Employer Self Service Work Process Manual

October 12, 2016

West Virginia
Consolidated Public Retirement Board
(WVCPRB)

COMPASS Project

Contents

Employer Self Service

1. Overview

The West Virginia Consolidated Public Retirement Board (CPRB) is replacing their existing software and web reporting system with **COMPASS,** which is a comprehensive, scalable, browser-based solution. **Employer Self-Service** (ESS) is the web portal that employers will use to view and update information related to contribution reporting, user administrative functions and other employee remittance functions. In order to access the ESS portal, the employer contacts (i.e. the employer staff member(s) requiring access to ESS) must have a valid login name and password (See Section 2. CPRB's ESS Access Registration and Login for Employer Self-Service for more details on logins and passwords) and will be able to access functionality based on assigned user roles (See Section 10. Manage Users for more details).

Employers can perform the following tasks on the Employer Self Service portal:

- **Payroll Schedule:** Allows employers to submit their Payroll begin date, which allows COMPASS to calculate and maintain each employer's payroll schedule. Employers must provide and confirm their payroll schedule information pertaining to each retirement system for a plan year prior to submitting their first contribution report.

- **Submit Employer Reports:** Allows employers flexibility in submitting information, 1) Employment Classification information, such as Job Position or Job Status can be submitted on its own or 2) Contribution Detail information along with Contribution Summary information and payment information can be submitted on its own, once the Employment Classification information is reported or 3) Employment Classification and Contribution Details, Summary information and payment information associated with the contribution report can be submitted together. This information can be submitted to CPRB via Enter On-Line or Upload Detail File functionality.

- **Employer Packet:** Allows employers to view the reports contained within a packet, which reflect information from the employer's last report submission. The Employer Packet will be generated 5 business days after the employer's report is balanced and posted. Employers will receive an email notification alerting them that their new employer packet is available for review.

- **Download CPRB ID:** Allows employers to download CPRB IDs for either a particular employee or a set of employees based on defined search criteria. A CPRB ID is optional to be reported for all employers reporting via the file layout, but may at some point in the future be required (in an effort to do away with reporting SSN).

- **Contribution Group Search:** Allows employers to determine the correct contribution group for employees, based on their prior and current employment classification.

- **Office Locations:** Allows employers to add and maintain office location information.

- **Contact Persons:** Employers will have the ability to identify employees within their organization who they wish to set up as contacts within the COMPASS system. Persons must be entered as contacts before they can be setup as an ESS user.

- **Manage Users:** Allows employers to maintain user information for employees who require access to Employer Self Service. Role assignment as well as password/PIN maintenance is included in this module. Only employees assigned to the ESS Admin role will have access to this functionality.

- **Death Notice:** Employers can notify CPRB about the death of employees.

- **Seminar Registration:** Allows employers to register for seminars via Employer Self Service.

- **Online Certification:** Allows employers to certify refund, retirement, disability and service purchase applications.

- **Message Center:** Allows employers to view messages that have been sent via the COMPASS correspondence engine. Documents sent from the COMPASS system will be viewed as attachments to the messages. Also, employers will be able to send a new message, or reply to a message from CPRB via the Message Center functionality.

- **Reports:** Allows employers to ad-hoc generate selected reports using pre-defined parameters.

- **DSRS Fee:** Allows County Commissions to separate their reporting by providing a separate role just for submitting the Deputy Sheriff Retirement System (DSRS) fees.

- **Pay Invoices:** Allows employers to view and remit payment for outstanding invoices. Credit Invoices will be available for selection at the time of report submission.

- **Bulk Order:** Employer can request forms, brochures, and other materials for bulk printing from CPRB.

- **Service Purchase Cost Calculator:** This functionality allows the employers to calculate certain service purchase costs for a member, once they are eligible for such a purchase event.

- **Service Purchase Request:** Employers can create requests for service purchase cost letters on behalf of their employees, through the Employer Self Service portal.

1.1 What You Will Be Able to Do

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

- Register for access to the ESS portal
- Login to the ESS portal for the first time
- Reset forgotten user IDs and/or passwords
- Submit Employer reports; containing Employment Classification details, and/or contributions, and DSRS fees
- Manage employer contact access, security settings, and other information about the agency, such as office locations and staff roles
- Send messages to CPRB through the Message Center, request bulk orders for CPRB materials, and access various reports
- Process invoices, and maintain your payroll schedules

1.2 Assumptions

The instructions in this guide assume you know the basics of navigating within a browser-based system.

All “employee” information shown within the screen shots in this document is not real and does not contain any Personally Identifiable Information (PII) or Protected Health Information (PHI).

2. CPRB's ESS Access – Registration and Login

In order to **Access CPRB's Employer Self-Service (ESS)** portal, the employer contact person who will act as ESS Administrator for the other employer staff member(s) requiring access to the ESS portal must have a valid login name and password.

The ESS Administrative user will have the ability to request access to CPRB's ESS portal for other staff members of the participating agency. If for some reason the agency's ESS Administrative user does not have access, then the employer can contact CPRB to restore the ESS Administrative user's access.

The four ESS user roles are:

- Administrative user (ESS Admin): has access to all functionalities such as Submit Employer Report, Contribution Group Search etc., including exclusive access to add, remove, and edit employer staff contact person(s) and ESS portal user accounts for the agency staff members
- Employer Reporting user: has access to all screens except for the Admin-related (manage users, locations, and contact persons) screens
- Staff user: has access to services such as Death Notice, Seminars, Message Center, Employee Information, Reporting and Admin menu.
- DSRS Fee Reporter: has access to be able to report DSRS fees only, no other access is given with this role assignment

2.1 ESS Registration Request

To submit an **ESS Registration Request,** the employer contact will submit the request to their:

1. **Employer administrator:** if the request is for access in a role as an employer reporting user, staff user, or DSRS fee reporter, for an employer that has an existing employer administrative user within ESS, then the ESS Admin creates the ESS user.

   The ESS user will receive their login credentials in three separate emails. One email includes the User ID, one email includes a temporary PIN and one email includes a temporary password.

   The temporary PIN and password are valid for 72 hours after the administrator emails the credentials. When the new user logs in to the ESS portal, they are prompted to enter a new password and PIN and select a security question. This new password, PIN and security question cannot be accessed by CPRB staff.

   Note: If the employer's ESS administrator is unavailable or unable to access the account, CPRB staff will help create an ESS account or create/update employer contact login credentials.

2. **CPRB Representative:** for access setup for the first ESS Admin from each participating employer, CPRB will create an ESS Admin user in COMPASS and an email is sent to the prospective ESS Admin user with the login credentials.

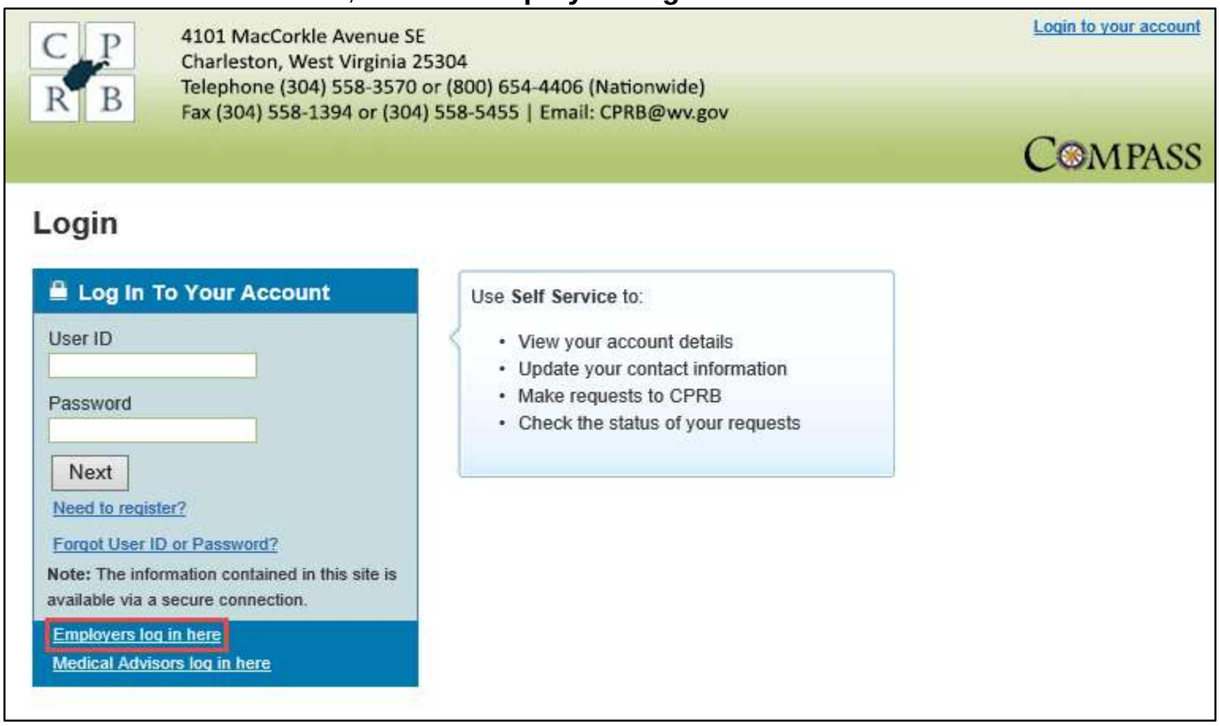
   The prospective ESS Admin will receive three separate emails, providing the required information to access the ESS portal – the first email will contain the User ID, the second will contain the temporary PIN, and the third and final will contain a temporary password. The temporary PIN and password are valid for 72 hours. When the user logs into the ESS portal for the first time, they are prompted to enter a new password and PIN and select a security question. This new password, PIN and security question cannot be accessed by CPRB staff.

2.2 Login to Employer Self-Service for the First Time

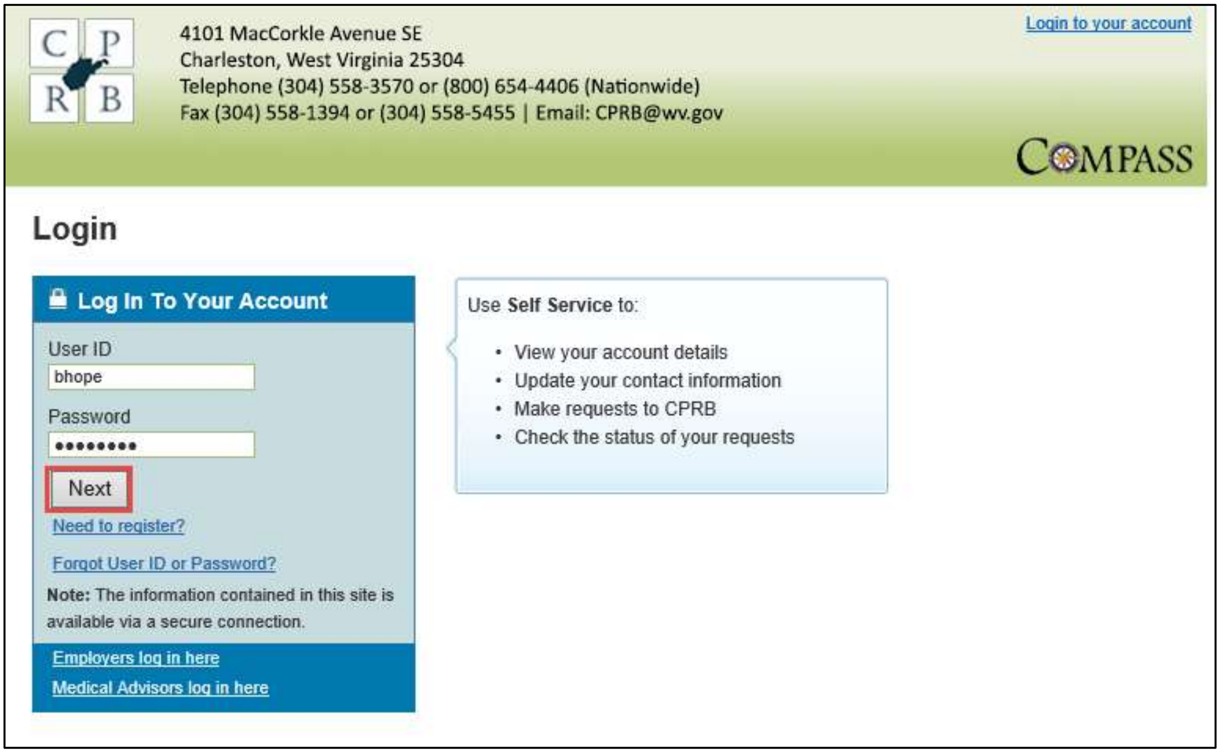
The first time a new employer contact logins into the ESS portal, they will be prompted to enter the user ID, temporary password and PIN as received in the auto generated email. The temporary password and PIN can only be used up to 72 hours after the administrator email is sent to the employer contact. If the employer contact does not use the temporary password and PIN within 72 hours, both credentials will become invalid and the employer administrator will have to reset the password and PIN.

The steps below describe the process to login to CPRB's ESS portal for the first time:

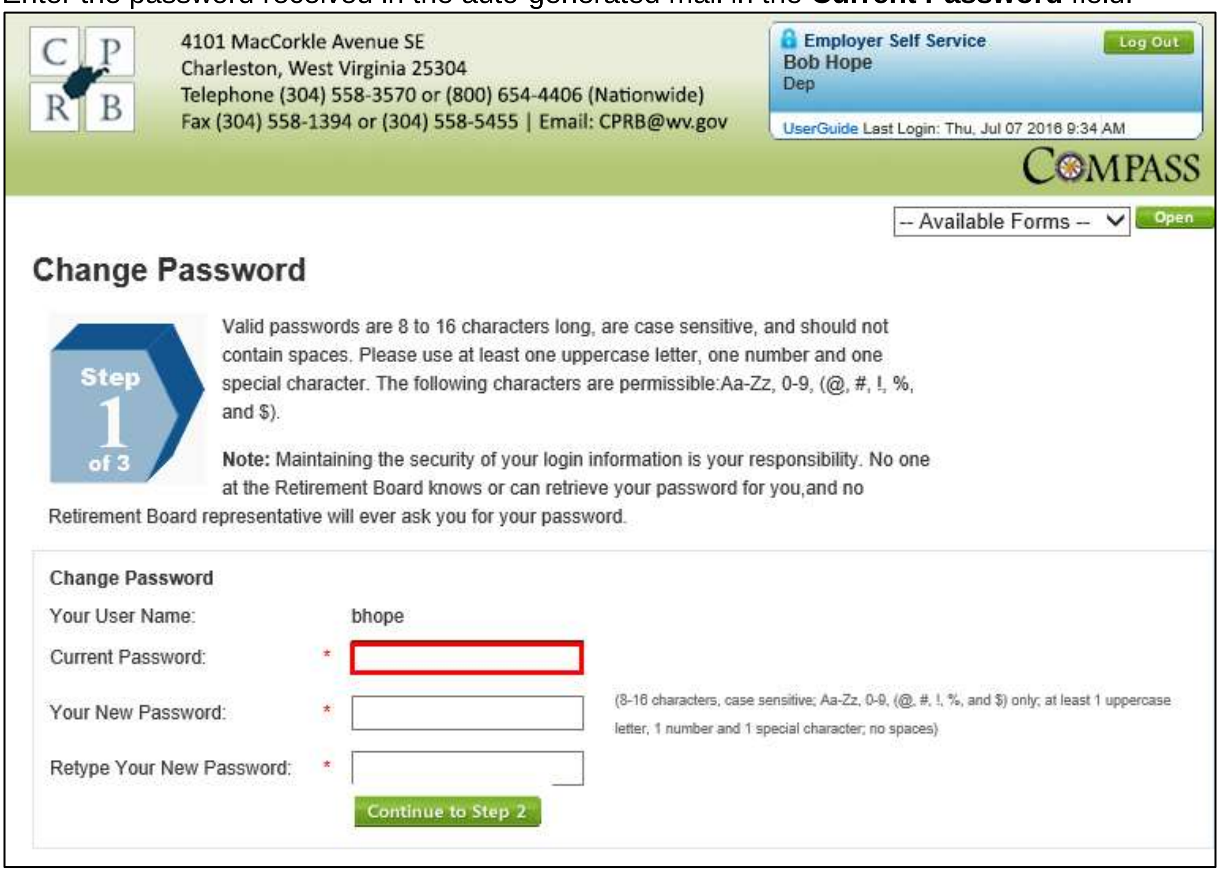
Step 1 -- In the **Self-Service** screen, click the **Employers login here** link.



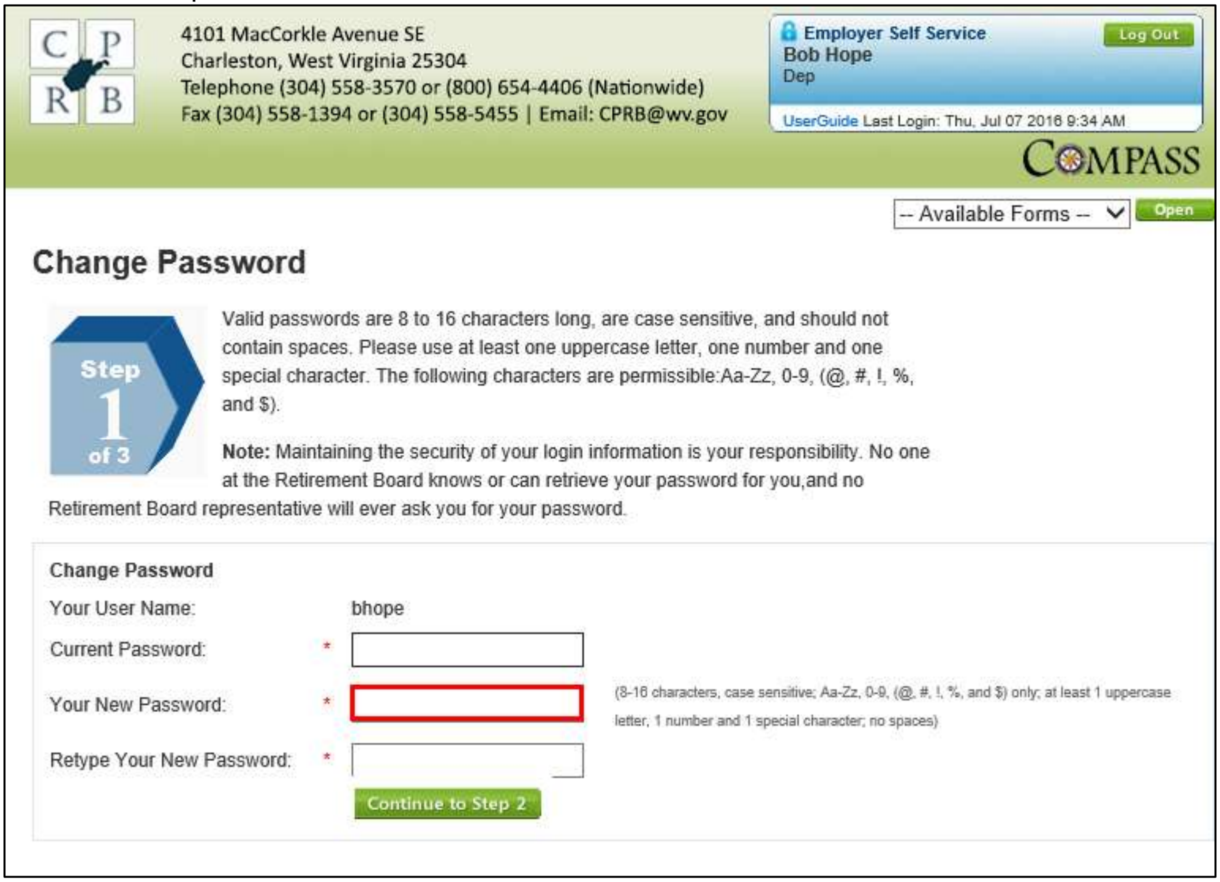
Step 2 -- Enter details in the **User ID** and **Password** fields and click the Next button.



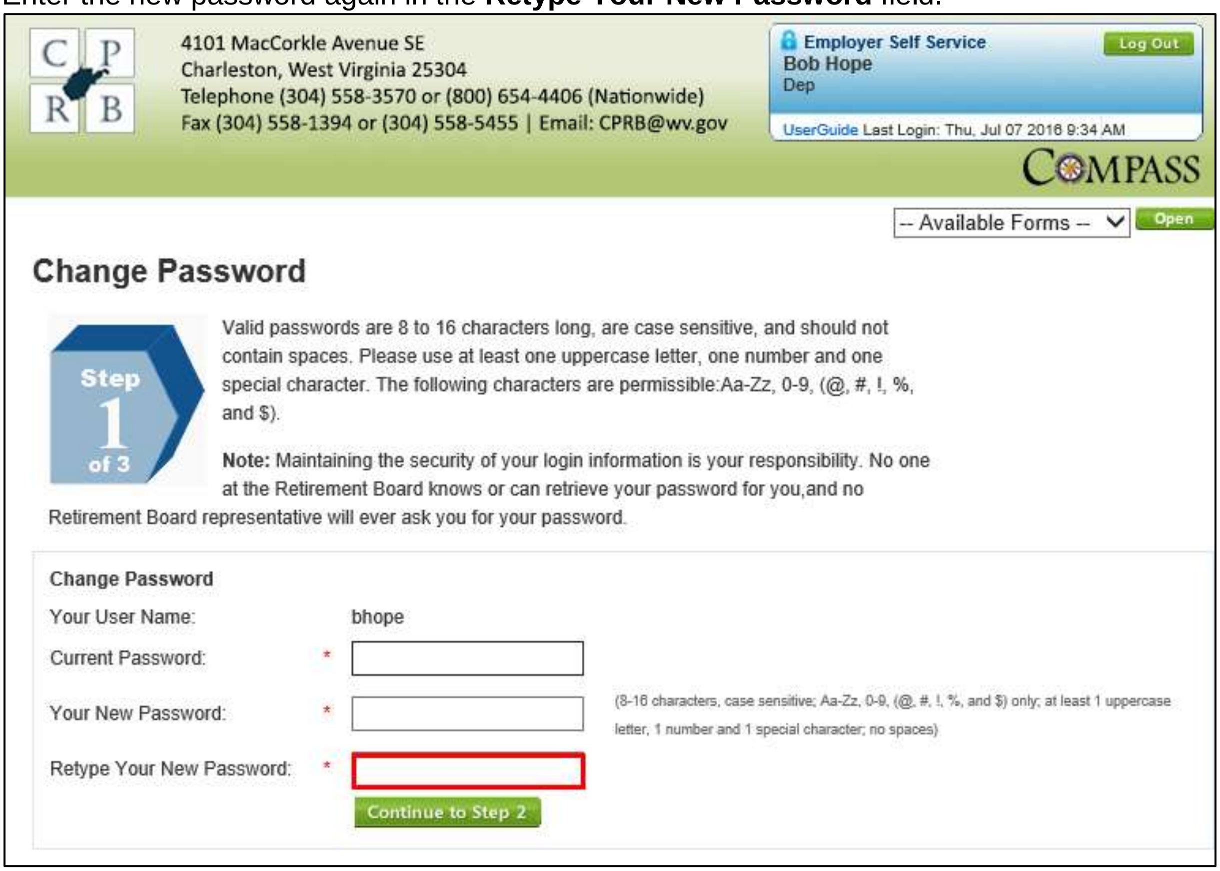
Step 3 -- Enter the password received in the auto-generated mail in the **Current Password** field.



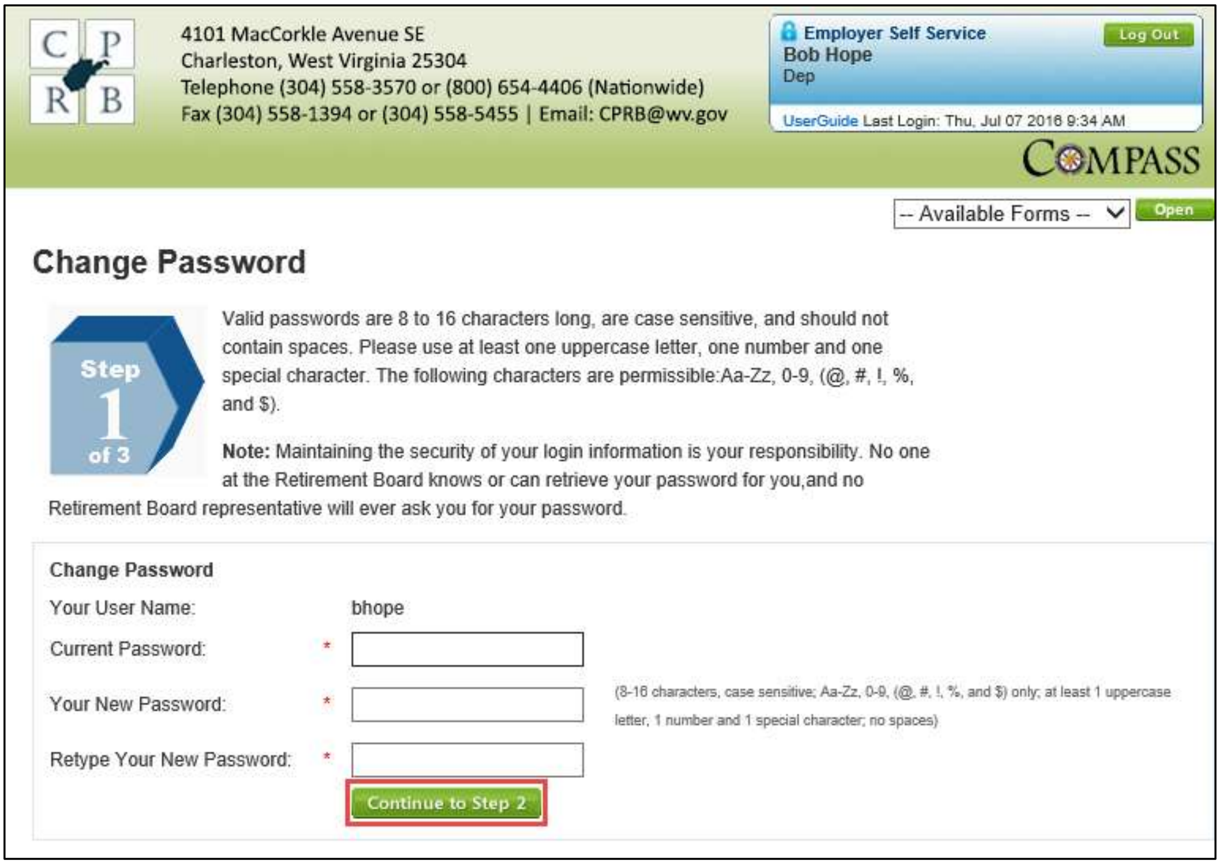
Step 4 -- Enter the new password in the **Your New Password** field.



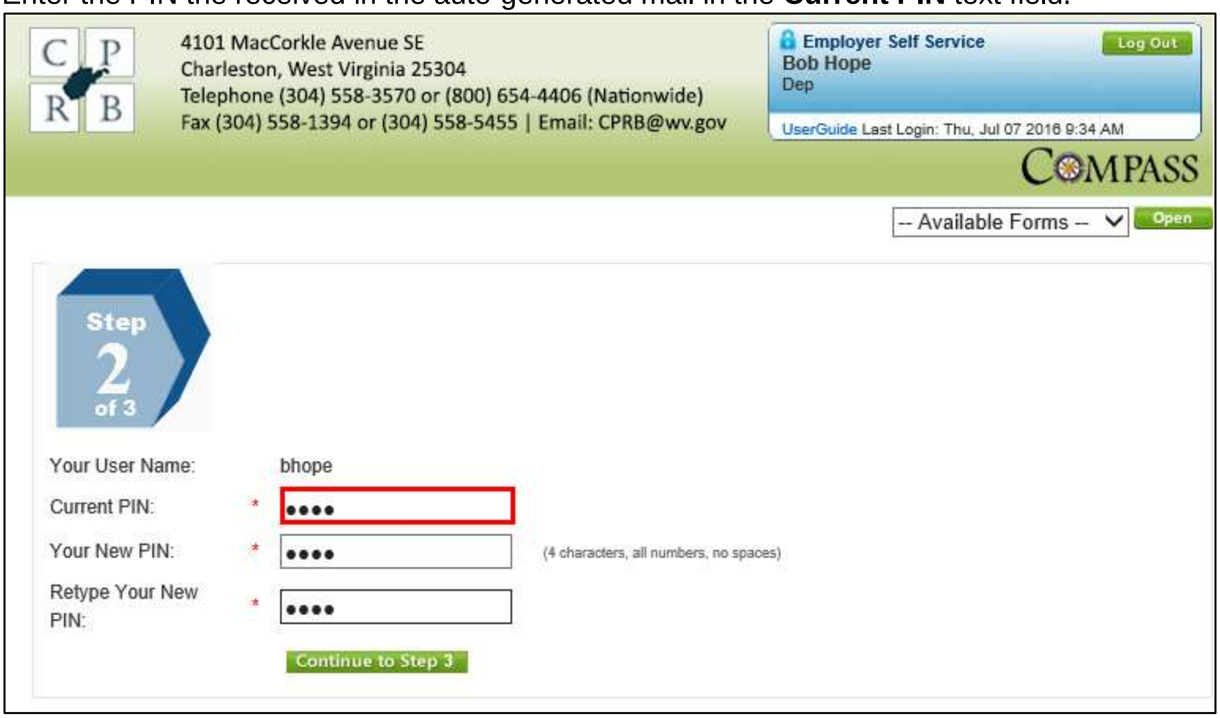
Step 5 -- Enter the new password again in the **Retype Your New Password** field.



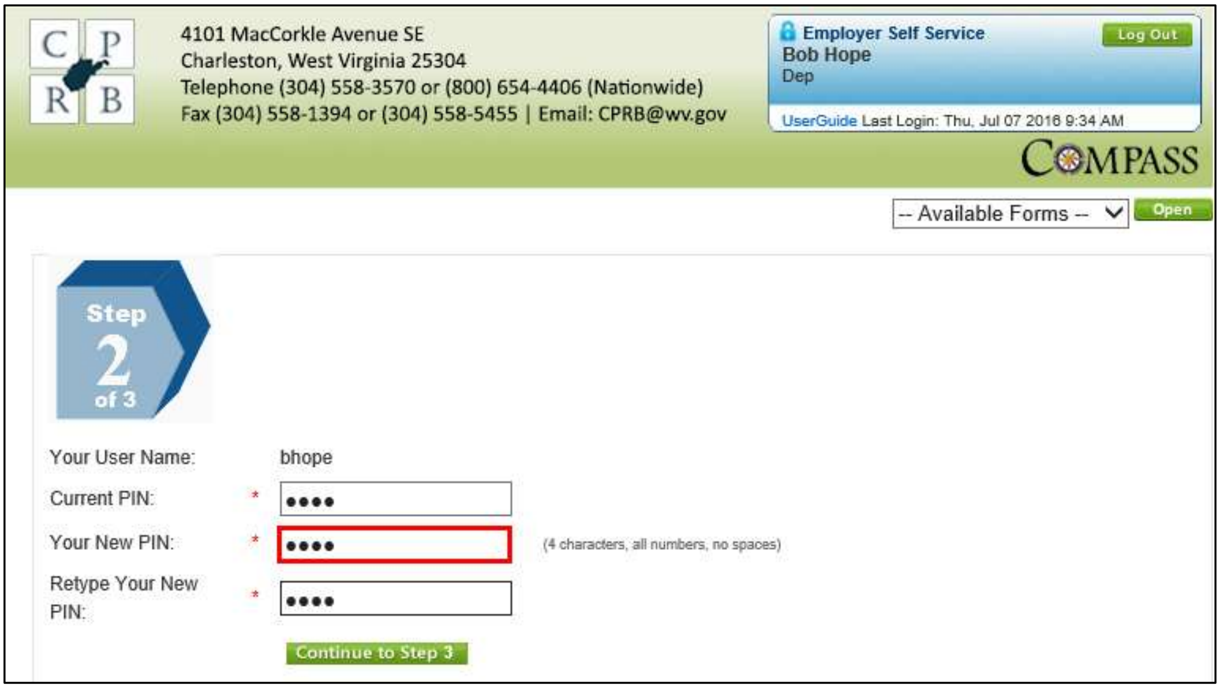
Step 6 -- Click the Continue to Step 2 button.



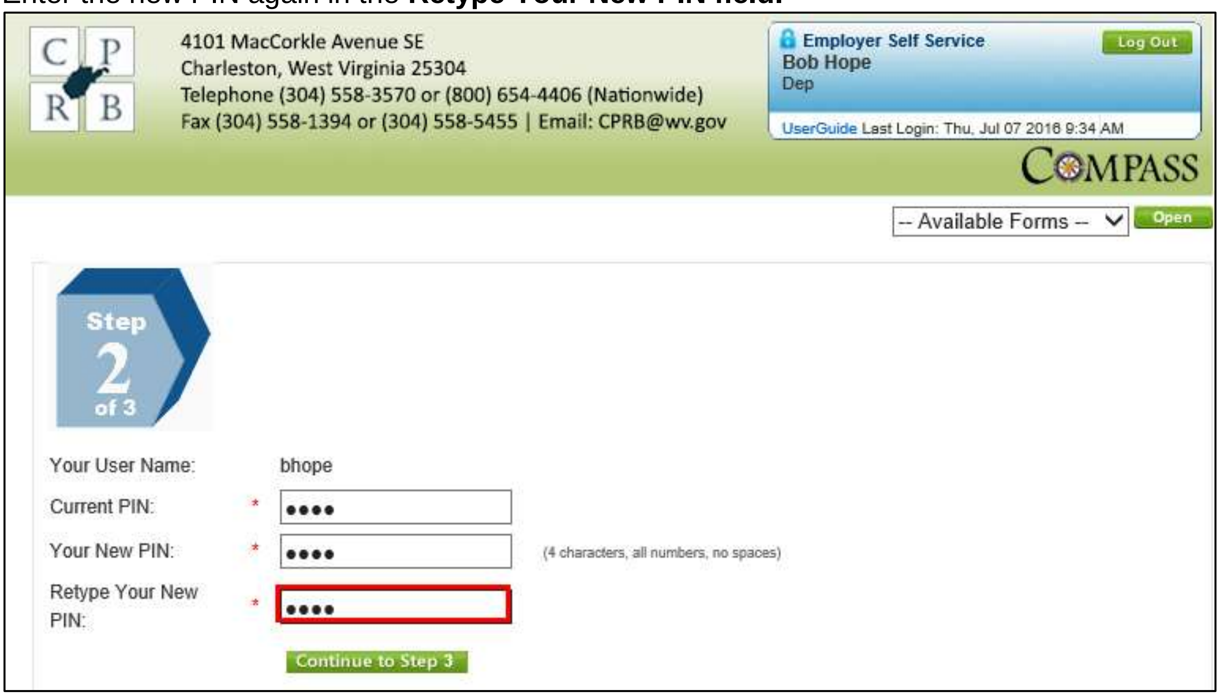
Step 7 -- Enter the PIN the received in the auto-generated mail in the **Current PIN** text field.



Step 8 -- Enter the new PIN in the **Your New PIN** field.

