is a dropdown for 'Available Forms' with an 'Open' button. The main content area contains a welcome message and a list of services including reporting wages, processing EFT payments, and verifying member IDs. At the bottom, there is a message from David H. Lillard, Jr., Treasurer.

**Step 2 --** Search for a member using their SSN. Enter the member's SSN in the **SSN** field.

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top right, a user profile for Sara Franklin is displayed with a 'Log Out' button. A navigation menu includes 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. Below the menu, there is a dropdown for 'Available Forms' and an 'Open' button. The main heading is 'Member Information'. Underneath, a section titled 'Enter Member SSN' contains the instruction: 'Enter the Member SSN that you wish to work with and then click on the [Next] button.' The 'SSN:' label is followed by a text input field containing '999999999' and a '(999999999)' label. A 'Next >>' button is positioned below the input field. A red rectangular box highlights the input field.

**Step 3 --** Click  .

This screenshot is identical to the previous one, showing the 'Member Information' page. However, the 'Next >>' button is now highlighted with a red rectangular box, indicating the next step in the process.

Step 4 -- The member's information displays.



Tennessee Consolidated  
**TCRS**  
Retirement System

**Employer Self Service** Log Out

Sara Franklin  
Shiloh Reg Lib  
[Change Your User ID And/Or Password](#)

Last Login: Thu, Oct 10 2013 8:55 AM UserGuide

Employer Home
Report
Services
Account
Admin
Logout

-- Available Forms -- Open

## Member Information

**Enter Member SSN**

Enter the Member SSN that you wish to work with and then click on the [Next] button.

SSN: \*  (999999999)

**View Account History**

Member Name : Jill Doe      Member SSN : XXX-XX-0001      Date Of Birth : 7/1/1953

**Account Information**

Member ID :	1000001
Retirement System :	Tennessee Consolidated Retirement System
Most Recent Contribution Group :	0080880-051NONC - Non-Contributing
Most Recent Employer :	SHILOH REG LIB
Begin Date :	7/1/2013
End Date :	08/02/2013

**Account History:** Your service, salary and contribution history for this account is below.

Year	Service Type	Employer	Contribution Group	Service Credit (Years)	Total Salary	Total Contributions
2014	MEMBERSHIP	SHILOH REG LIB	0080880-051NONC - Non-Contributing	1.0000	0.00	0.00
2014	MEMBERSHIP	SOUTH CARTHAGE TOWN OF	0089020-051NONC - Non-Contributing	1.0000		
<b>Total</b>				<b>2.0000</b>		<b>0.00</b>

1

## 14. Employer Information

All those with ESS access (administrative, employer reporting, and staff) can view the **Employer Information** screen. This screen provides a snapshot of the most often requested information about their participation with TCRS, asset balance information, plan provisions, and contribution rates.

**Note:** Current fiscal year contribution rates display. When new fiscal year rates are loaded, they display on this screen even if the current fiscal year has not ended. Both rates display until the effective date of the new fiscal year rates. After the effective date of the new fiscal year rates, the old rates will no longer display. Asset balances only display for the current fiscal year.

**Step 1 --** To navigate to the **Employer Information** screen, click on the following menu options:

**Services > Employer Information**

The screenshot displays the TCRS Retirement System Employer Self-Service interface. At the top left is the TCRS logo. At the top right, a user information box shows 'Employer Self Service' for Sara Franklin, White Bluff Town Of, with a 'Log Out' button and a 'UserGuide' link. Below this is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Services' dropdown menu is open, listing options: 'Death Notice', 'Seminars', 'Employer Certification', 'Member Information', 'Employer Information' (highlighted with a red box), 'Reports', and 'Message Center'. The main content area contains a welcome message and a list of services including reporting wages, processing EFT payments, and adding/updating employer information. At the bottom, there is a message from David H. Lillard, Jr., Treasurer.

**Step 2 --** All of your organization's information displays on the screen as read-only. The information displayed includes: *Current Rates*, *Plan Provisions*, and *Employer Assets (Fiscal Year Close)* sections.

### Employer Information

Fiscal Year: 2013 - 2014

Master Code: 0081885 - WHITE BLUFF TOWN OF

Reference Codes:

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**Current Rates:**

Contribution Group	Effective Date	Employer Rate (%)	Employee Rate (%)	Supplemental Employee Rate (%)
0081885-051ALTC	01/01/2015	2.5000	2.5000	0.0000
0081885-051ALTC	01/01/2014	20.4700	2.5000	0.0000
0081885-051CONT	10/01/2015	14.7500	14.7500	15.2500
0081885-051CONT	10/01/2013	14.7500	14.7500	15.2500
0081885-051NONC	10/01/2015	14.7500	14.7500	15.2500
0081885-051NONC	10/01/2013	14.7500	14.7500	15.2500
0081885-051NONP	01/01/1900	0.0000	0.0000	0.0000

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**Plan Provisions:** [Plan Provision Information](#)

Plan Provisions	Begin Date	End Date	Employee Limiting Factor
002 - LIMIT CONTRIBUTIONS	06/18/1980		
002 - LIMIT CONTRIBUTIONS	06/18/1980		
003 - MEMBERS AFTER AGE 70	07/01/1980		
003 - MEMBERS AFTER AGE 70	07/01/1980		
004 - OPTION 1 DEATH BENEFIT	06/03/1980		
004 - OPTION 1 DEATH BENEFIT	06/03/1980		
007 - SICK LEAVE DAYS	11/01/1978		
007 - SICK LEAVE DAYS	11/01/1978		
010 - 25 YEAR RETIREMENT	07/01/1982		
010 - 25 YEAR RETIREMENT	07/01/1982		

[1](#) [2](#) [3](#) [4](#)

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**Employer Assets (Fiscal Year Close):**

Fiscal Year	2014
Beginning Asset Balance	52617367.97
Contribution Amount	0.00
Non-Contributory Amount	-
Current Year Interest	-
Benefit Payments	100.00
Death Benefit Payments	-
Transfer-Retirements	0.00
Investment Income	0.00
Employer Refunds	0.00

[1](#) [2](#)

## 15. Reports

All those with ESS access (administrative, employer reporting, and staff) can use the **Reports** screen to generate specific reports in real-time outside of the monthly packet batch process on an ad-hoc basis. Additionally, Employer Annual Statements are available on the **Reports** screen at the end of each fiscal year.

**Note:** If your organization reports for or balances for another employer, you have the ability to view those employer codes in the **Employer Code** drop down menu in the **Reports** screen. If your organization is reported for or balanced for by another employer, you can only view your own employer code from the **Employer Code** drop down menu.

**Step 1 --** To navigate to the **Reports** screen, click on the following menu options:

**Services > Reports**

The screenshot shows the TCRS Retirement System Employer Self Service interface. The user is Sara Franklin, White Bluff Town Of, and the last login was on Thu, Aug 15 2013 10:49 AM. The 'Services' menu is open, and the 'Reports' option is highlighted with a red box. The interface includes a navigation bar with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Services' menu is open, showing options: Death Notice, Seminars, Employer Certification, Member Information, Employer Information, Reports (highlighted), and Message Center. The main content area displays a welcome message and a list of services including Reporting wages and, Processing EFT Paym, Processing wage adju, Adding/updating empl, Reviewing employer r, Downloading and com, and Verifying Member IDs. The page also includes a footer with the TCRS logo and the text 'TCRS Concord Project | Employer Self-Service'.

**Step 2 --** Select the report from the drop down menu.

The screenshot shows the TCRS Retirement System Employer Self Service interface. The user is Sara Franklin from White Bluff Town Of. The main navigation bar includes 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. Below the navigation bar, there is a 'View Monthly Reports' section with a dropdown menu for 'Available Forms'. The dropdown menu is open, showing a list of reports: Posting Exceptions Report By Employer Code, Demographic Errors, Non-Participating Part-Time Status, Probationary Status, Missing Employment End Date, Errors Not In Template, Leave Without Pay, Load Errors, Employer Annual Statement, and Contribution Error Correction Totals. The dropdown menu is highlighted with a red box. Below the dropdown menu are 'Reset' and 'Generate' buttons.

### Explanation of Fields

The following table describes the reports available on the **View Monthly Reports** screen.

Field Name	Attribute	Description
<b>ESS Reports</b>		
Posting Exceptions Report By Employer Code	V	This report displays a list of an employer's Edit errors grouped by member
Demographic Errors	V	This report lists all demographic errors for a reporting month for an employer
Non-Participating Part-Time Status	V	This report lists all part-time employees who are non-participants with TCRS
Probationary Status	V	This report displays employees who have been on Probation for 5 or more months
Missing Employment End Date	V	This report displays employees whose employment end date is not recorded with TCRS
Errors Not In Template	V	This report displays errors that have occurred that are not in the template
Leave Without Pay	V	This report displays a list of employees who are currently on leave without pay
Load Errors	V	This report displays a summary of all errors, warnings, and informational messages that were identified as part of the load edit process

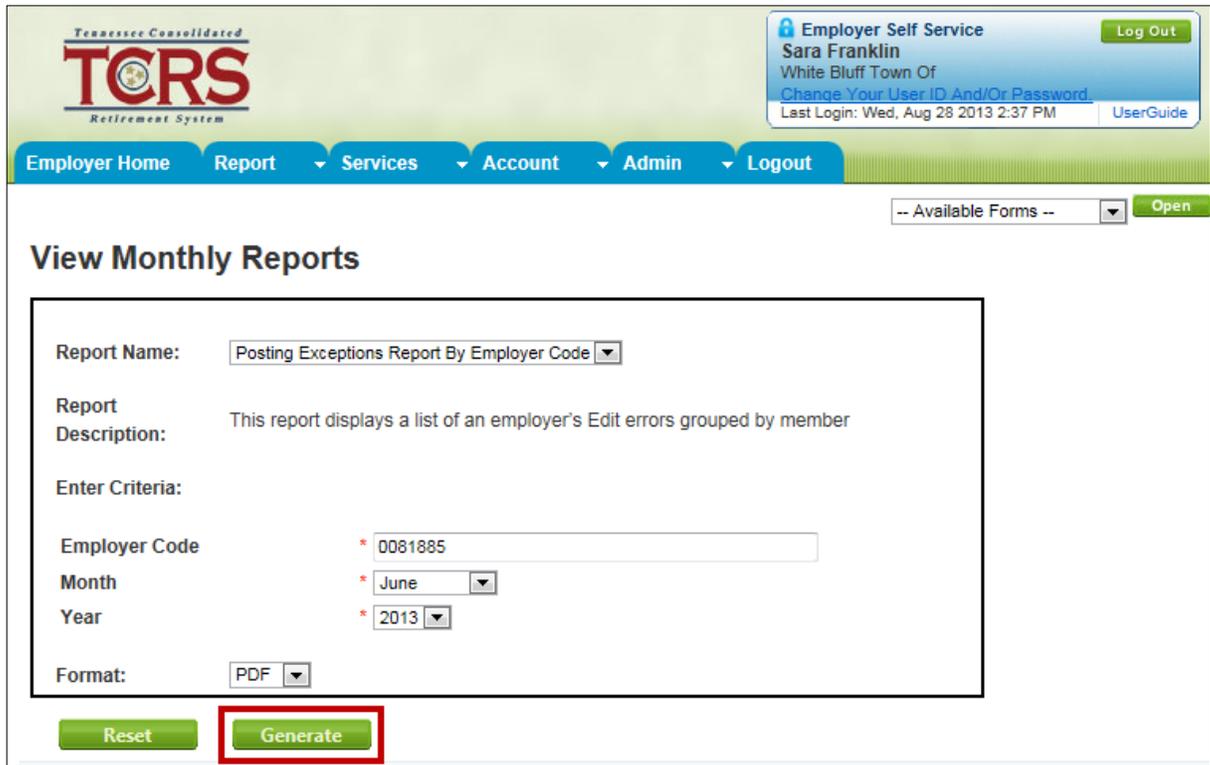
Field Name	Attribute	Description
Employer Annual Statement	V	This report displays the asset balance details for an employer and a fiscal year
Contribution Error Correction Totals	V	This report will be populated from the originally received data and any changes made to that data by either the employer or internal TCRS users

**Attribute Key:** R = Required, O = Optional, C = Conditional, V = View Only

**Step 3 --** The report description displays for the selected report. Enter search criteria for the report.

The screenshot shows the TCRS Retirement System Employer Self-Service interface. The user is Sara Franklin, logged in as White Bluff Town Of. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The main content area is titled 'View Monthly Reports' and features a dropdown for 'Available Forms' and an 'Open' button. The selected report is 'Posting Exceptions Report By Employer Code'. The report description states: 'This report displays a list of an employer's Edit errors grouped by member'. A red box highlights the 'Enter Criteria' section, which contains three required fields: 'Employer Code' (text input), 'Month' (dropdown), and 'Year' (dropdown). Below these fields is a 'Format' dropdown set to 'PDF'. At the bottom of the form are 'Reset' and 'Generate' buttons.

Step 4 -- Click .



The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top right, the user is identified as Sara Franklin, White Bluff Town Of, with a last login of Wednesday, August 28, 2013, at 2:37 PM. The main navigation bar includes links for Employer Home, Report, Services, Account, Admin, and Logout. Below this, there is a dropdown menu for 'Available Forms' and an 'Open' button. The main content area is titled 'View Monthly Reports' and contains a form with the following fields:

- Report Name: Posting Exceptions Report By Employer Code
- Report Description: This report displays a list of an employer's Edit errors grouped by member
- Enter Criteria:
  - Employer Code: \* 0081885
  - Month: \* June
  - Year: \* 2013
- Format: PDF

At the bottom of the form, there are two buttons: 'Reset' and 'Generate'. The 'Generate' button is highlighted with a red box.

Step 5 -- A PDF of the report downloads. Either open it or save it to your desktop.



The screenshot shows a file download dialog box with the following text: "Do you want to open or save POSTINGEXCEPTIONSREPORTBYEMPLOYERCODE14145.pdf (13.6 KB) from 10.233.0.30?". The dialog box has three buttons: 'Open', 'Save', and 'Cancel'. The 'Open' button is highlighted with a red box.

## 16. Message Center

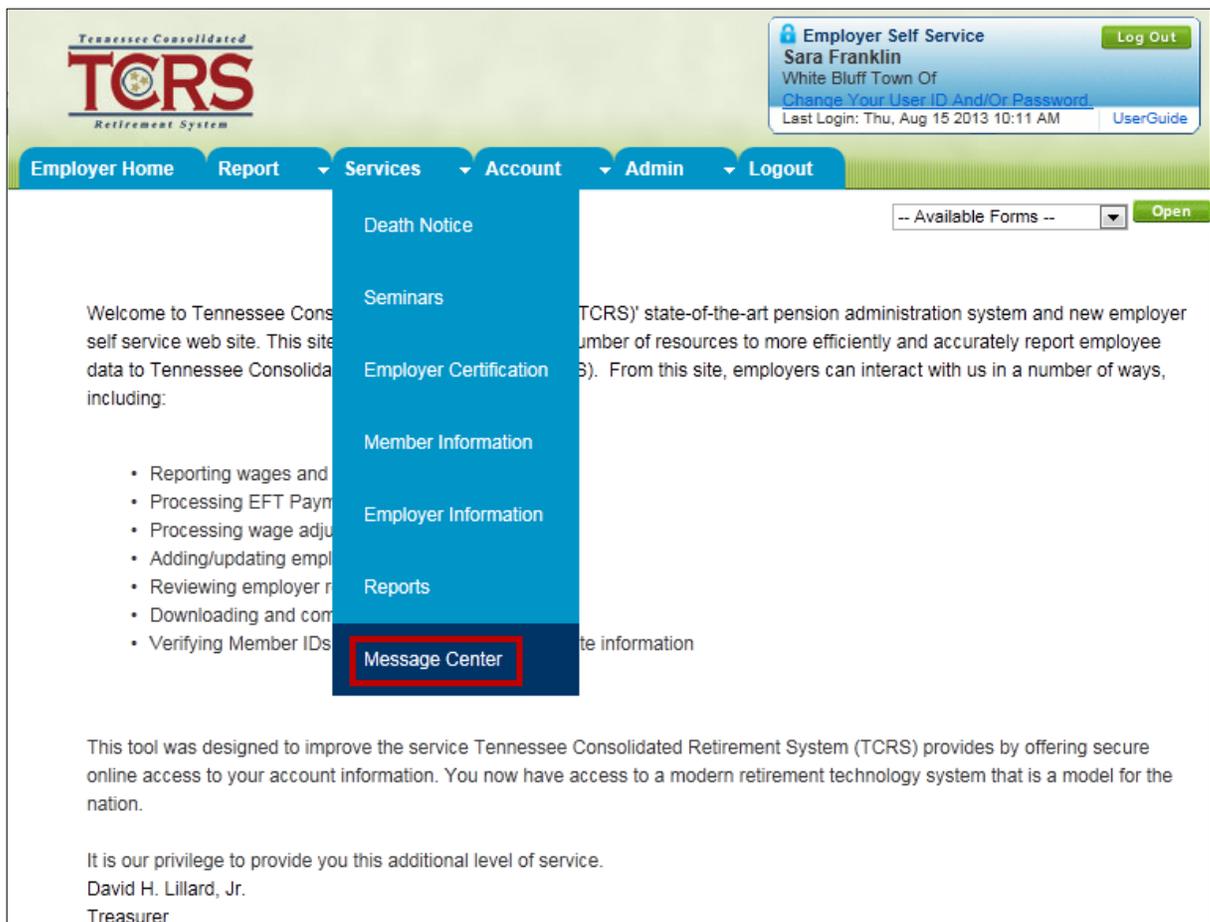
All those with ESS access (administrative, employer reporting, and staff) can view the **Message Center** screen. The **Message Center** screen displays all correspondence sent (as attachments) from TCRS to a specific user's inbox. Correspondence items sent to the **Message Center** screen are only available for 90 days. After 90 days, the messages are automatically deleted. You can flag messages in the **Message Center** screen as important. If a message is flagged as important, it will not be deleted after 90 days.

## 16.1. Viewing Messages

You can view correspondence items sent from TCRS to you using the **Message Center** screen.