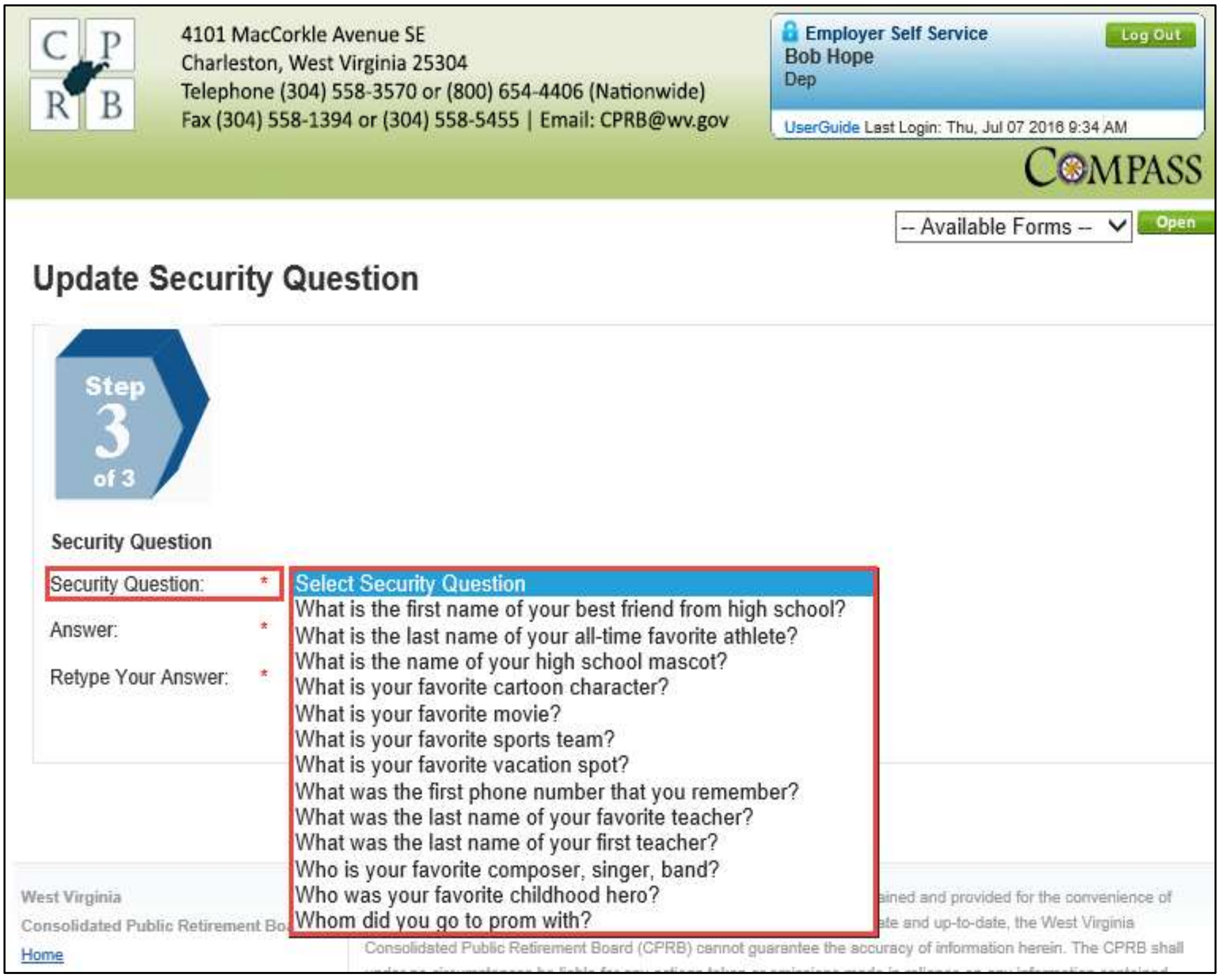


Step 9 -- Enter the new PIN again in the **Retype Your New PIN field.**

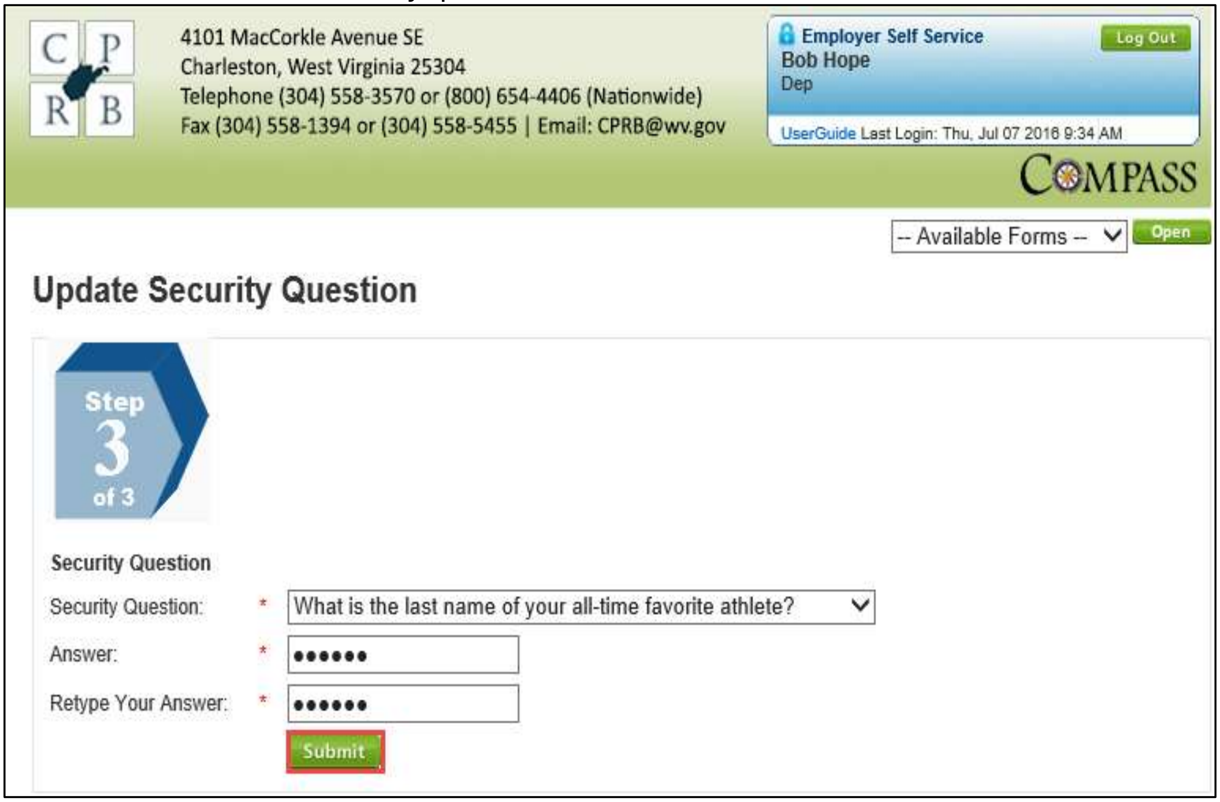


Step 10 -- Click the Continue to Step 3 button to proceed further.

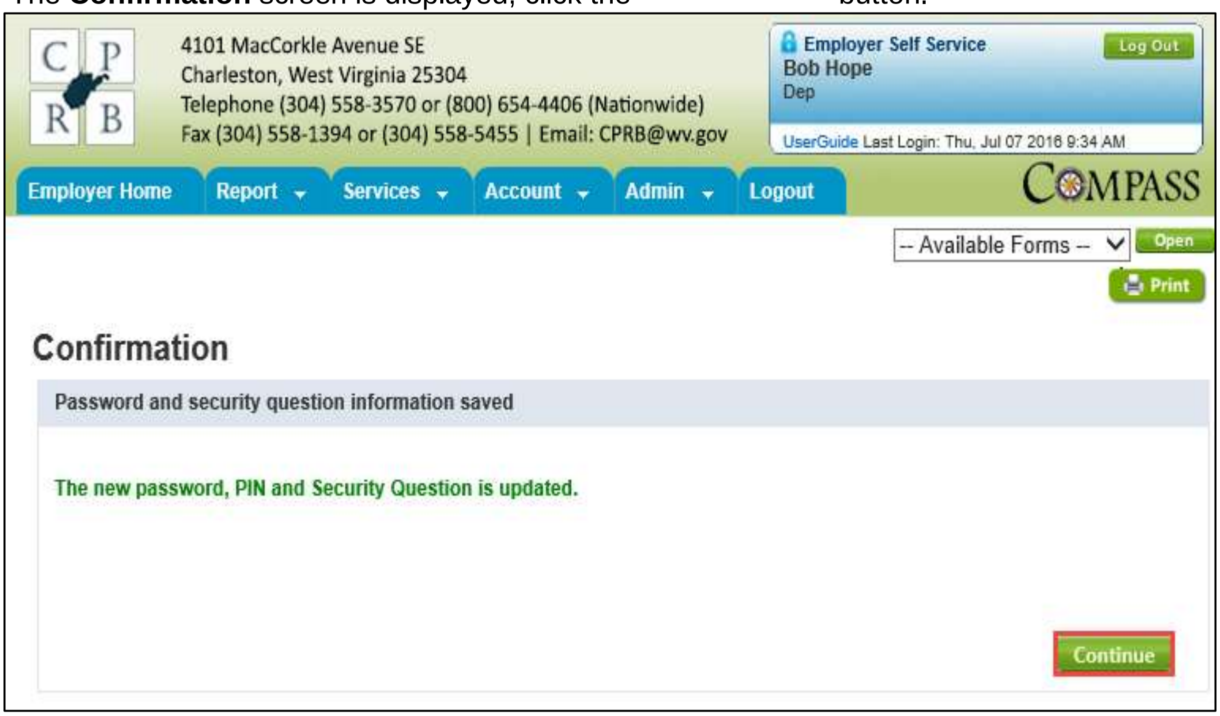
Step 11 -- Select a question from the **Security Question** drop down menu.
Note: In case, password is forgotten, this question will be used to validate access to the account.



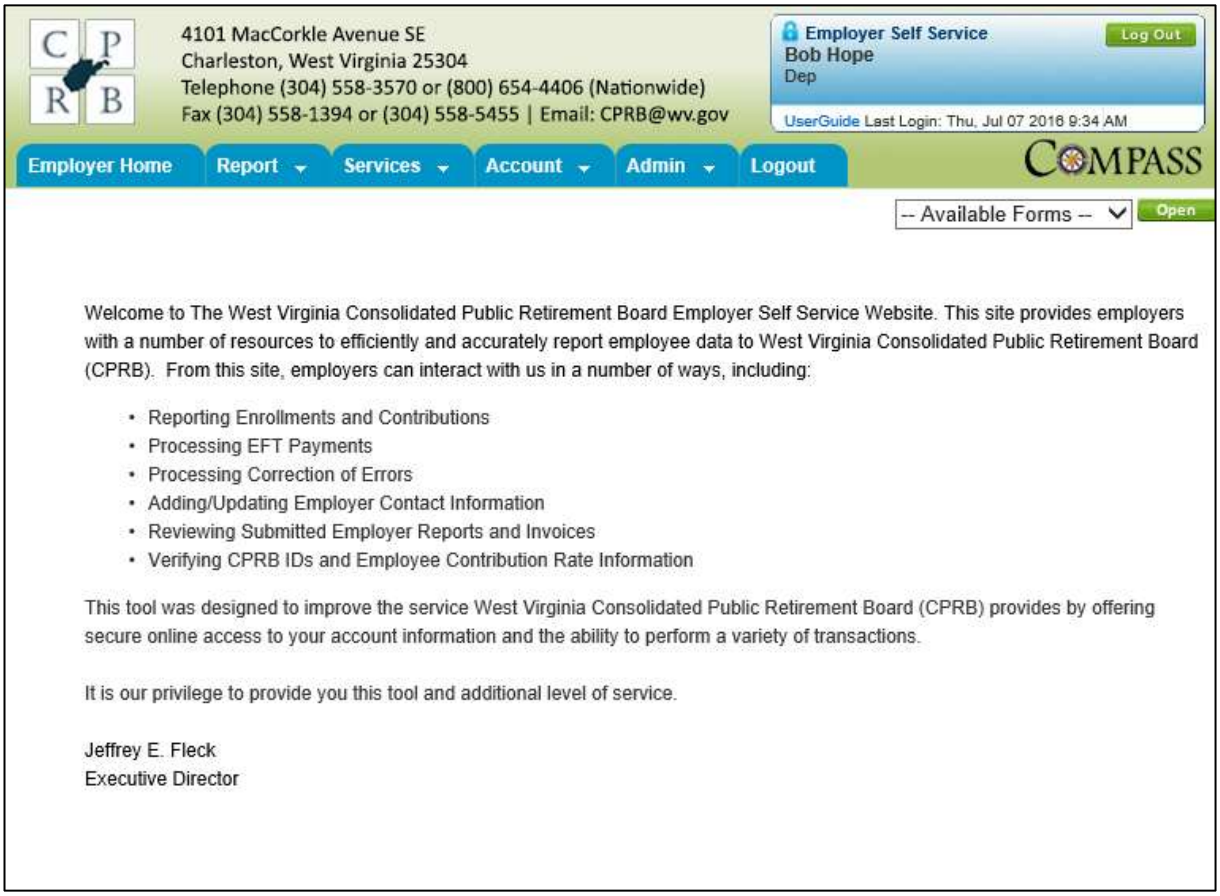
Step 12 -- Enter the answer to the security question and click the Submit button.



Step 13 -- The **Confirmation** screen is displayed, click the Continue button.



Step 14 -- The **Employer Home** screen is displayed.

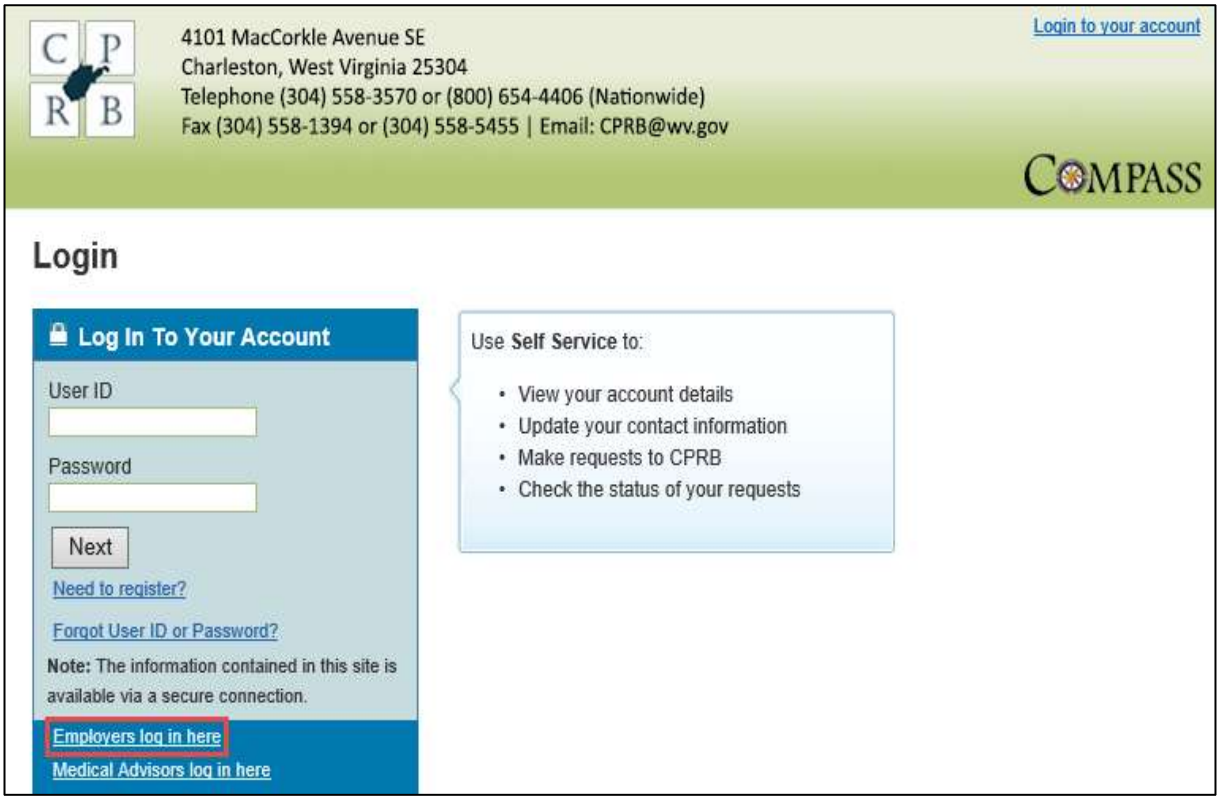


2.3 Login to Employer Self-Service

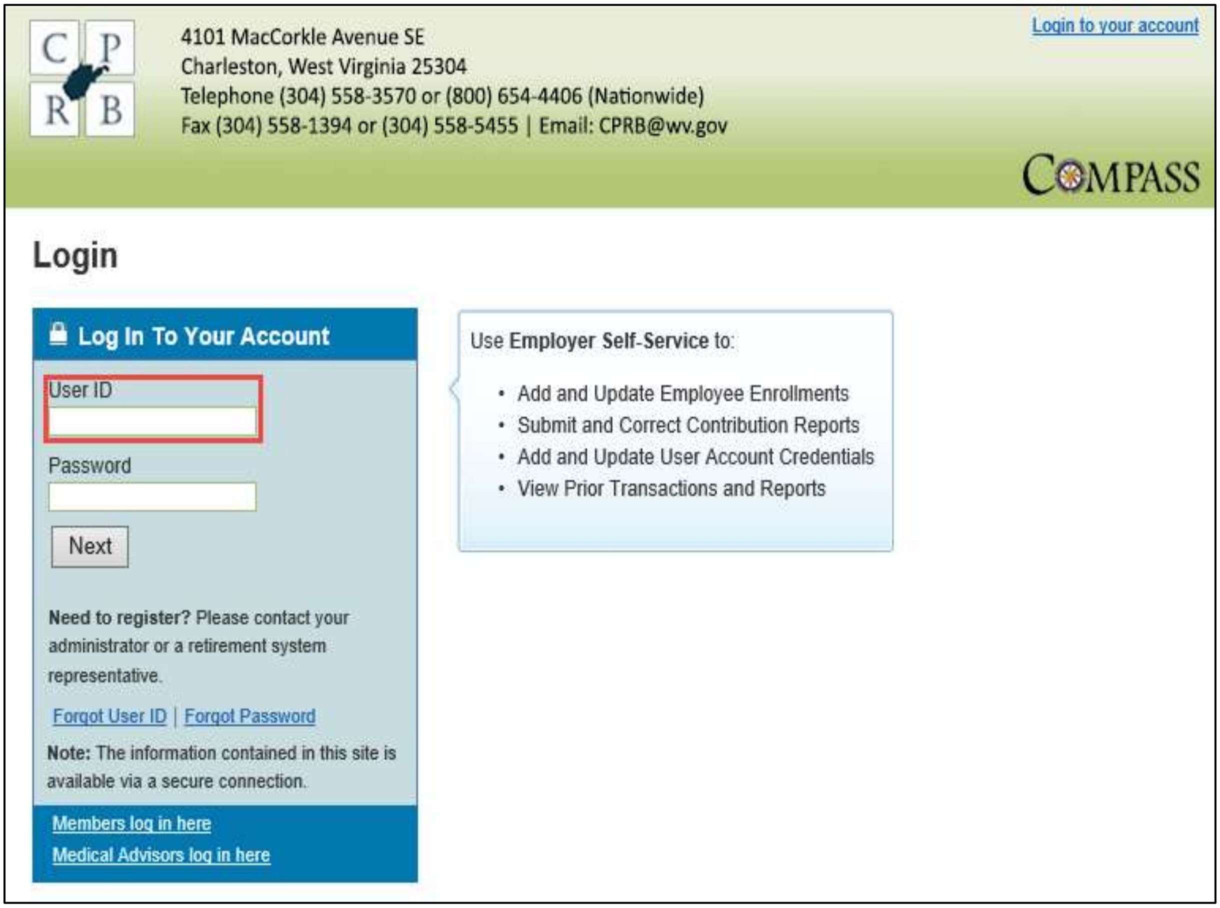
After an employer contact has registered and they have logged into the ESS portal for the first time, then the ESS portal is accessible by using the new password and PIN created by the employer contact.

The steps below describe the process to login to the ESS portal:

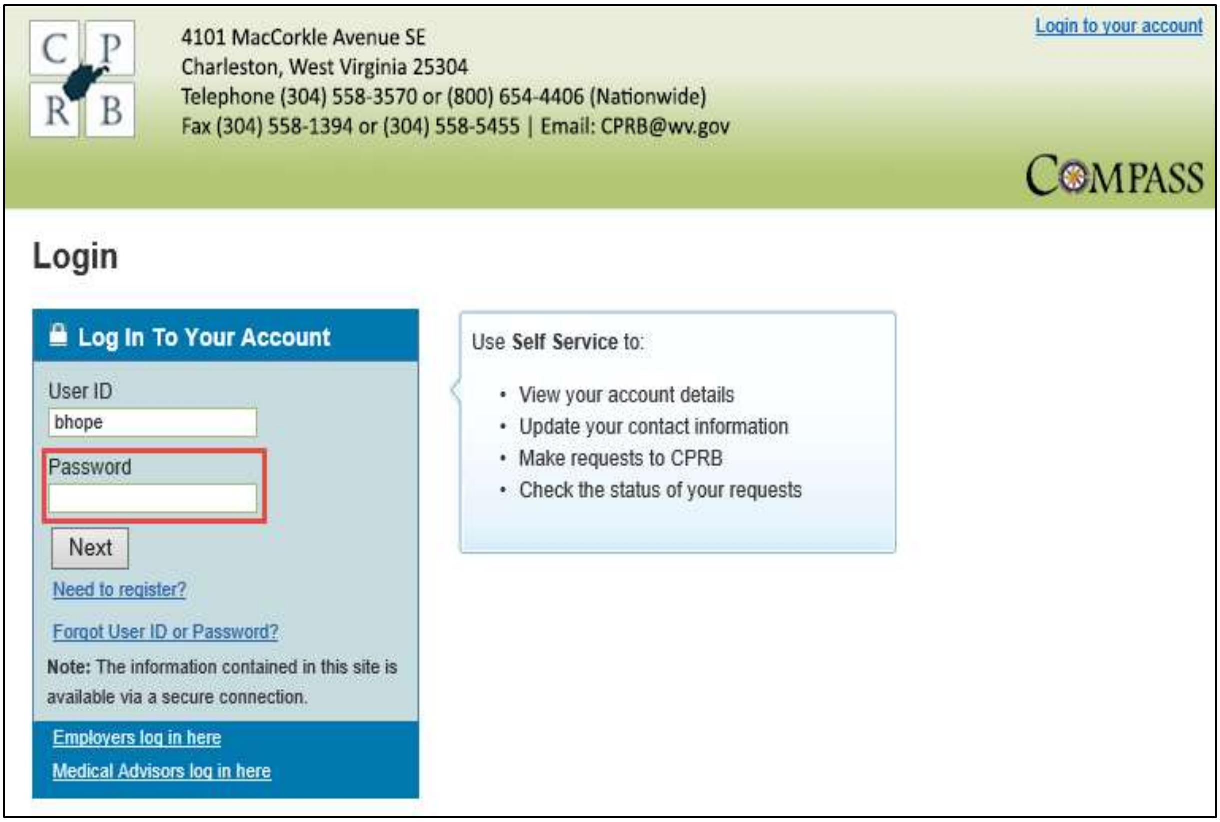
Step 1 -- In the **Self-Service** screen, click the **Employers login here** link.



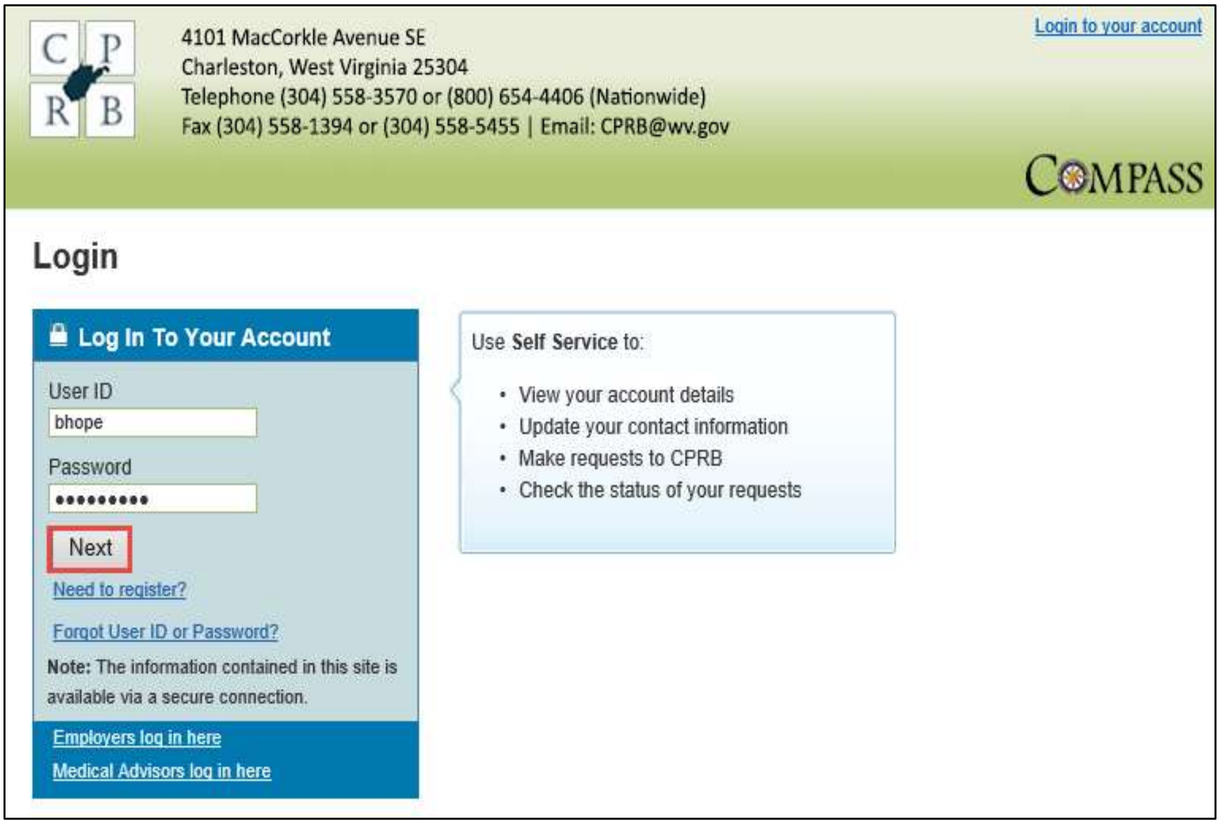
Step 2 -- In the **Login** screen, enter the user ID in the **User ID** field.



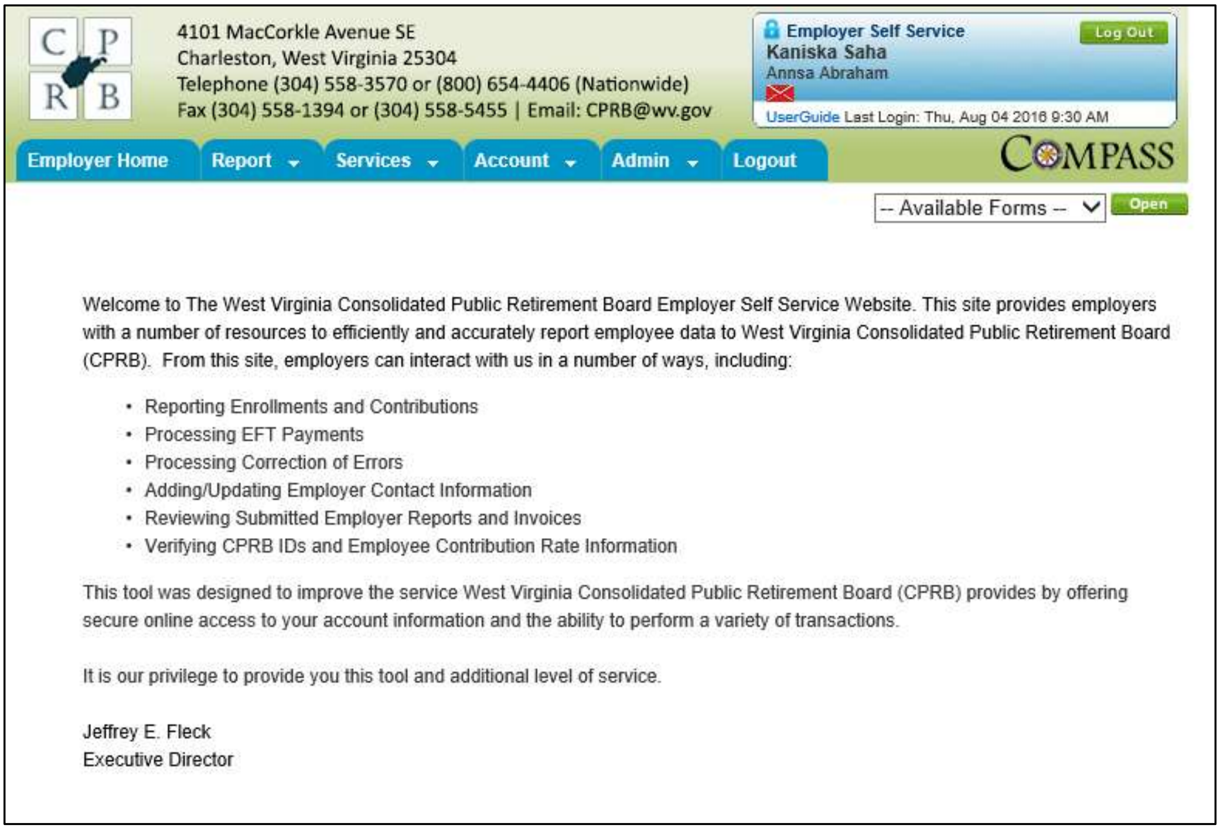
Step 3 -- Enter the **Password** associated with the **User ID**.



Step 4 -- Click the Next button.
Note: An ESS user is allowed five unsuccessful login attempts before the account is locked. Once the account is locked, an ESS user will need to contact their ESS Admin to unlock their account. If the ESS Admin is locked out, they will need to contact CPRB to unlock their Admin account.



Step 5 -- The **Home** screen is displayed.

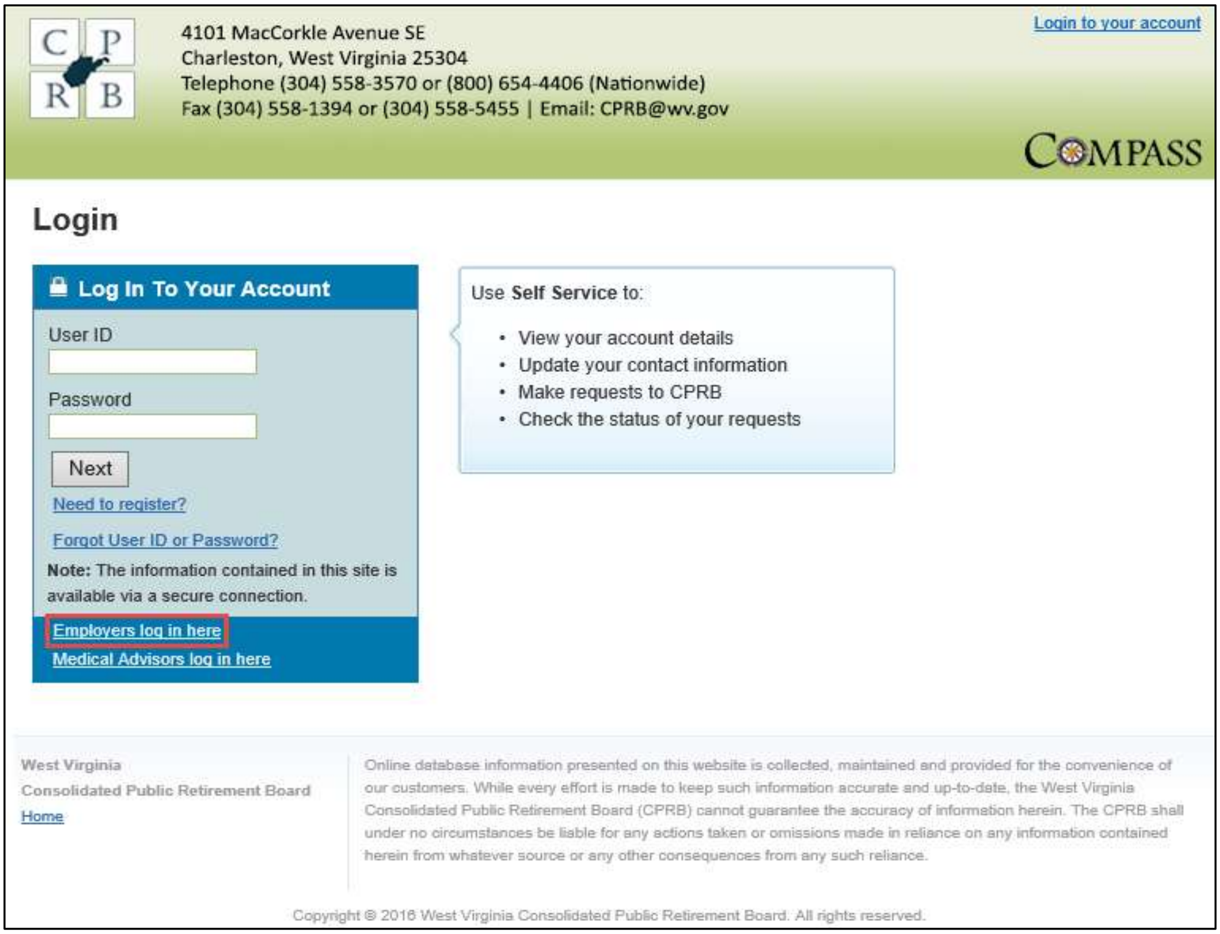


2.4 Retreive Forgotten User ID

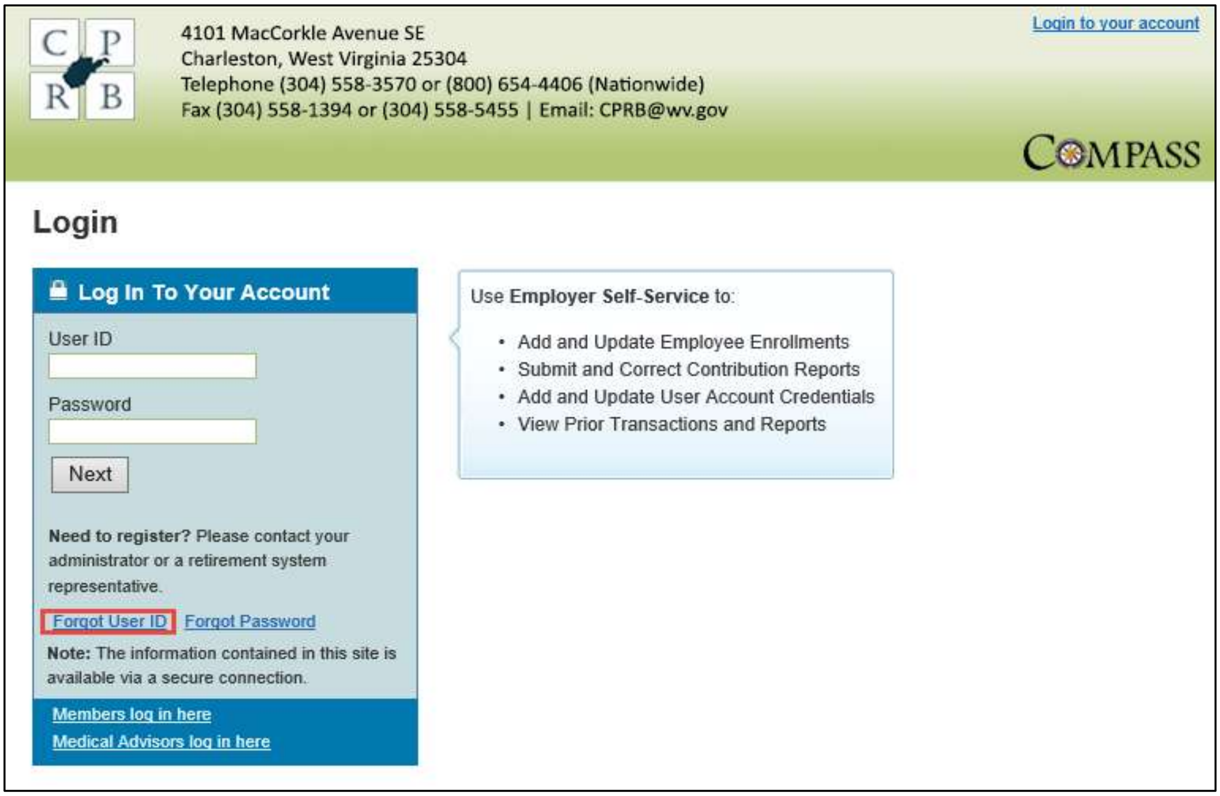
ESS users who have forgotten their User ID, can use the **Forgot User ID** link on the **Log In To Your Account** dialog box. The ESS user will be required to provide their **employer code**, **email address** associated with their ESS account, and **answer the security question** they selected to retrieve their forgotten User ID.

To obtain the forgotten User ID, follow the steps below:

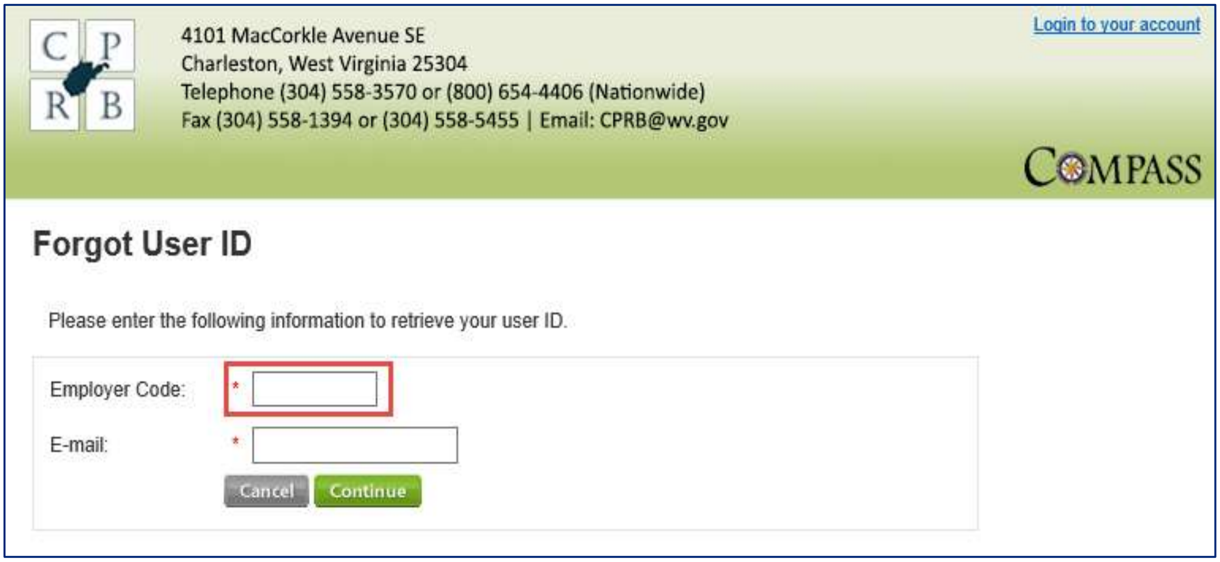
Step 1 -- From the **Self-Service** login screen, click the **Employers login here** link.



Step 2 -- Click the **Forgot User ID** link to reset the user ID.



Step 3 -- Enter the **Employer Code** associated with the login credentials.



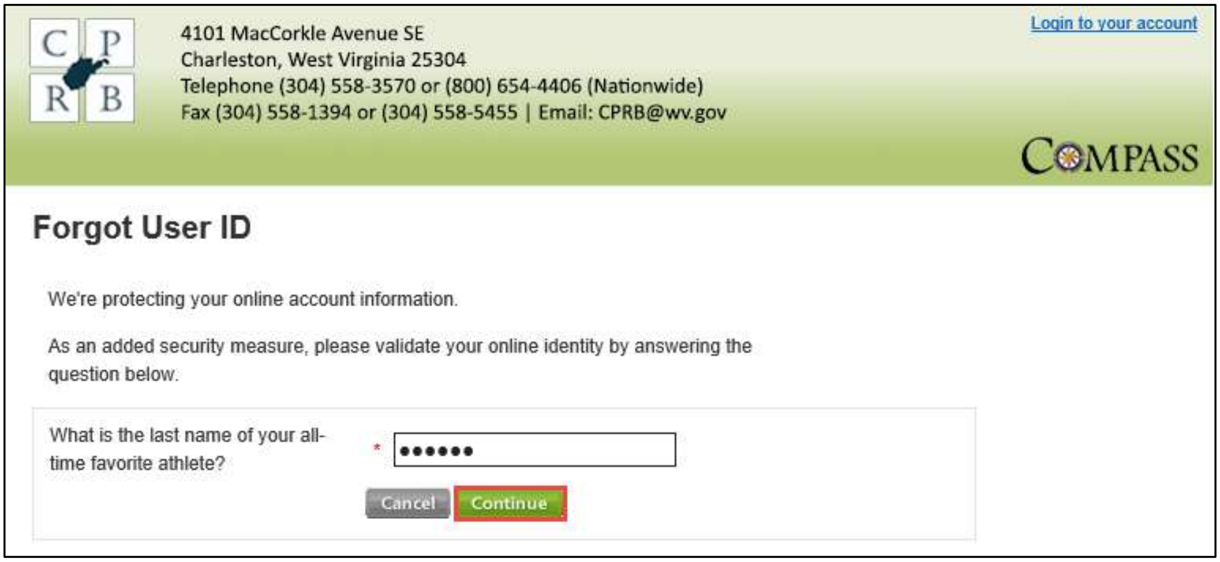
Step 4 -- Enter the email address associated with the login credentials in the **E-mail** field

Step 5 -- Click the 

button.

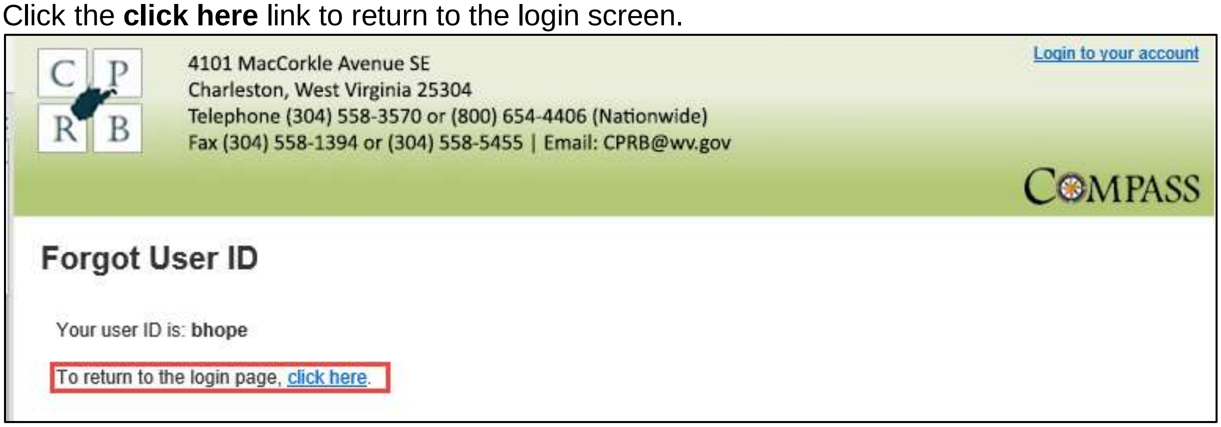
Step 6 -- Enter the answer for the security question in the security question field.

Step 7 -- Click the Continue button.



Step 6 -- The **User ID** is displayed on the screen.

Step 7 -- Click the **click here** link to return to the login screen.

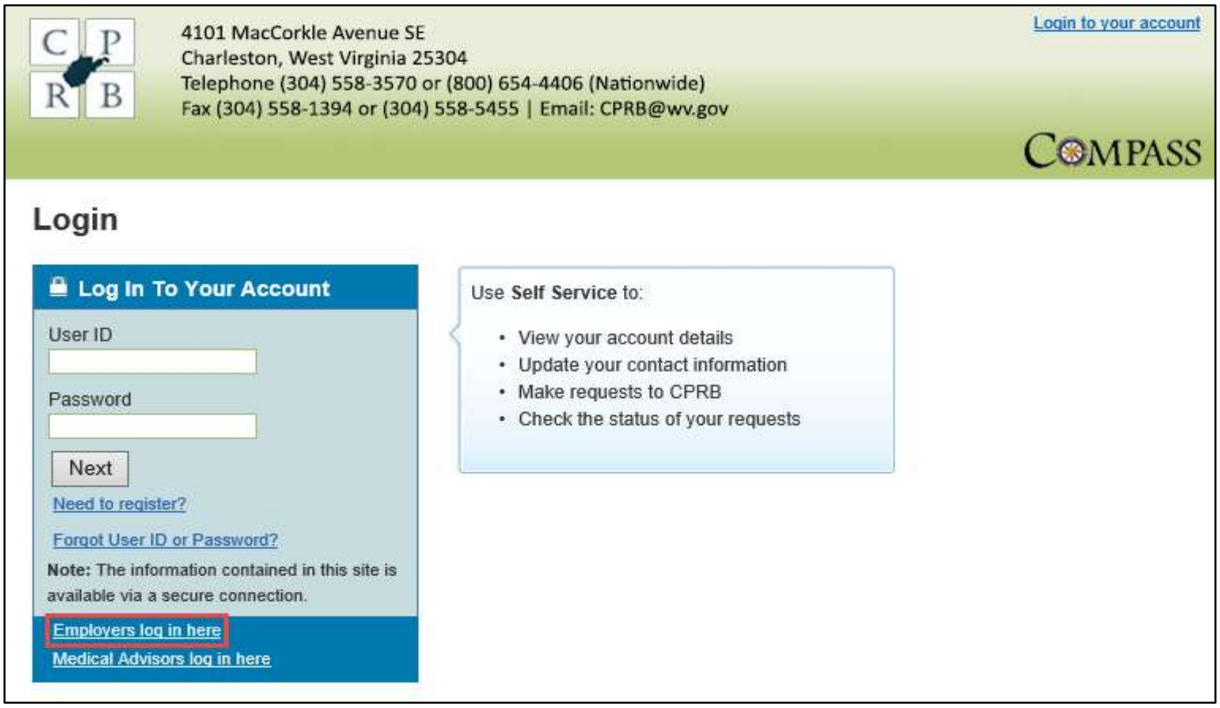


2.5 Reset Forgotten Password

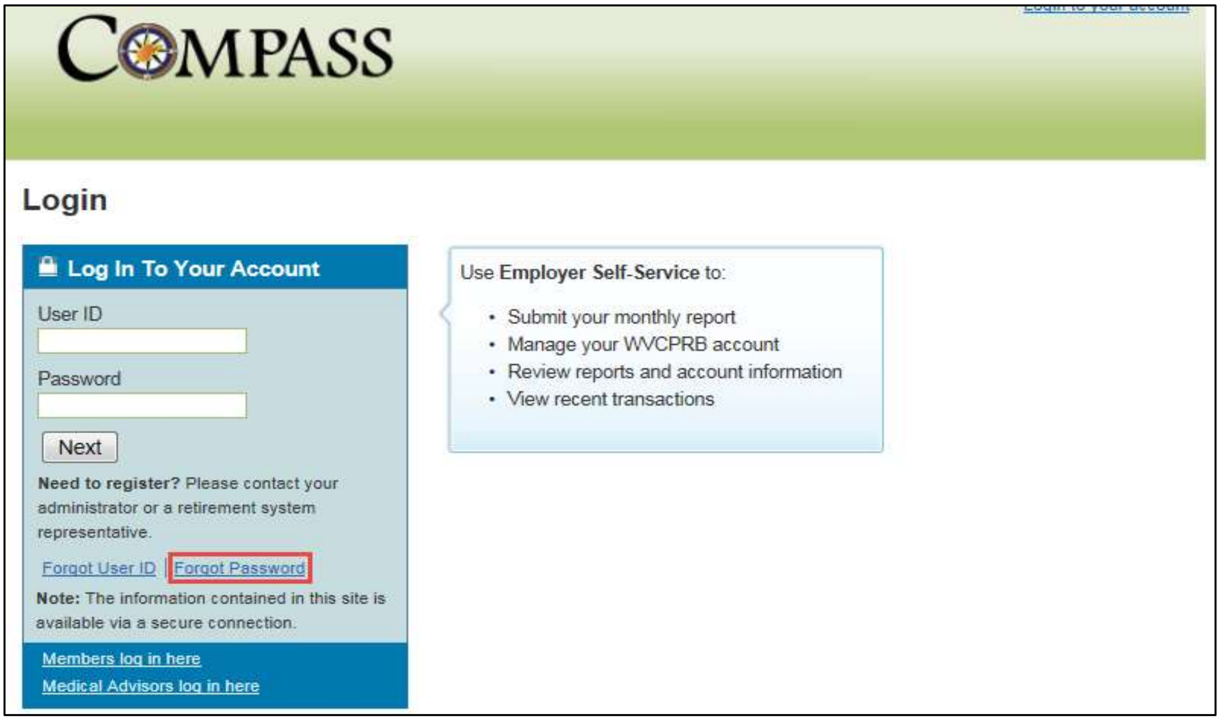
ESS users who have forgotten their password, can use the **Forgot Password** link on the **Log In To Your Account** dialog box. ESS users will be required to enter their **User ID**, **answer the security question** they selected, and enter their **PIN** to Reset the Forgotten Password.

To reset a password, follow the steps listed below:

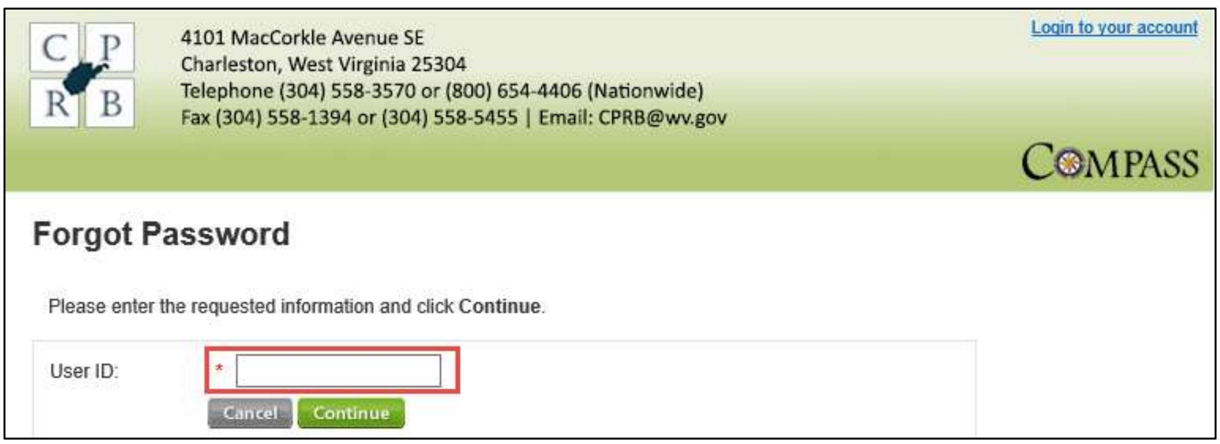
Step 1 -- From the **Self-Service** login screen, click the **Employers login here** link.



Step 2 -- In the **Log In To Your Account** dialog box, click the **Forgot Password** link.



Step 3 -- Enter information in the **User ID** field.



Step 4 -- Click the 

button.

Step 5 -- Enter the answer of the security question in the security question field.

Step 6 -- Click the **Continue** button.

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

Step 8 -- Click the **Continue** button.

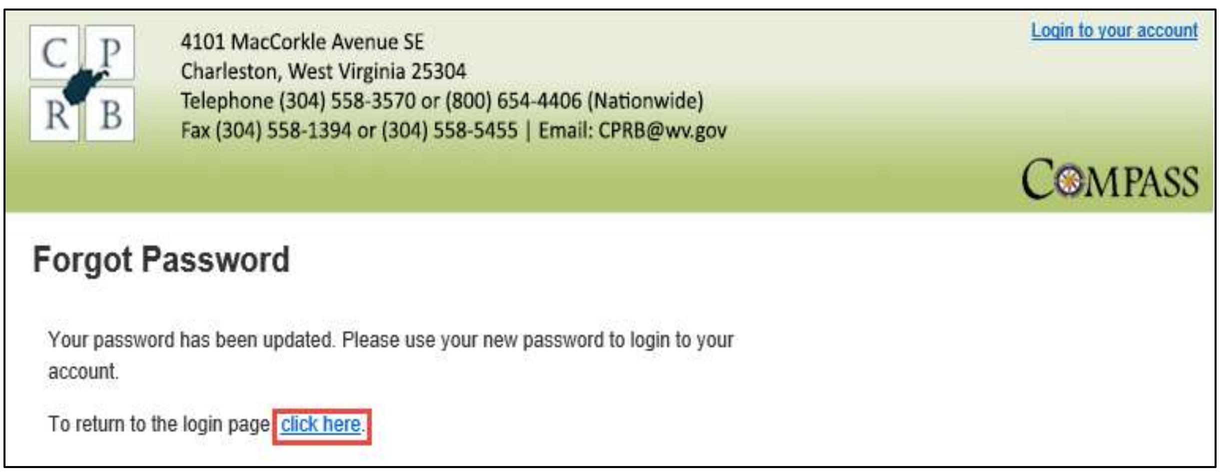
Step 9 -- Enter a new password in the **Your New Password** field following the instructions to the right of the field.

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

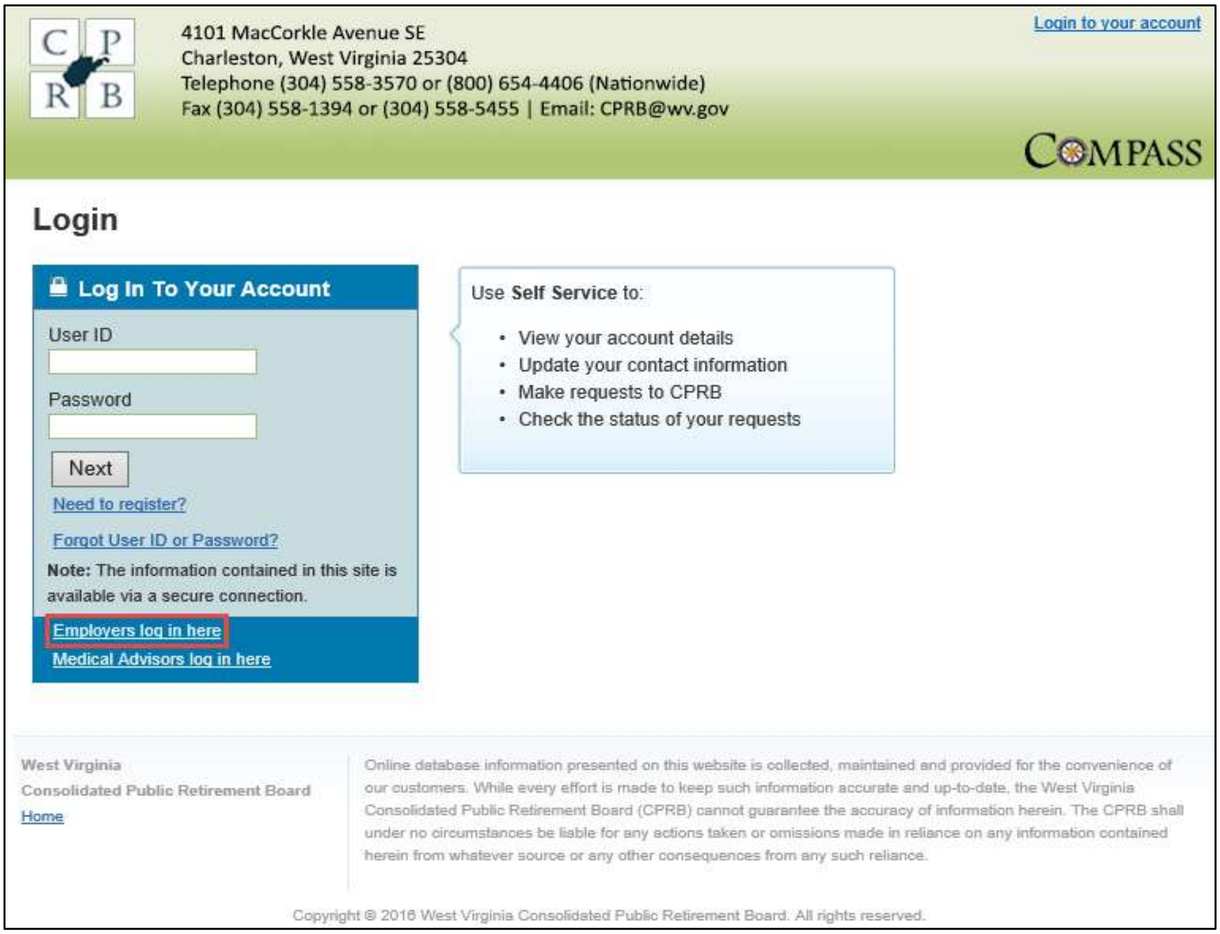
Step 11 -- Click the Continue button.

Note: Clicking the Cancel button will display the initial self-service login screen.

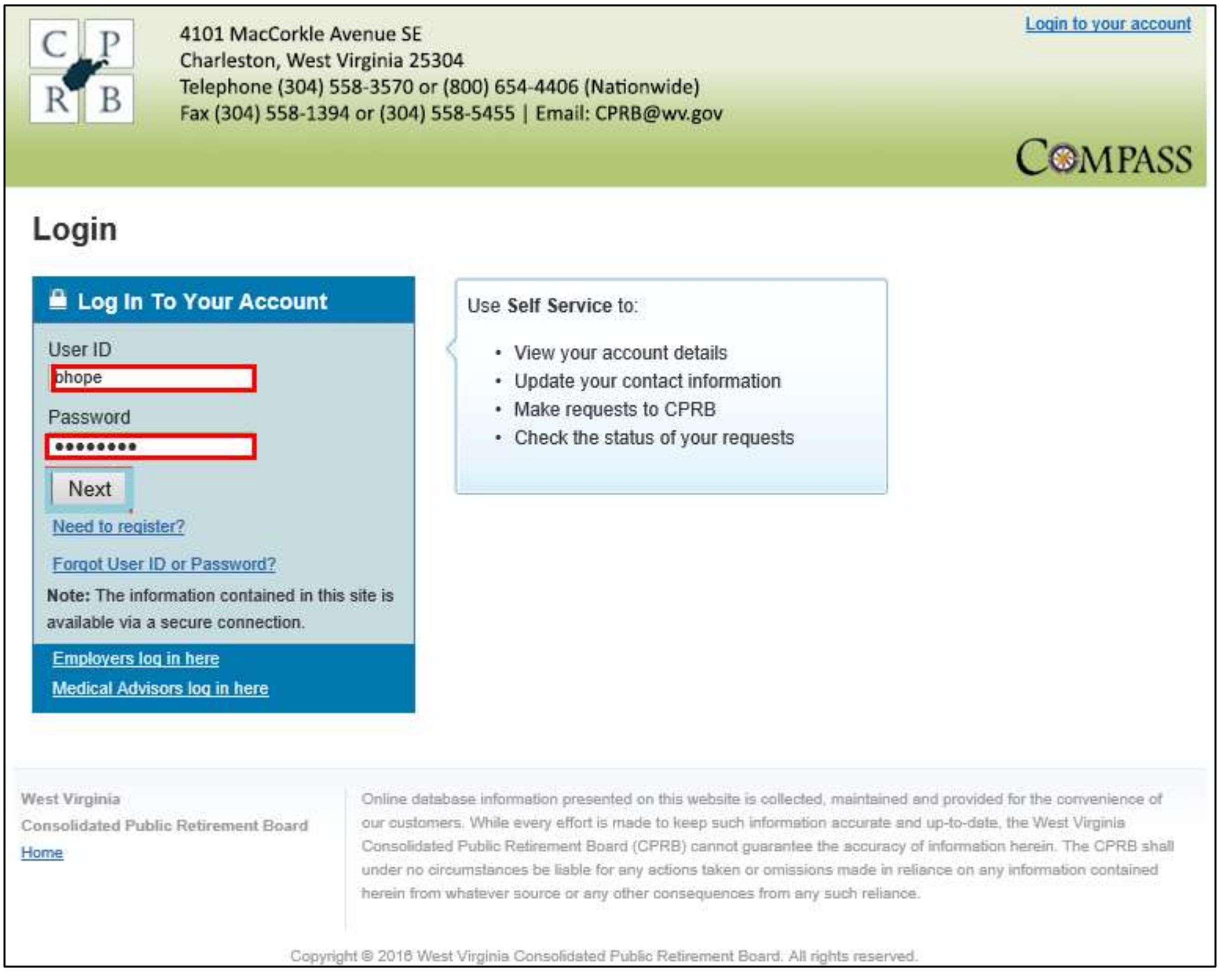
Step 12 -- The password is changed and updated in the system. Click the **click here** link to return to the login screen.



Step 13 -- The **Login** screen is displayed. Click the **Employers login here** link.

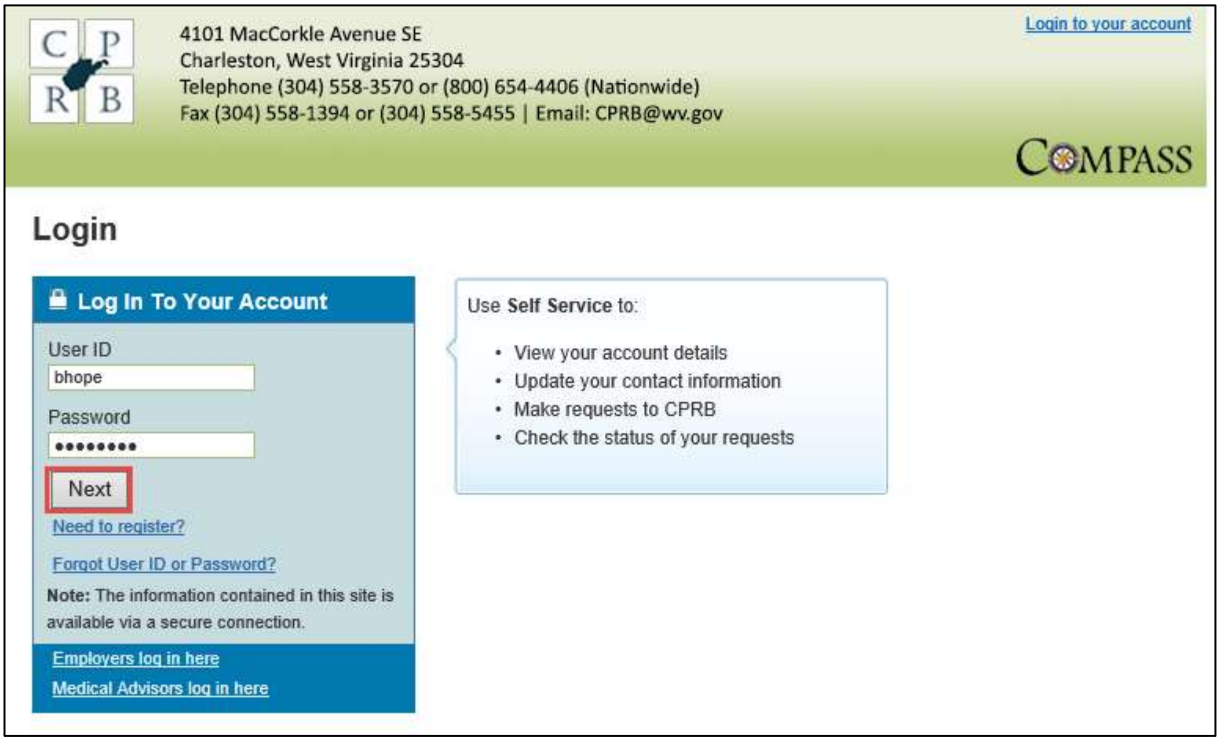


Step 14 -- Enter the new User ID and Password in the **User ID** and **Password** fields.



Step 15 -- Click the 

button to access the ESS portal.


C P R B
4101 MacCorkle Avenue SE
Charleston, West Virginia 25304
Telephone (304) 558-3570 or (800) 654-4406 (Nationwide)
Fax (304) 558-1394 or (304) 558-5455 | Email: CPRB@wv.gov
Login to your account
COMPASS
Login
Log In To Your Account
User ID
bhope
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 account details
Update your contact information
Make requests to CPRB
Check the status of your requests

3. Manage Office Locations

The **Office Location** screen gives the user the ability to add, update, or delete office locations associated with an organization. Multiple office locations can be listed using this screen.

Note: Once the office location is set up only then can a contact person be added, and each contact person must be assigned a location.

3.1 Add an Office Location

If an organization has a new office, enter the new office location using the **Office Location** screen. The following steps demonstrate how to add a new office location.

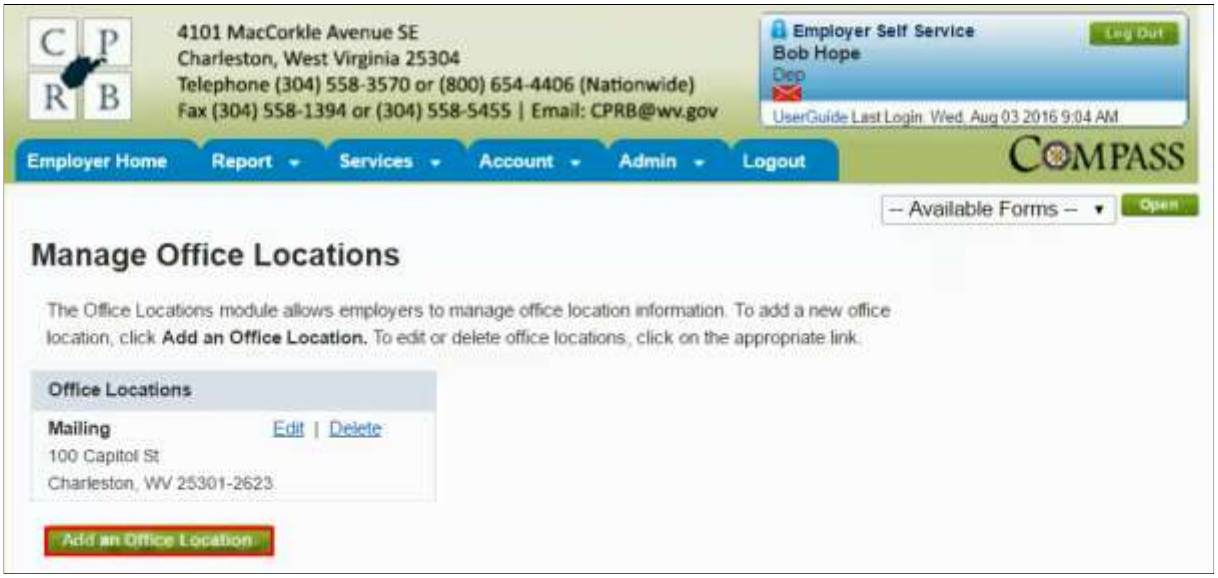
Note: A mailing location must be added before any other location types can be added. It is the default location type. Only one Primary Location and one Mailing Location (these two can be the same location), and as many Satellite Locations as needed can be added per employer.

Step 1 -- To navigate to the **Office Locations** screen, click the following menu options:

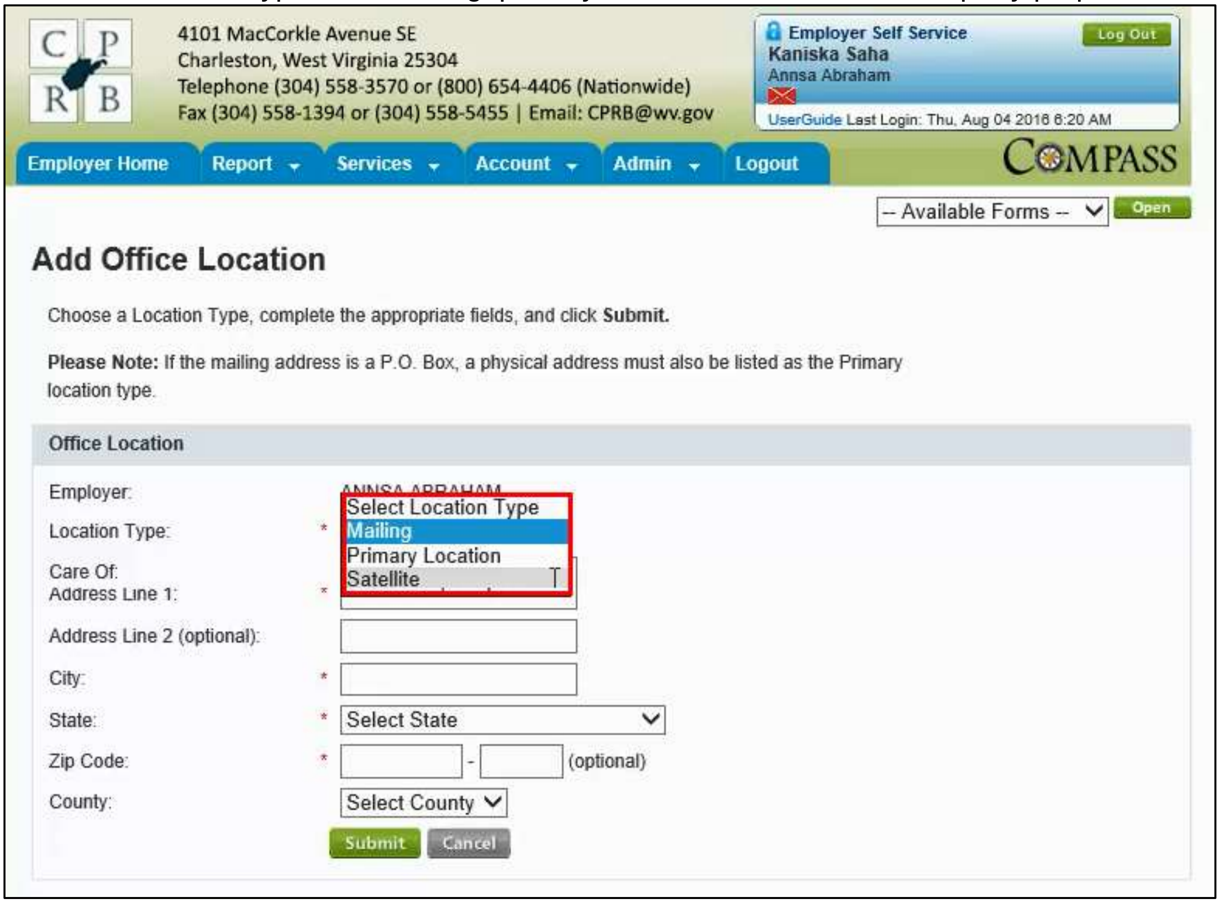
Admin > **Office Locations**

Step 2 -- If the organization office location already exists, a list of existing office locations displays in the **Office Location** section of the **Manage Office Locations** screen.

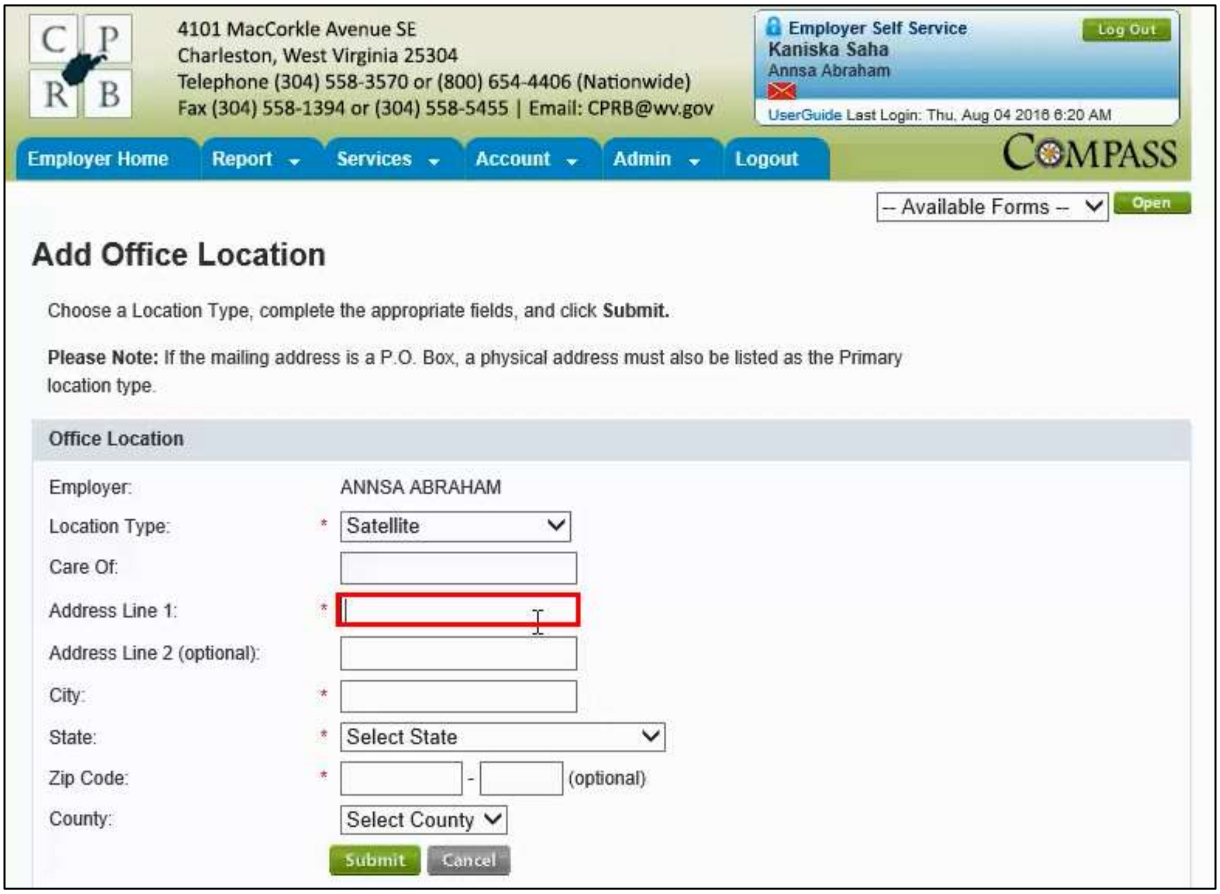
To add a new office location, click the Add an Office Location button.