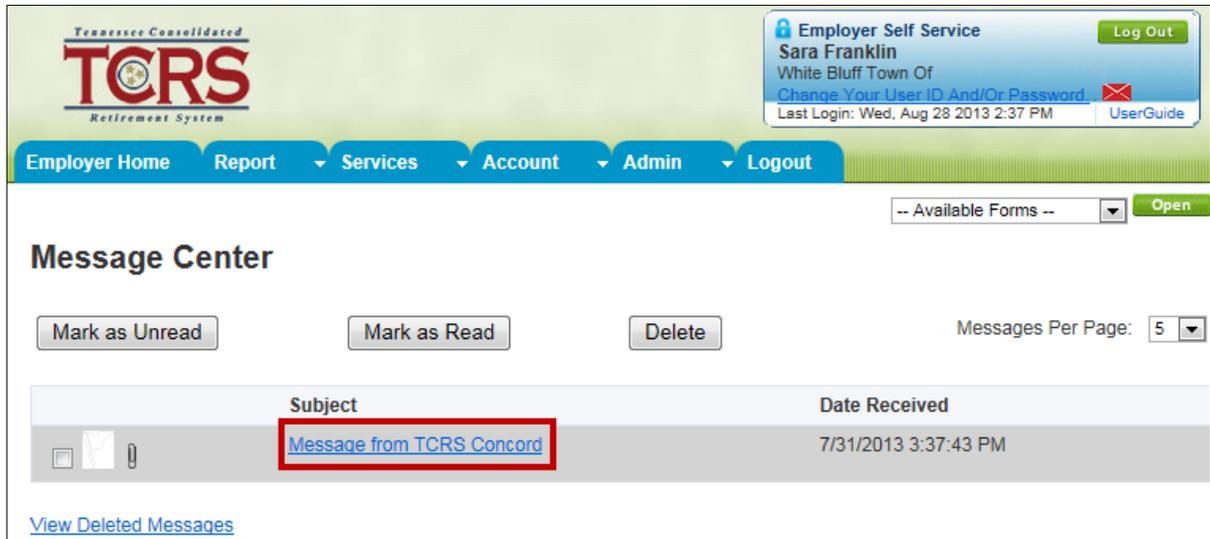
**Step 1** -- To navigate to the **Message Center** screen, click on the following menu options:

**Services > Message Center**



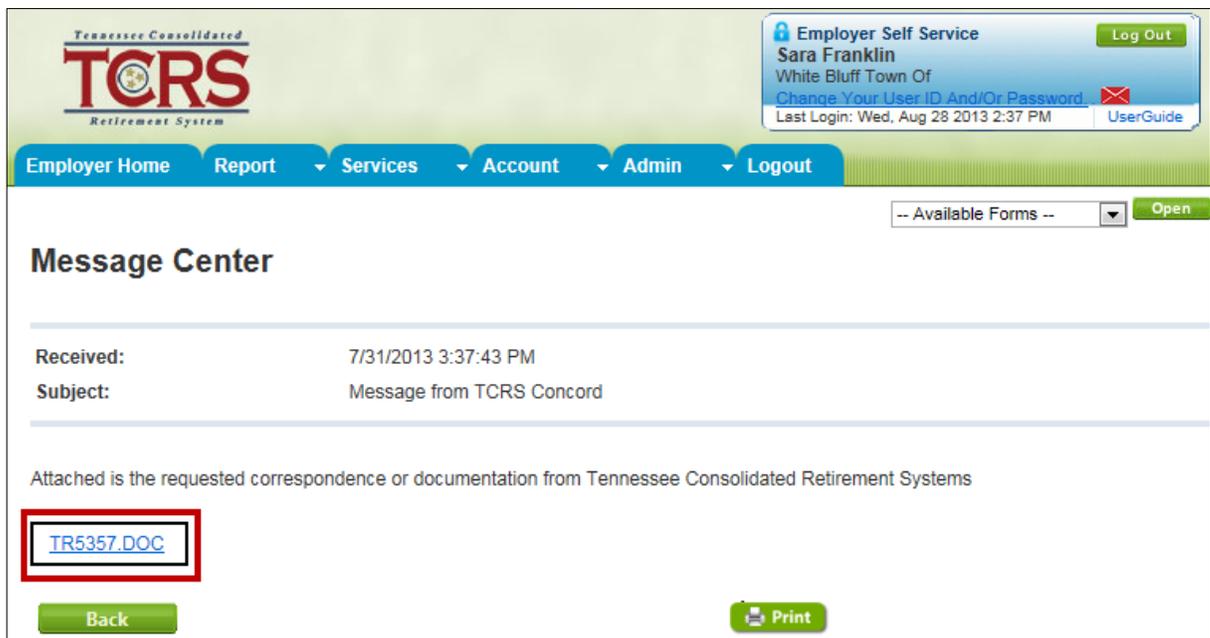
The screenshot displays the TCRS Employer Self Service interface. At the top left is the TCRS logo with the text "Tennessee Consolidated Retirement System". At the top right, a user information box shows "Employer Self Service" for Sara Franklin, White Bluff Town Of, with a "Log Out" button and a "UserGuide" link. Below this is a navigation bar with tabs for "Employer Home", "Report", "Services", "Account", "Admin", and "Logout". The "Services" tab is selected, and a dropdown menu is open, listing options: "Death Notice", "Seminars", "Employer Certification", "Member Information", "Employer Information", "Reports", and "Message Center". The "Message Center" option is highlighted with a red rectangular box. To the right of the dropdown menu, there is a search bar labeled "-- Available Forms --" and an "Open" button. The main content area contains a welcome message and a list of services including "Reporting wages and", "Processing EFT Paym", "Processing wage adju", "Adding/updating empl", "Reviewing employer r", "Downloading and com", and "Verifying Member IDs". At the bottom, there is a message from David H. Lillard, Jr., Treasurer.

**Step 2 --** The messages in your inbox display. Click the **subject line** link of the message to view it.



The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top right, the user is identified as Sara Franklin, White Bluff Town Of, with a last login of Wednesday, August 28, 2013, at 2:37 PM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The Message Center section contains buttons for 'Mark as Unread', 'Mark as Read', and 'Delete', along with a 'Messages Per Page' dropdown set to 5. A table lists messages, with the first entry having the subject 'Message from TCRS Concord' and a date received of 7/31/2013 3:37:43 PM. The subject line is highlighted with a red box. A link for 'View Deleted Messages' is located at the bottom left.

**Step 3 --** The message displays. Click the **attachment** link to view it.



The screenshot displays the content of the message. It shows the received date and time (7/31/2013 3:37:43 PM) and the subject (Message from TCRS Concord). Below this, a text block states: 'Attached is the requested correspondence or documentation from Tennessee Consolidated Retirement Systems'. A link for the attachment, 'TR5357.DOC', is highlighted with a red box. At the bottom of the message content, there are 'Back' and 'Print' buttons.

**Step 4 --** The attachment opens as a separate document. You save it to your desktop.

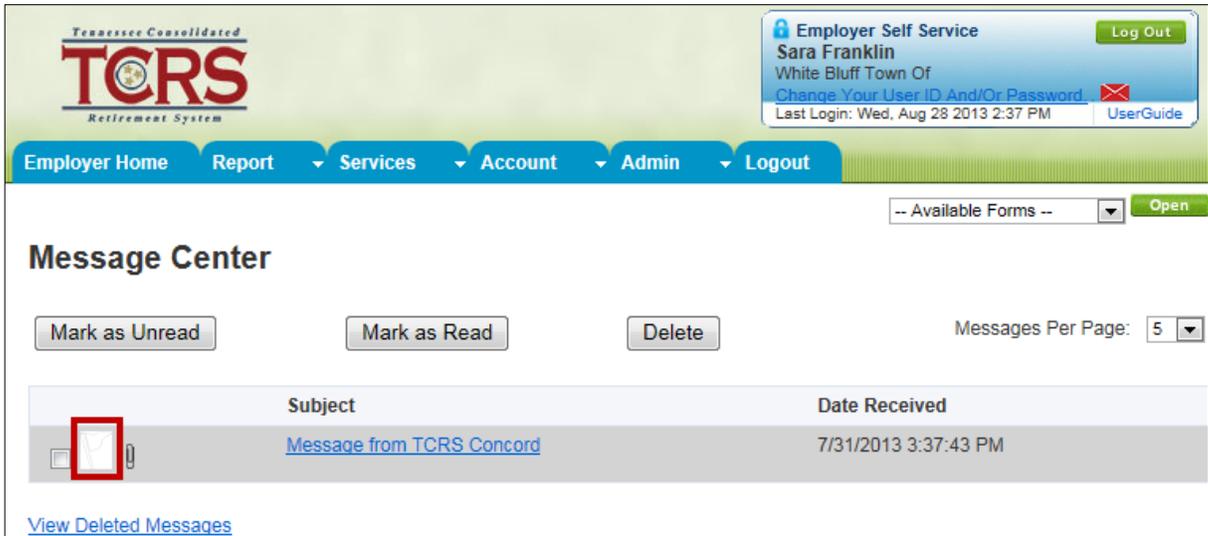


The screenshot shows a file dialog box with the text: 'Do you want to open or save TR5357.DOC (127 KB) from 10.233.0.30?'. The dialog includes 'Open', 'Save', and 'Cancel' buttons, with a close button (X) on the far right. The 'Save' button is highlighted with a red box.

## 16.2. Flagging a Message

You can flag a message as important in the **Message Center** screen. Flagging a message as important ensures that it is not deleted after 90 days.

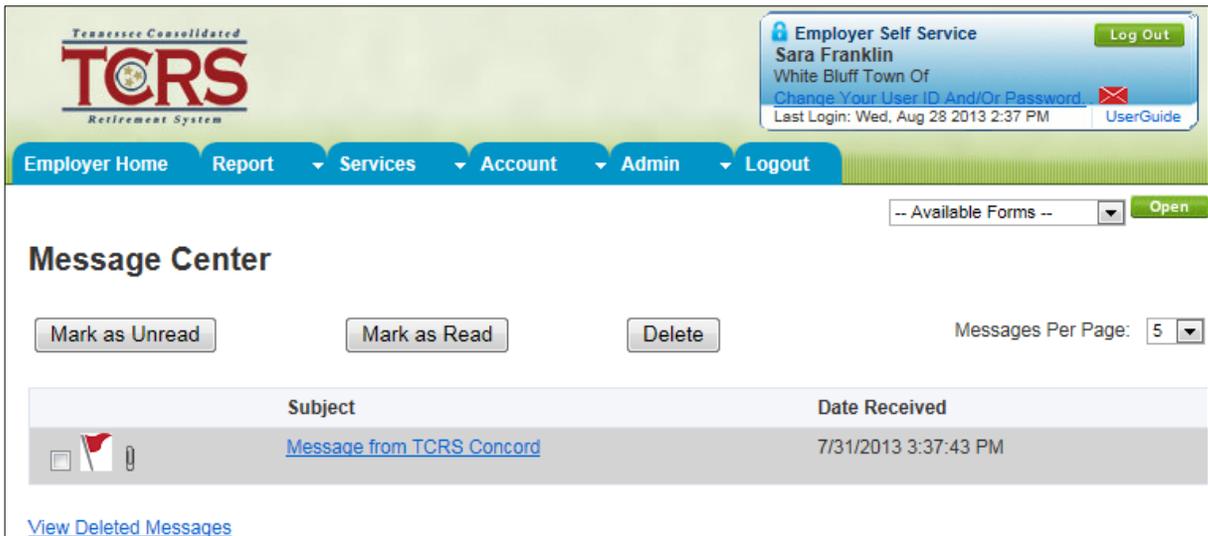
**Step 1 --** From the **Message Center** screen, click the **Flag** icon next to the message you want to view.



The screenshot shows the TCRS Retirement System Employer Self Service interface. The user is Sara Franklin, White Bluff Town Of, with a last login of Wednesday, August 28, 2013, at 2:37 PM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The Message Center section has buttons for Mark as Unread, Mark as Read, and Delete, along with a Messages Per Page dropdown set to 5. A table lists messages with columns for Subject and Date Received. The first message is "Message from TCRS Concord" received on 7/31/2013 at 3:37:43 PM. A red flag icon is highlighted with a red box next to the message.

Subject	Date Received
<a href="#">Message from TCRS Concord</a>	7/31/2013 3:37:43 PM

**Step 2 --** The **Flag** icon displays next to the message.



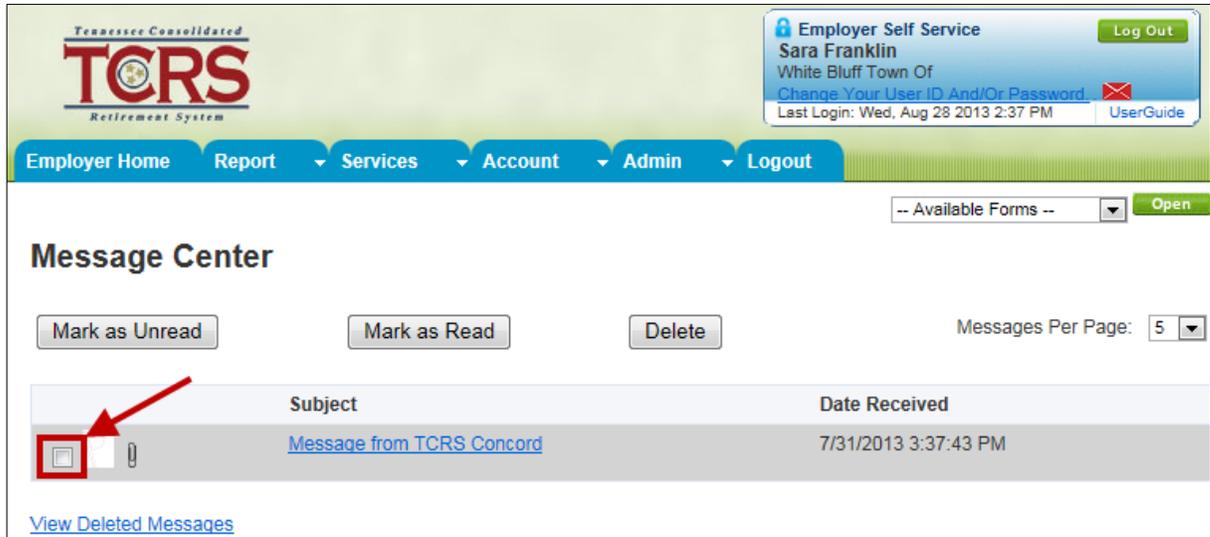
This screenshot is identical to the previous one, but the red flag icon next to the message "Message from TCRS Concord" is now fully visible and no longer highlighted.

Subject	Date Received
<a href="#">Message from TCRS Concord</a>	7/31/2013 3:37:43 PM

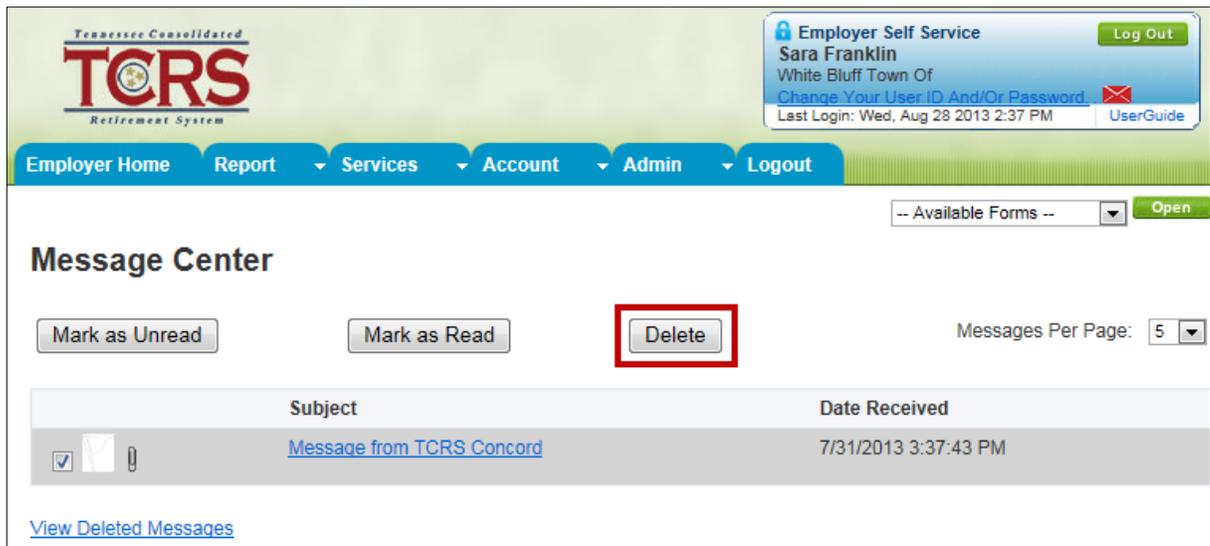
### 16.3. Deleting Messages

You can delete correspondence items that you have already read and handled in the **Message Center** screen.

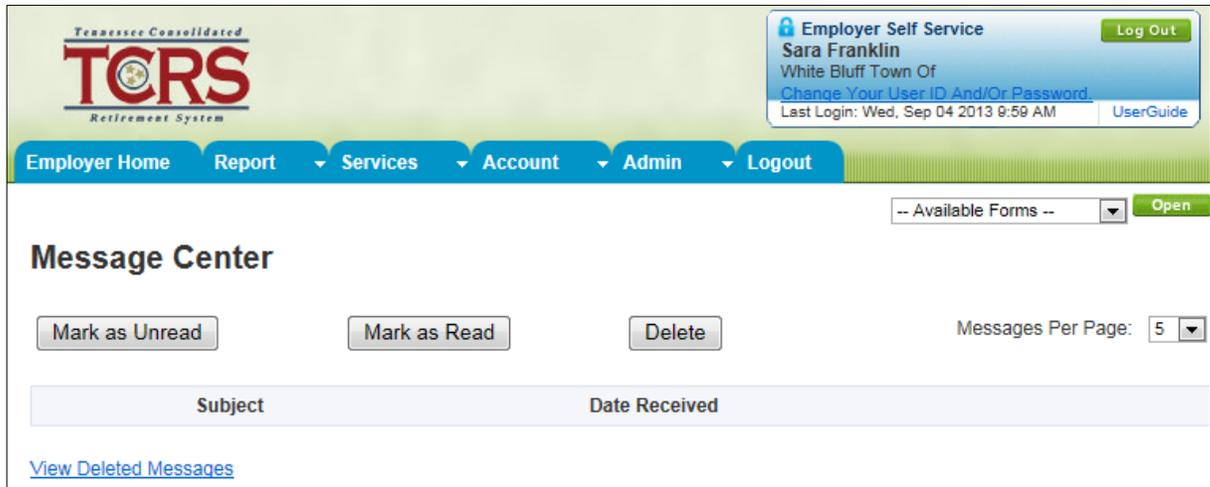
**Step 1** -- From the **Message Center** screen, select the check box to the left of the message you want to delete.