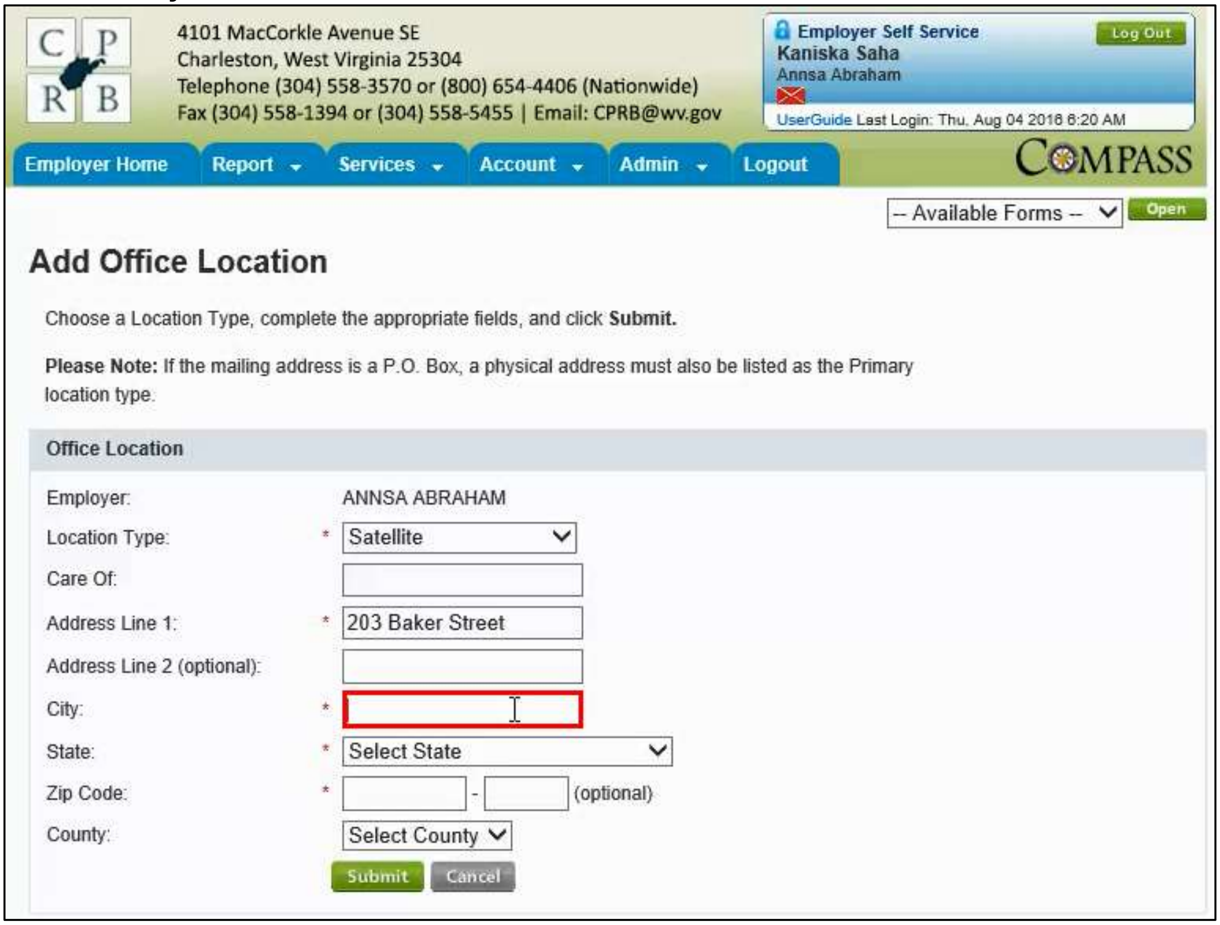
Step 3 -- The **Add Office Location** screen is displayed. Select the **Location Type** from the drop down options.
Note: The location types are: mailing, primary location, satellite, and third party preparer.



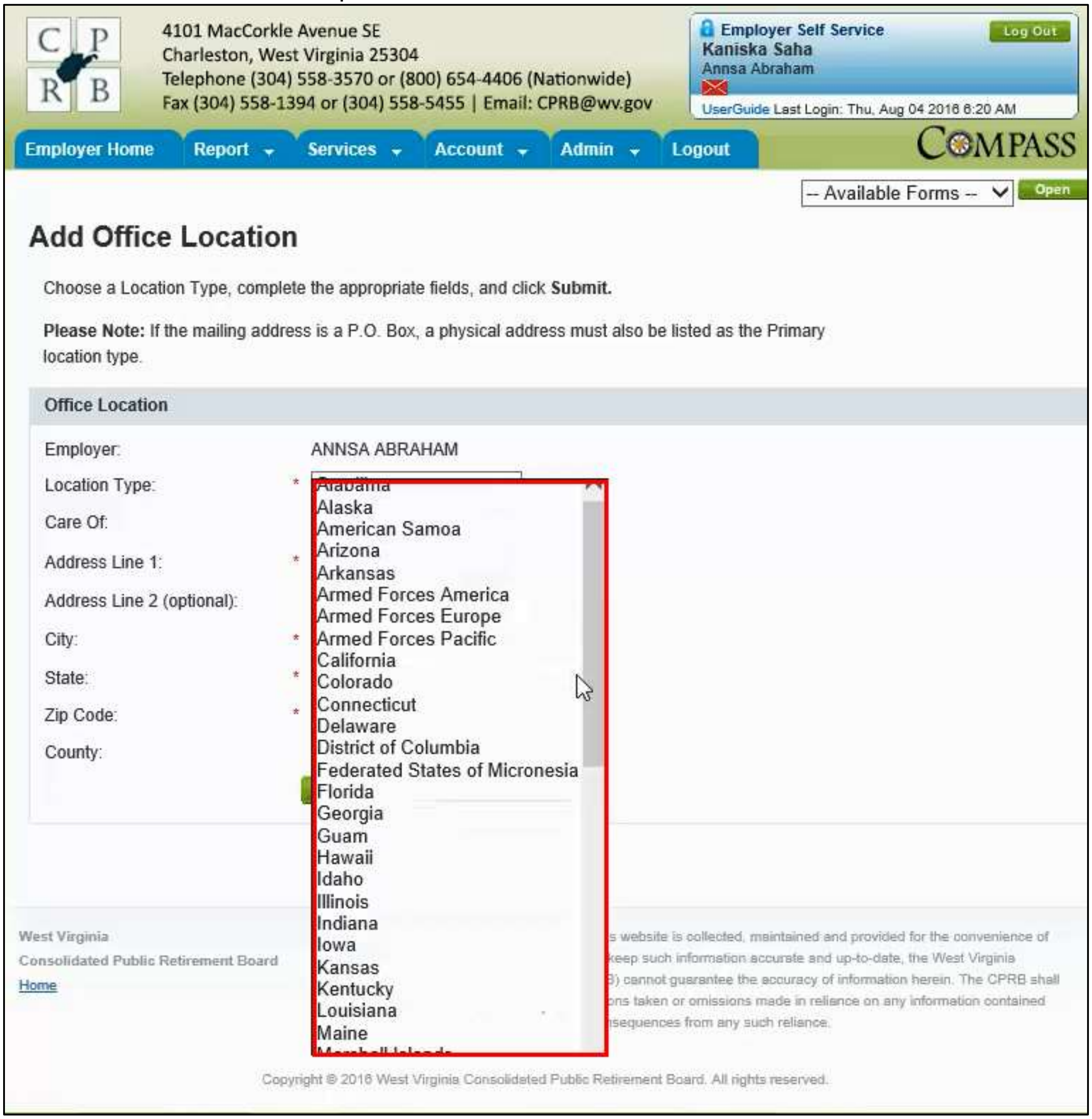
Step 4 -- Enter the **Adress Line 1** text field.



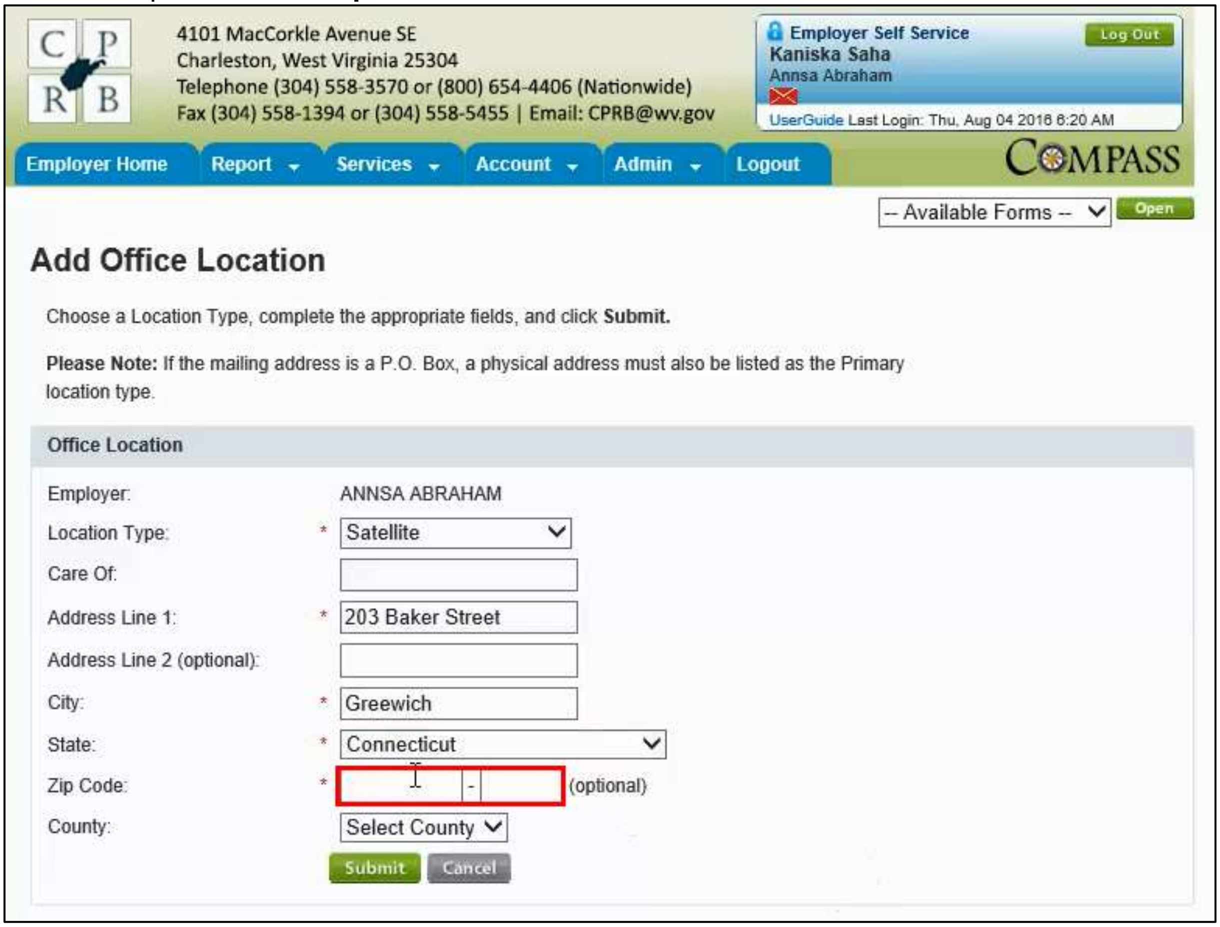
Step 5 -- Enter the **City** in the text field.



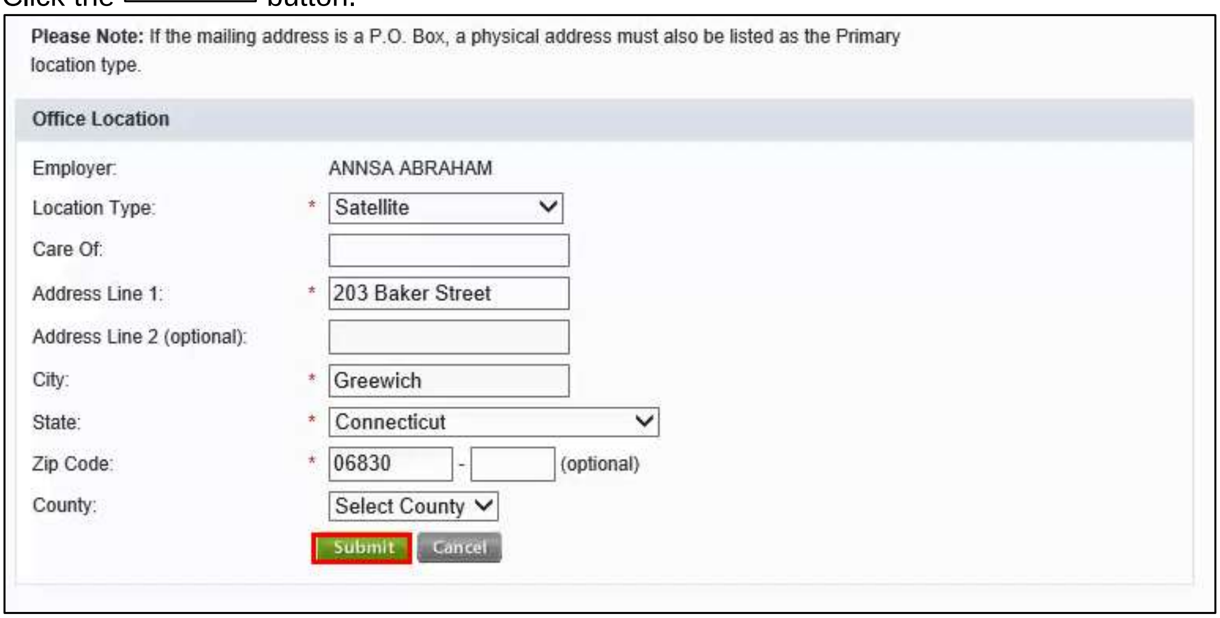
Step 6 -- Select the **State** from the drop down menu.



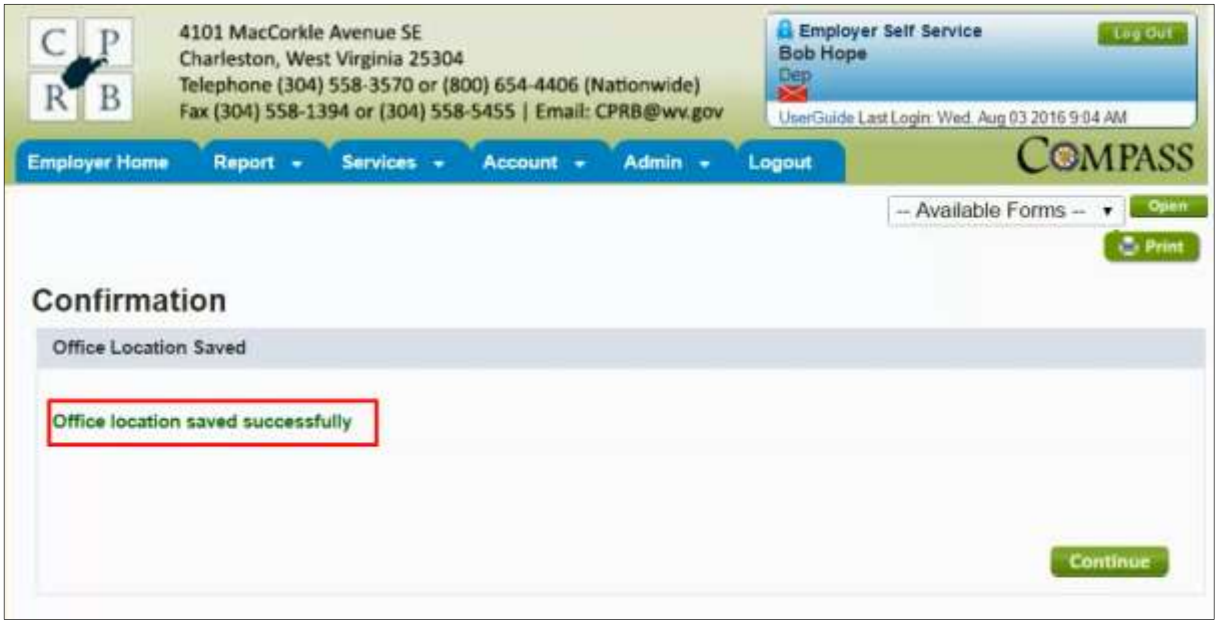
Step 7 -- Enter the zip code in the **Zip Code** field.



Step 8 -- Click the Submit button.



Step 9 -- The "**Office location saved successfully"** message is displayed**,** confirming the office location saved is successfully.

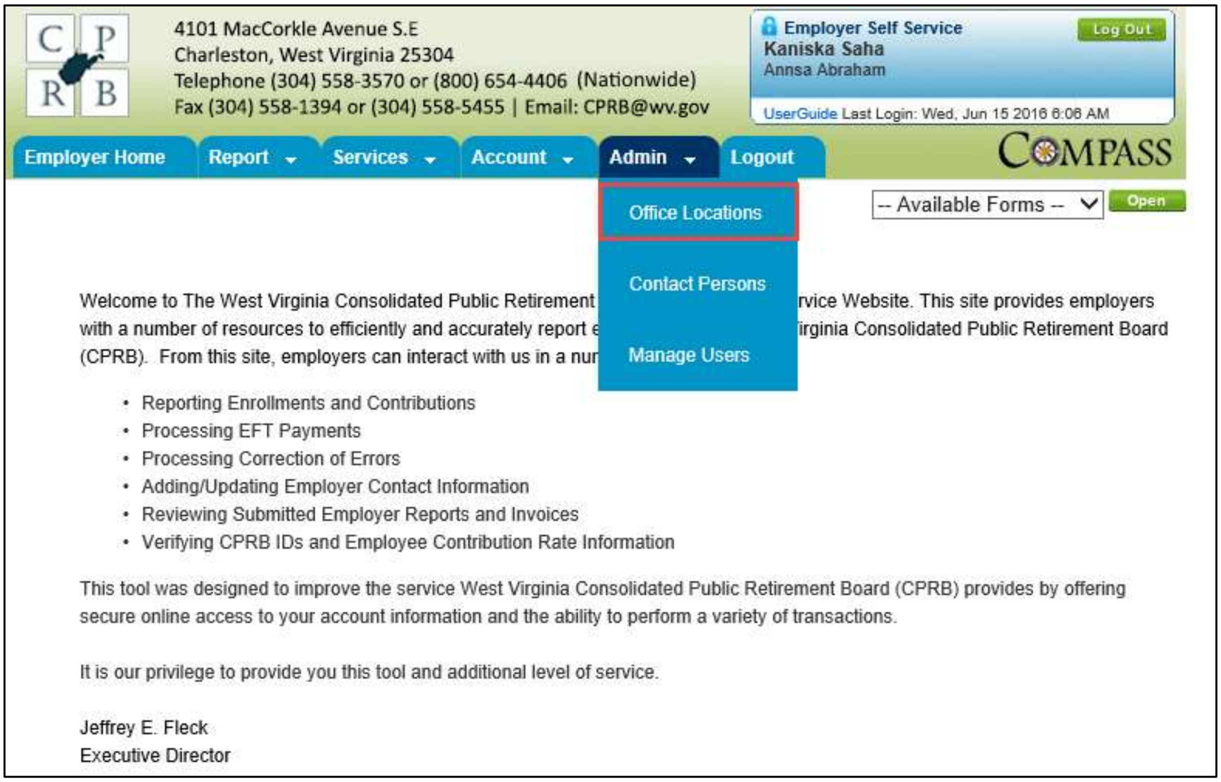


3.2 Edit an Office Location

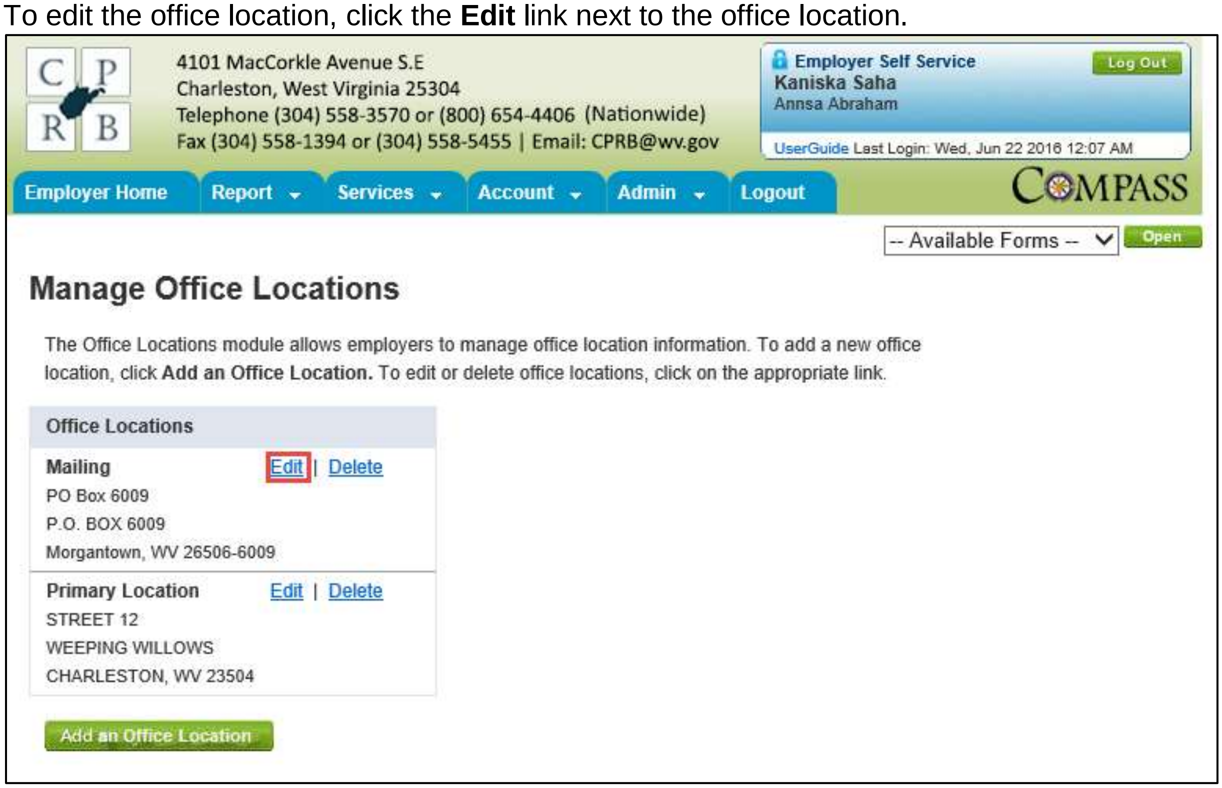
Use the **Office Location** screen to update an organization's existing office locations. Follow the steps below to edit an office location:

Step 1 -- To navigate to the **Office Location** screen click the following menu options:

Admin > **Office Locations**

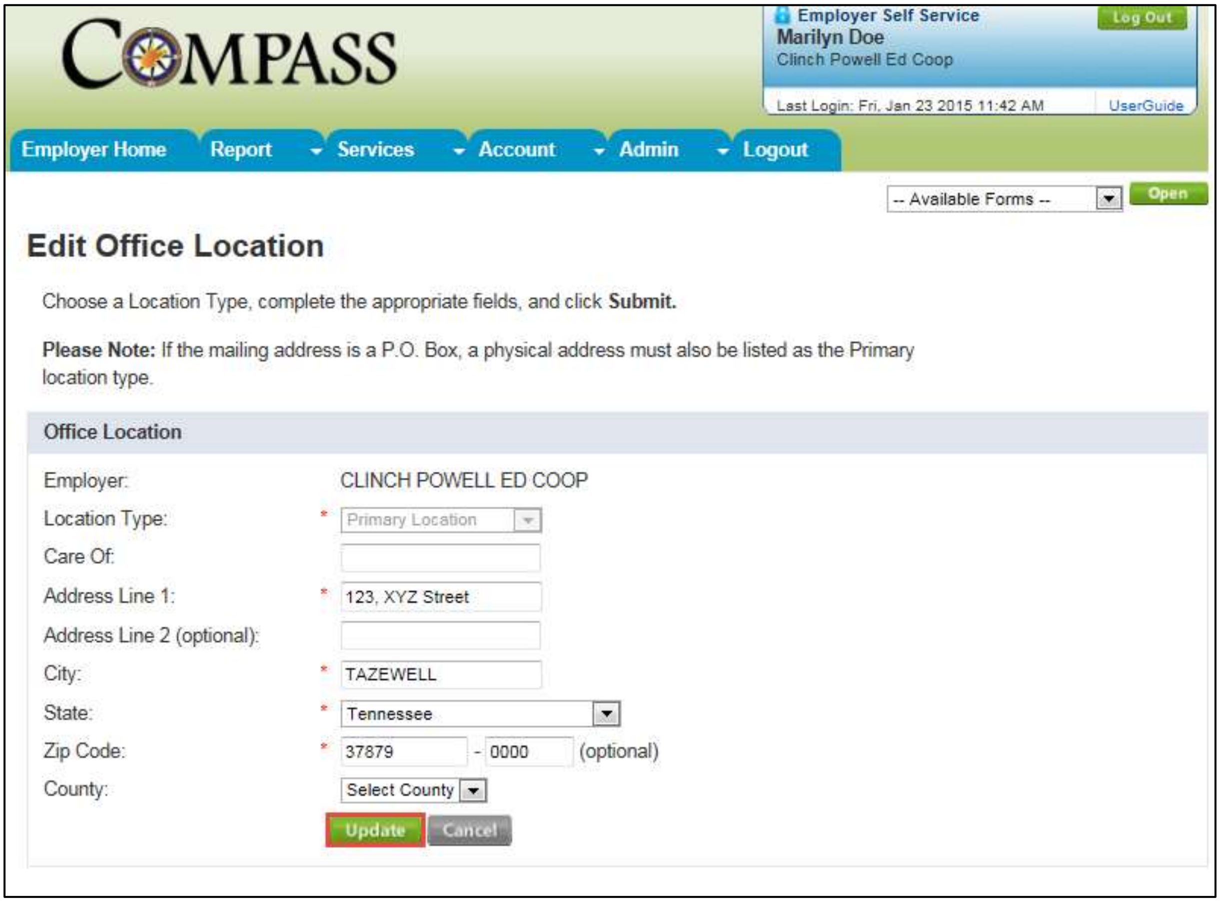


Step 2 -- To edit the office location, click the **Edit** link next to the office location.



Step 3 -- Edit the required information for the office location. Click the 

button to confirm edits.



Step 4 -- The "**Office location save successfully**" message displays indicating the edits have been successfully saved. Click the **Continue** button to return to the **Manage Office Locations** screen.

3.3 Delete an Office Location

Use the **Office Location** screen to delete an organization's office locations. An Office Location can only be deleted if there is not an existing Contact Person linked to the Office Location. To delete an office location with an existing Contact Person, either:

- Navigate to section 4.2 Edit Contact Person, follow steps 1 – 4 to reassign the Contact Person associated with the office location to be deleted to another office location
- If the Contact Person does not have an ESS role or account, navigate to section 4.3 Delete a Contact Person, follow steps 1 – 4 to delete a contact person associated with the office location to be deleted

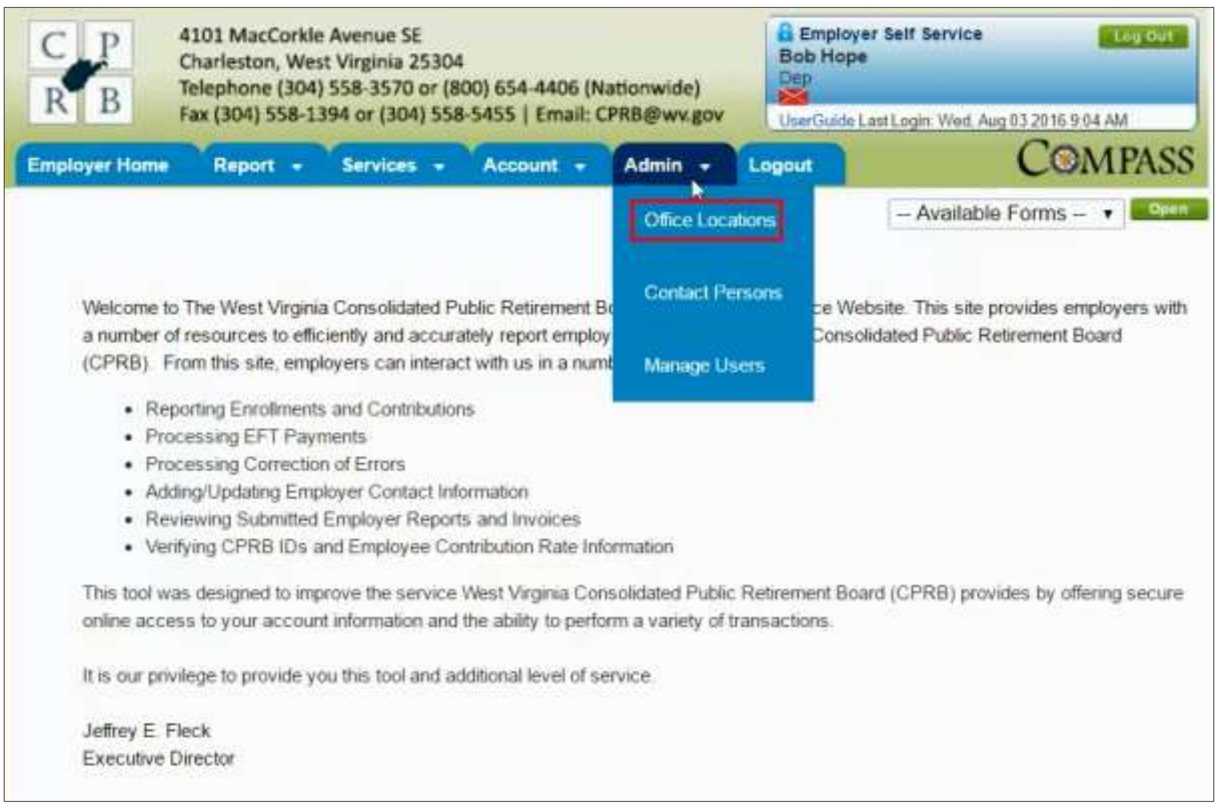
An Office Location can only be deleted if the office location type assigned to the office is Satellite or Primary. If the office location type assigned is Mailing the office location cannot be deleted but if can be the office location type can be edited or updated. To edit an office location with a location type listed as Mailing Location:

- Navigate to section 3.2 Edit an Office location to update the Mailing Office location type.

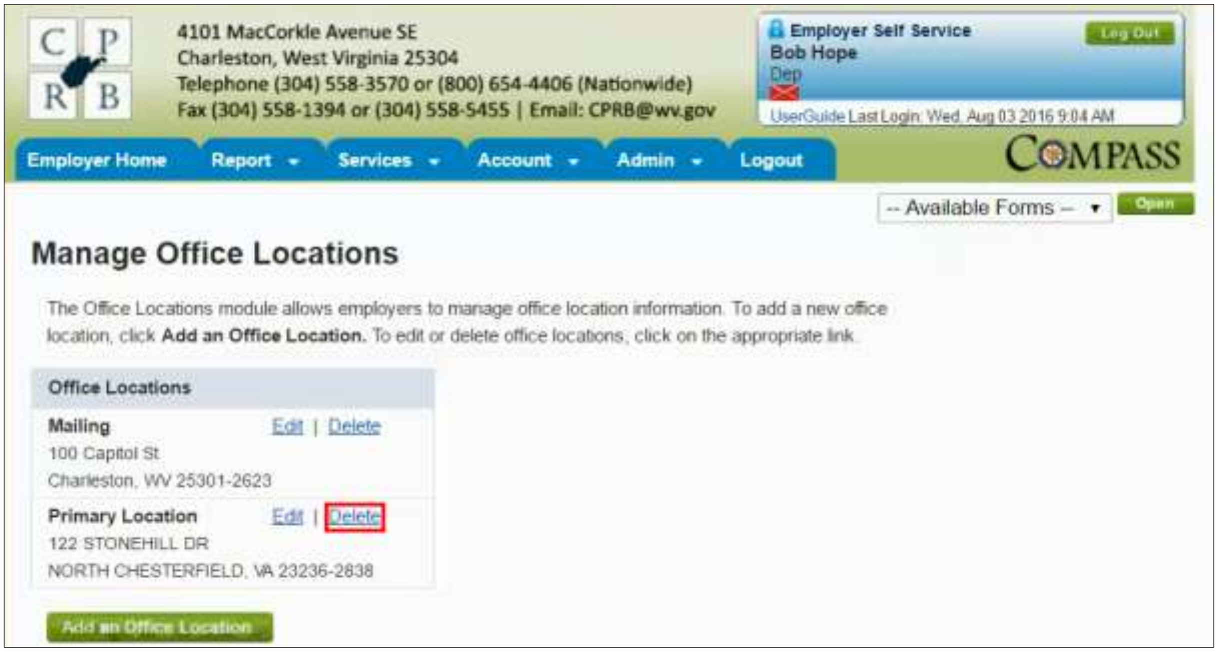
Follow the steps below to delete an office location:

Step 1 -- To navigate to the **Office Location** screen, click the following menu options:

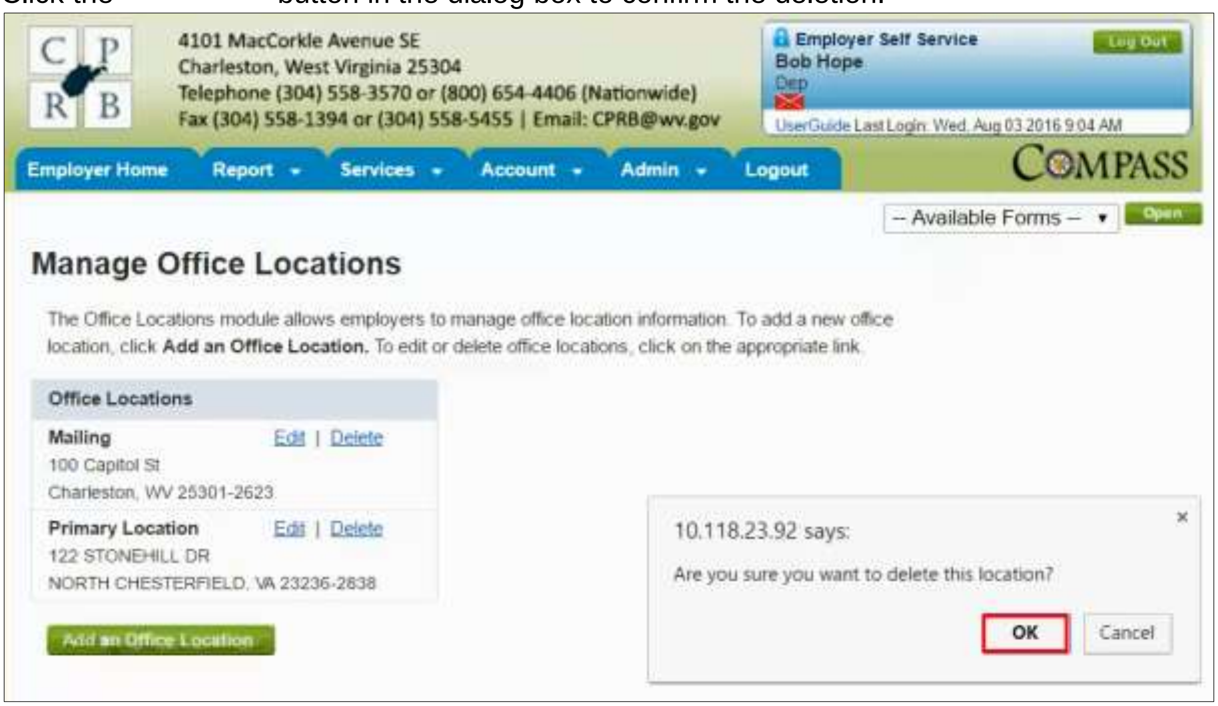
Admin > **Office Locations**



Step 2 -- On the **Manage Office Locations** screen, click the **Delete** link next to the office location to delete the office location.