**Step 2** -- Click .



**Step 3 --** The message is removed from your inbox.



## 17. Changing Your Login Information

You can change your password, PIN, or security question. You must be logged into ESS to do this.

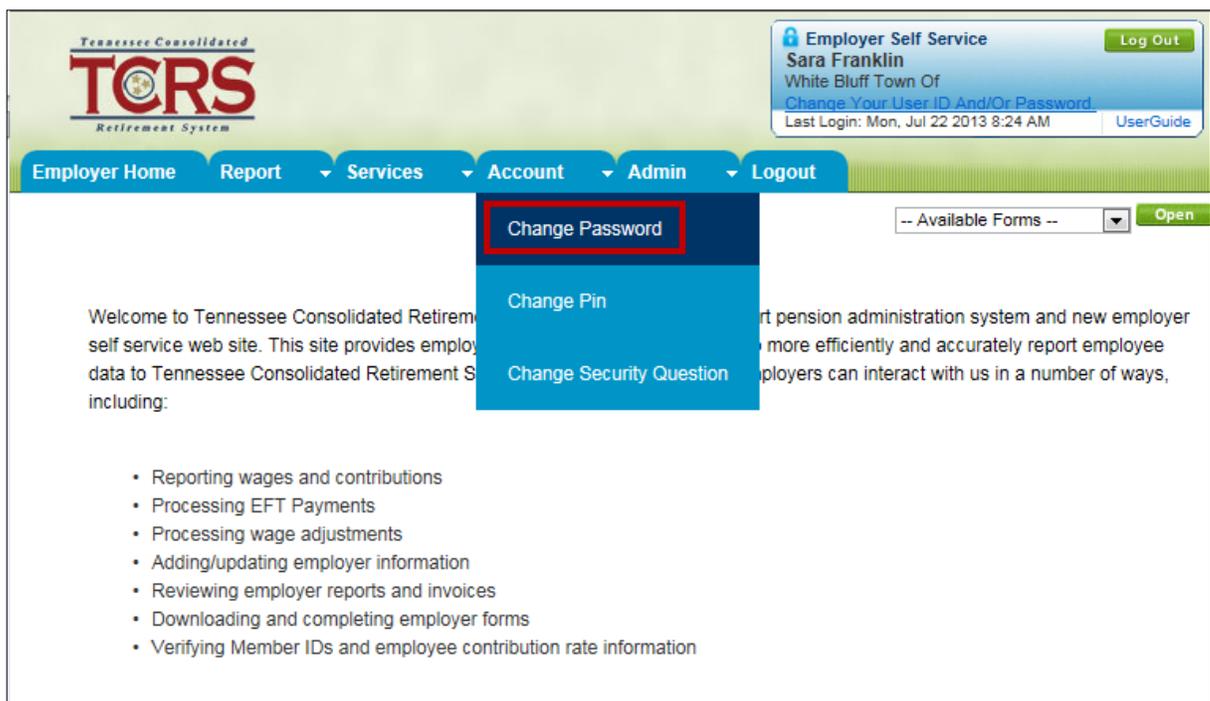
**Note:** Other user roles with ESS access can request to have another individual's password or PIN reset, but they cannot make any direct changes in the **Manage Users** module. By making that request, an automated email is sent to the user.

### 17.1. Changing Your Password

**Step 1 --** To navigate to the **Change Password** screen, click on the following menu options:

**Account > Change Password**

**Note:** TCRS can only issue new user IDs. If you don't remember your user ID, use the obtain user ID functionality in ESS.



**Step 2 --** Enter the current password in the **Current Password** field.

**Tennessee Consolidated TCRS Retirement System**

**Employer Self Service**  
Sara Franklin  
White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Wed, Aug 28 2013 2:37 PM [UserGuide](#) [Log Out](#)

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

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

### Change Password

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: \*  (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: \*

PIN: \*

[Cancel](#) [Update](#)

**Step 3 --** Develop a new password abiding by the instructions to the right of the **Your New Password** field. Enter the new password in the **Your New Password** field.

**Tennessee Consolidated TCRS Retirement System**

**Employer Self Service** Sara Franklin White Bluff Town Of  
Last Login: Wed, Aug 28 2013 2:37 PM

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

### Change Password

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: \* [red box] (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: \*

PIN: \*

Cancel Update

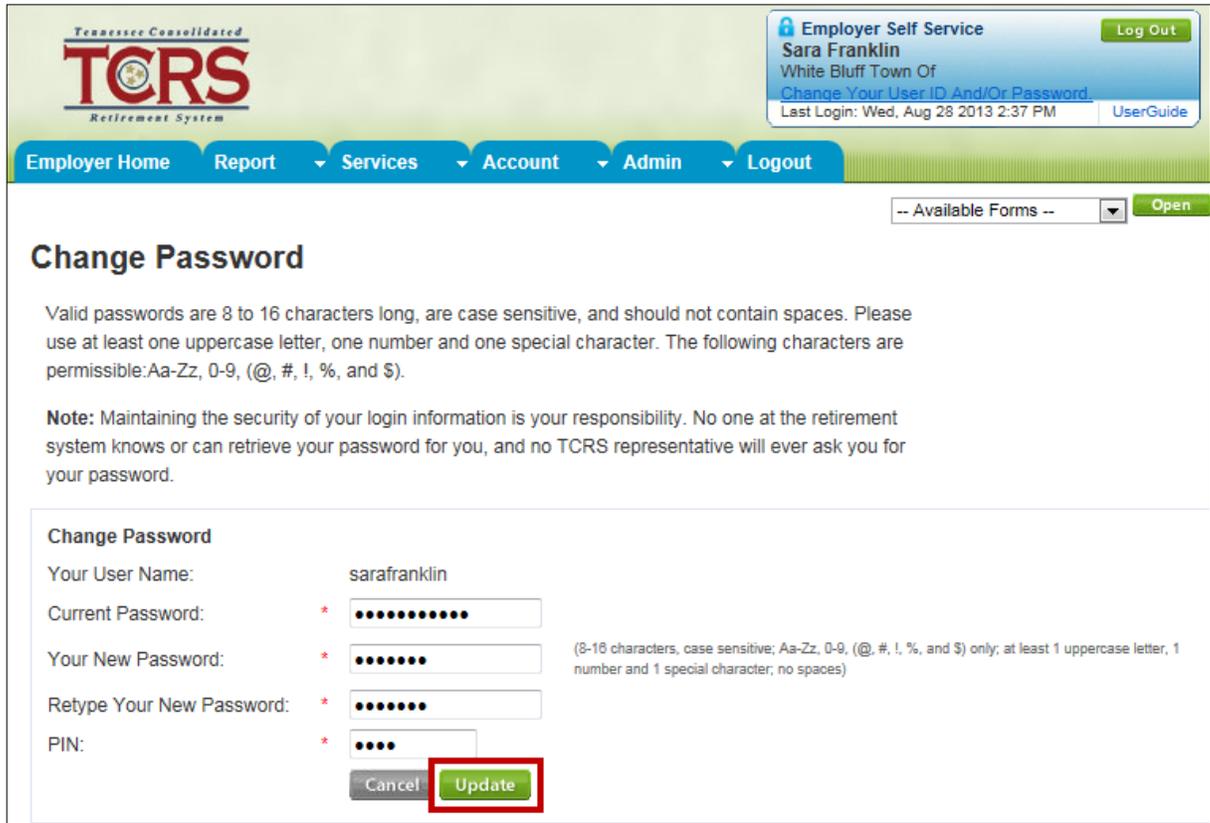
**Step 4 --** Enter the new password in the **Retype Your New Password** field.

The screenshot shows the 'Change Password' page in the TCRS Employer Self Service portal. The user is Sara Franklin. The page includes a navigation menu with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. Below the menu is a dropdown for 'Available Forms' and an 'Open' button. The main heading is 'Change Password'. A text block explains password requirements: 8-16 characters, case sensitive, no spaces, and must include at least one uppercase letter, one number, and one special character from the set (@, #, !, %, and \$). A note states that the user is responsible for maintaining the security of their login information. The form contains the following fields: 'Your User Name' (sarafranklin), 'Current Password' (masked with dots), 'Your New Password' (masked with dots), 'Retype Your New Password' (highlighted with a red box), and 'PIN' (masked with dots). There are 'Cancel' and 'Update' buttons at the bottom of the form.

**Step 5 --** Enter the **PIN** in the corresponding field.

This screenshot is identical to the previous one, showing the 'Change Password' page. The 'PIN' field, which is currently empty and masked with dots, is now highlighted with a red box. The rest of the page, including the user information, navigation, and password requirements, remains the same.

**Step 6 --** Click . The password change takes effect immediately.



**Change Password**

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: \*

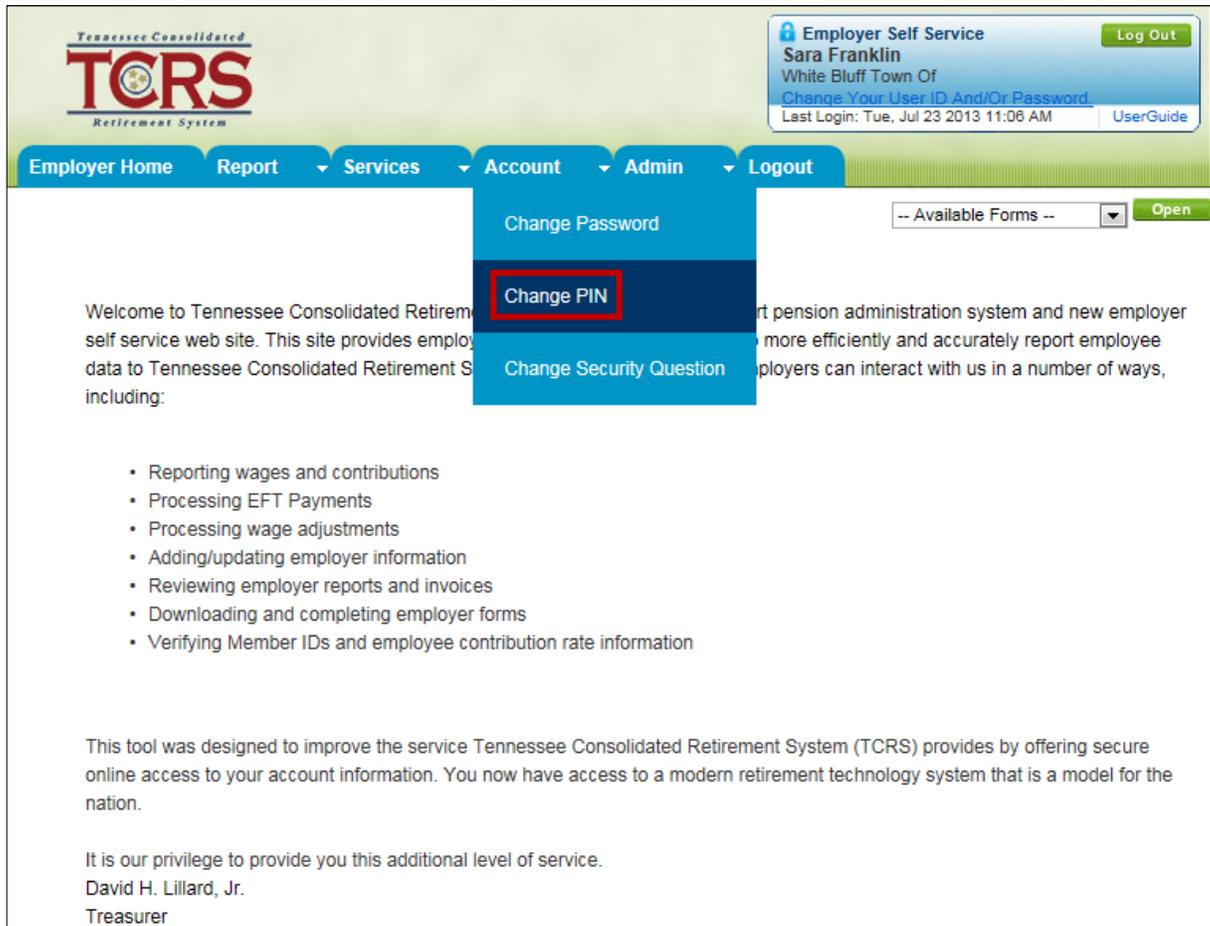
PIN: \*

## 17.2. Changing Your PIN

The following steps describe how to change your PIN.

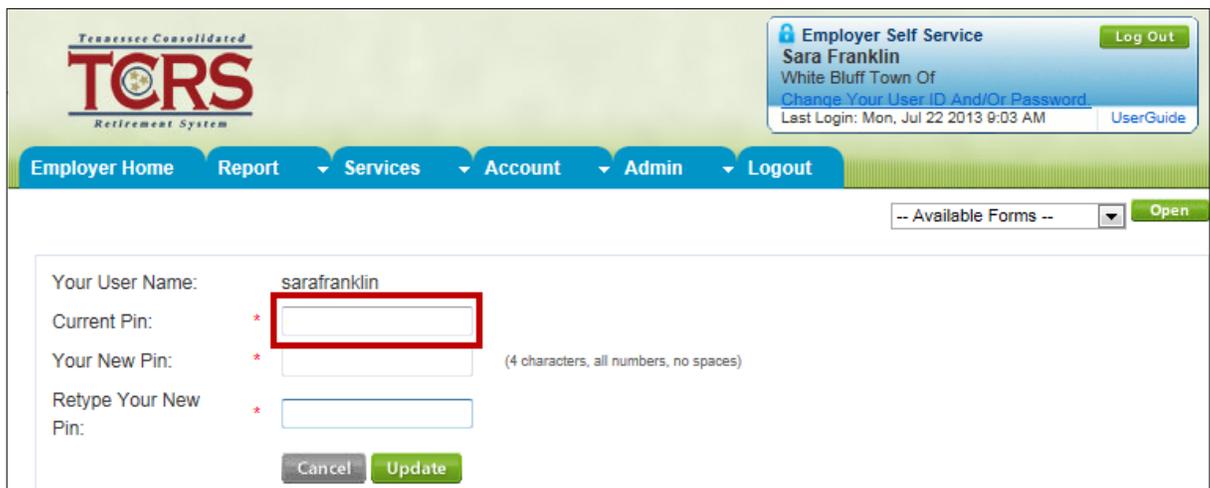
**Step 1 --** To navigate to the **Change PIN** screen, click on the following menu options:

**Account > Change PIN**



The screenshot shows the TCRS Retirement System Employer Self Service interface. The user is Sara Franklin, logged in as White Bluff Town Of, with a last login on Tue, Jul 23 2013 11:06 AM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The Account menu is expanded, showing options for Change Password, Change PIN (highlighted with a red box), and Change Security Question. The main content area displays a welcome message and a 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. A message from David H. Lillard, Jr., Treasurer, is also visible.

**Step 2 --** Enter the current PIN in the **Current PIN** field.



The screenshot shows the Change PIN form in the TCRS Employer Self Service interface. The user's name is Sara Franklin. The form includes fields for: Your User Name (sarafranklin), Current Pin (highlighted with a red box), Your New Pin (4 characters, all numbers, no spaces), and Retype Your New Pin. There are Cancel and Update buttons at the bottom.

**Step 3 --** Enter the new PIN in the **Your New PIN** field.

**Note:** The new PIN must be four digits in length.

The screenshot shows the TCRS Retirement System interface. At the top left is the TCRS logo. At the top right, a user profile box displays "Employer Self Service", "Sara Franklin", "White Bluff Town Of", and "Last Login: Mon, Jul 22 2013 9:03 AM". Below the logo is a navigation menu with "Employer Home", "Report", "Services", "Account", "Admin", and "Logout". A dropdown menu for "Available Forms" is open, showing an "Open" button. The main form area contains the following fields:  
Your User Name: sarafranklin  
Current Pin: \* [masked] (4 characters, all numbers, no spaces)  
Your New Pin: \* [red box] (4 characters, all numbers, no spaces)  
Retype Your New Pin: \* [ ]  
At the bottom of the form are "Cancel" and "Update" buttons.

**Step 4 --** Enter the new PIN again the in the **Retype Your New PIN** field.

This screenshot is identical to the previous one, but the "Retype Your New Pin" field is now highlighted with a red box. The "Your New Pin" field now contains four dots, indicating that a value has been entered.

**Step 5 --** Click **Update**. The PIN change takes effect immediately.

This screenshot is identical to the previous one, but the "Update" button at the bottom of the form is now highlighted with a red box.