Step 3 -- Click the OK button in the dialog box to confirm the deletion.



Step 4 -- The “**Office location save successfully**” message displays message is displayed, confirming the office location is deleted successfully.

4. Maintain Contact Persons

The **Contact Person** screen allows employers to manage their staff's contact information. The **Contact Person** screen can be used to add a new contact person, edit the existing contact information, or/and delete the contact information for an organization.

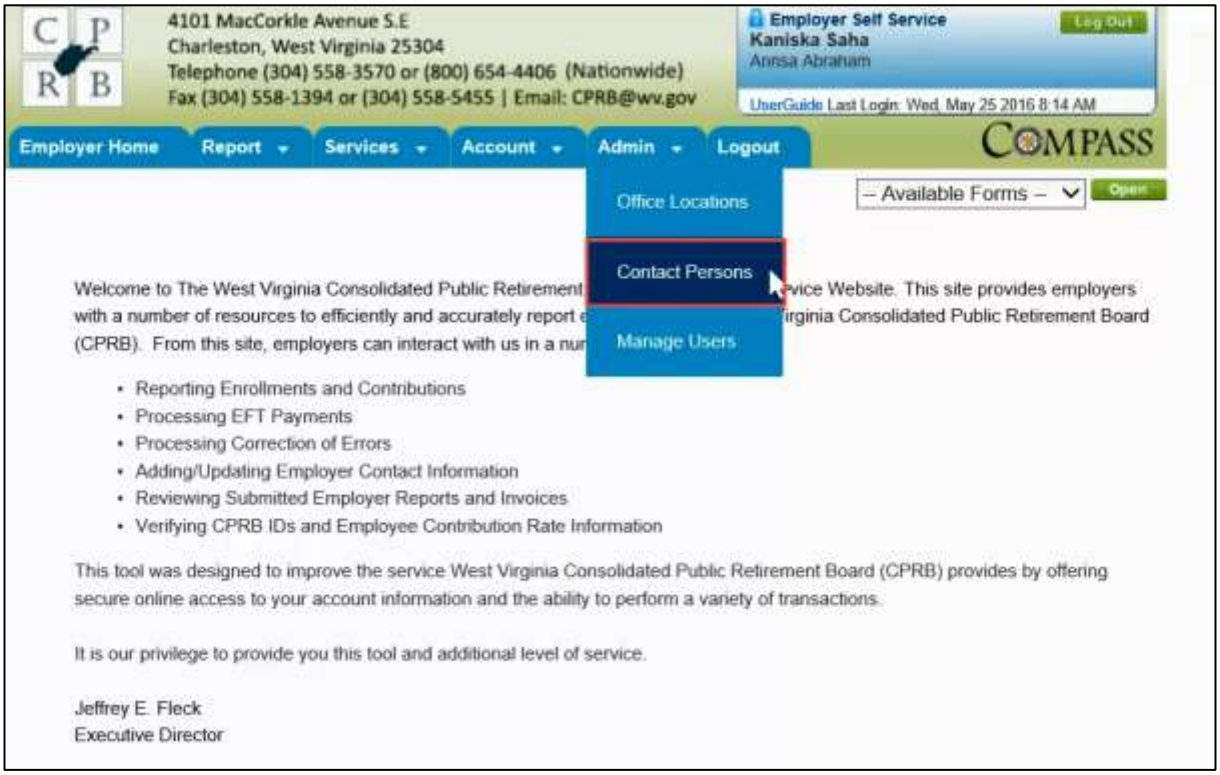
Note: The **Contact Person** screen is only accessible by ESS administrator role.

4.1 Add a Contact Person

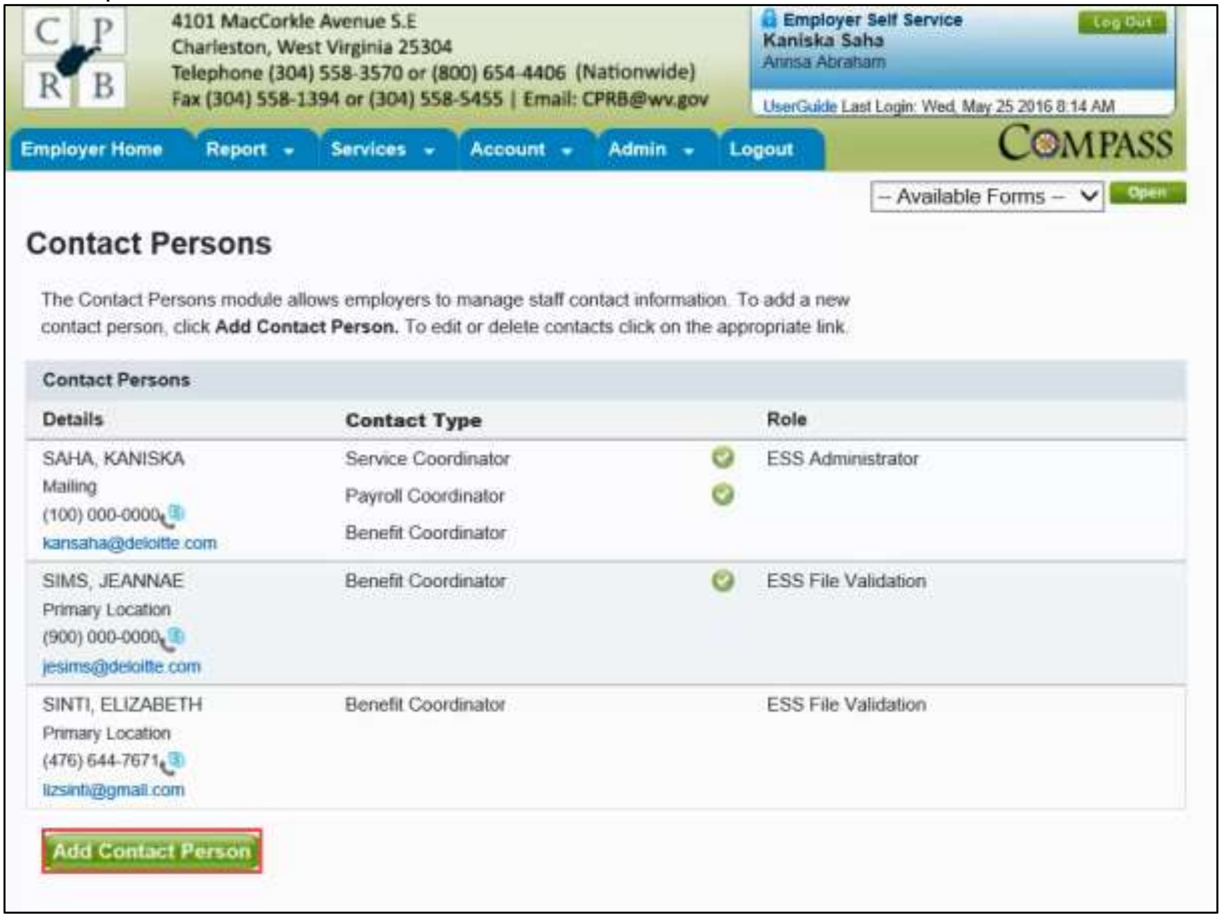
The following steps demonstrate how to add a new contact person in ESS:

Step 1 -- To navigate to the **Contact Persons** screen, click the following menu options:

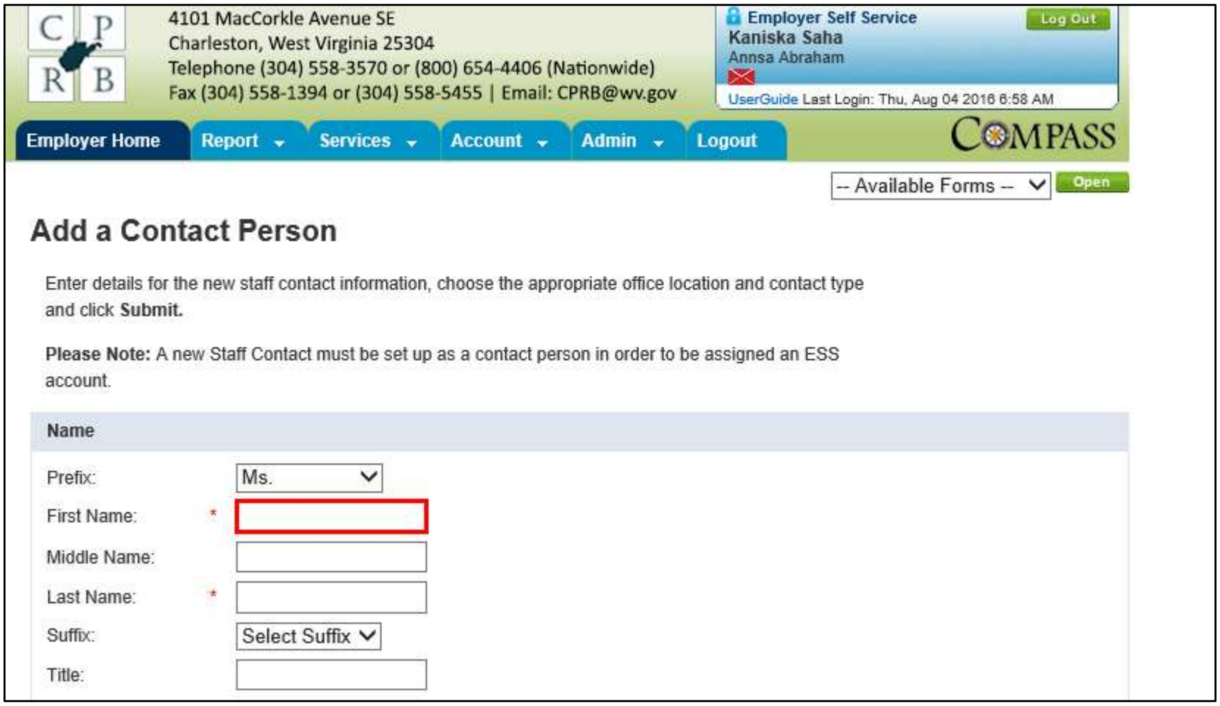
Admin > **Contact Persons**



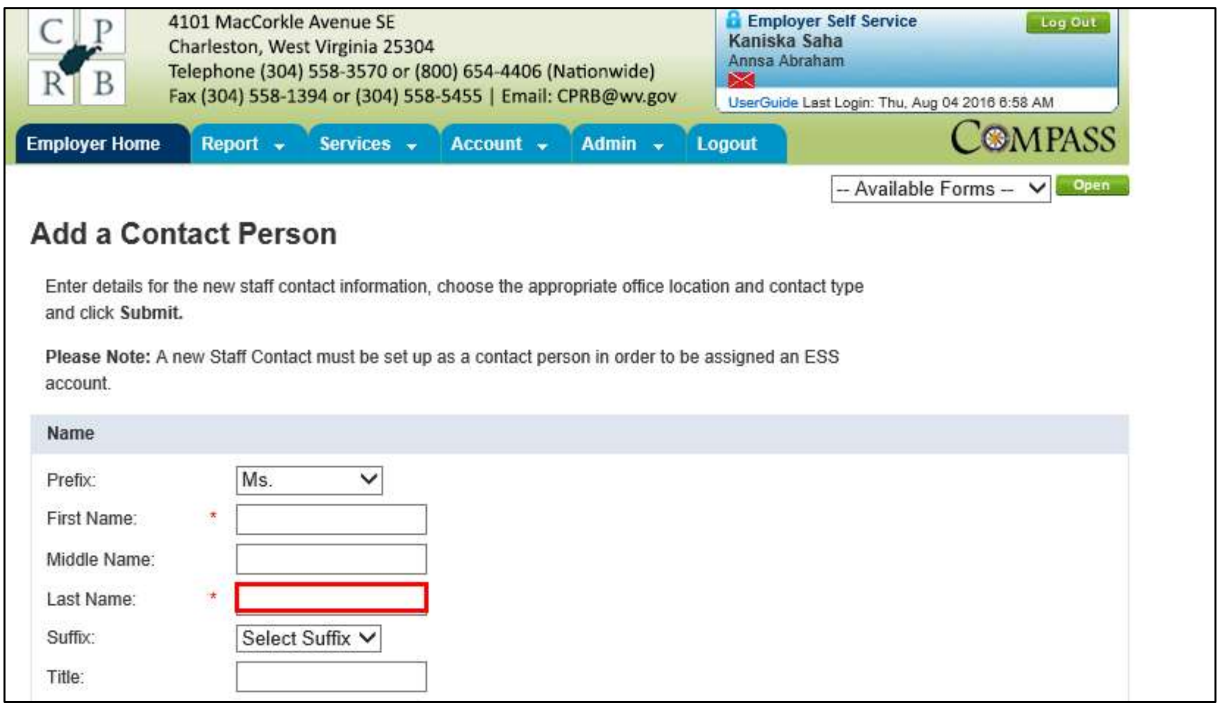
Step 2 -- The **Contact Persons** screen displays. Click the Add Contact Person button to add a new contact person.



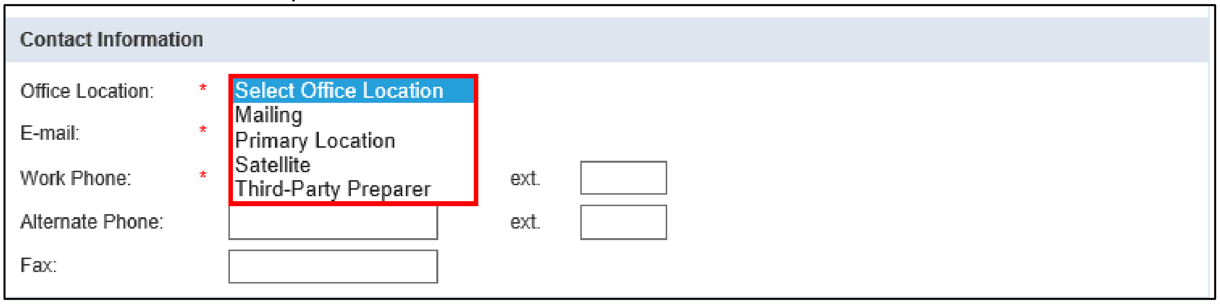
Step 3 -- Enter the required information in the **Name** section. Enter the **First Name**.



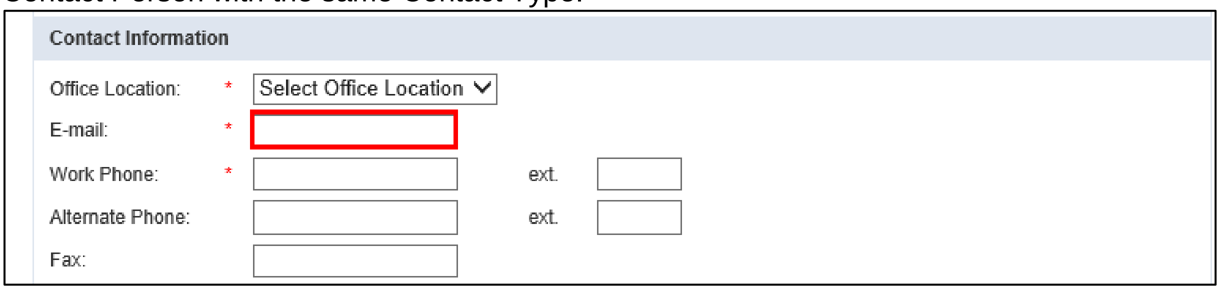
Step 4 -- Enter the **Last Name**.



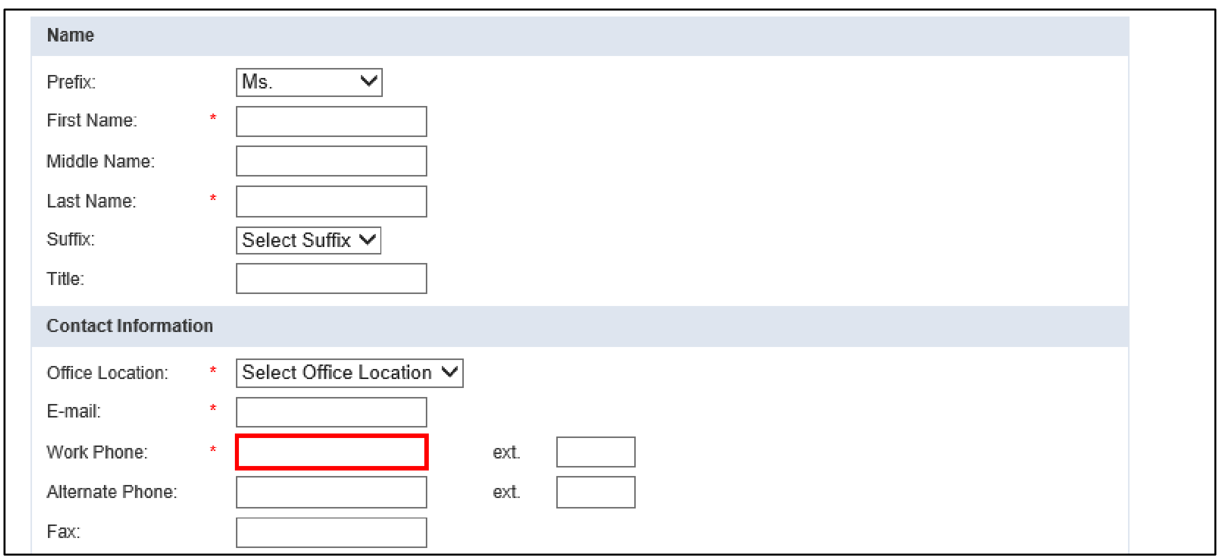
Step 5 -- Enter the required information in the **Contact Information** section. Select the **Office Location** from the drop down menu**.**



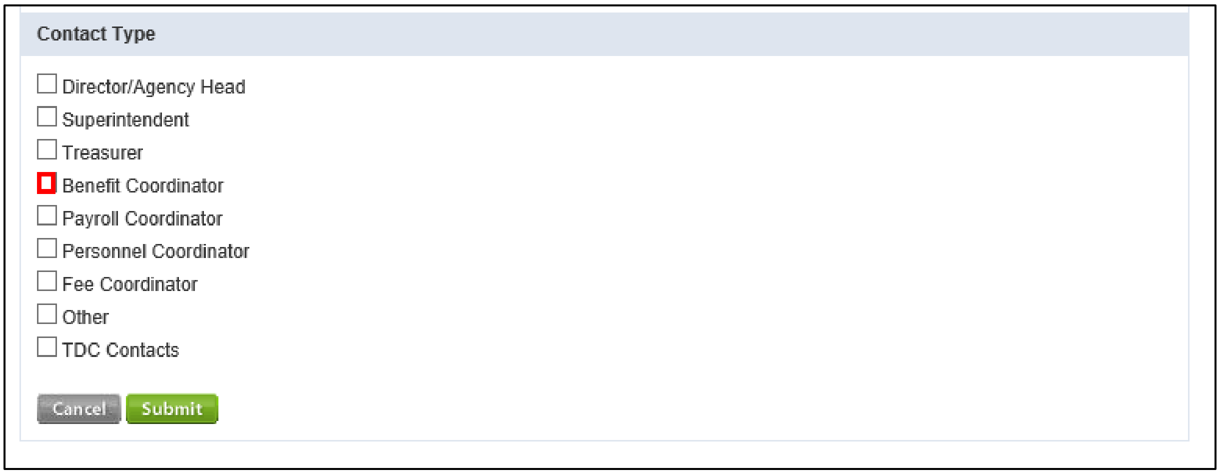
Step 6 -- Enter the email address in the **E-mail** text field.
Note: The e-mail address for each Contact Type cannot be the same for more than one Contact Person with the same Contact Type.



Step 7 -- Enter the **Work Phone** number.



Step 8 -- Select the appropriate check box in the **Contact Type** section.

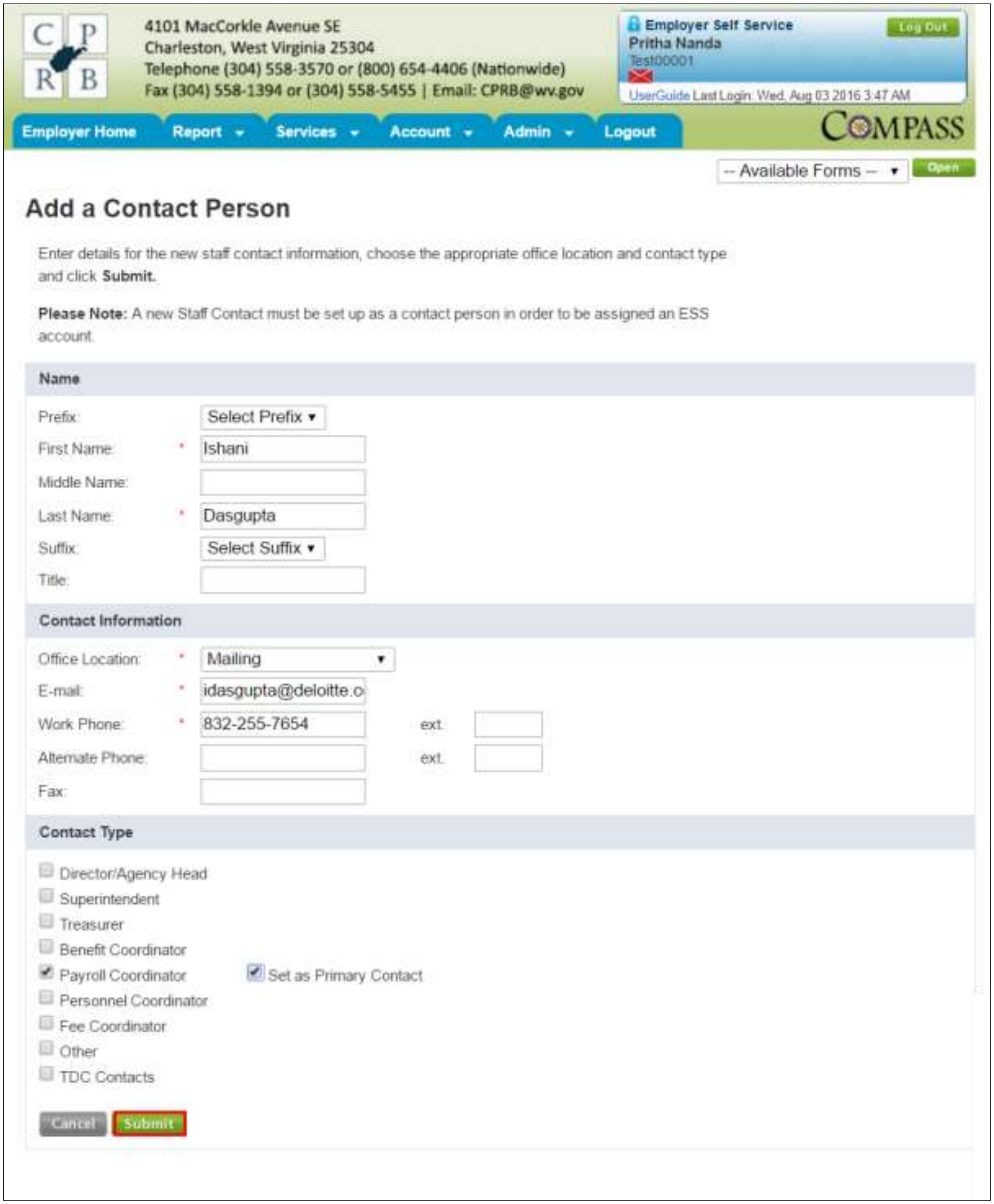


Step 9 -- If the contact person is the primary contact for the employer, select the **Set as Primary Contact** check box.

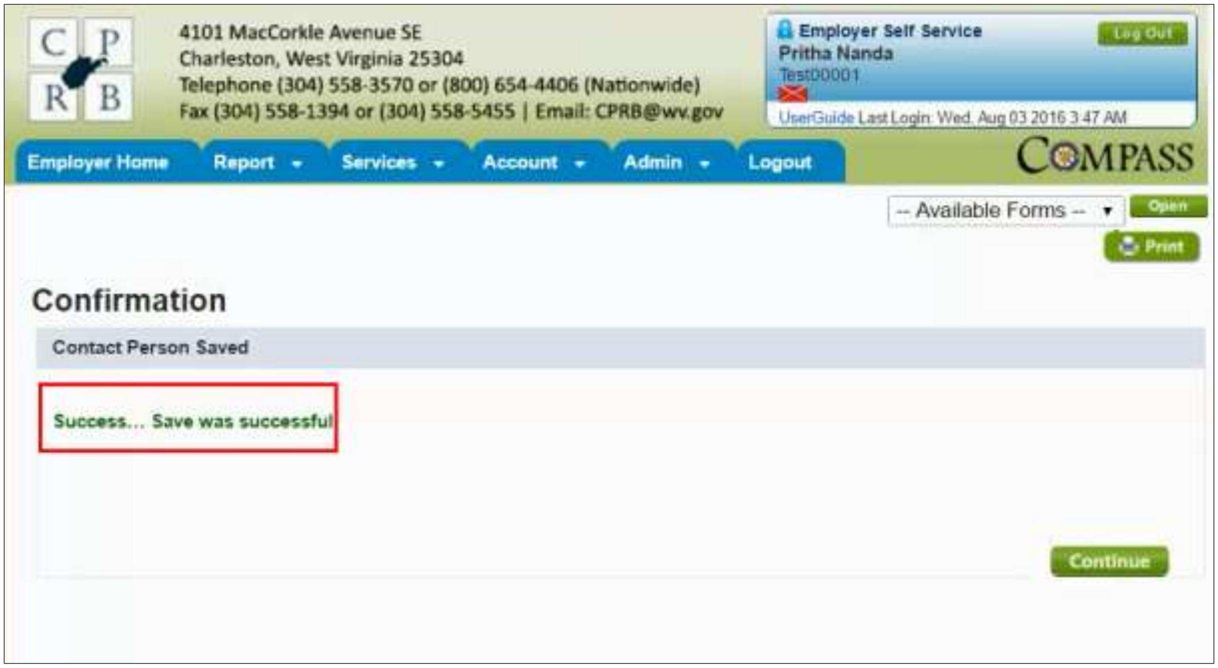
Note: When designating a Payroll Coordinator for the first time, select the **Set as Primary Contact** check box. The **Primary Payroll Coordinator** receives and manages the following:

- Reminder – receive reminders on invoices
- Employer Packet – receive employer packets
- Delinquencies – receive notices on delinquent payments
- File Rejection – receive file rejection notice
- Submit payroll schedule – needs to submit payroll schedule before the beginning of the plan year
- Submit signature – receives reminder to submit signature card

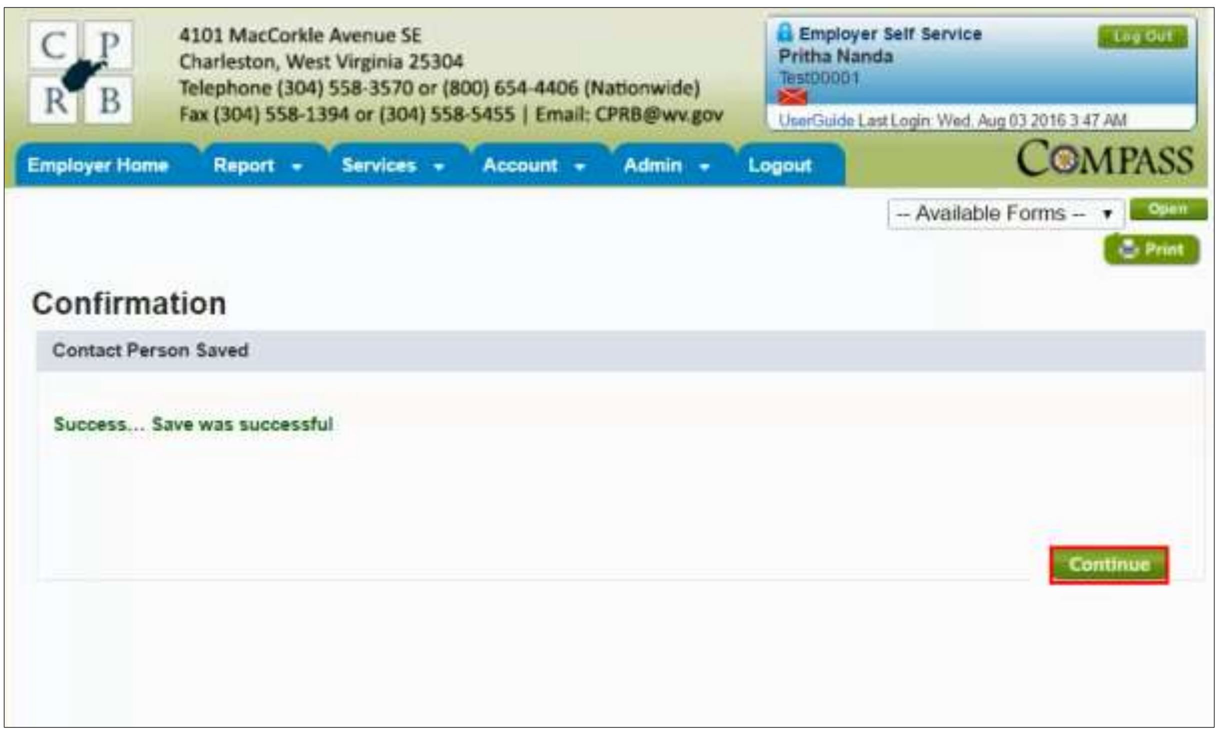
Step 10 -- Click the Submit button.



Step 11 -- The '**Success…Save was successful**' message displays when the contact person is added to the system.



Step 12 -- Click the Continue button to return to the **Contact Person** screen.



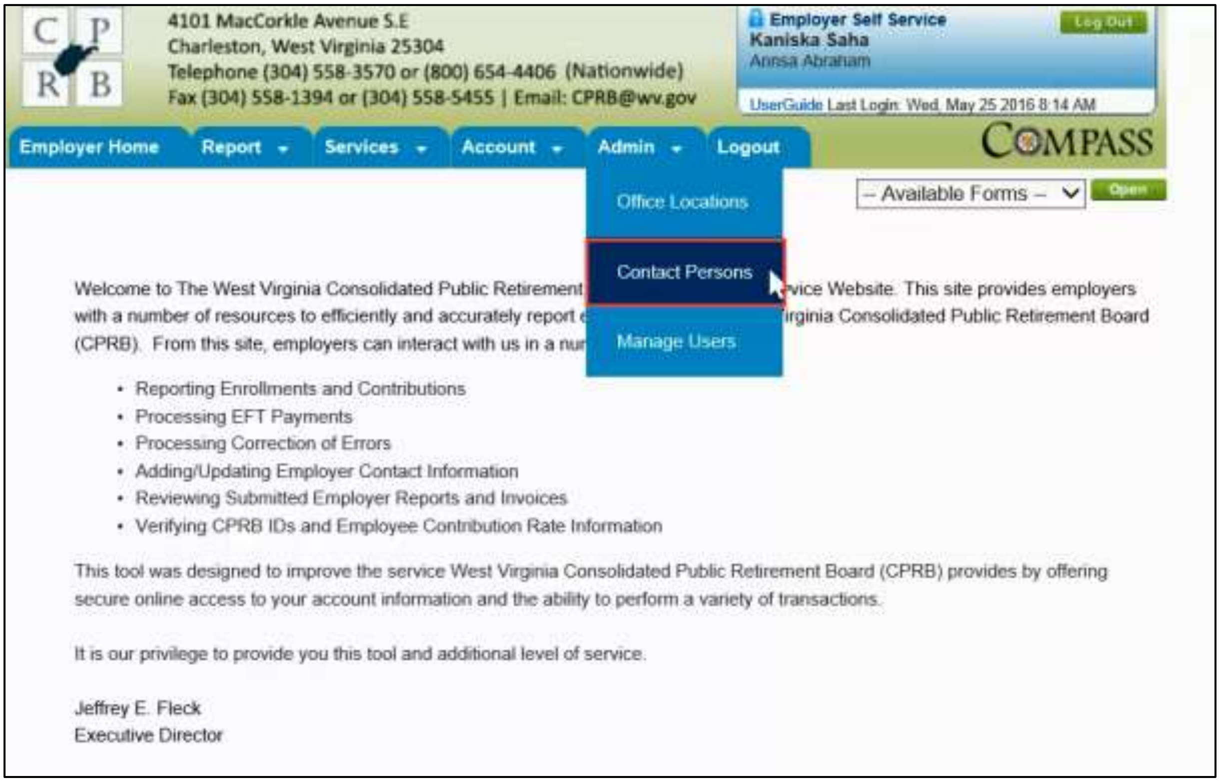
4.2 Edit a Contact Person

Contact person information may need to be edited if the information has been keyed incorrectly or if it has changed. The contact information can also be edited if a new contact type needs to be designated to an existing contact person for the employer, or for other administrative reasons.