### 17.3. Changing Your Security Question

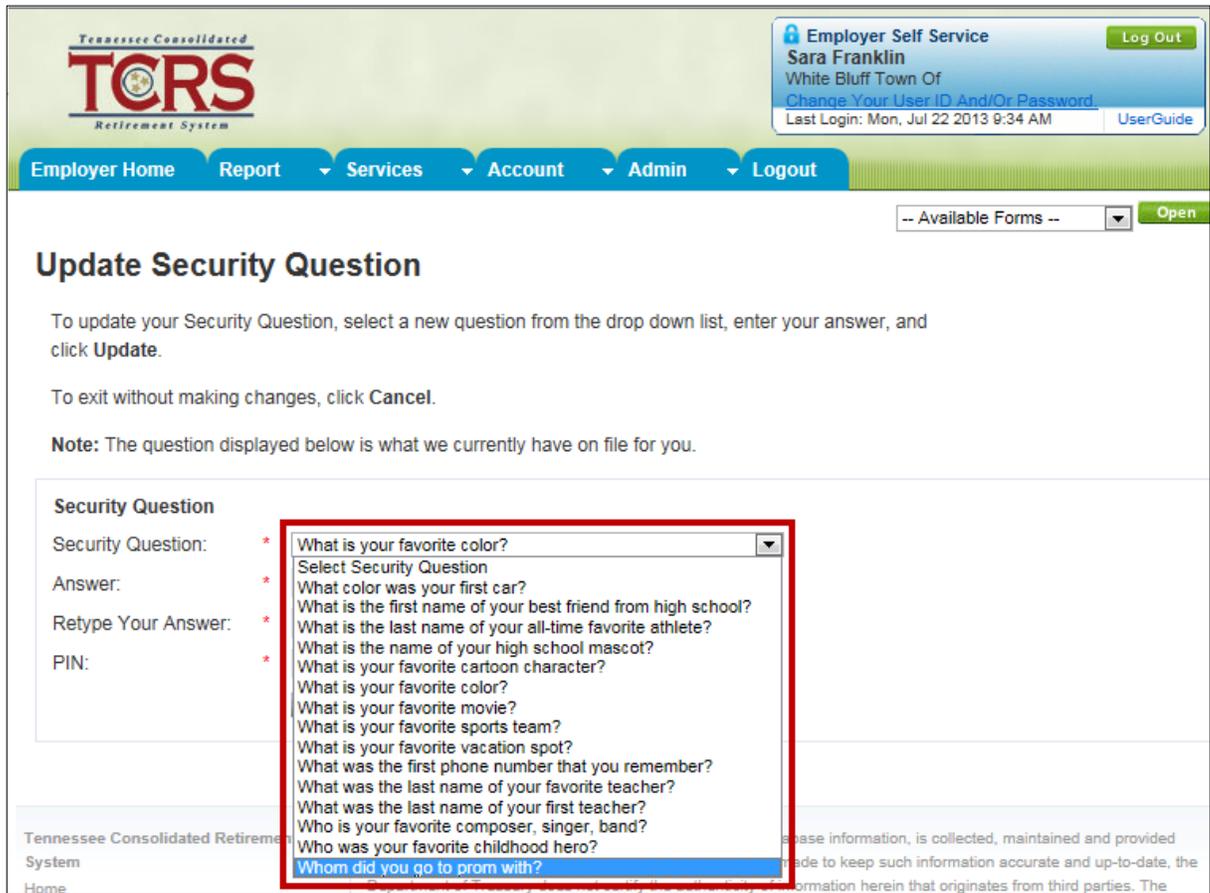
The following steps describe how to change your security question.

**Step 1** -- To navigate to the **Change Security Question** screen, click on the following menu options:

**Account > Change Security Question**

The screenshot displays the TCRS Retirement System Employer Self-Service interface. At the top left is the TCRS logo. At the top right, a user information box shows 'Employer Self Service' for Sara Franklin, White Bluff Town Of, with a 'Log Out' button and a 'UserGuide' link. Below this is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Account' dropdown menu is open, showing three options: 'Change Password', 'Change PIN', and 'Change Security Question', which is highlighted with a red rectangular box. To the right of the menu is a dropdown for 'Available Forms' with an 'Open' button. The main content area contains a welcome message, a list of services, and a closing signature from David H. Lillard, Jr., Treasurer.

**Step 2 --** The **Update Security Question** screen appears. The current security question displays. Select a new question from the **Security Question** drop down menu.



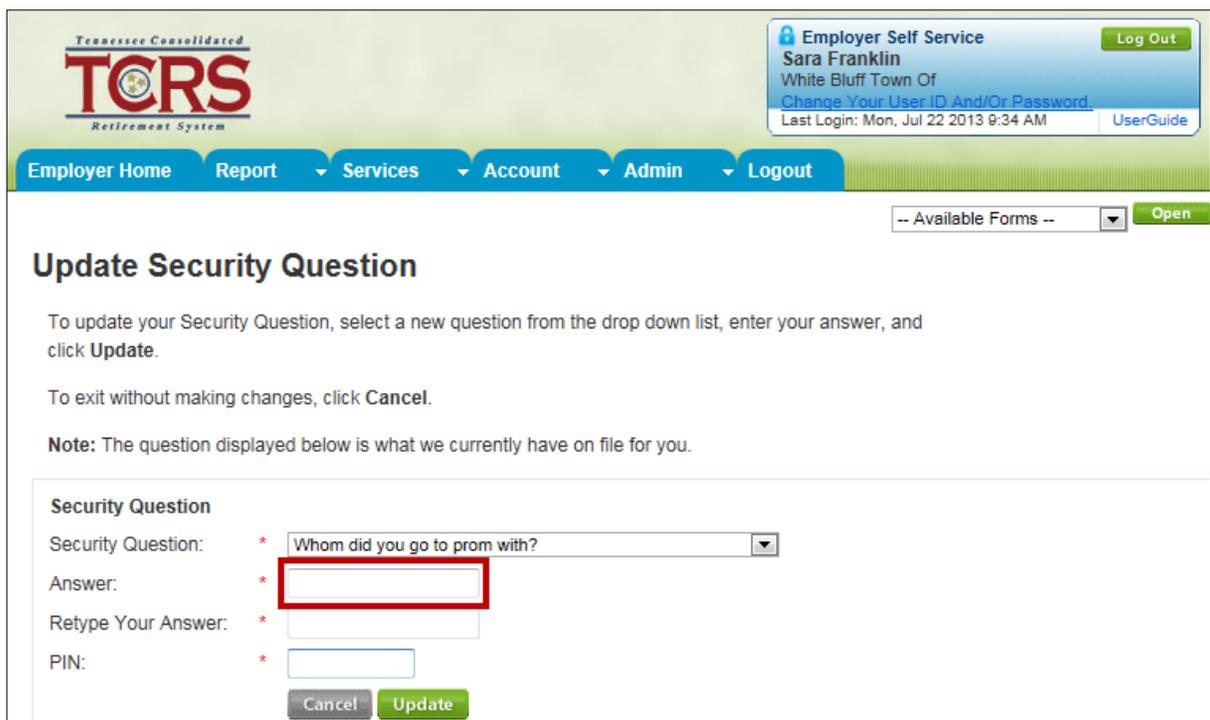
The screenshot shows the TCRS Employer Self Service interface. At the top right, the user is identified as Sara Franklin, White Bluff Town Of, with a last login of Mon, Jul 22 2013 9:34 AM. The main navigation bar includes Employer Home, Report, Services, Account, Admin, and Logout. Below this is a dropdown menu for "Available Forms" with an "Open" button. The page title is "Update Security Question".

Instructions on the page state: "To update your Security Question, select a new question from the drop down list, enter your answer, and click Update." and "To exit without making changes, click Cancel." A note indicates: "The question displayed below is what we currently have on file for you."

The "Security Question" section contains a dropdown menu with the following options:

- 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?

**Step 3 --** Answer the new security question in the **Answer** field.



This screenshot shows the same "Update Security Question" screen. The dropdown menu is now set to "Whom did you go to prom with?". The "Answer:" field is highlighted with a red box, indicating where the user should enter their response. Below the answer field are "Cancel" and "Update" buttons.

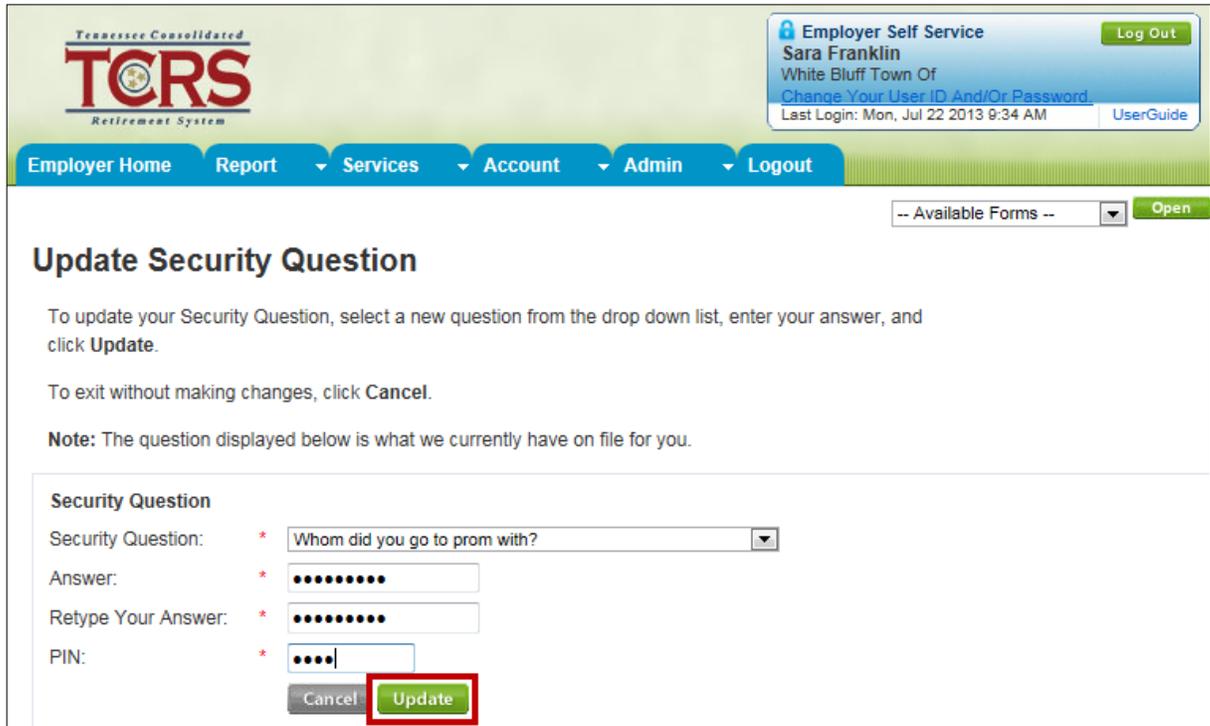
**Step 4 --** Answer the question again in the **Retype Your Answer** field.

The screenshot shows the 'Update Security Question' page in the TCRS Employer Self Service portal. The user is Sara Franklin, White Bluff Town Of. The page includes a navigation menu with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. Below the menu is a dropdown for 'Available Forms' and an 'Open' button. The main heading is 'Update Security Question'. Instructions state: 'To update your Security Question, select a new question from the drop down list, enter your answer, and click Update. To exit without making changes, click Cancel. Note: The question displayed below is what we currently have on file for you.' The 'Security Question' section contains four fields: 'Security Question' (a dropdown menu with 'Whom did you go to prom with?' selected), 'Answer' (a masked field with 10 dots), 'Retype Your Answer' (a masked field with 10 dots, highlighted with a red box), and 'PIN' (a masked field with 4 dots). At the bottom are 'Cancel' and 'Update' buttons.

**Step 5 --** Enter the PIN in the **PIN** field.

This screenshot is identical to the previous one, showing the 'Update Security Question' page. In this step, the 'PIN' field, which is a masked input field with 4 dots, is highlighted with a red box. The 'Retype Your Answer' field is no longer highlighted.

**Step 6 --** Click . The Security Question change takes effect immediately.



## 18. Payment Accounts

Administrative and employer reporting users use the **Payment Accounts** screen to manage payment methods. You use this screen to setup EFT or eCheck accounts (which can then be used by the Monthly Reporting process to remit payment), setup multiple payment accounts with mixed payment types, allow payments from multiple accounts to be remitted, and setup accounts to pay monthly reports and invoices.

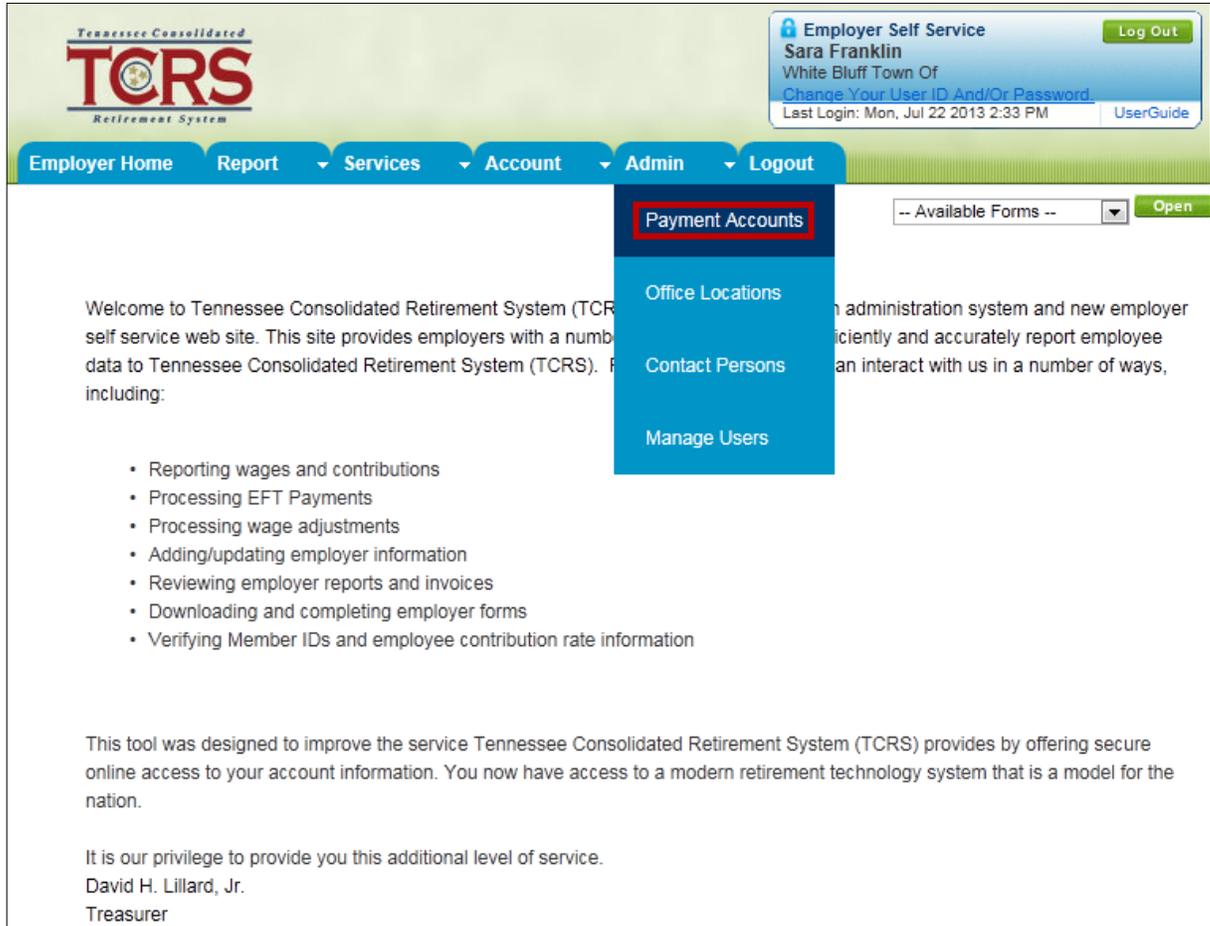
**Note:** Select employers will be setup with LGIP payment accounts. This account will not display in ESS. TCRS pulls the appropriate payments via LGIP once the monthly report is submitted.

## 18.1. Adding a Payment Account

You can add a new payment method to your organization's account. New payment methods include EFT or eCheck.

**Step 1 --** To navigate to the **Manage Payment Accounts** screen, click on the following menu options:

**Admin > Manage Payment Accounts**



The screenshot displays the TCRS Retirement System Employer Self Service 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 a 'Log Out' button and a 'UserGuide' link. Below this is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Admin' tab is selected, and a dropdown menu is open, highlighting 'Payment Accounts'. Other options in the dropdown include 'Office Locations', 'Contact Persons', and 'Manage Users'. The main content area contains a welcome message and a 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, there is a message from David H. Lillard, Jr., Treasurer.

**Step 2 --** If there are any existing payment accounts, they display on this screen. To add a new payment account, click **Add a Payment Account**.

The screenshot shows the 'Manage Payment Accounts' page in the TCRS Retirement System. At the top left is the TCRS logo with the text 'Tennessee Consolidated Retirement System'. To the right is a user profile box for Sara Franklin, White Bluff Town Of, with a 'Log Out' button and a 'UserGuide' link. Below the logo is a navigation menu with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A dropdown menu for 'Available Forms' is set to 'Open'. The main heading is 'Manage Payment Accounts'. Below this is a paragraph explaining the module's purpose. A table titled 'Existing Payment Accounts' contains one entry with the nickname 'BofA', bank name 'BANK OF AMERICA, N.A.', bank account number '...6789', and receipt type 'EFT'. A 'Delete' link is next to the entry. At the bottom left, a green button labeled 'Add a Payment Account' is highlighted with a red border.

Nickname	Bank Name	Bank Account Number	Receipt Type	
<a href="#">BofA</a>	BANK OF AMERICA, N.A.	...6789	EFT	<a href="#">Delete</a>

**Step 3 --** Enter all required information on the screen:

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

**Employer Self Service**  
Ron Swanson  
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

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### 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](#)

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**.

The screenshot shows the 'Add a Payment Account' page in Step 1 of 2. The page header includes the TCRS logo and user information for Ron Swanson. A navigation bar contains 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A dropdown menu for 'Available Forms' is set to 'Open'. The main heading is 'Add a Payment Account'. Below it, a circular icon indicates 'Step 1 of 2'. The instructions state: '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:	* EFT
Nickname: (e.g. My Checking Account)	* Police
Bank routing or ABA number:	* 031000053
Bank Account number:	* 123456789
Retype Bank Account number:	* 123456789

Buttons: **Cancel**, **Continue** (highlighted with a red box).

An illustration of a check is shown with red boxes and arrows pointing to the routing number (123456789) and account number (123456789 0222). Labels below the check indicate 'Routing Number or ABA Number' and 'Account Number'. A note below the check states: '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.

The screenshot shows the 'Add a Payment Account' page in Step 2 of 2. The page header and navigation bar are identical to Step 1. The main heading is 'Add a Payment Account'. Below it, a circular icon indicates 'Step 2 of 2'. The instructions state: '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"/>

Buttons: **Cancel**, **Edit**, **Submit** (highlighted with a red box).

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

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### 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]

Cancel Edit **Submit**

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

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### Confirmation

Account Added

Payment account added successfully.

**Continue**

## 18.2. Updating a Payment Account

You may need to update an existing payment account with new information.

**Step 1 --** From the **Manage Payment Accounts** screen, click on the name of the existing payment account that you want to update.

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### Manage Payment Accounts

The Payment Accounts module allows employers to manage various methods for payment. Accounts entered through this module will be available for use on the Submit Monthly Summary and Invoices screens of Employer Self Service. Users will click the Nickname of the account to update entered account information. New account information can be entered using the Add a Payment Account button.