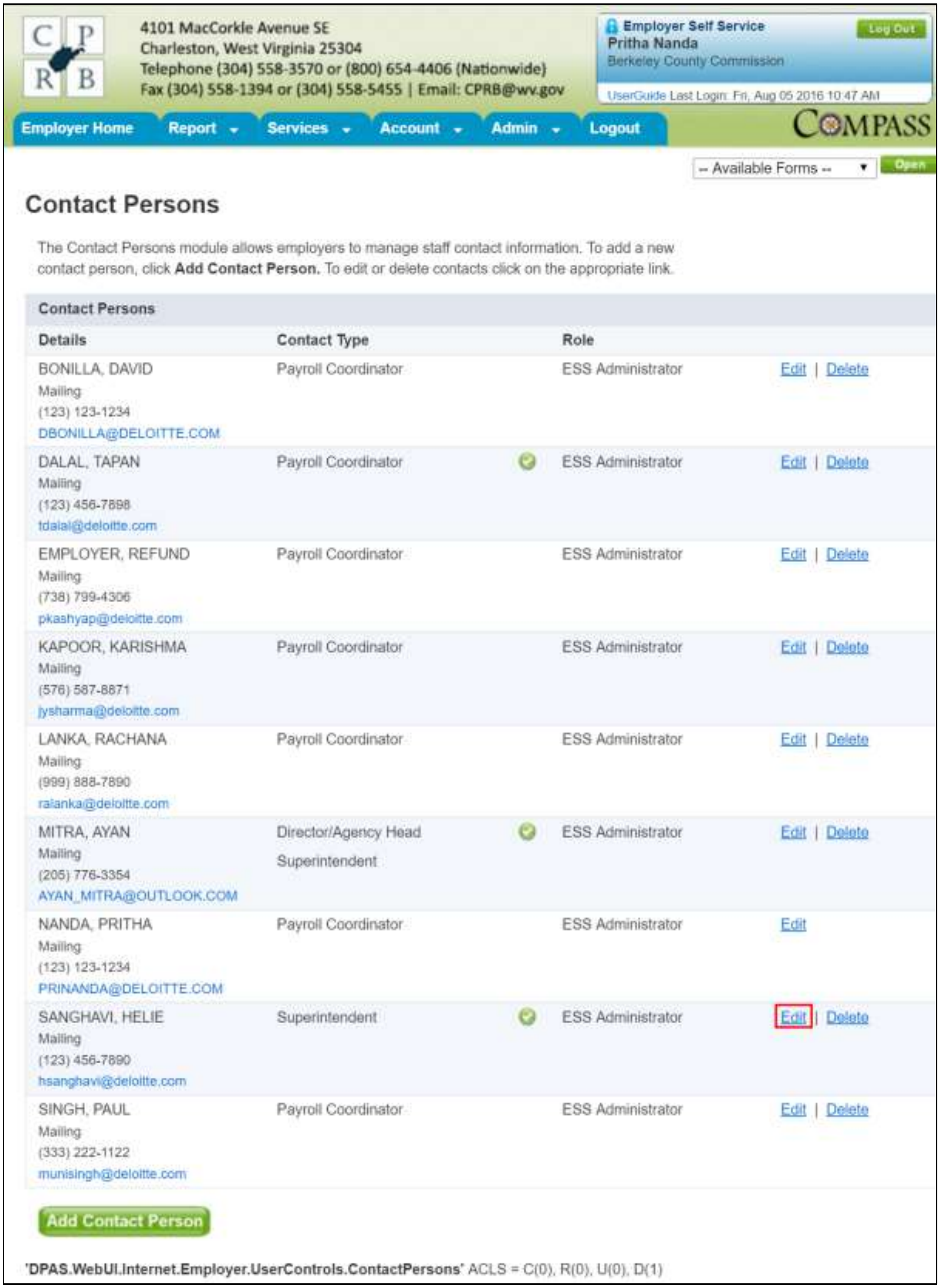
The following steps show how to edit a contact person's information in the ESS portal:

Step 1 -- To navigate to the **Contact Persons** screen, click the following menu options:

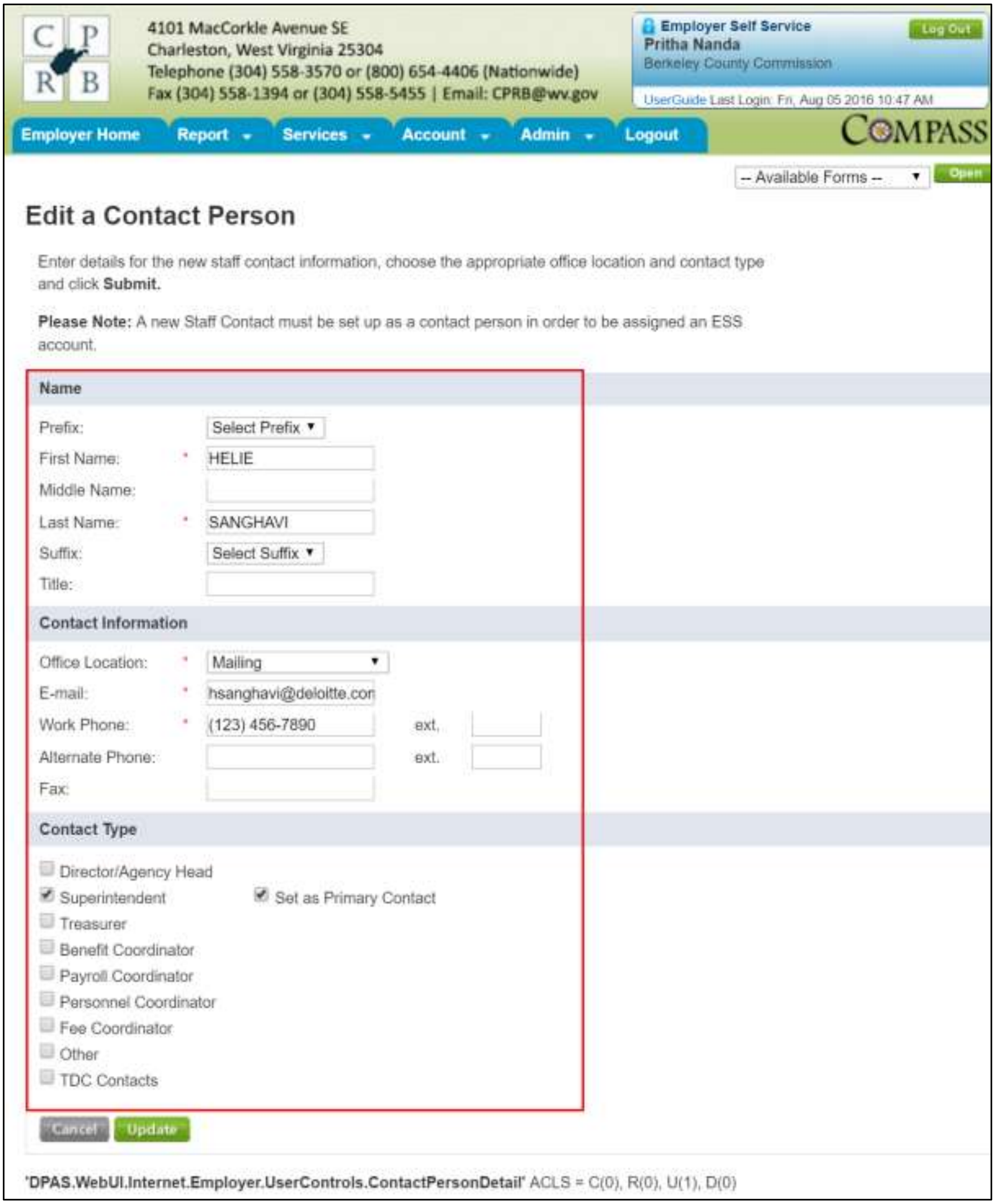
Admin > **Contact Persons**



Step 2 -- The **Contact Persons** screen displays. Click the **Edit** link.

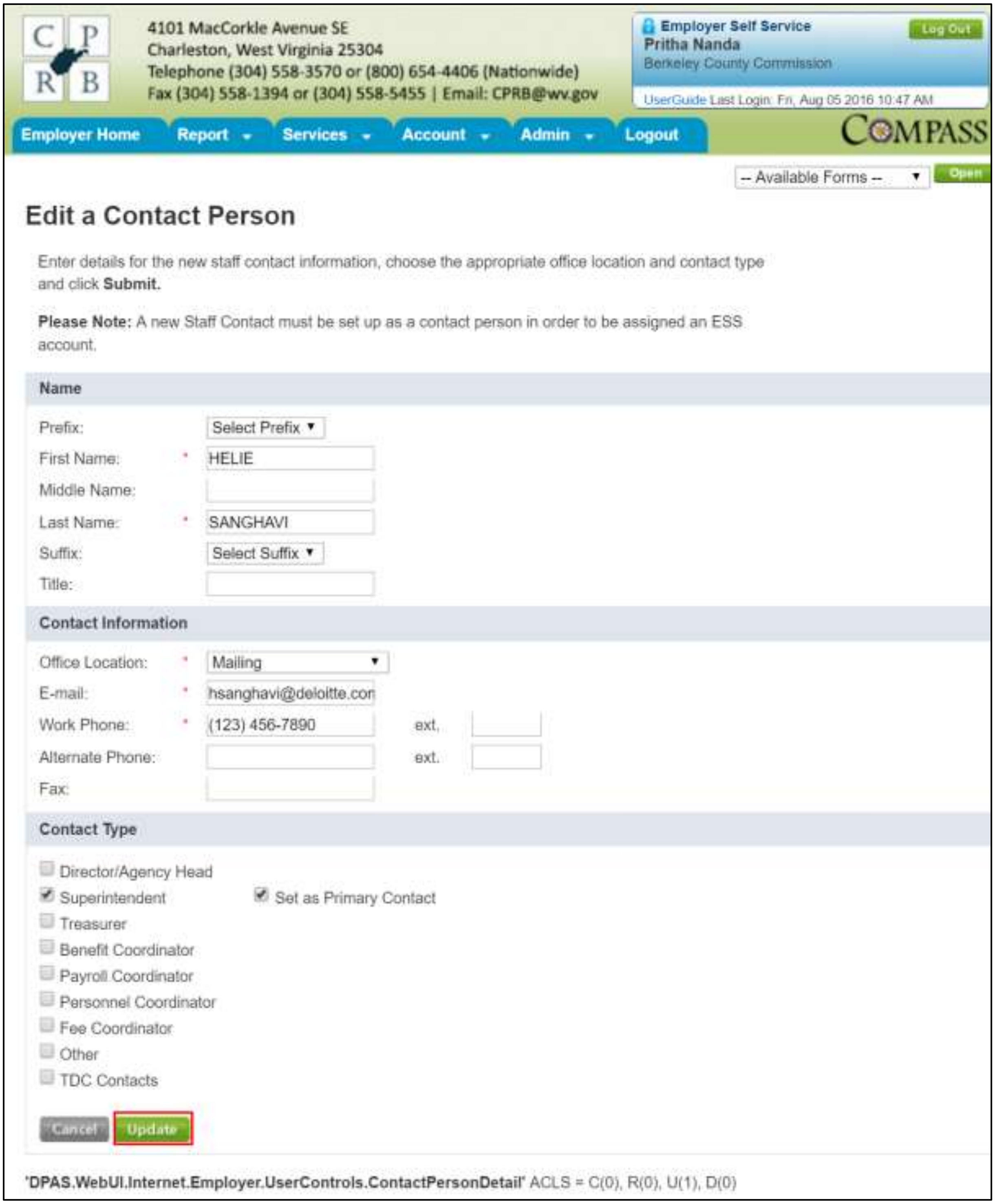


Step 3 -- Update the contact person information.



Step 4 -- Click the 

button. The "**Save was Successful**" message displays to confirm that the contact person information has been updated.



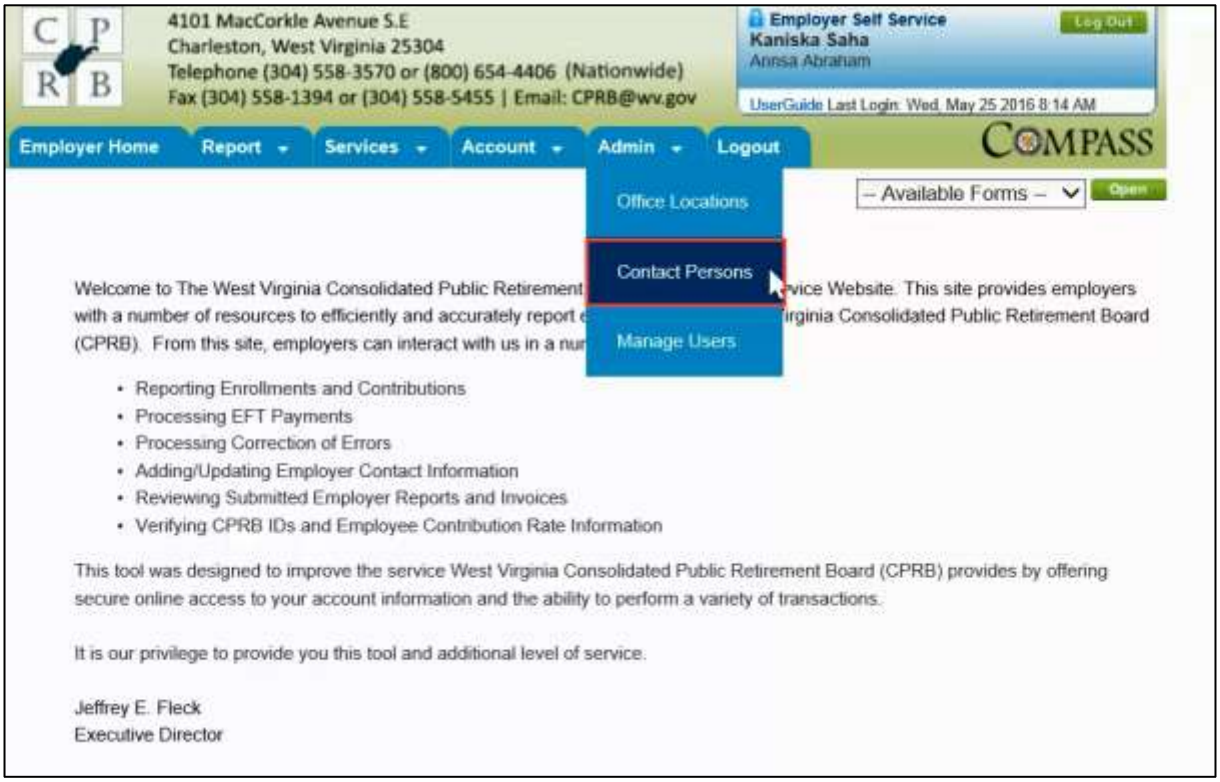
4.3 Delete a Contact Person

Certain contact persons in the organization may be deleted if they are not associated with an ESS user account. However, before a primary contact person can be deleted with a Contact Type such as Payroll Coordinator, then a new primary contact for the Contact Type must first be designated.

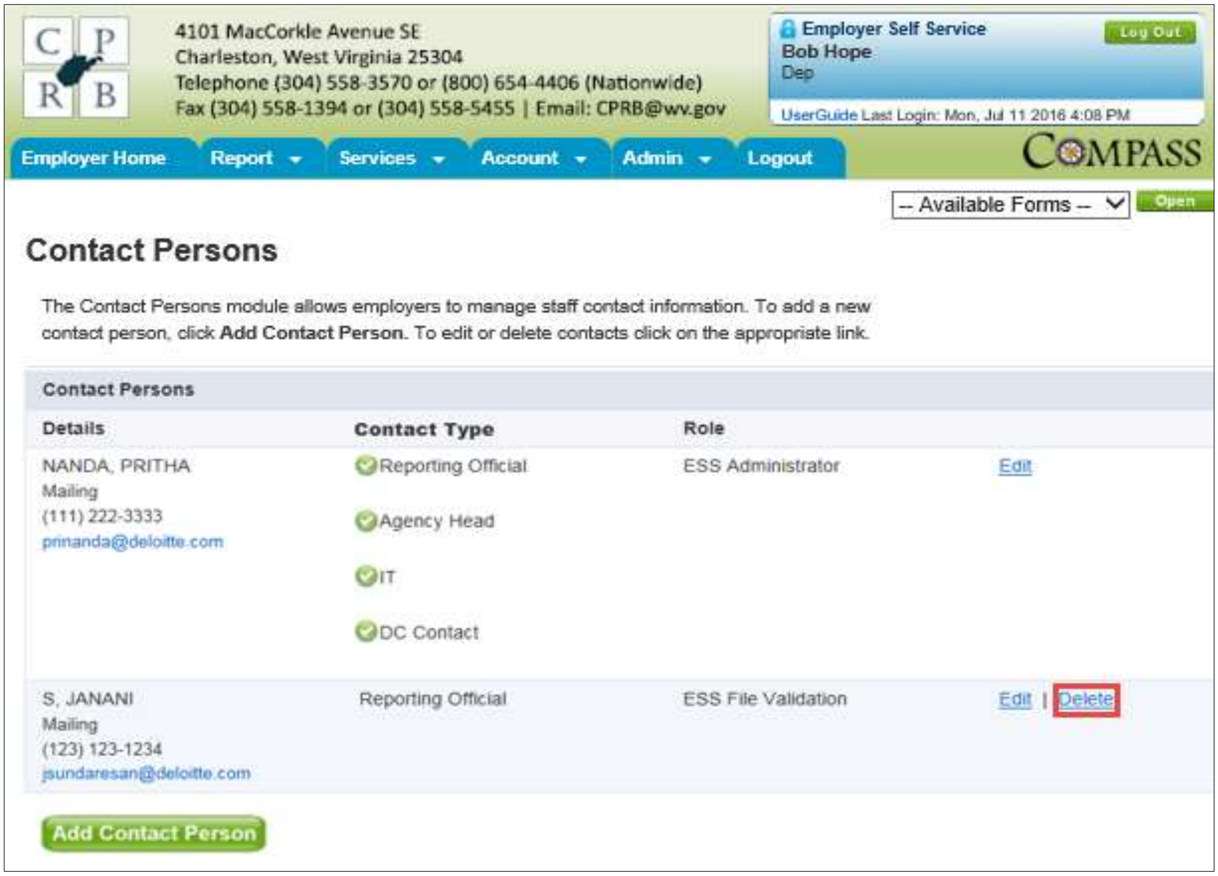
The following steps show how to delete a contact person's information in ESS:

Step 1 -- To navigate to the **Contact Persons** screen, click the following menu options:

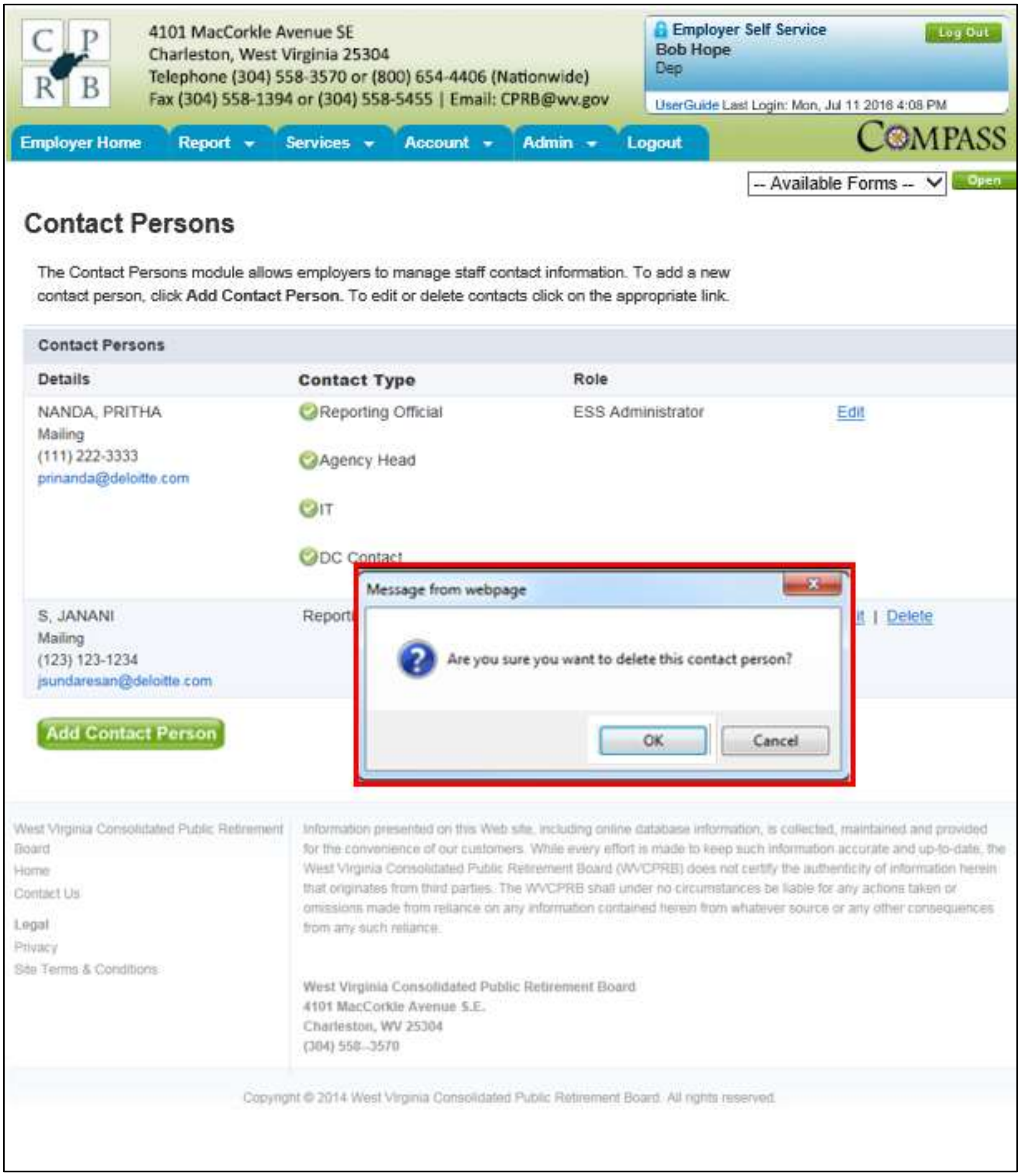
Admin > **Contact Persons**



Step 2 -- The **Contact Person** screen displays, click the **Delete** link.

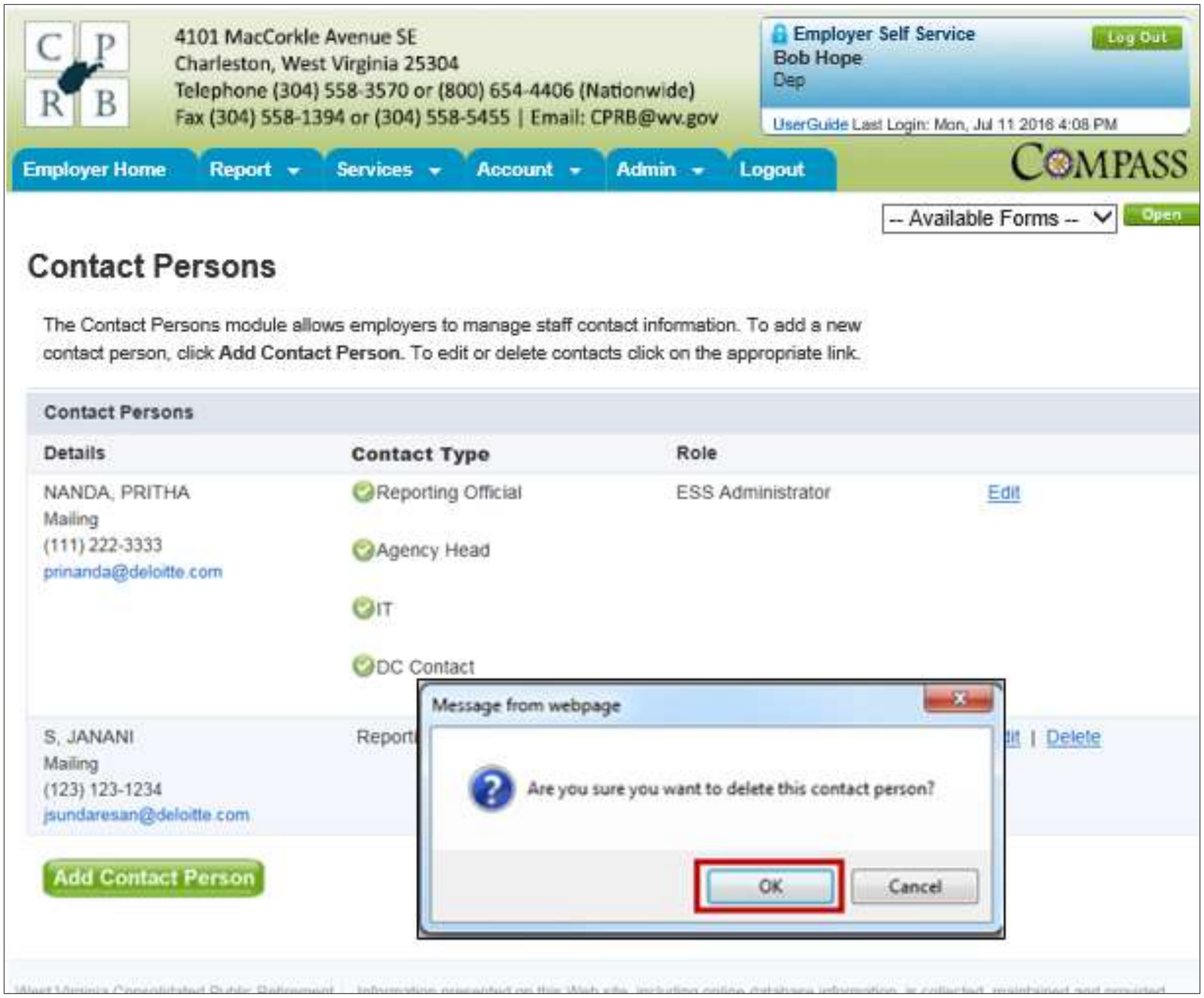


Step 3 -- The “**Are you sure you want to delete this contact person?**” message displays.



Step 4 -- Click the 

button in the dialog box to delete the contact.



5. Manage Users

The **Manage Users** screen features the ability to add, deactivate, or reset user access to their ESS accounts.

Note: To use the **Manage Users** screen, requires Administrative access.

The Manage Users functionality allows the employers to administer their own employees' ESS accounts. Each employer will have at least one individual who is assigned as an Administrator role for ESS. Multiple ESS Admins can be created for an employer for instances when an administrator is out of the office or unavailable.

The available roles are Admin (access to all ESS functionality including Manage Users), Employer Reporting (access to all functionality except Admin menu) and Staff (access to screens such as Death Notice, Message Center, etc.). Administrators will also have the ability to reset ESS passwords and PINs and inactivate ESS accounts.

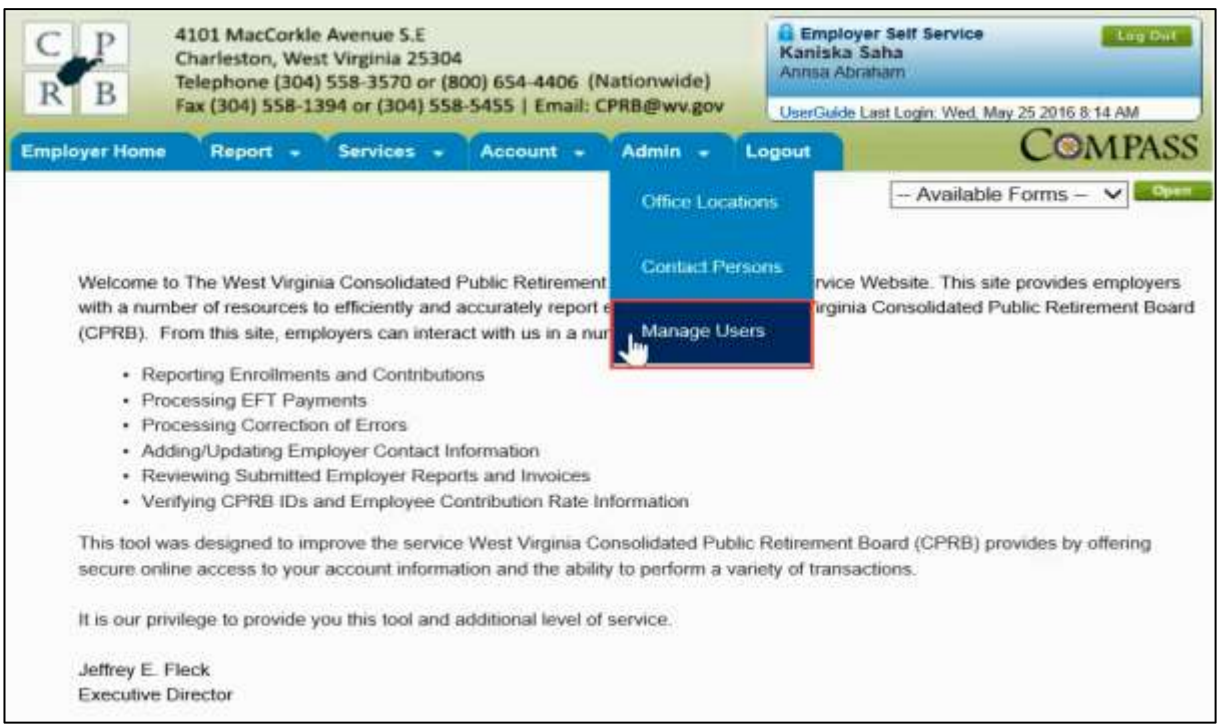
5.1 Add a New User

Staff contact information must be added in the **Contact Person** screen before adding that staff person as a new ESS user (See Section 4.1 Add Contact Persons).

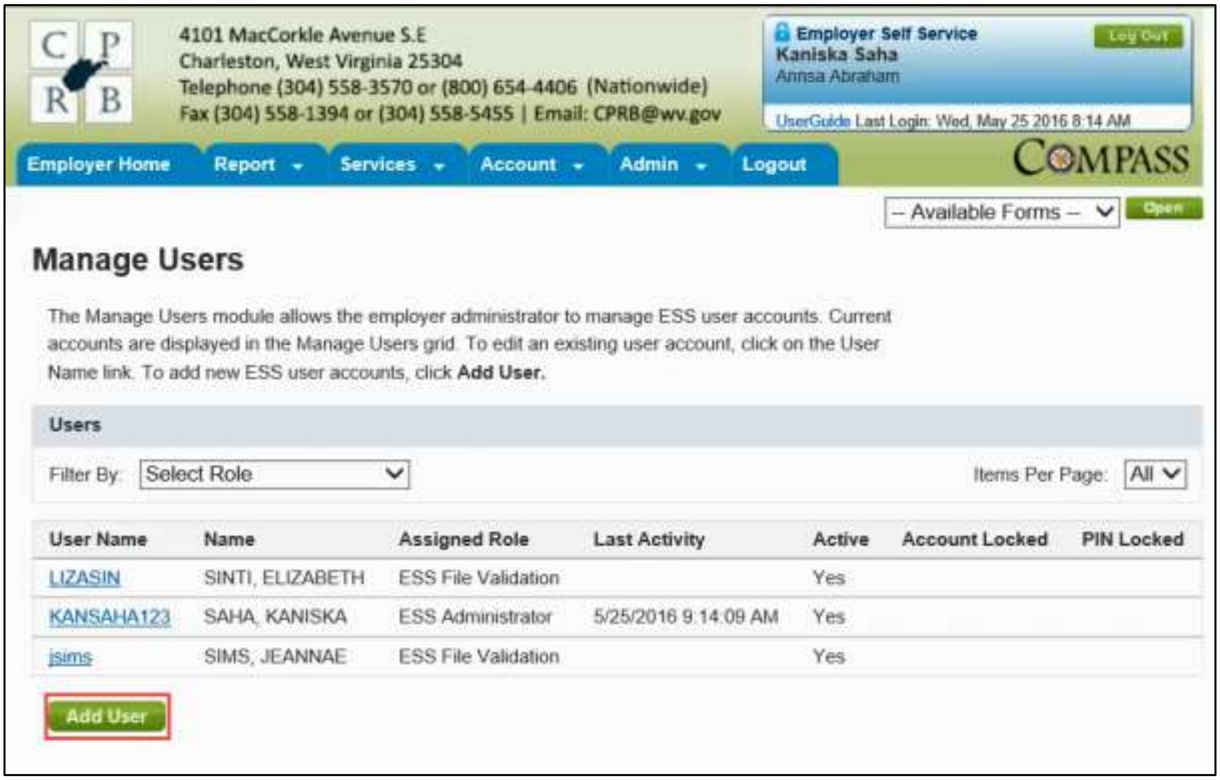
The following steps show how to add a new user in CPRB's ESS portal who is already added as a Contact Person:

Step 1 -- To navigate to the **Manage Users** screen, click the following menu options

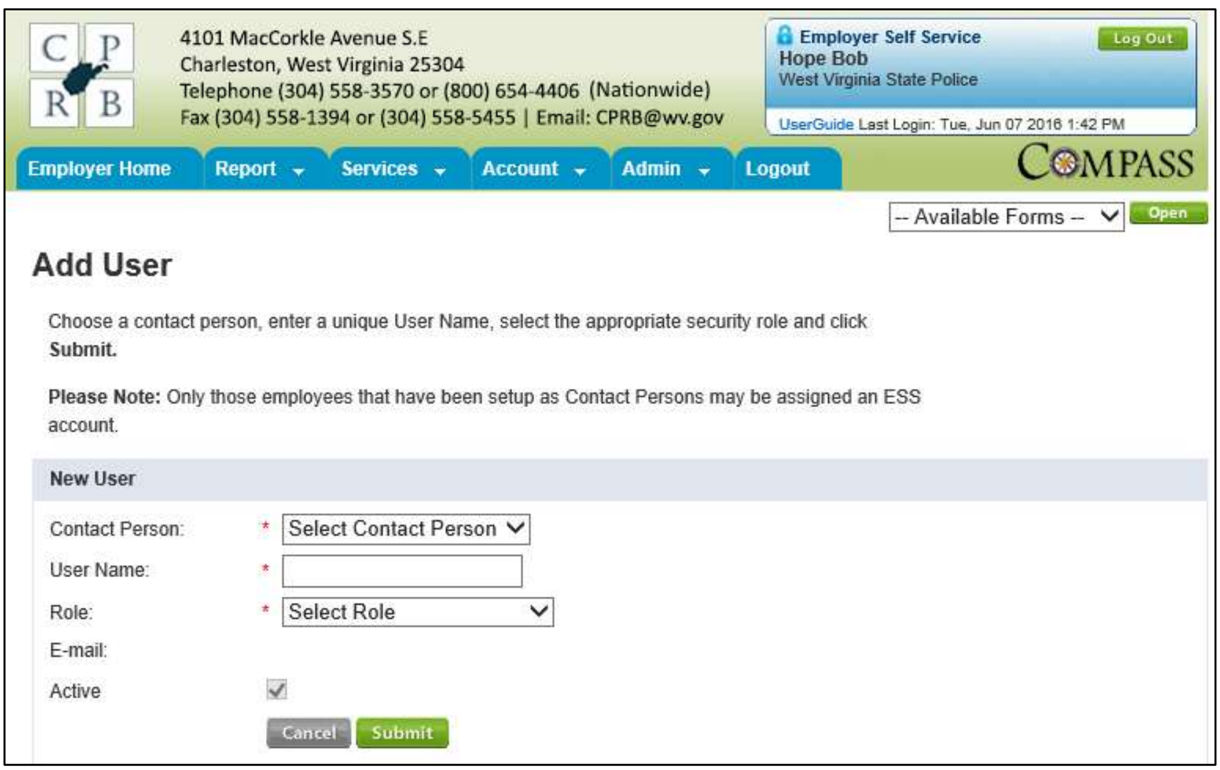
Admin > **Manage Users**



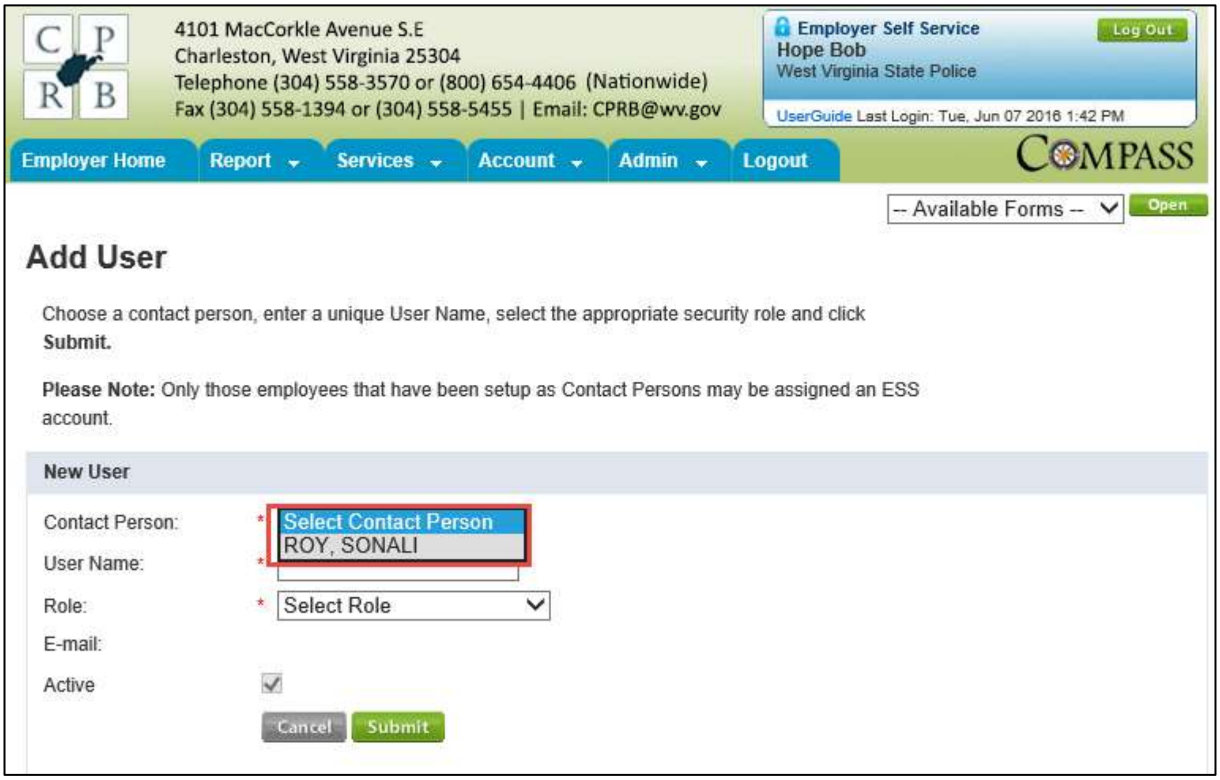
Step 2 -- The **Manage Users** screen displays. This screen displays all the active users and their roles. To add a new user, click the **Add User** button.



Step 3 -- The **Add User** screen displays to select a contact person.