Nickname	Bank Name	Bank Account Number	Receipt Type	
<b>BofA</b>	BANK OF AMERICA, N.A.	...6789	EFT	<a href="#">Delete</a>

Add a Payment Account

**Step 2 --** Update the payment account information as needed.

**Note:** Only the account **Nickname** may be edited on this screen.

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### Edit a Payment Account

Provide a nickname for the account below.  
When you have finished, click **Update**.

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

Bank Name: BANK OF AMERICA, N.A.

Bank routing or ABA number: 122203248

Bank Account number: ...6789

Receipt Type: EFT

PIN: \*

Cancel Update

**Step 3 --** Enter your PIN.

The screenshot shows the TCRS Retirement System Employer Self Service interface. The user is Sara Franklin, White Bluff Town Of, with a last login of Mon, Jul 22 2013 3:13 PM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The main content area is titled "Edit a Payment Account" and contains the following form fields:

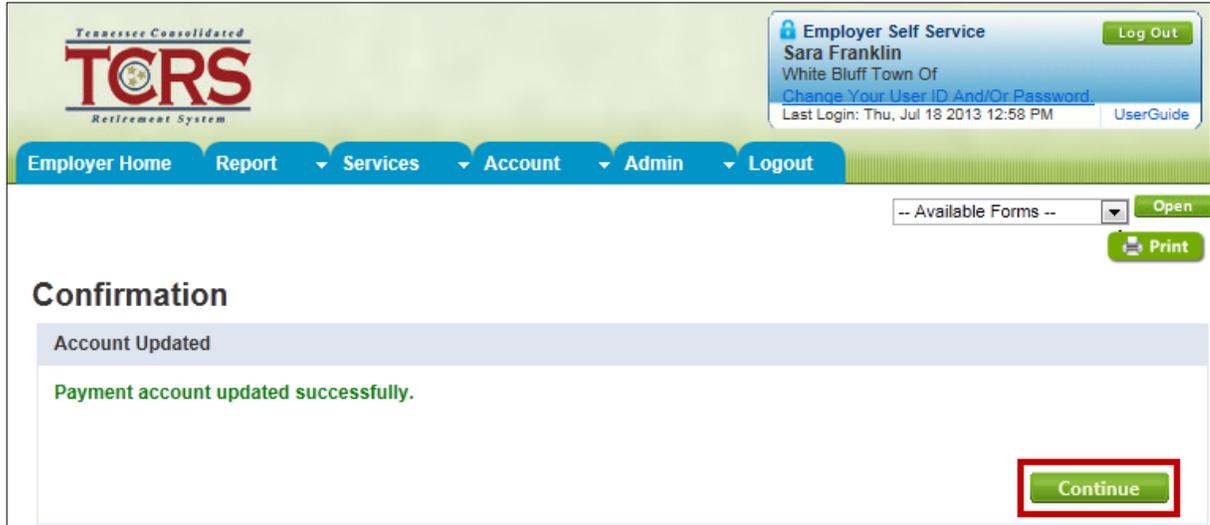
- Nickname: (e.g. My Checking Account) \* BofA
- Bank Name: BANK OF AMERICA, N.A.
- Bank routing or ABA number: 122203248
- Bank Account number: ...6789
- Receipt Type: EFT
- PIN: \* [Redacted]

Buttons for "Cancel" and "Update" are located at the bottom of the form. The "Update" button is highlighted with a red box.

**Step 4 --** Click **Update**. The payment account updated successfully message displays to confirm that updates have been saved.

This screenshot is identical to the previous one, showing the "Edit a Payment Account" form. The "Update" button at the bottom of the form is now highlighted with a red box, indicating it has been clicked.

**Step 5 --** Click  to return to the **Manage Payment Accounts** screen.



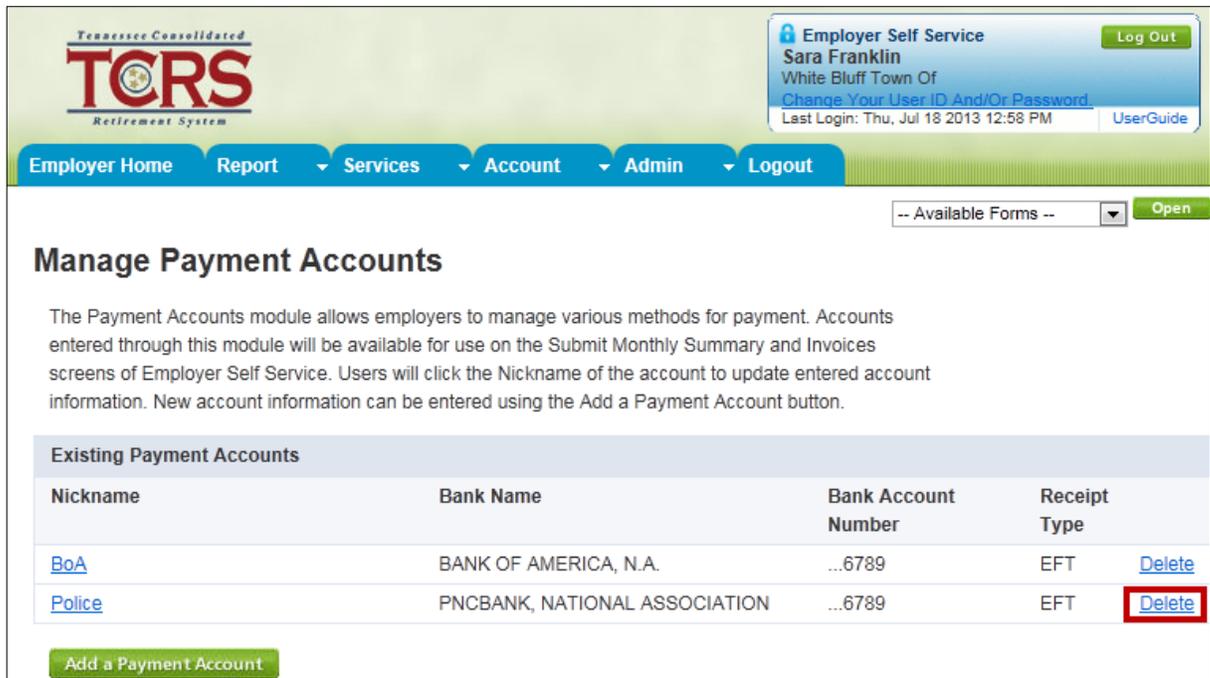
The screenshot shows the TCRS Retirement System interface. At the top right, the user is logged in as Sara Franklin, White Bluff Town Of, with a last login time of Thu, Jul 18 2013 12:58 PM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. Below the menu, there is a dropdown for 'Available Forms' and buttons for 'Open' and 'Print'. The main content area displays a 'Confirmation' message: 'Account Updated' and 'Payment account updated successfully.' A red box highlights the 'Continue' button at the bottom right of the confirmation area.

### 18.3. Deleting a Payment Account

You may need to delete an existing payment account due to disuse. If there is a pending payment associated with this account, you cannot delete it.

**Note:** Deleted payment accounts will not be available in ESS, but they will be visible within TCRS' retirement system.

**Step 1 --** From the **Manage Payment Accounts** screen, click the **Delete** link next to the existing payment account that you want to delete.



The screenshot shows the 'Manage Payment Accounts' screen. It includes the same user information and navigation menu as the previous screenshot. Below the menu, there is a dropdown for 'Available Forms' and buttons for 'Open' and 'Print'. The main content area displays the title 'Manage Payment Accounts' and a brief description of the module. Below the description is a table titled 'Existing Payment Accounts' with columns for Nickname, Bank Name, Bank Account Number, and Receipt Type. The table contains two rows: one for 'BoA' (BANK OF AMERICA, N.A.) and one for 'Police' (PNCBANK, NATIONAL ASSOCIATION). A red box highlights the 'Delete' link next to the 'Police' account. At the bottom left, there is a button labeled 'Add a Payment Account'.

Nickname	Bank Name	Bank Account Number	Receipt Type
<a href="#">BoA</a>	BANK OF AMERICA, N.A.	...6789	EFT <a href="#">Delete</a>
<a href="#">Police</a>	PNCBANK, NATIONAL ASSOCIATION	...6789	EFT <a href="#">Delete</a>

**Step 2 --** The **Edit a Payment Account** screen displays. Enter your PIN in the **PIN** field.

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## Edit a Payment Account

Provide a nickname for the account below.  
When you have finished, click **Update**.

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

Bank Name: PNCBANK, NATIONAL ASSOCIATION

Bank routing or ABA number: 031000053

Bank Account number: ...6789

Receipt Type: EFT

PIN: \*

**Step 3 --** Click  .

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## Edit a Payment Account

Provide a nickname for the account below.  
When you have finished, click **Update**.

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

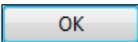
Bank Name: PNCBANK, NATIONAL ASSOCIATION

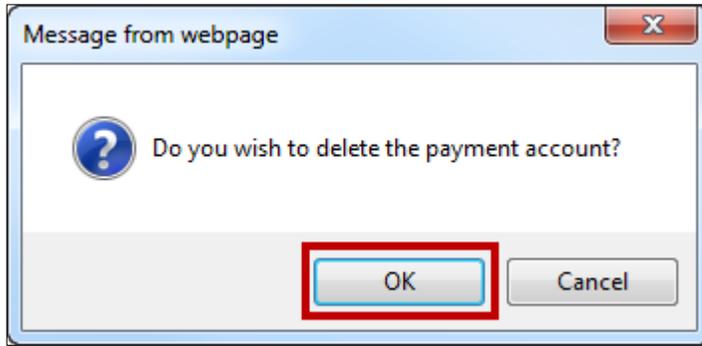
Bank routing or ABA number: 031000053

Bank Account number: ...6789

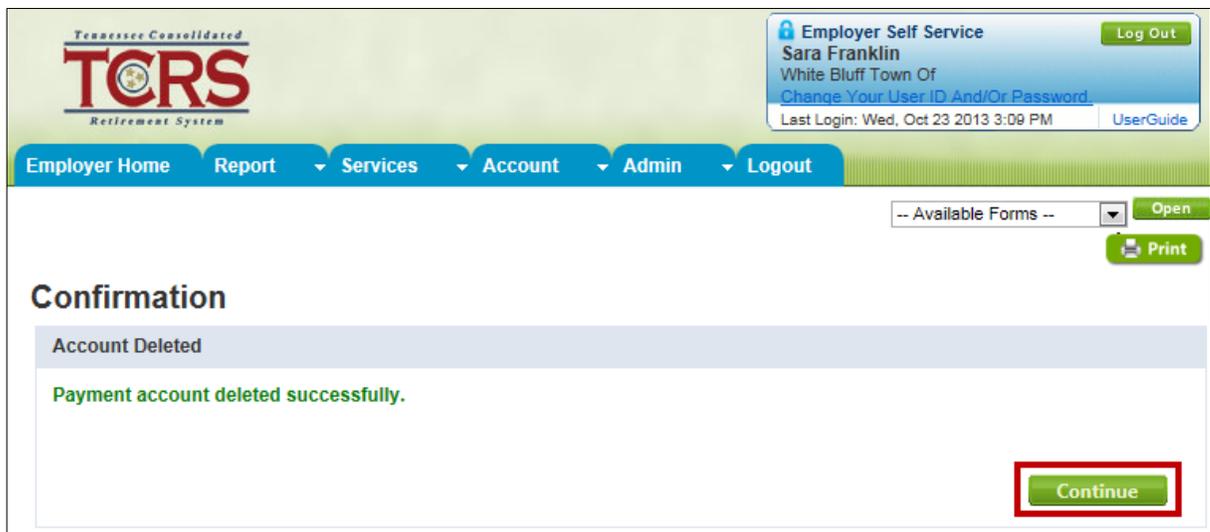
Receipt Type: EFT

PIN: \*

**Step 4 --** A confirmation pop up window displays. Click  to delete the payment account.



**Step 5 --** The **Confirmation** screen displays. The payment account deleted successfully message displays to confirm that the payment account was deleted. Click  to return to the **Payment Account** screen.



## 19. Office Location

All those with ESS access (administrative, employer reporting, and staff) can use the **Office Location** screen to add, update, or delete office locations associated with their organization. After an office location is added, you can associate the location with a contact person using the **Contact Person** screen. See Section 20, Contact Persons, to view more information and steps on this screen.

**Note:** New addresses and updated addresses are validated using the Melissa web service. This service validates that the address entered is a deliverable address according to the US Postal Service. This web service does not exclude you from entering an address that is not included in Melissa web service.

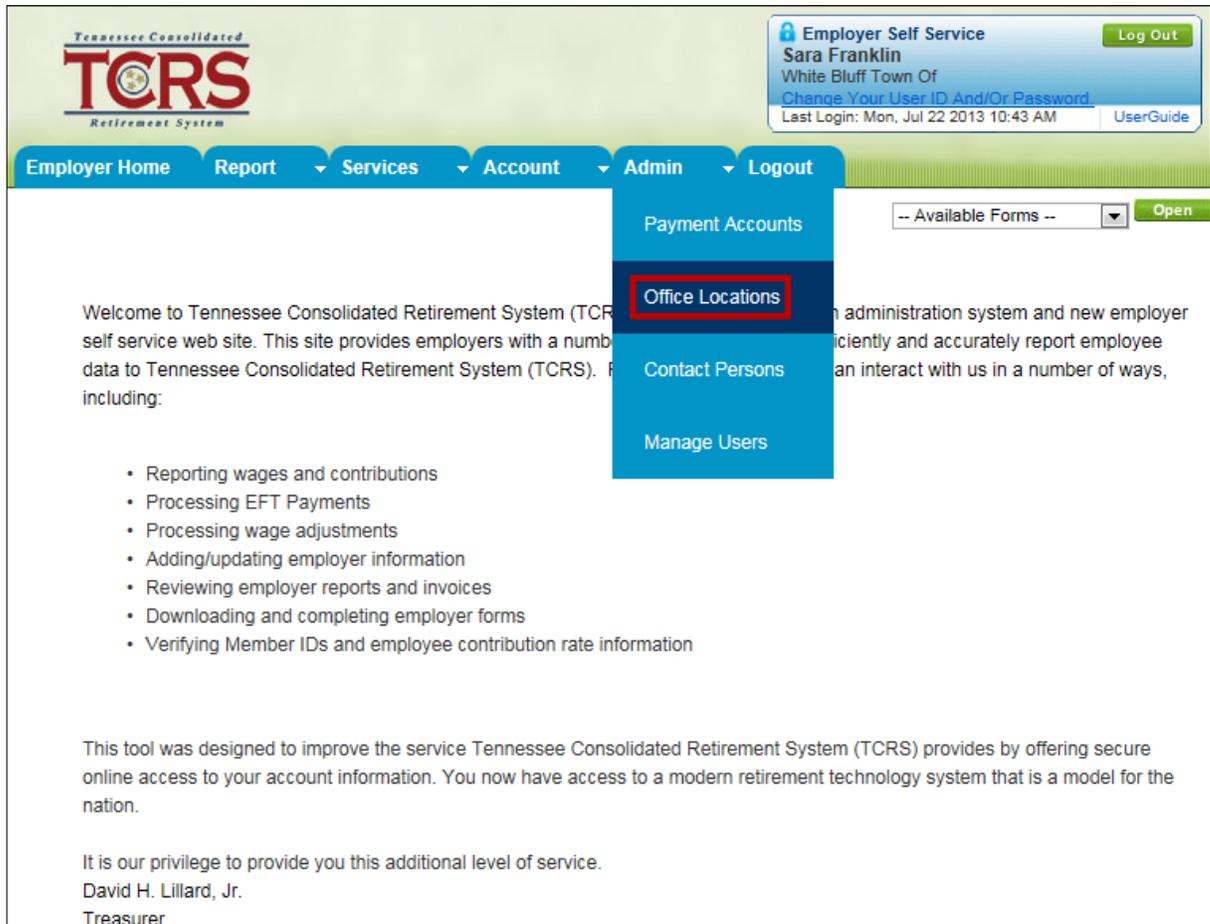
**Note:** Before adding a new contact person, an office location must be set up and a primary reporting official must be designated. See Section 19, Office Location for more information on adding an office location. You must assign a primary contact person to each address listed. Contact types with more than one contact listed, must have a primary contact assigned.

## 19.1. Adding an Office Location

If your organization has a new office, enter the new office location using the **Office Location** screen.

**Step 1** -- To navigate to the **Office Location** screen, click on the following menu options:

**Admin > Office Locations**



The screenshot displays the TCRS Retirement System Employer Self Service 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 a Log Out button and a UserGuide link. The main navigation bar includes Employer Home, Report, Services, Account, Admin, and Logout. The Admin dropdown menu is open, showing options for Payment Accounts, Office Locations (highlighted with a red box), Contact Persons, and Manage Users. Below the navigation, a welcome message is followed by a 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. A message from David H. Lillard, Jr., Treasurer, is also visible.

**Step 2 --** If there is an office location on file, the location displays. Click [Add an Office Location](#).

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### Manage Office Locations

The Office Locations module allows employers to manage office location information. To add a new office location, click [Add an Office Location](#). To edit or delete office locations, click on the appropriate link.

**Office Locations**

Primary Location	<a href="#">Edit</a>   <a href="#">Delete</a>
100 First Street NASHVILLE, TN 37203	

[Add an Office Location](#)

**Step 3 --** The [Add an Office Location](#) screen displays. Select an option from the **Location Type** drop down menu.

**Note:** You can have only one physical location. However, you can add as many satellite locations as necessary.

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### Add Office Location

Choose a Location Type, complete the appropriate fields, and click **Submit**.

**Please Note:** If the mailing address is a P.O. Box, a physical address must also be listed as the Primary location type.

**Office Location**

Employer: WHITE BLUFF TOWN OF

Location Type: \*  (dropdown menu open with options: Mailing, Primary Location, Satellite, Third-Party Preparer)

Care Of: \*

Address Line 1: \*

Address Line 2 (optional):

City: \*

State: \*  (dropdown menu)

Zip Code: \*  -  (optional)

County:  (dropdown menu)

[Submit](#) [Cancel](#)

**Step 4 --** Enter the remaining office location information.

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### Add Office Location

Choose a Location Type, complete the appropriate fields, and click **Submit**.

**Please Note:** If the mailing address is a P.O. Box, a physical address must also be listed as the Primary location type.

**Office Location**

Employer: WHITE BLUFF TOWN OF

Location Type: \* Mailing

Care Of:

Address Line 1: \* 200 Main Street

Address Line 2 (optional):

City: \* Nashville

State: \* Tennessee

Zip Code: \* 37203 -  (optional)

County: Select County

[Submit](#) [Cancel](#)

**Step 5 --** Click **Submit**. If the address is verified, the Office location saved successfully message displays to confirm that the addition was submitted.

**Note:** An error will display if the web service is unable to verify the address entered into the **Add Office Location** fields. The system displays the original address and a suggested address; the suggested address is what the USPS has on file. It is highly recommended that the suggested address is used.

The screenshot shows the 'Add Office Location' form in the TCRS Employer Self-Service interface. The form is titled 'Add Office Location' and includes a 'Submit' button highlighted with a red box. The form fields are as follows:

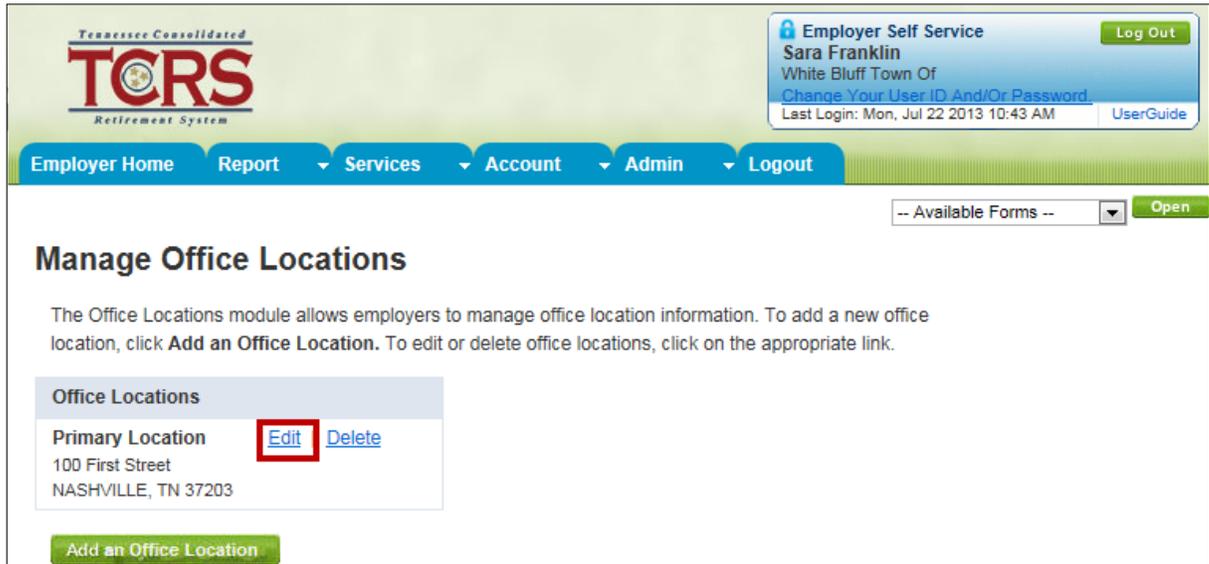
Employer:	WHITE BLUFF TOWN OF
Location Type:	* Mailing
Care Of:	
Address Line 1:	* 200 Main Street
Address Line 2 (optional):	
City:	* Nashville
State:	* Tennessee
Zip Code:	* 37203 - (optional)
County:	Select County

At the bottom of the form, there are two buttons: **Submit** (highlighted with a red box) and **Cancel**.

## 19.2. Updating an Office Location

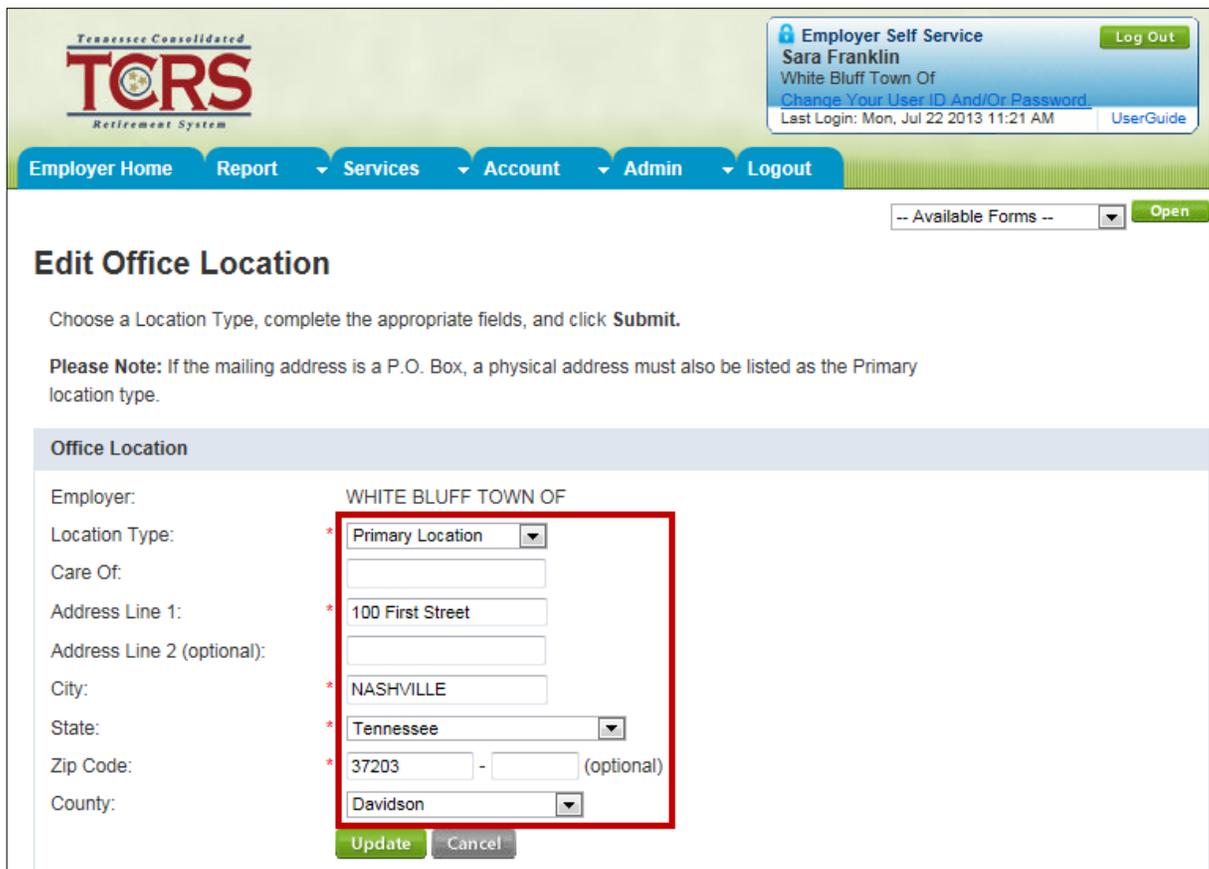
Use the **Office Location** screen to update one of your organization's current office locations.

**Step 1 --** From the **Office Location** screen, click the **Edit** link next to an existing office location.



The screenshot shows the TCRS Retirement System interface. At the top right, a user profile for Sara Franklin is displayed with a 'Log Out' button. A navigation bar includes 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. Below this is a dropdown menu for 'Available Forms' and an 'Open' button. The main heading is 'Manage Office Locations'. A descriptive paragraph explains the module's purpose. A table lists office locations, with the first entry 'Primary Location' at '100 First Street, NASHVILLE, TN 37203' having an 'Edit' link highlighted with a red box. An 'Add an Office Location' button is at the bottom.

**Step 2 --** The **Edit Office Location** screen displays. Update the office location.



The screenshot shows the 'Edit Office Location' screen. It features the same header and navigation as the previous screen. The main heading is 'Edit Office Location'. A note instructs users to choose a location type and complete fields before clicking 'Submit'. A 'Please Note' section states that a physical address must be listed as the primary location type if a P.O. Box is used. The 'Office Location' form is displayed with the following fields: Employer (WHITE BLUFF TOWN OF), Location Type (Primary Location, highlighted with a red box), Care Of, Address Line 1 (100 First Street, highlighted with a red box), Address Line 2 (optional), City (NASHVILLE, highlighted with a red box), State (Tennessee, highlighted with a red box), Zip Code (37203, highlighted with a red box), and County (Davidson, highlighted with a red box). 'Update' and 'Cancel' buttons are at the bottom.

**Step 3** -- Click **Update**. If the address is verified, the Office location saved successfully message to confirm that the location was updated.

**Note:** An error will display if the web service is unable to verify the address keyed into the **Add Office Location** fields. The system displays the original address and a suggested address; the suggested address is what the USPS has on file. It is highly recommended that the suggested address is used.

The screenshot shows the 'Edit Office Location' page in the TCRS Employer Self Service portal. The page header includes the TCRS logo and a user session box for Sara Franklin, White Bluff Town Of, with a 'Log Out' button. A navigation menu contains 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. Below the menu is a dropdown for 'Available Forms' and an 'Open' button. The main content area is titled 'Edit Office Location' and contains instructions: 'Choose a Location Type, complete the appropriate fields, and click **Submit**.' A 'Please Note' states: 'If the mailing address is a P.O. Box, a physical address must also be listed as the Primary location type.' The form fields are as follows: Employer: WHITE BLUFF TOWN OF; Location Type: Primary Location (dropdown); Care Of: (empty); Address Line 1: 112 First Street; Address Line 2 (optional): (empty); City: NASHVILLE; State: Tennessee (dropdown); Zip Code: 37203 - (optional); County: Davidson (dropdown). At the bottom of the form are 'Update' and 'Cancel' buttons, with the 'Update' button highlighted by a red box.

### 19.3. Deleting an Office Location

If your organization no longer uses an office location listed on the **Office Location** screen, you can delete the location.

**Note:** Before deleting an office location, you must first remove all contact persons from that office location, using the **Contact Person** screen (See Section 20, Contact Persons, for more information on these steps).

**Step 1 --** From the **Office Location** screen, click the **Delete** link.

The screenshot shows the TCRS Retirement System interface. At the top right, the user is logged in as Sara Franklin, White Bluff Town Of, with a last login of Mon, Jul 22 2013 10:43 AM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. Below the menu, there is a dropdown for 'Available Forms' and an 'Open' button. The main heading is 'Manage Office Locations'. A text block explains that the module allows employers to manage office location information and provides instructions on how to add, edit, or delete locations. Below this, a table lists the 'Office Locations'. The first entry is the 'Primary Location' at 100 First Street, Nashville, TN 37203. Next to it are 'Edit' and 'Delete' links. The 'Delete' link is highlighted with a red rectangular box. At the bottom of the table area is a green 'Add an Office Location' button.

**Step 2 --** Confirm that you want to delete the office location. The office location is deleted from the **Office Location** screen.

This screenshot is similar to the first one, but it includes a confirmation dialog box. The dialog box is titled 'Message from webpage' and contains a question mark icon followed by the text 'Are you sure you want to delete this location?'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangular box. The background page shows the 'Manage Office Locations' section with the 'Delete' link still visible.

## 20. Contact Persons

All staff (administrative, employer reporting, and staff) can use the **Contact Persons** screen to add, edit, or delete contact information for contact persons for your organization.

### 20.1. Adding a Contact Person

Contact persons may be added to assist with ESS tasks.

**Note:** At least a primary reporting official is required to be set up before other contact persons are created.

**Step 1 --** To navigate to the **Contact Persons** screen, click on the following menu options:

**Admin > Contact Persons**

The screenshot shows the TCRS Employer Self Service interface. At the top left is the TCRS logo. At the top right, a user information box displays 'Employer Self Service', 'Sara Franklin', 'White Bluff Town Of', and 'Last Login: Mon, Jul 22 2013 11:21 AM'. Below this is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Admin' tab is selected, and a dropdown menu is open, showing options for 'Payment Accounts', 'Office Locations', 'Contact Persons' (highlighted with a red box), and 'Manage Users'. The main content area contains a welcome message and a 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, there is a signature block for David H. Lillard, Jr., Treasurer.

Step 2 -- Click

**Add Contact Person**

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

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

## Contact Persons

The Contact Persons module allows employers to manage contact information. To add a new contact person, click **Add Contact Person**. To edit or delete contacts click on the appropriate link.

Details	Contact Type	Role	
FRANKLIN, SARA Primary Location (717) 763-3204 <a href="mailto:sfranklin@whitebluff.gov">sfranklin@whitebluff.gov</a>		ESS Administrator	<a href="#">Edit</a>
KNOPE, LESLIE Primary Location (717) 763-3204 <a href="mailto:lknope@whitebluff.gov">lknope@whitebluff.gov</a>		ESS Employer Reporting	<a href="#">Edit</a>   <a href="#">Delete</a>

**Add Contact Person**

**Step 3 --** Enter the required information. Required information includes:

- First Name
- Last Name
- Office Location
- E-mail
- Work Phone

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### Add a Contact Person

Enter details for the new contact person, choose the appropriate office location and contact type and click **Submit**.

**Please Note:** An employee must be setup as a contact person in order to be assigned an ESS account.

**Name**

Prefix: Select Prefix ▼

First Name: \*

Middle Name:

Last Name: \*

Suffix: Select Suffix ▼

Title:

**Contact Information**

Office Location: \* Select Office Location ▼

E-mail: \*

Work Phone: \*  ext.

Alternate Phone:  ext.

Fax:

**Contact Type**

Agency Head

DC Contact

IT

Reporting Official

**Step 4 --** If the contact person is the primary contact for the employer, select the **Set as Primary Contact** check box.

The screenshot shows the 'Add a Contact Person' form in the TCRS Employer Self Service portal. The form is divided into three main sections: Name, Contact Information, and Contact Type. The 'Set as Primary Contact' checkbox is highlighted with a red box and a red arrow.

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### Add a Contact Person

Enter details for the new contact person, choose the appropriate office location and contact type and click **Submit**.

**Please Note:** An employee must be setup as a contact person in order to be assigned an ESS account.

**Name**

Prefix:

First Name: \*

Middle Name:

Last Name: \*

Suffix:

Title:

**Contact Information**

Office Location: \*

E-mail: \*

Work Phone: \*  ext.

Alternate Phone:  ext.

Fax:

**Contact Type**

Agency Head  **Set as Primary Contact**

DC Contact

IT

Reporting Official

**Step 5** -- Click **Submit**. The Save was Successful message displays to confirm that the contact person was added.

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### Add a Contact Person

Enter details for the new contact person, choose the appropriate office location and contact type and click **Submit**.

**Please Note:** An employee must be setup as a contact person in order to be assigned an ESS account.

**Name**

Prefix:

First Name: \*

Middle Name:

Last Name: \*

Suffix:

Title:

**Contact Information**

Office Location: \*

E-mail: \*

Work Phone: \*  ext.

Alternate Phone:  ext.

Fax:

**Contact Type**

Agency Head  Set as Primary Contact

DC Contact

IT

Reporting Official

Step 6 -- Click **Continue** to return to the **Contact Persons** screen.

The screenshot shows the TCRS Retirement System interface. At the top left is the TCRS logo. At the top right, a user profile for Sara Franklin is displayed with a 'Log Out' button. Below the logo is a navigation menu with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A dropdown menu for 'Available Forms' is open, showing 'Open' and 'Print' buttons. The main content area displays a 'Confirmation' message: 'Contact Person Saved' and 'Your contact person has been successfully saved.' A red box highlights a 'Continue' button at the bottom right of the message.

## 20.2. Editing a Contact Person

Contact person information may need to be edited if the information was keyed incorrectly upon entering in in ESS, if a contact person has changed his or her name, if a contact person's role has changed, or for other administrative reasons. You can update information for any of the contact persons in your organization.

Step 1 -- From the **Contact Person** screen, click the **Edit** link.

The screenshot shows the TCRS Retirement System interface. At the top left is the TCRS logo. At the top right, a user profile for Sara Franklin is displayed with a 'Log Out' button. Below the logo is a navigation menu with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A dropdown menu for 'Available Forms' is open, showing 'Open' and 'Print' buttons. The main content area displays the 'Contact Persons' screen. It includes a description: 'The Contact Persons module allows employers to manage contact information. To add a new contact person, click **Add Contact Person**. To edit or delete contacts click on the appropriate link.' Below this is a table with the following data:

Details	Contact Type	Role	
FRANKLIN, SARA Primary Location (717) 763-3204 <a href="mailto:sfranklin@whitebluff.gov">sfranklin@whitebluff.gov</a>		ESS Administrator	<a href="#">Edit</a>
KNOPE, LESLIE Primary Location (717) 763-3204 <a href="mailto:lknope@whitebluff.gov">lknope@whitebluff.gov</a>		ESS Employer Reporting	<a href="#">Edit</a> <a href="#">Delete</a>

At the bottom left of the table is a green 'Add Contact Person' button. A red box highlights the 'Edit' link for the contact person KNOPE, LESLIE.

**Step 2 -- Update the contact person information.**

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Employer Self Service  
Sara Franklin  
White Bluff Town Of  
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Log Out

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

## Edit a Contact Person

Enter details for the new contact person, choose the appropriate office location and contact type and click **Submit**.

**Please Note:** An employee must be setup as a contact person in order to be assigned an ESS account.

**Name**

Prefix:

First Name: \*

Middle Name:

Last Name: \*

Suffix:

Title:

**Contact Information**

Office Location: \*

E-mail: \*

Work Phone: \*  ext.

Alternate Phone:  ext.

Fax:

**Contact Type**

Agency Head

DC Contact

IT

Reporting Official

**Step 3** -- Click **Update**. The Save was Successful message displays to confirm that the contact person information has been updated.

The screenshot shows the 'Edit a Contact Person' page in the TCRS Retirement System. The page header includes the TCRS logo and user information for Sara Franklin. The navigation menu contains 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A dropdown menu for 'Available Forms' is set to 'Open'. The main content area is titled 'Edit a Contact Person' and contains the following sections:

- Name:** Fields for Prefix (Select Prefix), First Name (LESLIE), Middle Name, Last Name (KNOPE), Suffix (Select Suffix), and Title.
- Contact Information:** Fields for Office Location (Primary Location), E-mail (lknope@whitebluff.gov), Work Phone ((717) 555-1234), Alternate Phone, and Fax.
- Contact Type:** Checkboxes for Agency Head, DC Contact, IT, and Reporting Official.