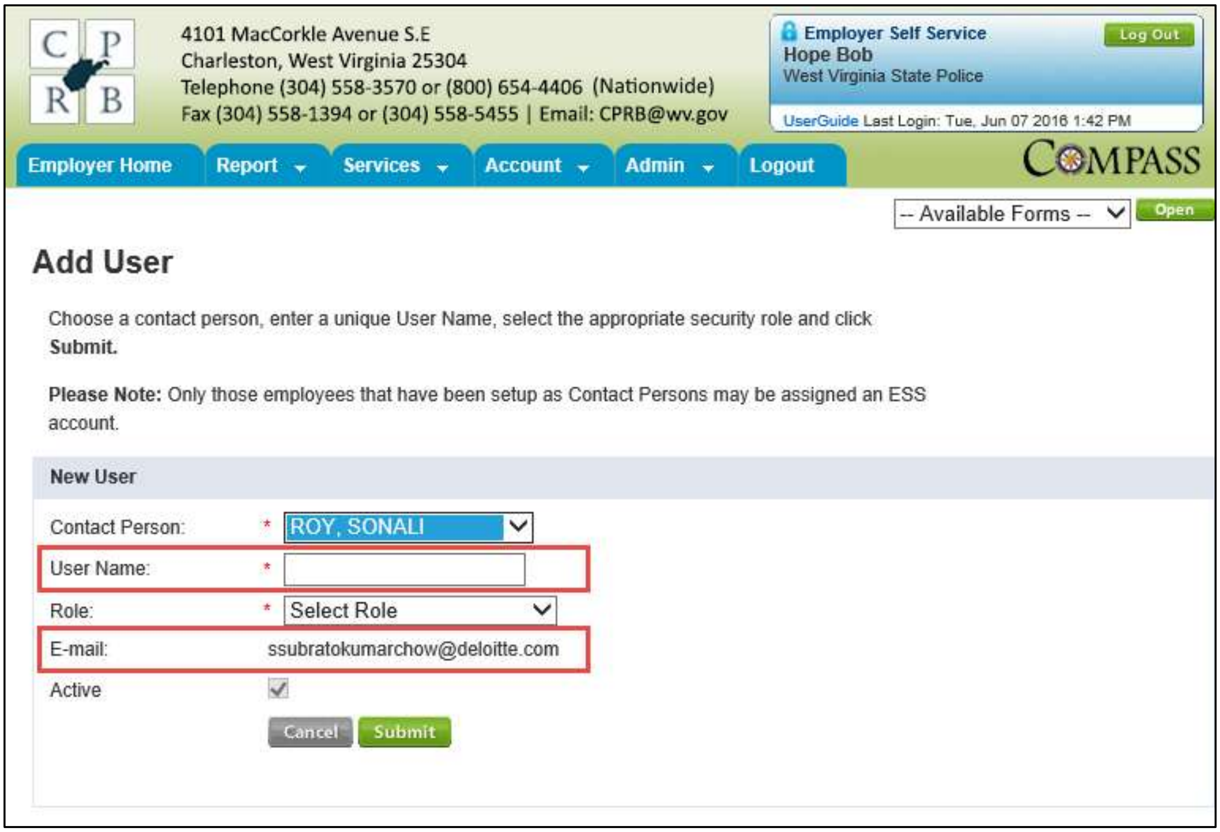


Step 4 -- Select a contact person from the **Contact Person** drop down menu.

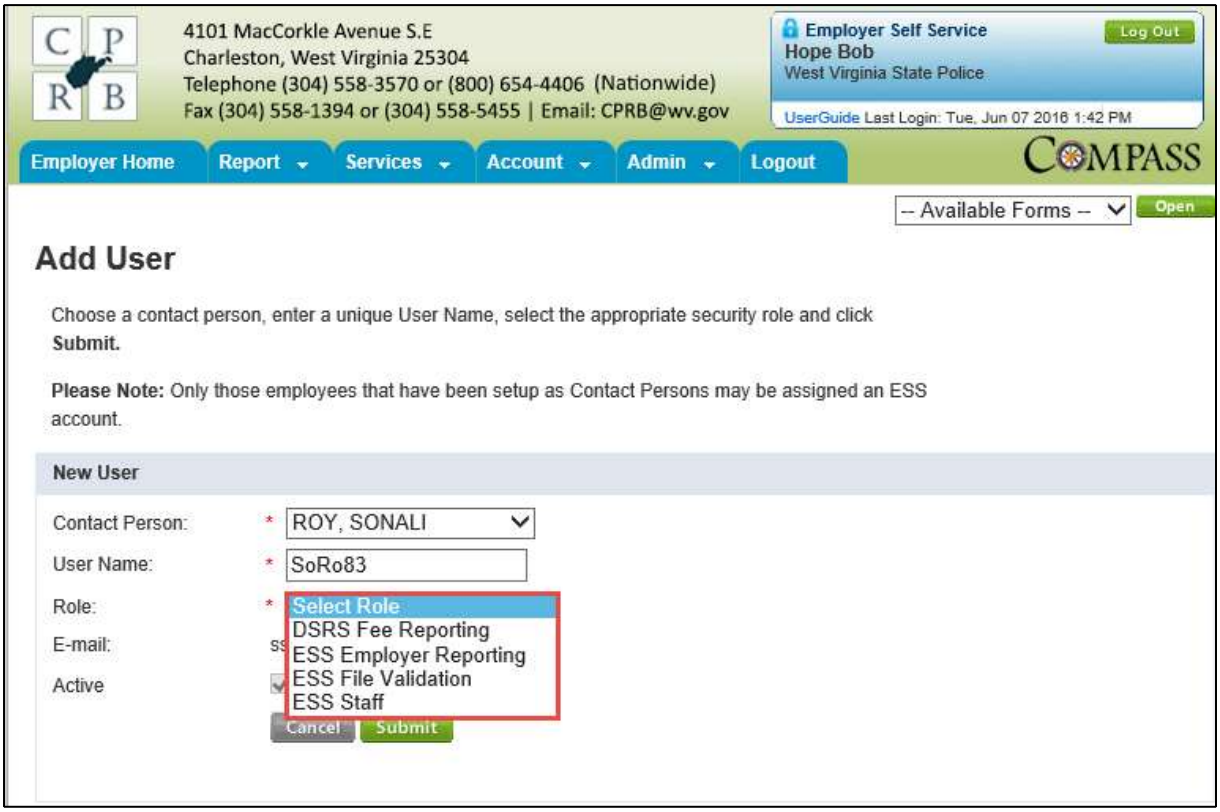


Step 5 -- The email address for the user displays. The status of the user is automatically set to active. Enter a unique user ID for the person.

Note: The user ID must be between 5 and 20 characters, using characters A-Z, a-z, and numbers 0-9. If the user name already exists, an error message will display.

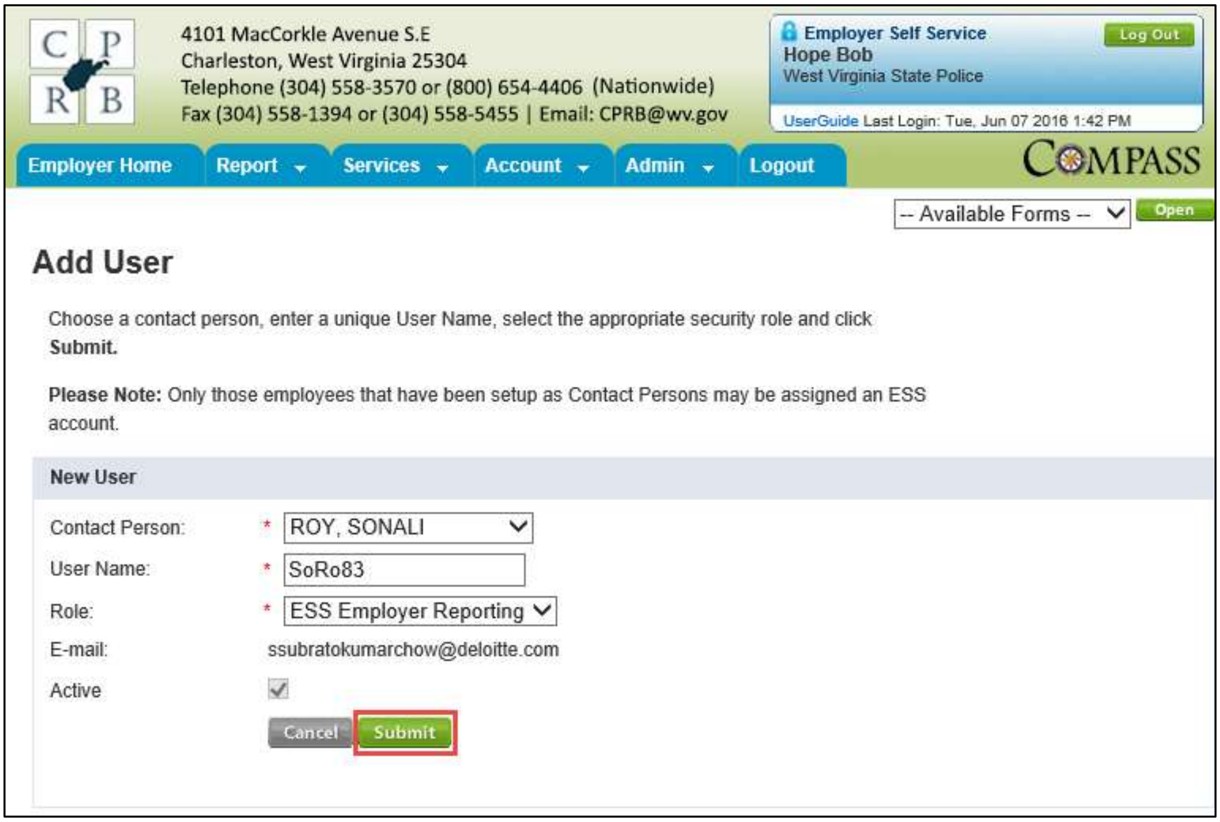


Step 6 -- Select an appropriate user role from the **Role** drop down menu.
Note: DSRS Fee Reporting user role should only be selected for the user who will submit the Deputy Sheriff Fee details. The ESS user role of **DSRS Fee Reporting**, will not be able to see the other menu options except **Submit DSRS Fee**. The **Submit DSRS Fee** menu will be available to ESS Admin and ESS Employer Reporting user roles as read-only. For other ESS user roles, this menu option will not be available.

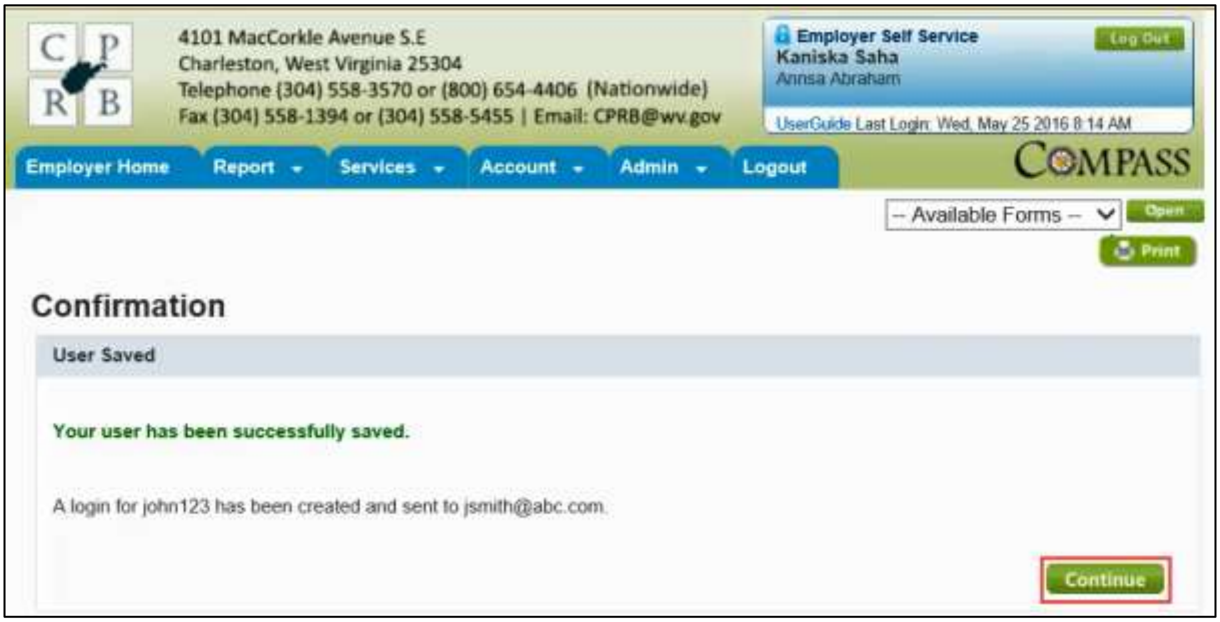


Step 7 -- Click the **Submit** button.

Note: The user ID, temporary password and temporary PIN will be sent to the new user in three separate emails (i.e. the user ID will be sent in a separate email, the temporary password in a separate email, and the temporary PIN in a separate email). The User ID, Password, and PIN information sent message displays to confirm the addition of a new user. The user must sign into CPRB's ESS portal within 72 hours with the login information emailed to them before the information expires.



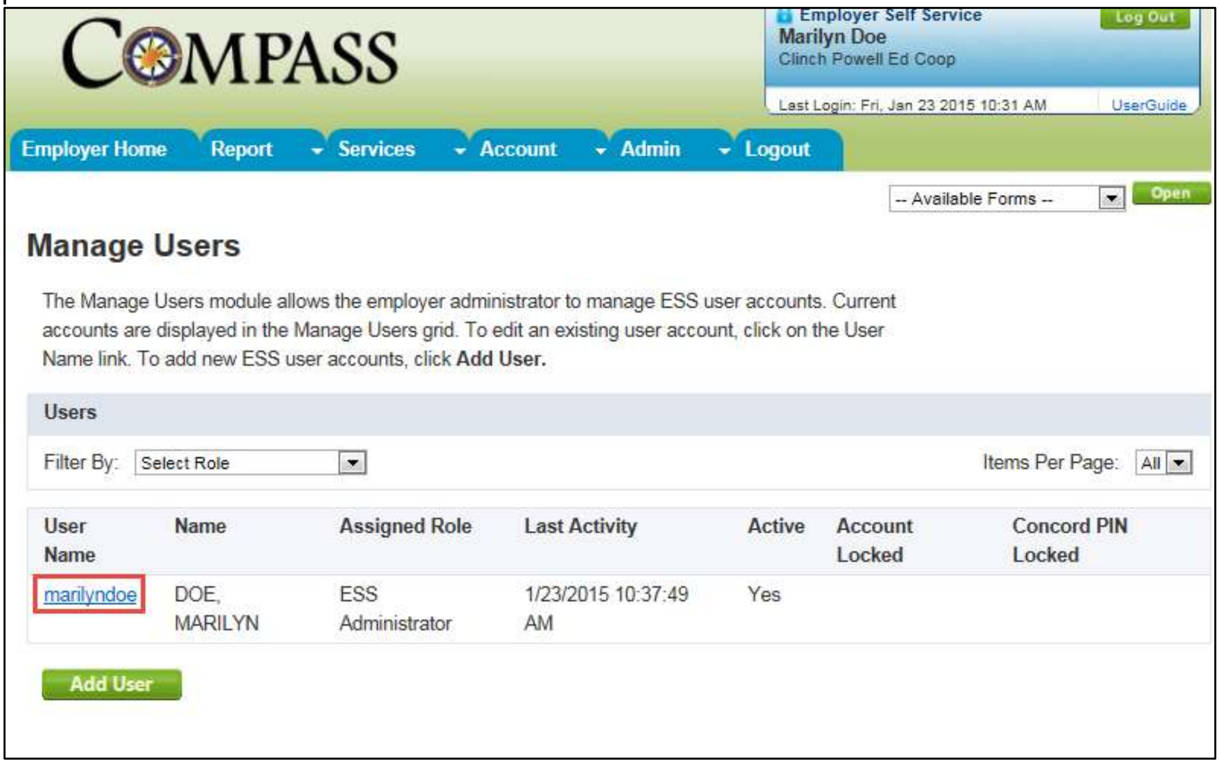
Step 8 -- The **Confirmation** screen displays the message 'Your user has been successfully saved.' Click the **Continue** button to return to the **Manage Users** screen.
Note: After the person is added as a new user, they must login to the ESS portal and change their password, PIN, and answer security questions (refer to Section 2.2 Login Employer Self-Service for the First Time).



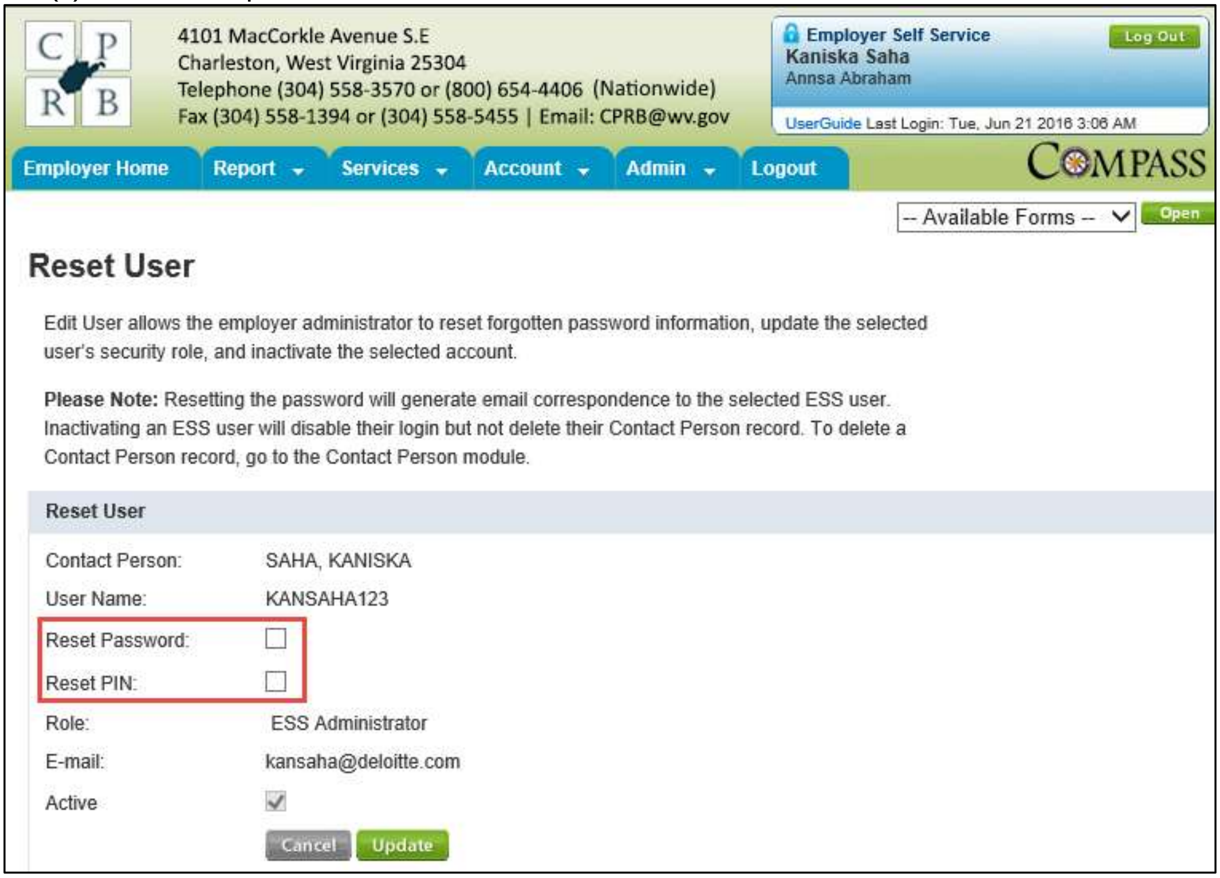
5.2 Reset a User's Password or PIN

An ESS Administrator can reset the password or PIN of an ESS user. Follow the steps below to reset a user's password or PIN.

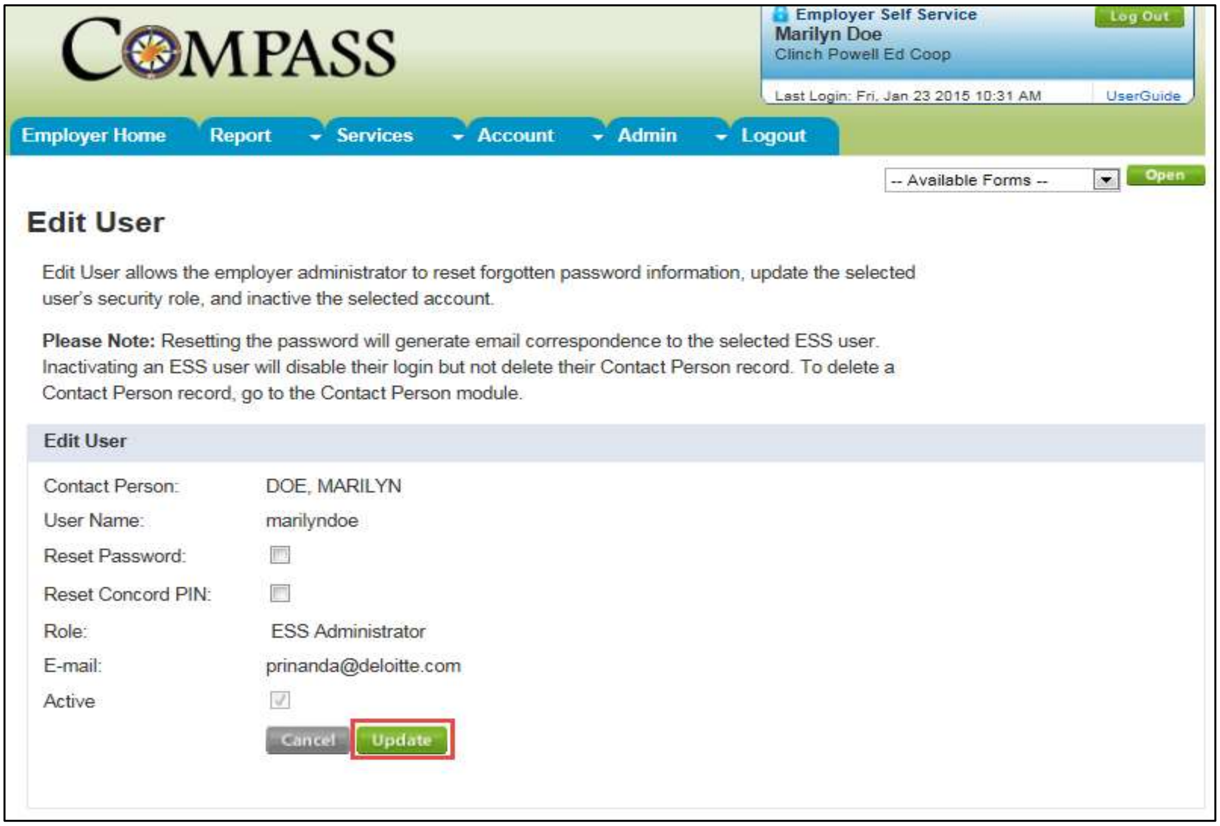
Step 1 -- On the **Manage Users** screen, click the **User Name** link for the user which needs their password or PIN reset.



Step 2 -- The **Reset User** screen displays, select the **Reset Password** and/or **Reset PIN** check box(s) to reset the password and/or PIN.



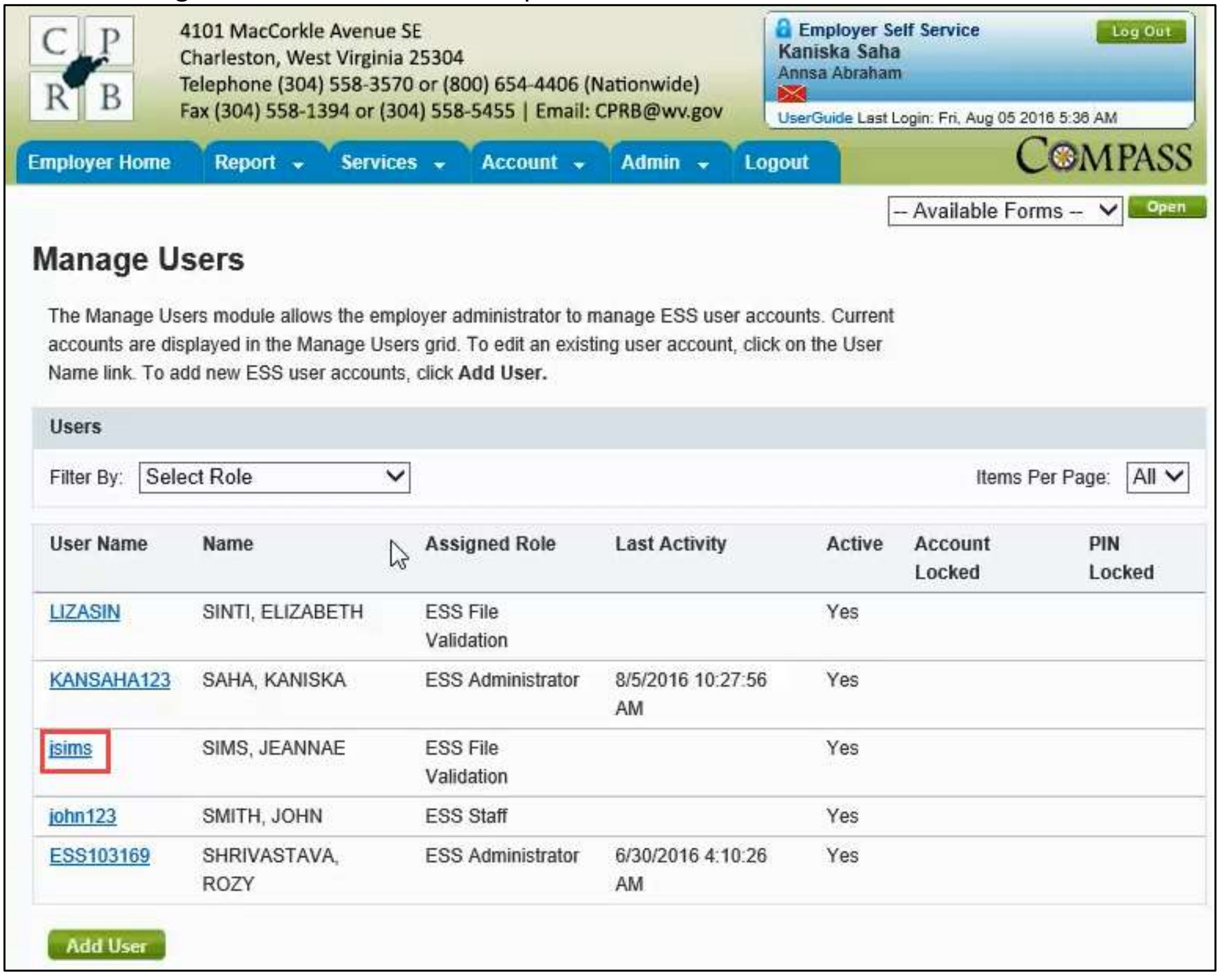
Step 3 -- Click the Update button. A temporary password is sent to the user.
Note: If both the password and PIN have been reset, the user will receive two separate emails. One email will contain the temporary password and the other email will contain the temporary PIN. The user will have 72 hours from the time the email is sent to login using the temporary password and PIN.



5.3 Deactivate a User

An ESS account must be deactivated by the ESS administrator, if a user is no longer employed with an employers' organization or that user no longer needs access to the ESS portal.

Step 1 -- On the **Manage Users** screen, click the particular User Name to deactivate the user.



C P R B

4101 MacCorkle Avenue SE
Charleston, West Virginia 25304
Telephone (304) 558-3570 or (800) 654-4406 (Nationwide)
Fax (304) 558-1394 or (304) 558-5455 | Email: CPRB@wv.gov

Employer Self Service
Kaniska Saha
Annsa Abraham
Log Out
UserGuide Last Login: Fri, Aug 05 2016 5:36 AM

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

COMPASS

-- Available Forms -- Open

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

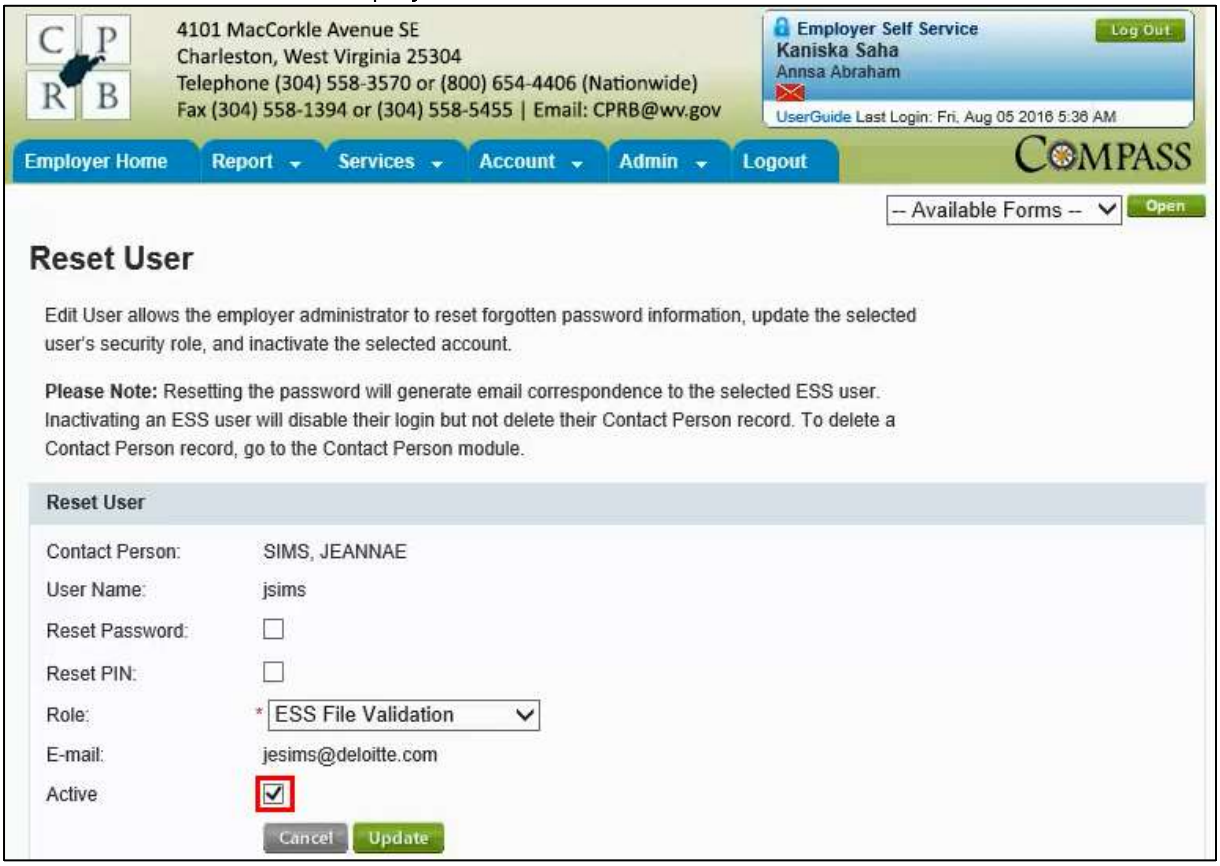
Filter By: Select Role

Items Per Page: All

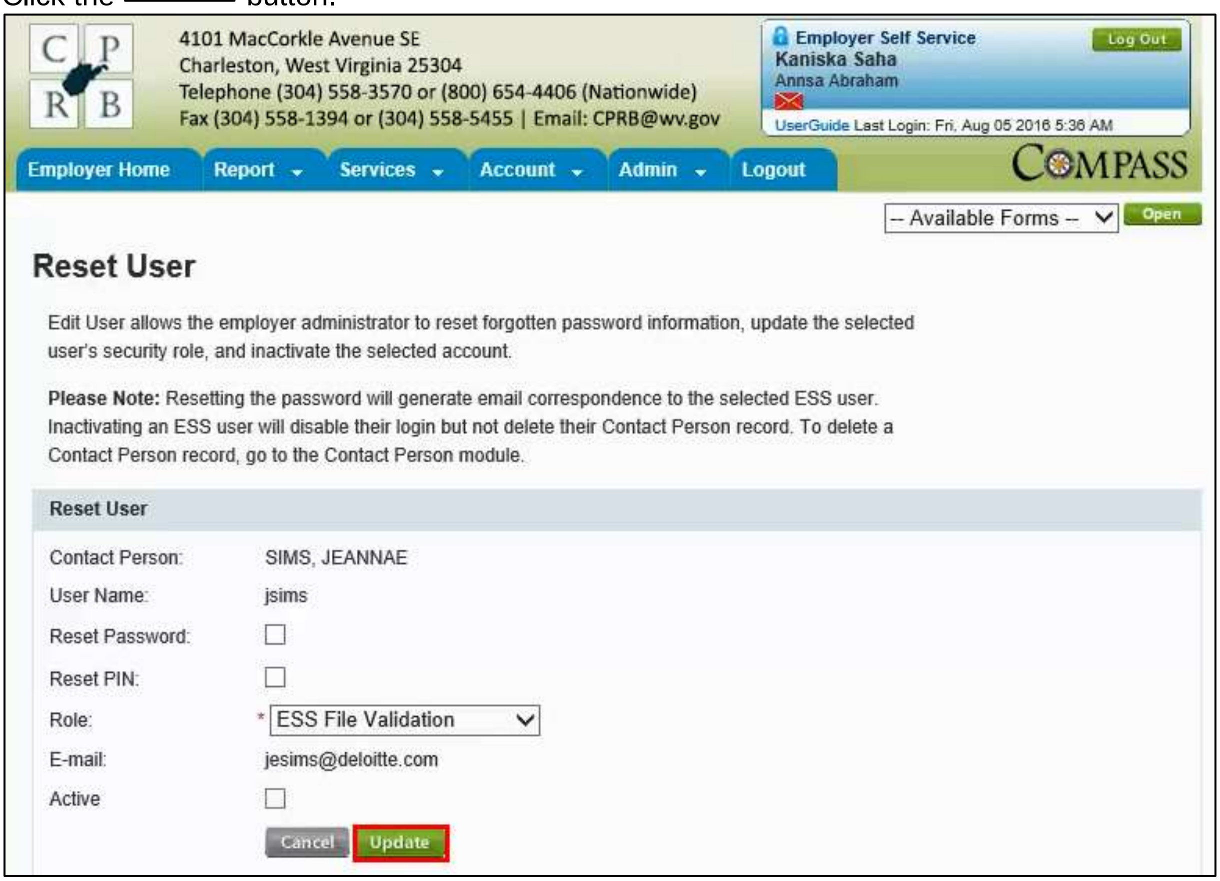
User Name	Name	Assigned Role	Last Activity	Active	Account Locked	PIN Locked
LIZASIN	SINTI, ELIZABETH	ESS File Validation		Yes		
KANSAHA123	SAHA, KANISKA	ESS Administrator	8/5/2016 10:27:56 AM	Yes		
jsims	SIMS, JEANNAE	ESS File Validation		Yes		
john123	SMITH, JOHN	ESS Staff		Yes		
ESS103169	SHRIVASTAVA, ROZY	ESS Administrator	6/30/2016 4:10:26 AM	Yes		

Add User

Step 2 -- The **Reset Users** screen displays. Click the **Active** check box to uncheck it.



Step 3 -- Click the Update button.



Step 4 -- The **Confirmation** screen displays to confirm the account is deactivated.

Step 5 -- Click the Continue button to return to the **Manage Users** screen.

6. Payroll Schedule

The Payroll Schedule is critical information that must be reported by the employer in order to submit the contribution reports and payments for the upcoming year. The Payroll schedule is used to assist employers in ensuring contribution information is reported in a timely manner. It is the employer's responsibility to provide the payroll schedule to CPRB using the Payroll Schedule screen.