At the bottom of the form, there are two buttons: 'Cancel' and 'Update'. The 'Update' button is highlighted with a red box.

### 20.3. Deleting a Contact Person

Certain contact persons in the organization may be deleted if they are not associated with an ESS user account; however, primary reporting officials cannot be deleted without first naming a new reporting official.

**Step 1 --** From the **Contact Person** screen, click the **Delete** link.

The screenshot shows the TCRS Retirement System Employer Self Service interface. The user is Sara Franklin, White Bluff Town Of, with a last login of Mon, Jul 22 2013 11:21 AM. The navigation menu includes Employer Home, Report, Services, Account, Admin, and Logout. The main content area is titled "Contact Persons" and contains a table of contact information. The table has columns for Details, Contact Type, and Role. Two contact persons are listed: FRANKLIN, SARA (ESS Administrator) and KNOPE, LESLIE (ESS Employer Reporting). The "Delete" link for KNOPE, LESLIE is highlighted with a red box. An "Add Contact Person" button is located at the bottom of the table.

Details	Contact Type	Role
FRANKLIN, SARA Primary Location (717) 763-3204 <a href="mailto:sfranklin@whitebluff.gov">sfranklin@whitebluff.gov</a>		ESS Administrator
KNOPE, LESLIE Primary Location (717) 763-3204 <a href="mailto:lknope@whitebluff.gov">lknope@whitebluff.gov</a>		ESS Employer Reporting

**Step 2** -- The “Are you sure you want to delete this contact person?” message displays. Click **OK** to delete the contact.

The screenshot shows the TCRS Retirement System Employer Self Service interface. At the top right, the user is identified as Sara Franklin, White Bluff Town Of, with a last login of Mon, Jul 22 2013 11:21 AM. The main navigation bar includes links for Employer Home, Report, Services, Account, Admin, and Logout. The current page is titled "Contact Persons" and contains a table with two entries: FRANKLIN, SARA and KNOPE, LESLIE. A modal dialog box titled "Message from webpage" is overlaid on the table, asking "Are you sure you want to delete this contact person?". The "OK" button in the dialog is highlighted with a red rectangle.

## 21. Manage Users

Administrative users use the **Manage Users** screen to add, remove, and edit ESS accounts for their organization. Administrative users associate contact information created from the **Contact Person** screen to a specific role. There are three roles available in ESS:

- Administrative – have access to all functionality in self-service
- Employer Reporting – have access to all screens except for the **Manager Users** screen
- Staff – have access to non-essential screens such as **Death Notice** or **Contact Persons**

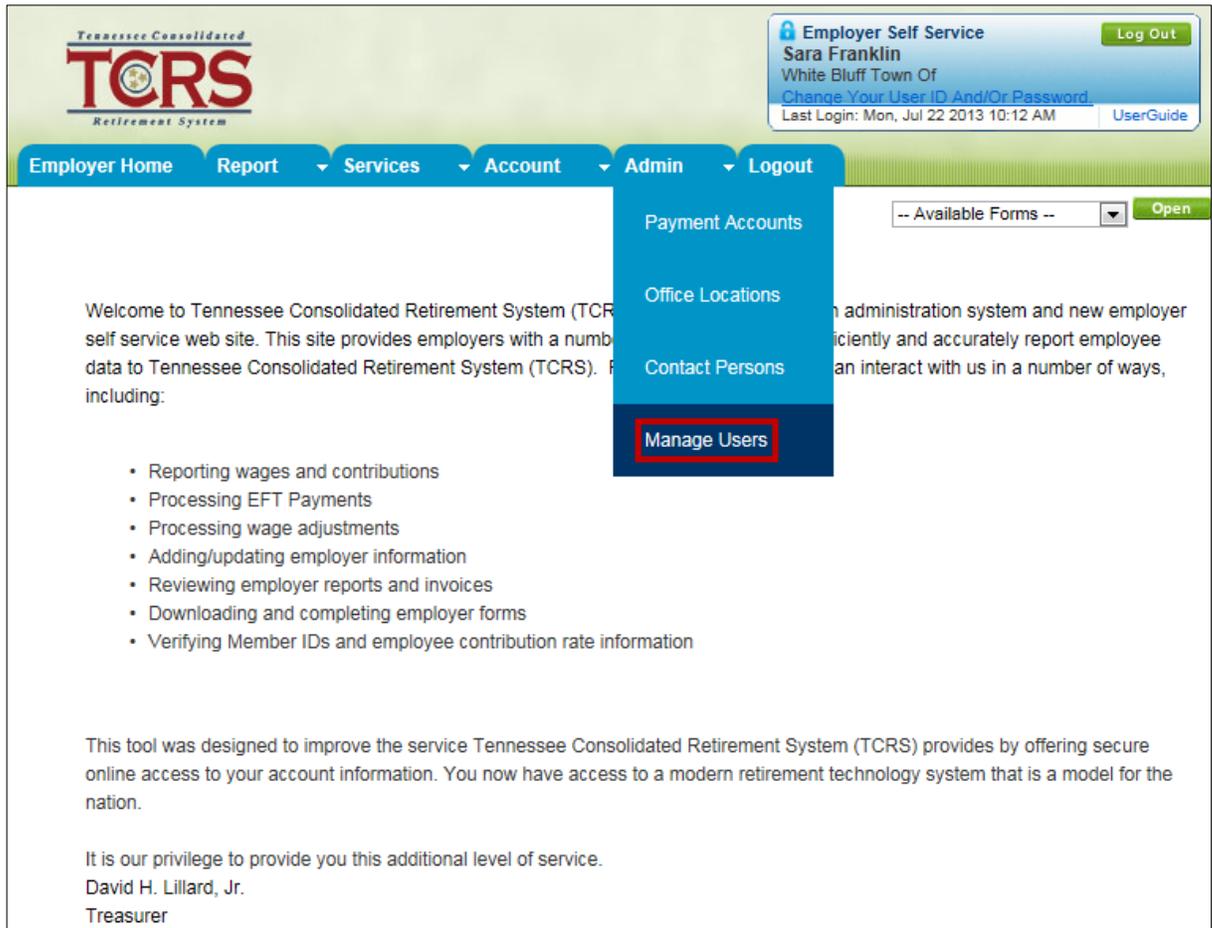
**Note:** TCRS will administer employer accounts using Concord only in the rare instances that the employer’s administrative user is not available or has been locked out of ESS.

## 21.1. Adding New Users

You must add a new employee as a person in the **Contact Person** screen before adding them as a new user. See Section 20.1, Adding a Contact Person for steps to add a new employee as a contact in ESS. Once you have added the person as a new user, they must log into ESS where they are prompted to change their password, PIN, and answer security questions.

**Step 1 --** To navigate to the **Manage Users** screen, click on the following menu options:

**Admin > Manage Users**



The screenshot shows the TCRS Retirement System Employer Self-Service interface. At the top left is the TCRS logo. At the top right, a user profile for Sara Franklin is displayed with a 'Log Out' button. Below the logo is a navigation bar with tabs for 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. The 'Admin' tab is selected, and a dropdown menu is open, showing options for 'Payment Accounts', 'Office Locations', 'Contact Persons', and 'Manage Users'. The 'Manage Users' option is highlighted with a red rectangular box. Below the navigation bar, there is a 'Forms' section with a dropdown menu set to '-- Available Forms --' and an 'Open' button. The main content area contains a welcome message and a list of services provided by the system.

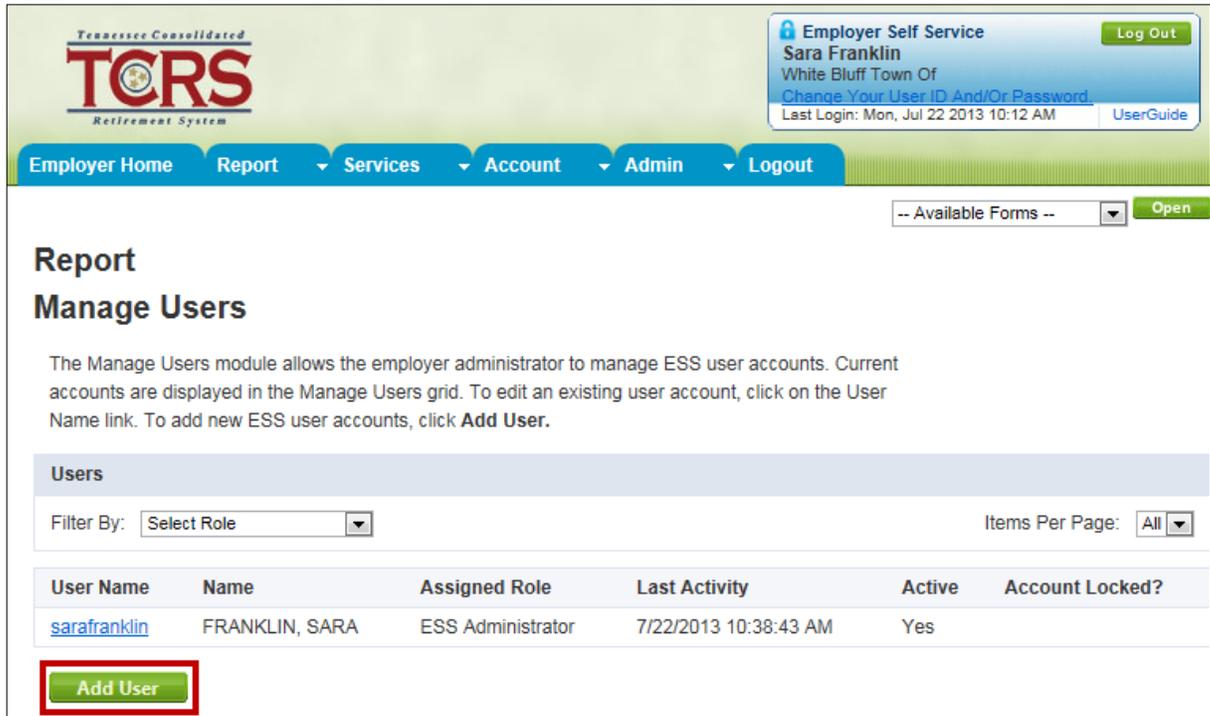
Welcome to Tennessee Consolidated Retirement System (TCRS) self service web site. This site provides employers with a number of services to efficiently and accurately report employee data to Tennessee Consolidated Retirement System (TCRS). You can interact with us in a number of ways, including:

- 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

Step 2 -- Click .



**Report**  
**Manage Users**

The Manage Users module allows the employer administrator to manage ESS user accounts. Current accounts are displayed in the Manage Users grid. To edit an existing user account, click on the User Name link. To add new ESS user accounts, click **Add User**.

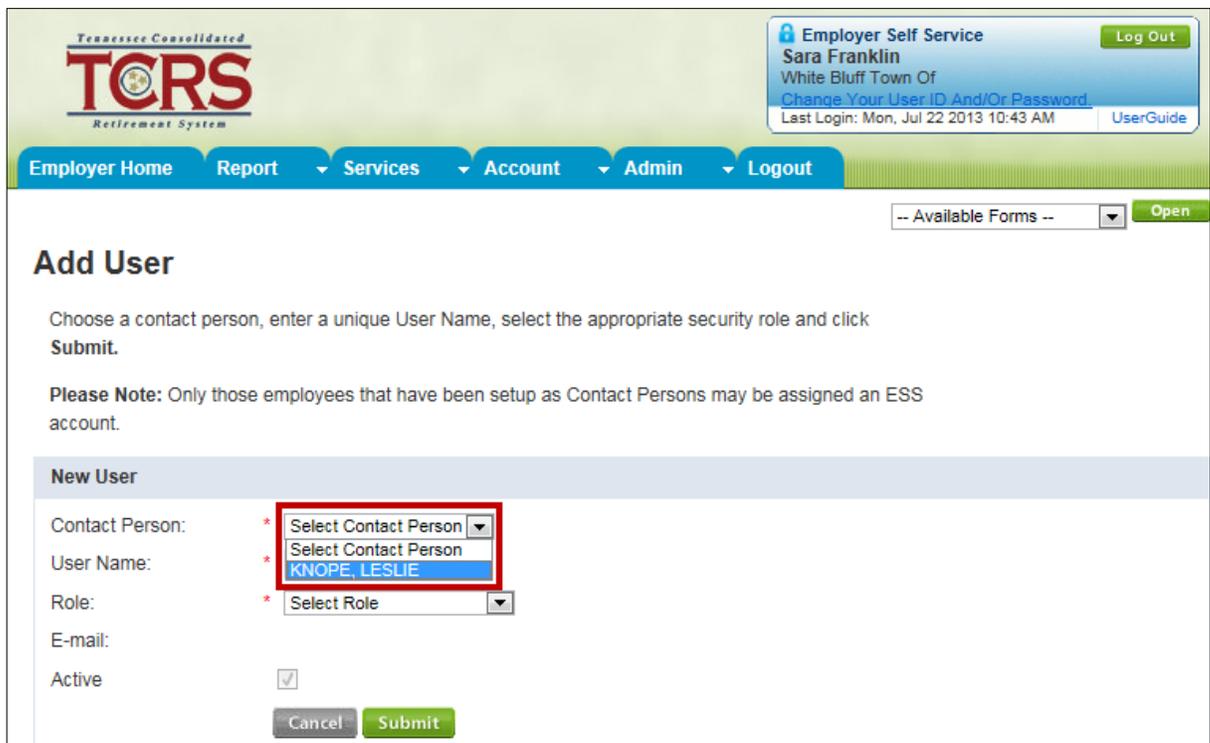
**Users**

Filter By:  Items Per Page:

User Name	Name	Assigned Role	Last Activity	Active	Account Locked?
<a href="#">sarafranklin</a>	FRANKLIN, SARA	ESS Administrator	7/22/2013 10:38:43 AM	Yes	

**Add User**

Step 3 -- The **Add User** screen displays. Select a contact person from the **Contact Person** drop down menu.



**Add User**

Choose a contact person, enter a unique User Name, select the appropriate security role and click **Submit**.

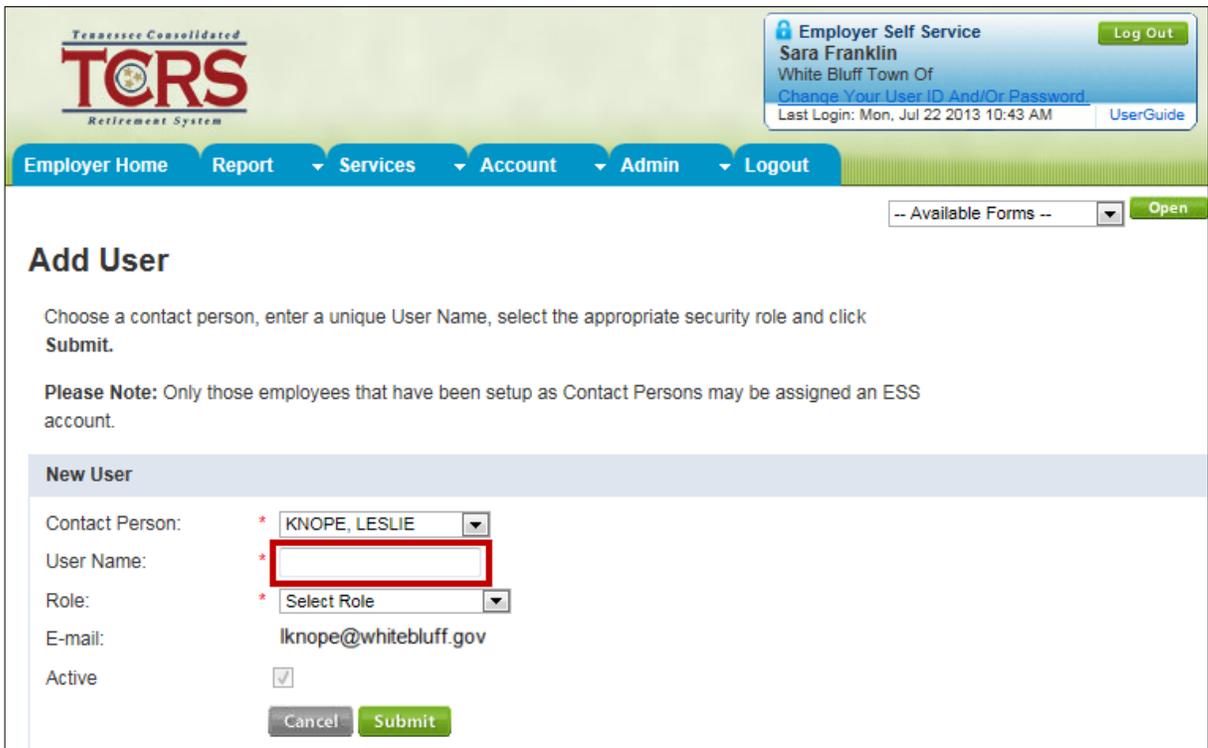
**Please Note:** Only those employees that have been setup as Contact Persons may be assigned an ESS account.

**New User**

Contact Person: \*   
User Name: \*   
Role: \*   
E-mail:   
Active

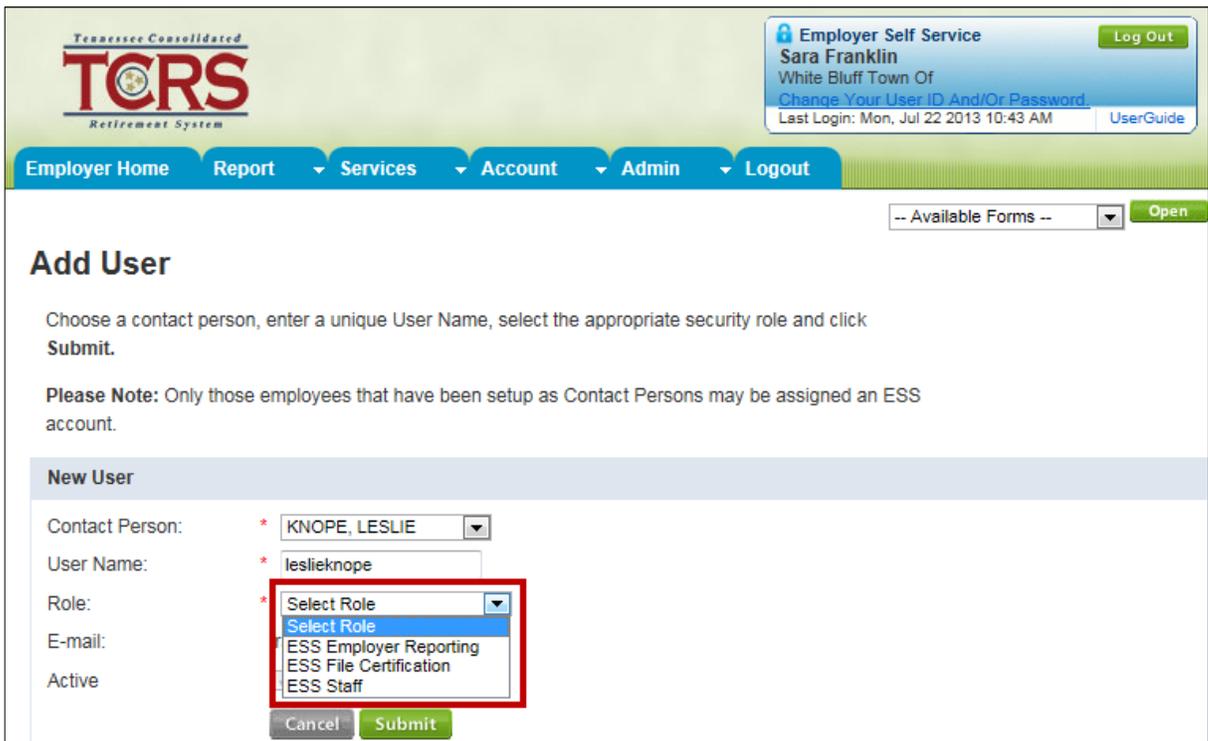
**Step 4 --** The email address for the user displays. The status of the user is automatically set to active. Enter a unique user ID for the person.

**Note:** The user ID must be between 5 and 20 characters, using characters A-Z, a-z, and number 0-9.



The screenshot shows the 'Add User' form in the TCRS Employer Self Service interface. The form includes a navigation bar with 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A user profile for Sara Franklin is visible in the top right. The form instructions state: 'Choose a contact person, enter a unique User Name, select the appropriate security role and click Submit.' A note specifies: 'Please Note: Only those employees that have been setup as Contact Persons may be assigned an ESS account.' The 'New User' section contains the following fields: 'Contact Person' (dropdown menu with 'KNOPE, LESLIE' selected), 'User Name' (text input field highlighted with a red box), 'Role' (dropdown menu with 'Select Role' selected), 'E-mail' (text input field with 'lknope@whitebluff.gov'), and 'Active' (checkbox checked). 'Cancel' and 'Submit' buttons are at the bottom.

**Step 5 --** Select a role from the **Role** drop down menu.



The screenshot shows the 'Add User' form with the 'Role' dropdown menu open. The 'User Name' field now contains 'leslieknope'. The 'Role' dropdown menu is highlighted with a red box and shows the following options: 'Select Role', 'ESS Employer Reporting', 'ESS File Certification', and 'ESS Staff'. The 'E-mail' field remains 'lknope@whitebluff.gov' and the 'Active' checkbox is checked. 'Cancel' and 'Submit' buttons are at the bottom.

**Step 6 --** Click **Submit**. Three separate emails are sent to the new user, each with the user ID, temporary password, or PIN. The User ID, Password, and PIN information sent message displays to confirm the addition of a new user.

**Note:** The user must sign into ESS within 72 hours with the login information emailed to them before the information expires. See Section 3.1, Logging into Employer Self-Service for the First Time for more information.

The screenshot shows the 'Add User' form in the TCRS Employer Self Service interface. The page header includes the TCRS logo and a user profile for Sara Franklin. The navigation menu contains 'Employer Home', 'Report', 'Services', 'Account', 'Admin', and 'Logout'. A dropdown menu for 'Available Forms' is set to 'Open'. The main content area is titled 'Add User' and contains instructions: 'Choose a contact person, enter a unique User Name, select the appropriate security role and click Submit.' A 'Please Note' states: 'Only those employees that have been setup as Contact Persons may be assigned an ESS account.' The 'New User' section contains the following fields: 'Contact Person' (dropdown menu with 'KNOPE, LESLIE' selected), 'User Name' (text input with 'leslieknope'), 'Role' (dropdown menu with 'ESS Employer Reporting' selected), 'E-mail' (text input with 'lknope@whitebluff.gov'), and 'Active' (checkbox checked). At the bottom of the form are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red box.

**Step 7 --** Click **Continue**.

The screenshot shows the 'Confirmation' page in the TCRS Employer Self Service interface. The page header and navigation menu are identical to the previous screenshot. The main content area is titled 'Confirmation' and contains a 'User Saved' message: 'Your user has been successfully saved.' Below this, it states: 'A login for leslieknope has been created and sent to lknope@whitebluff.gov'. At the bottom right of the page is a 'Continue' button, which is highlighted with a red box.

**Step 8 --** The **Manage Users** screen displays with a list of all users for your organization.

The screenshot shows the TCRS Retirement System interface. At the top right, there is a user profile for Sara Franklin, White Bluff Town Of, with a last login of Mon, Jul 22 2013 10:43 AM. Below this is a navigation bar with tabs for Employer Home, Report, Services, Account, Admin, and Logout. The main heading is "Manage Users". Below the heading is a brief description of the module. A "Users" section contains a filter dropdown set to "Select Role" and an "Items Per Page" dropdown set to "All". A table lists two users: Sara Franklin (ESS Administrator) and Leslie Knope (ESS Employer Reporting). An "Add User" button is at the bottom left.

User Name	Name	Assigned Role	Last Activity	Active	Account Locked?
<a href="#">sarafranklin</a>	FRANKLIN, SARA	ESS Administrator	7/22/2013 10:57:24 AM	Yes	
<a href="#">leslieknope</a>	KNOPE, LESLIE	ESS Employer Reporting		Yes	

## 21.2. Deactivating a User

If a user is no longer employed with your organization or they no longer need access to ESS, an administrative user must deactivate their account.

**Step 1 --** From the **Manage Users** screen, click the **User Name** link.

This screenshot is similar to the previous one but shows a different set of users. The user profile at the top right is now Sara Franklin with a last login of Thu, Oct 10 2013 8:35 AM. The table lists two users: Sara Franklin (ESS Administrator) and Ron Swanson (ESS Administrator). The user "ronswanson" is highlighted with a red box. An "Add User" button is at the bottom left.

User Name	Name	Assigned Role	Last Activity	Active	Account Locked	PIN Locked
<a href="#">sarafranklin</a>	FRANKLIN, SARA	ESS Administrator	10/10/2013 8:36:49 AM	Yes		
<a href="#">ronswanson</a>	SWANSON, RON	ESS Administrator	8/28/2013 2:27:25 PM	Yes		

Step 2 -- Deselect the **Active** check box.

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service Sara Franklin White Bluff Town Of  
Last Login: Thu, Oct 10 2013 8:35 AM

Employer Home Report Services Account Admin Logout

-- Available Forms -- Open

### Edit User

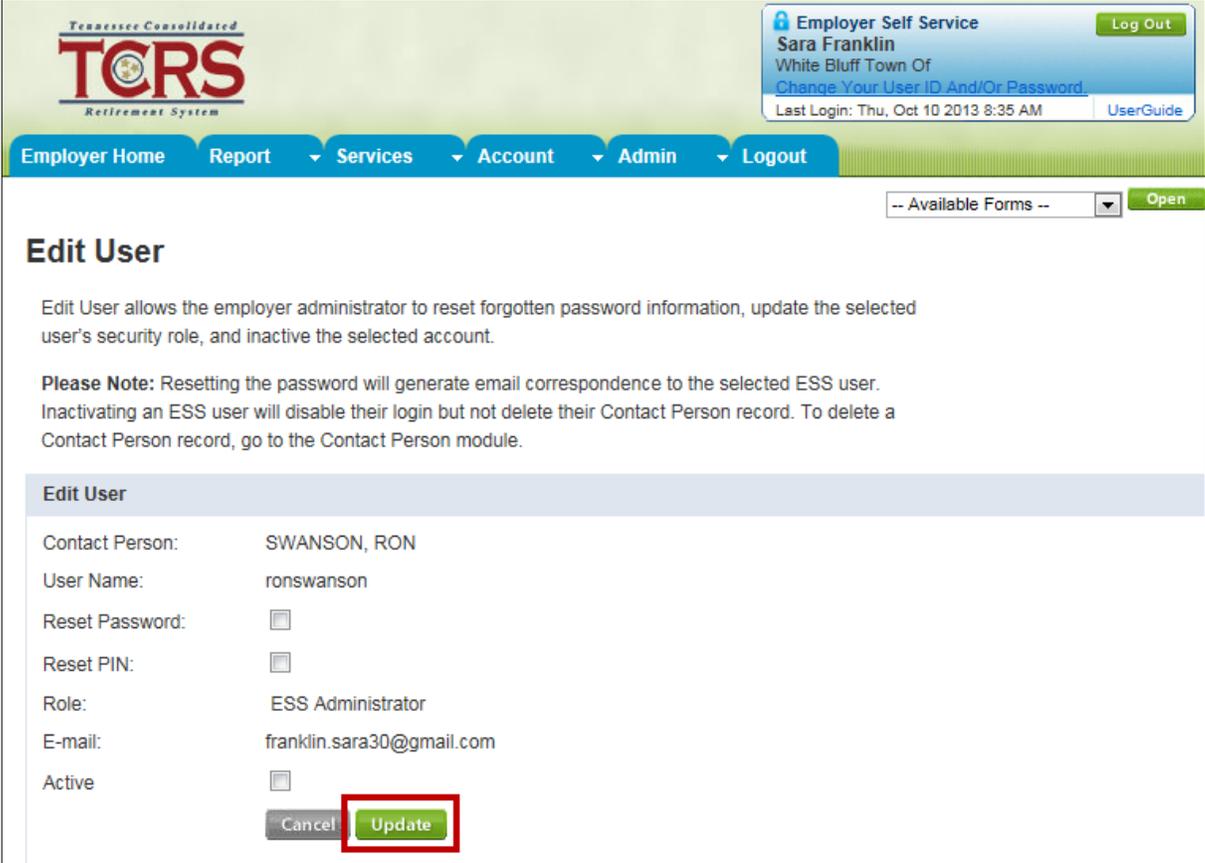
Edit User allows the employer administrator to reset forgotten password information, update the selected user's security role, and inactive the selected account.

**Please Note:** Resetting the password will generate email correspondence to the selected ESS user. Inactivating an ESS user will disable their login but not delete their Contact Person record. To delete a Contact Person record, go to the Contact Person module.

Contact Person:	SWANSON, RON
User Name:	ronswanson
Reset Password:	<input type="checkbox"/>
Reset PIN:	<input type="checkbox"/>
Role:	ESS Administrator
E-mail:	franklin.sara30@gmail.com
Active	<input checked="" type="checkbox"/>

Cancel Update

**Step 3 --** Click . The user's account is deactivated.



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White Bluff Town Of  
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Last Login: Thu, Oct 10 2013 8:35 AM [UserGuide](#) [Log Out](#)

Employer Home Report Services Account Admin Logout

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

### Edit User

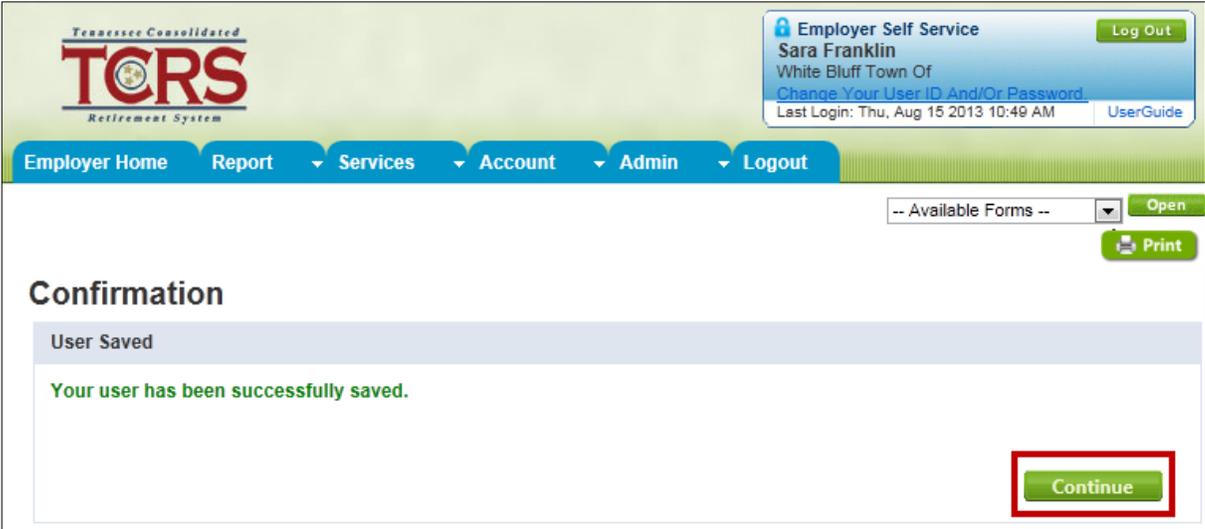
Edit User allows the employer administrator to reset forgotten password information, update the selected user's security role, and inactive the selected account.

**Please Note:** Resetting the password will generate email correspondence to the selected ESS user. Inactivating an ESS user will disable their login but not delete their Contact Person record. To delete a Contact Person record, go to the Contact Person module.

Contact Person:	SWANSON, RON
User Name:	ronswanson
Reset Password:	<input type="checkbox"/>
Reset PIN:	<input type="checkbox"/>
Role:	ESS Administrator
E-mail:	franklin.sara30@gmail.com
Active	<input type="checkbox"/>

[Cancel](#) [Update](#)

**Step 4 --** A **Confirmation** screen displays to confirm the account is deactivated. Click  to return to the **Manage Users** screen.



Tennessee Consolidated  
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Retirement System

Employer Self Service  
Sara Franklin  
White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Thu, Aug 15 2013 10:49 AM [UserGuide](#) [Log Out](#)

Employer Home Report Services Account Admin Logout

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

### Confirmation

User Saved

Your user has been successfully saved.

[Continue](#)

**Step 5 --** The user is no longer listed as active.

The screenshot shows the TCRS Employer Self Service interface. The user is Sara Franklin, White Bluff Town Of. The page title is "Manage Users". Below the title, there is a description: "The Manage Users module allows the employer administrator to manage ESS user accounts. Current accounts are displayed in the Manage Users grid. To edit an existing user account, click on the User Name link. To add new ESS user accounts, click **Add User**."

Below the description is a "Users" section with a "Filter By: Select Role" dropdown and "Items Per Page: All" dropdown. The main content is a table of users:

User Name	Name	Assigned Role	Last Activity	Active	Account Locked	PIN Locked
<a href="#">sarafranklin</a>	FRANKLIN, SARA	ESS Administrator	10/10/2013 8:36:49 AM	Yes		
<a href="#">ronswanson</a>	SWANSON, RON	ESS Administrator	8/28/2013 2:27:25 PM	No		

At the bottom left of the table area is an "Add User" button.

### 21.3. Resetting a User's Password

In some instances it is necessary for the administrative user to reset a user's password. The following steps show how to do this.

**Step 1 --** From the **Manage Users** screen, click the **User Name** link.

The screenshot shows the TCRS Employer Self Service interface. The user is Sara Franklin, White Bluff Town Of. The page title is "Manage Users". Below the title, there is a description: "The Manage Users module allows the employer administrator to manage ESS user accounts. Current accounts are displayed in the Manage Users grid. To edit an existing user account, click on the User Name link. To add new ESS user accounts, click **Add User**."

Below the description is a "Users" section with a "Filter By: Select Role" dropdown and "Items Per Page: All" dropdown. The main content is a table of users:

User Name	Name	Assigned Role	Last Activity	Active	Account Locked?
<a href="#">sarafranklin</a>	FRANKLIN, SARA	ESS Administrator	7/22/2013 10:57:24 AM	Yes	
<a href="#">leslieknope</a>	KNOPE, LESLIE	ESS Employer Reporting		Yes	

At the bottom left of the table area is an "Add User" button.

**Step 2 --** Select the **Reset Password** check box.

**Note:** PINs may only be reset by TCRS staff.

**Tennessee Consolidated TCRS Retirement System**

**Employer Self Service**  
Sara Franklin  
White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Mon, Jul 22 2013 10:43 AM [UserGuide](#) [Log Out](#)

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

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

### Edit User

Edit User allows the employer administrator to reset forgotten password information, update the selected user's security role, and inactive the selected account.

**Please Note:** Resetting the password will generate email correspondence to the selected ESS user. Inactivating an ESS user will disable their login but not delete their Contact Person record. To delete a Contact Person record, go to the Contact Person module.

**Edit User**

Contact Person: KNOPE, LESLIE

User Name: leslieknope

Reset Password:

Role: \* ESS Employer Reporting

E-mail: lknope@whitebluff.gov

Active:

[Cancel](#) [Update](#)

Step 3 -- Click **Update**. A temporary password is sent to the user.

**Tennessee Consolidated TCRS Retirement System**

Employer Self Service  
Sara Franklin  
White Bluff Town Of  
[Change Your User ID And/Or Password](#)  
Last Login: Mon, Jul 22 2013 10:43 AM [UserGuide](#) **Log Out**

Employer Home Report Services Account Admin Logout

-- Available Forms -- **Open**

### Edit User

Edit User allows the employer administrator to reset forgotten password information, update the selected user's security role, and inactive the selected account.

**Please Note:** Resetting the password will generate email correspondence to the selected ESS user. Inactivating an ESS user will disable their login but not delete their Contact Person record. To delete a Contact Person record, go to the Contact Person module.

**Edit User**

Contact Person:	KNOPE, LESLIE
User Name:	leslieknope
Reset Password:	<input checked="" type="checkbox"/>
Role:	* ESS Employer Reporting ▼
E-mail:	franklin.sara30@gmail.com
Active	<input checked="" type="checkbox"/>