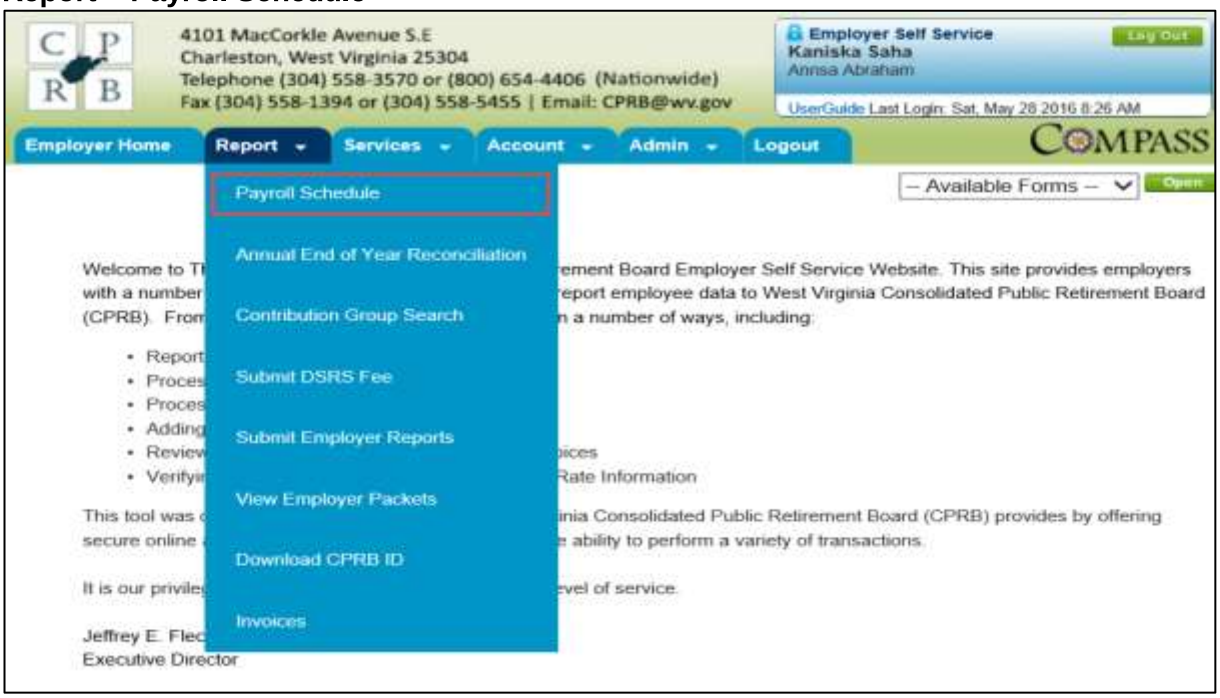
The **Payroll Schedule** screen provides the ability to add, view, or edit employer payroll schedules. The Employer Payroll Schedule is determined by the frequency with which an employer pays their employees, as indicated by the specific dates for a given year (plan year). Employers with ESS Admin roles and Employer Reporting roles can submit and maintain payroll schedules for the retirement system(s) in which they participate.

6.1 Add Payroll Schedule Information

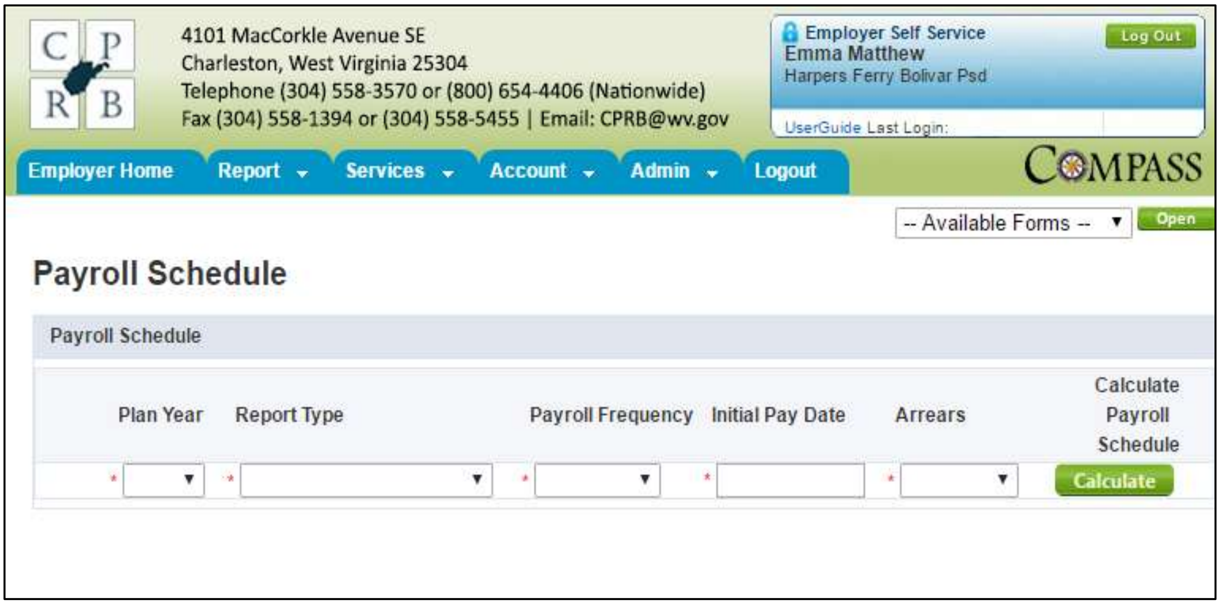
As an employer, the payroll schedule must be submitted in CPRB's ESS portal prior to submission of the first report for the plan year. Follow the steps below to add a Payroll Schedule:

Step 1 -- To navigate to the **Payroll Schedule** screen, click the following menu options:

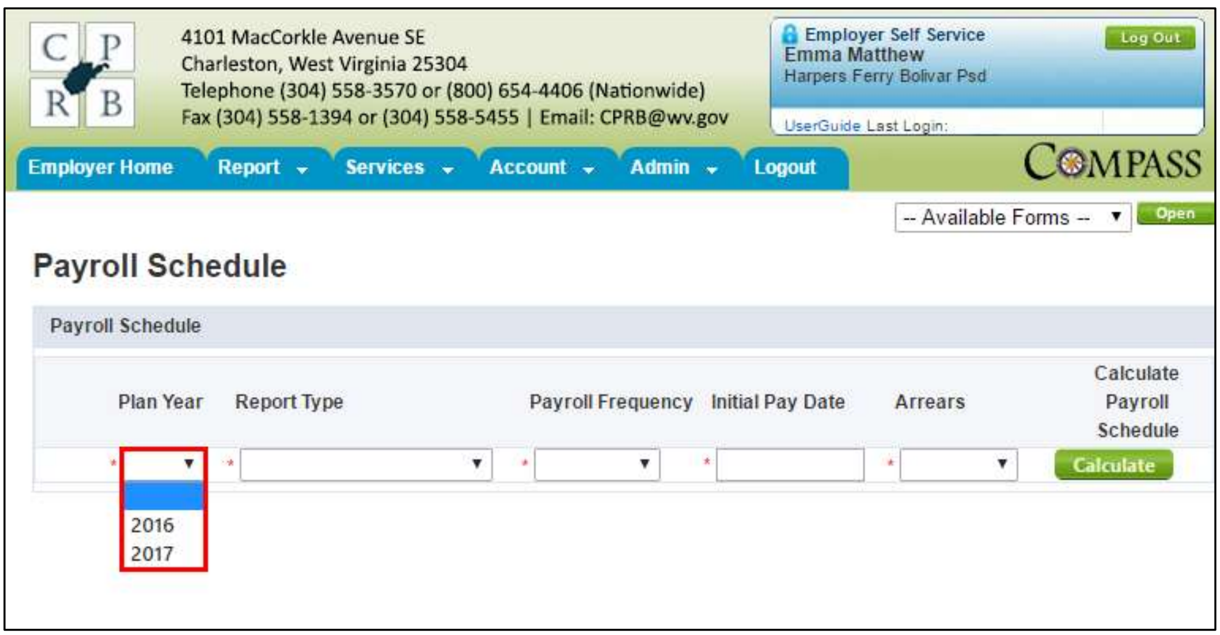
Report > **Payroll Schedule**



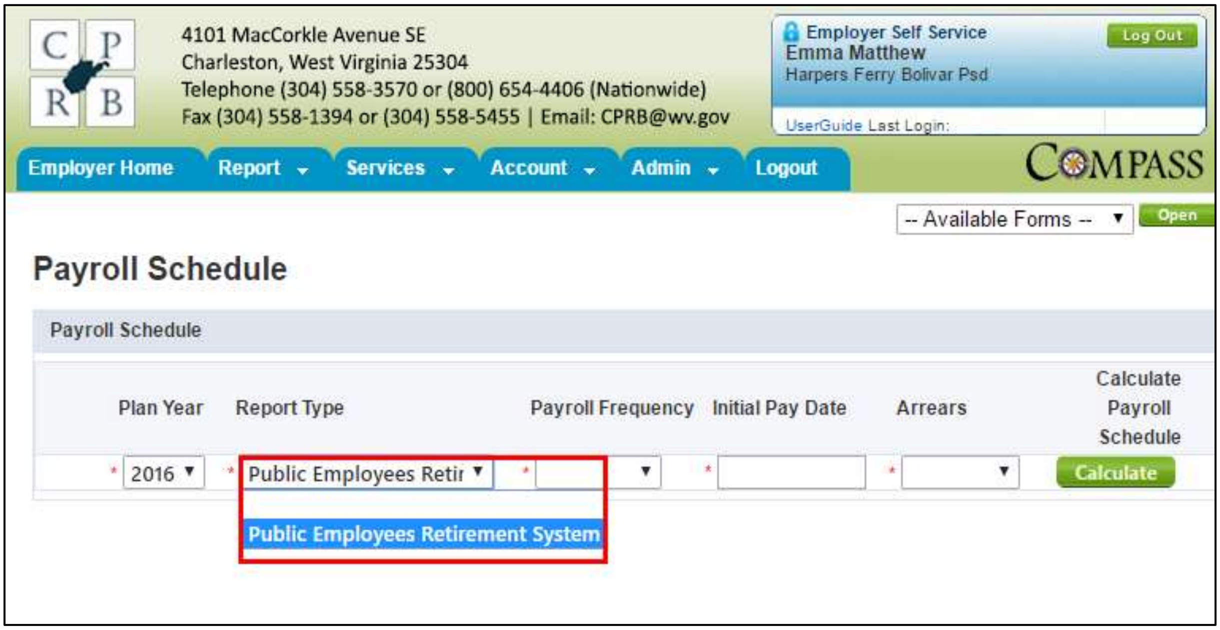
Step 2 -- The **Payroll Schedule** screen displays.



Step 3 -- Select the **Plan Year** from the drop down menu.

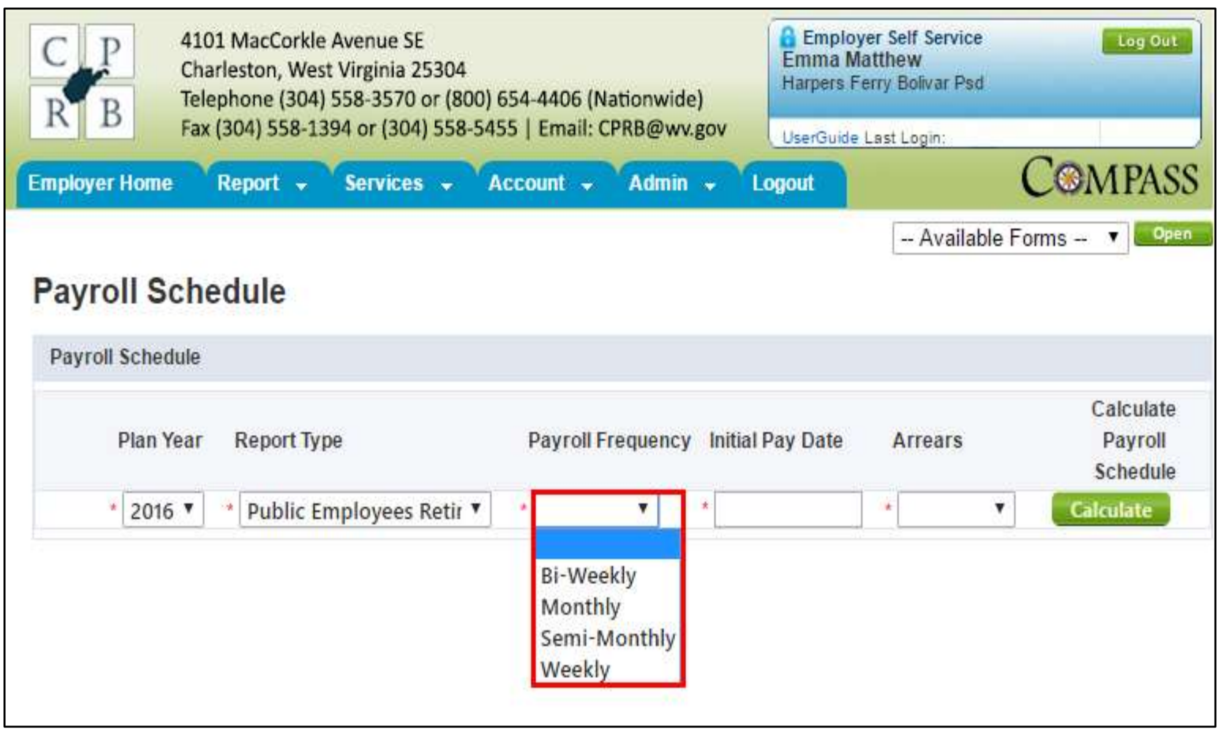


Step 4 -- Select the **Report Type** from the drop down menu. The Report Type is the associated Retirement System.



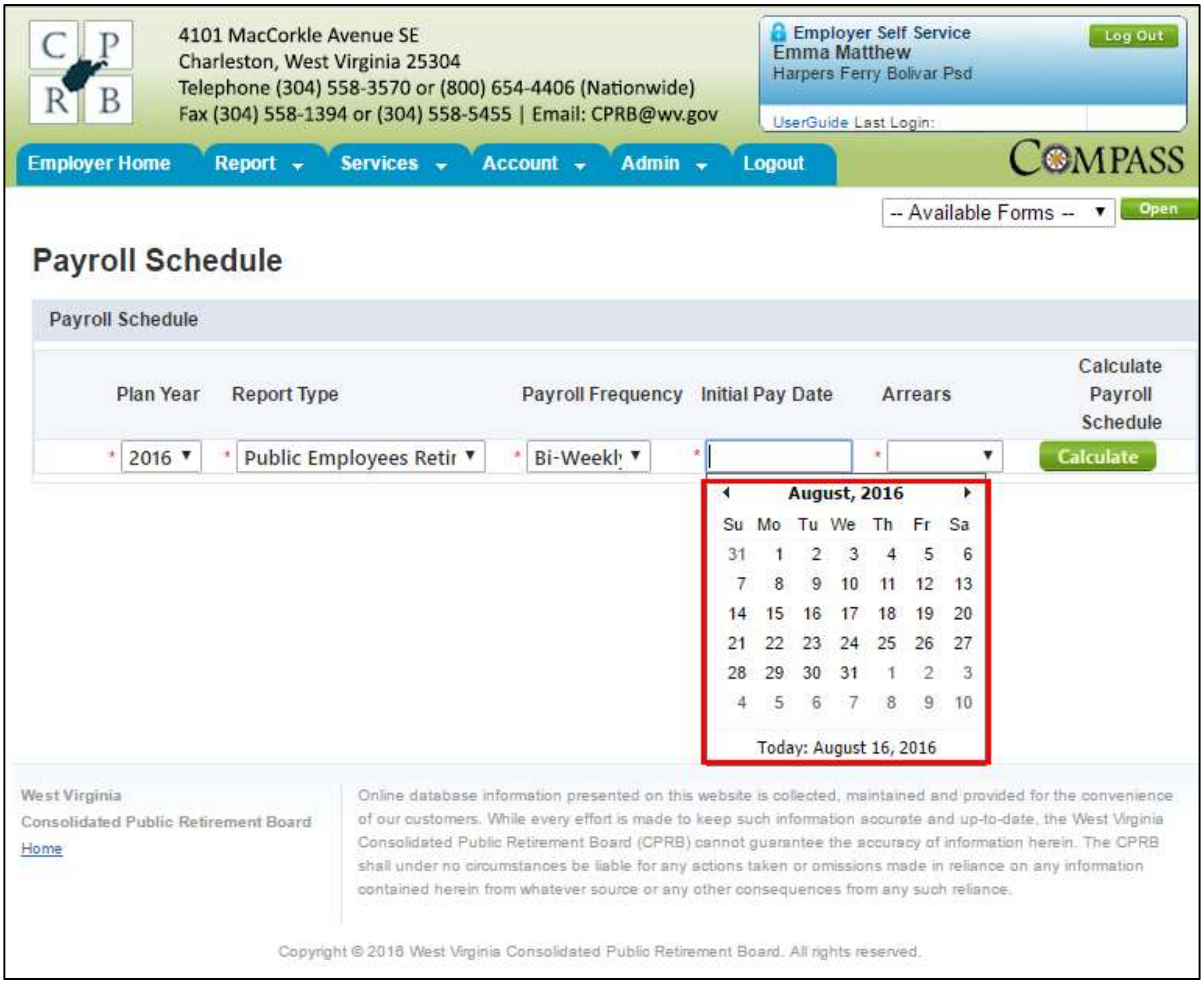
Step 5 -- Select the **Payroll Frequency** from the drop down menu.

Note: The Payroll Frequency is how often the employees receive compensation.



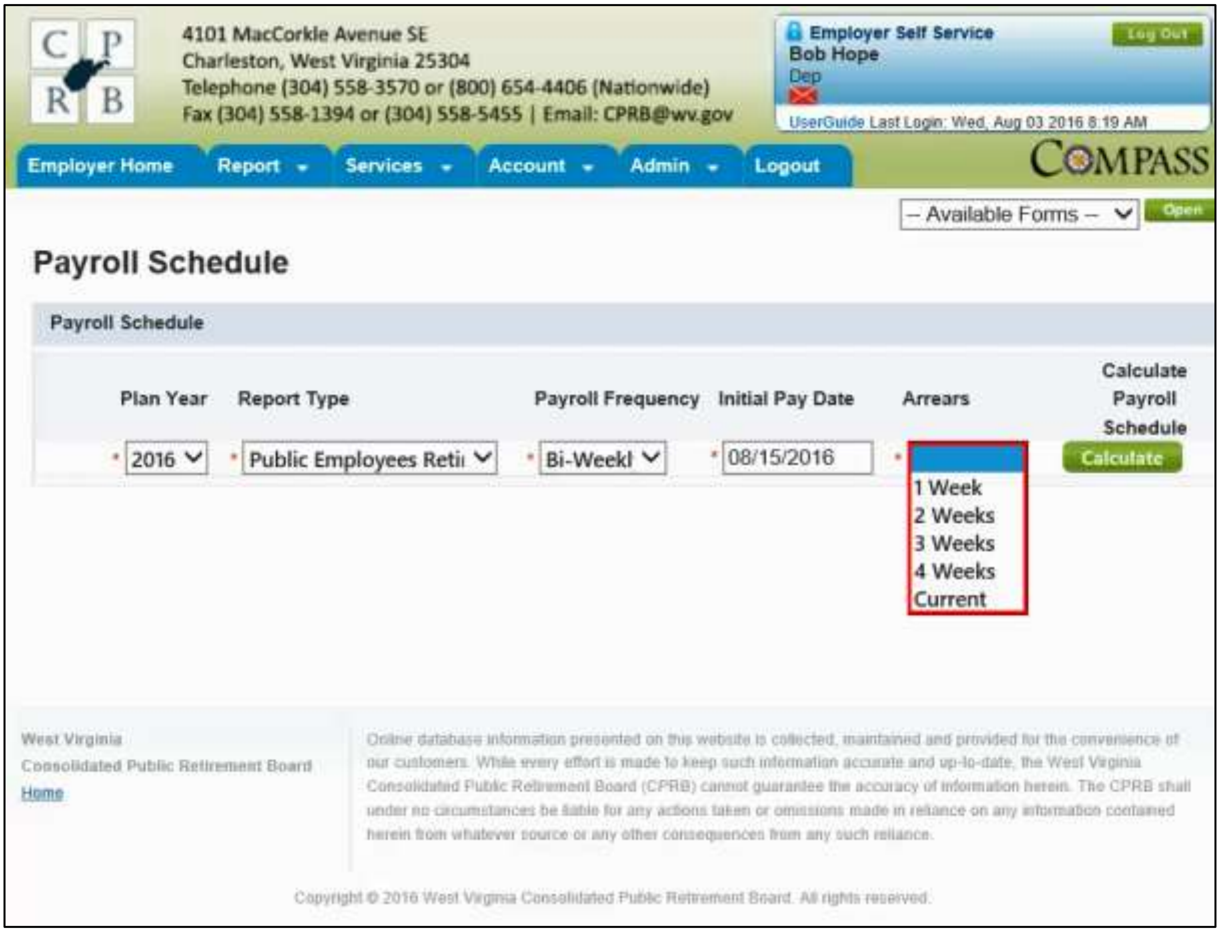
Step 6 -- Enter the date in the **Initial Pay Date** field.

Note: The Initial Pay Date is first pay date for the corresponding Plan Year.



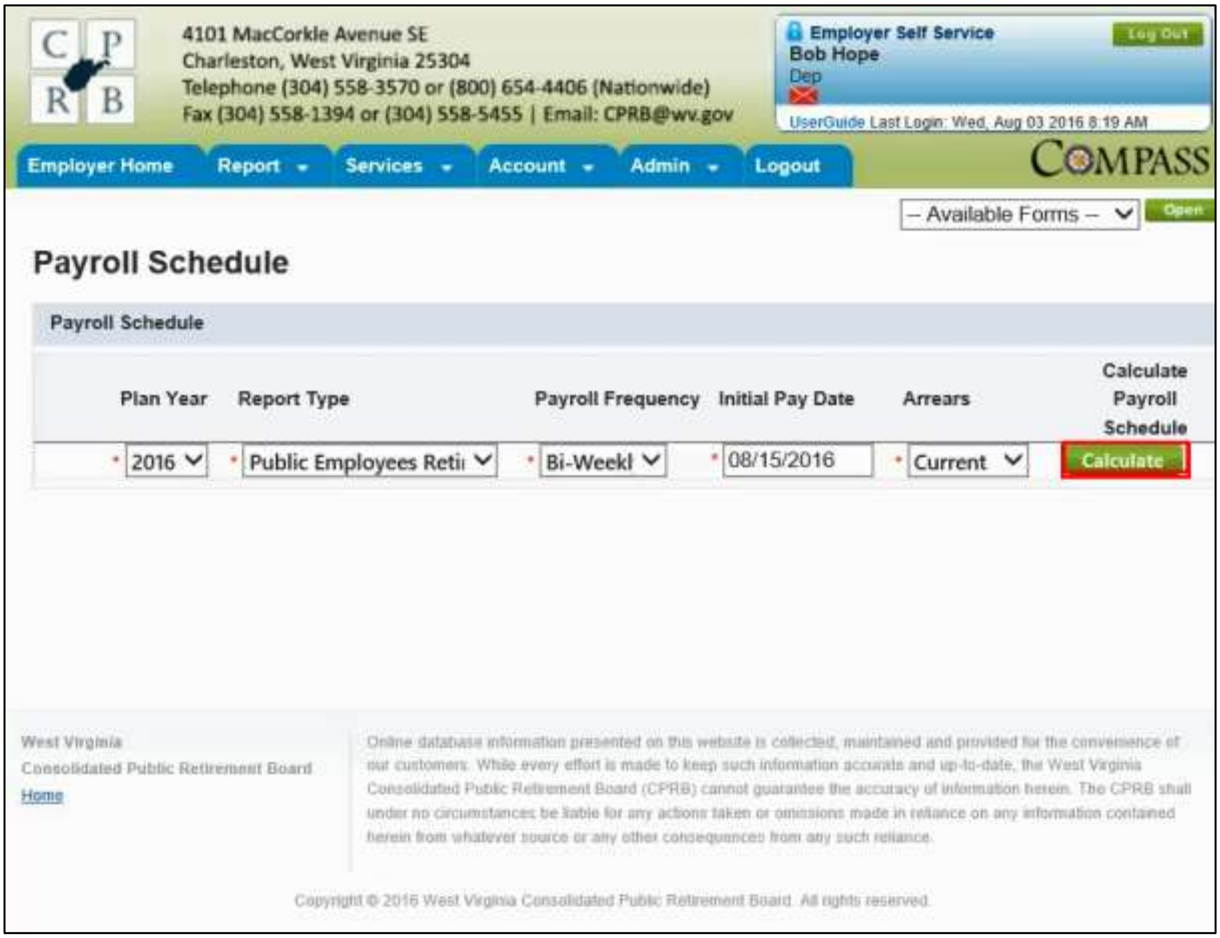
Step 7 -- Select the **Arrears** from the drop down menu.

Note: Arrears is the length of the delay between when the employee works and when they are paid for that work; the options are Current, 1 week, 2 weeks, 3 weeks, or 4 weeks.

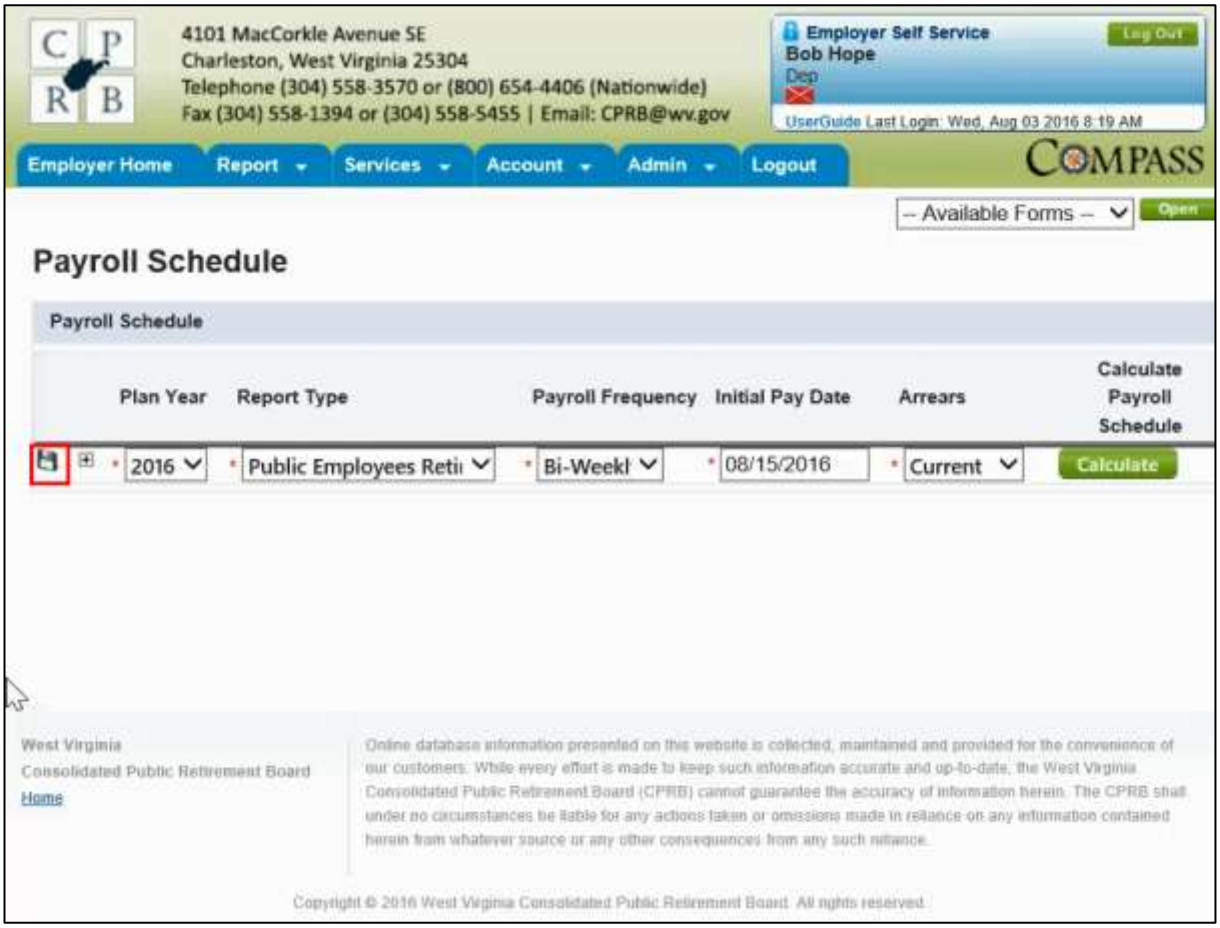


Step 8 -- Click the 

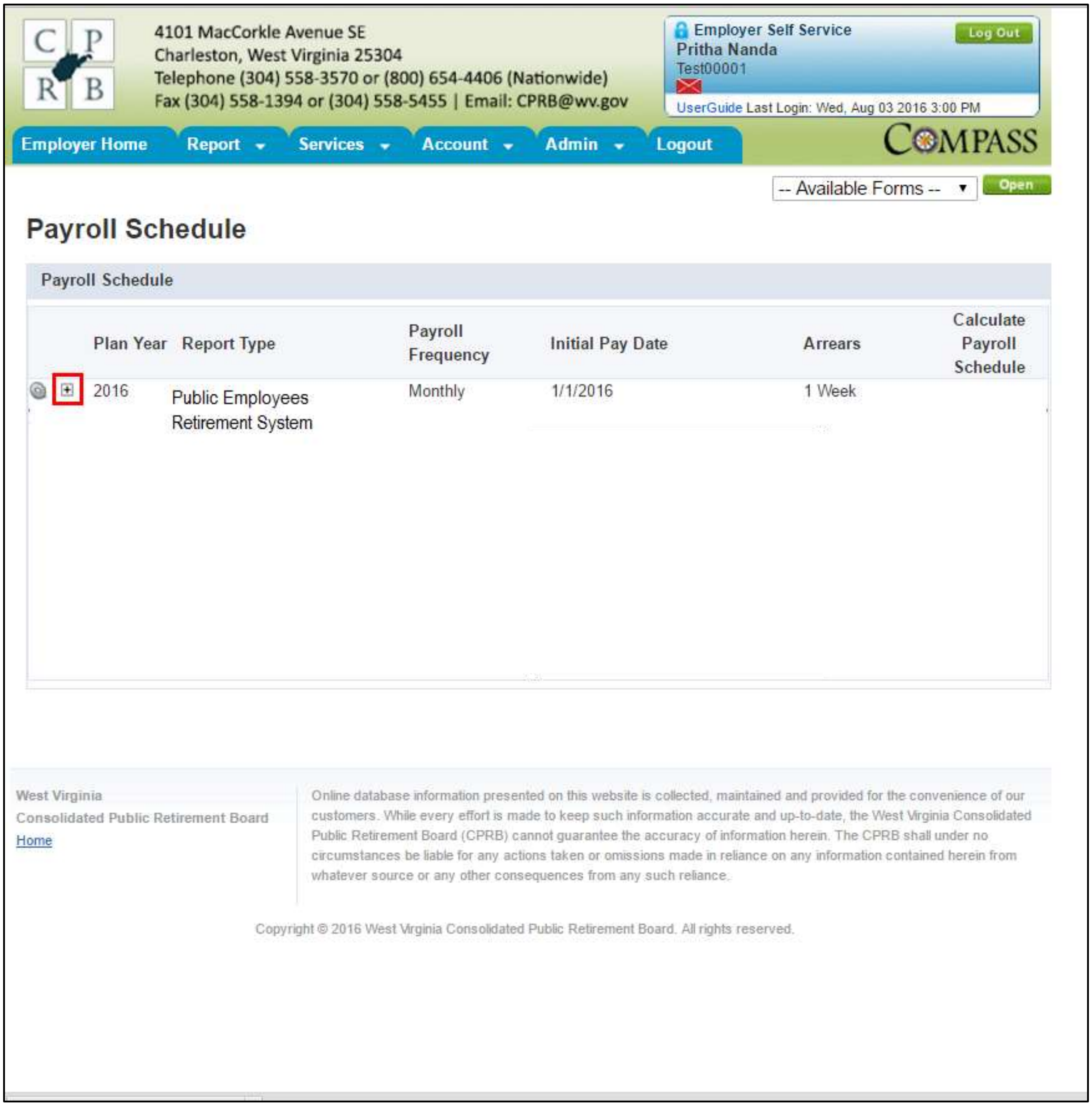
button.



Step 9 -- Click the **save** icon.

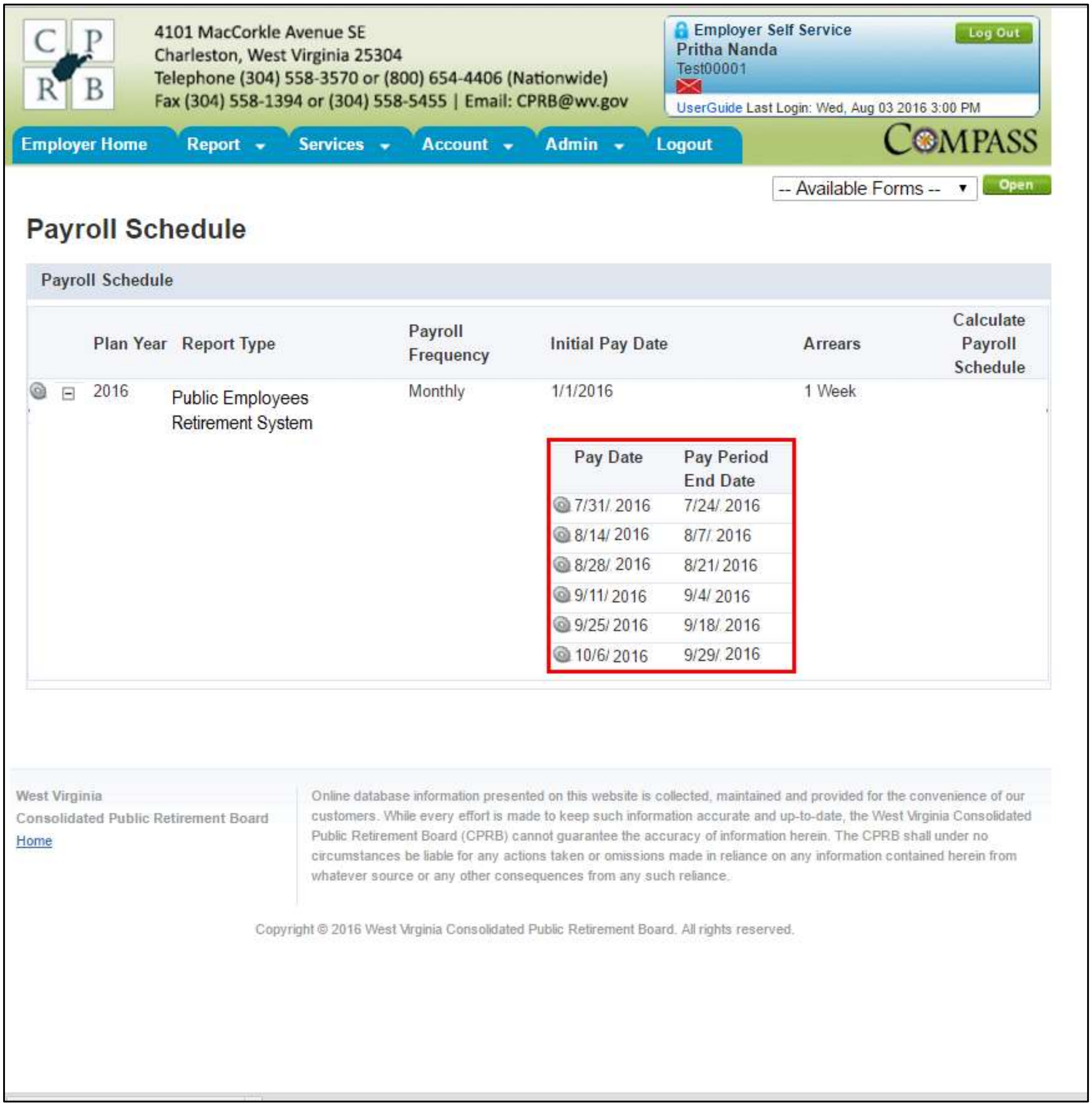


Step 10 -- Upon saving the payroll schedule, click the **expand** icon to view the detailed payroll schedule.



Step 11 -- The detailed **Payroll Schedule** displays with the Pay Dates and the Pay Period End Dates.

Note: A Pay Period End Date is the month, day and year which reflects the end of the period in which the wages were earned (regardless of when they were paid).



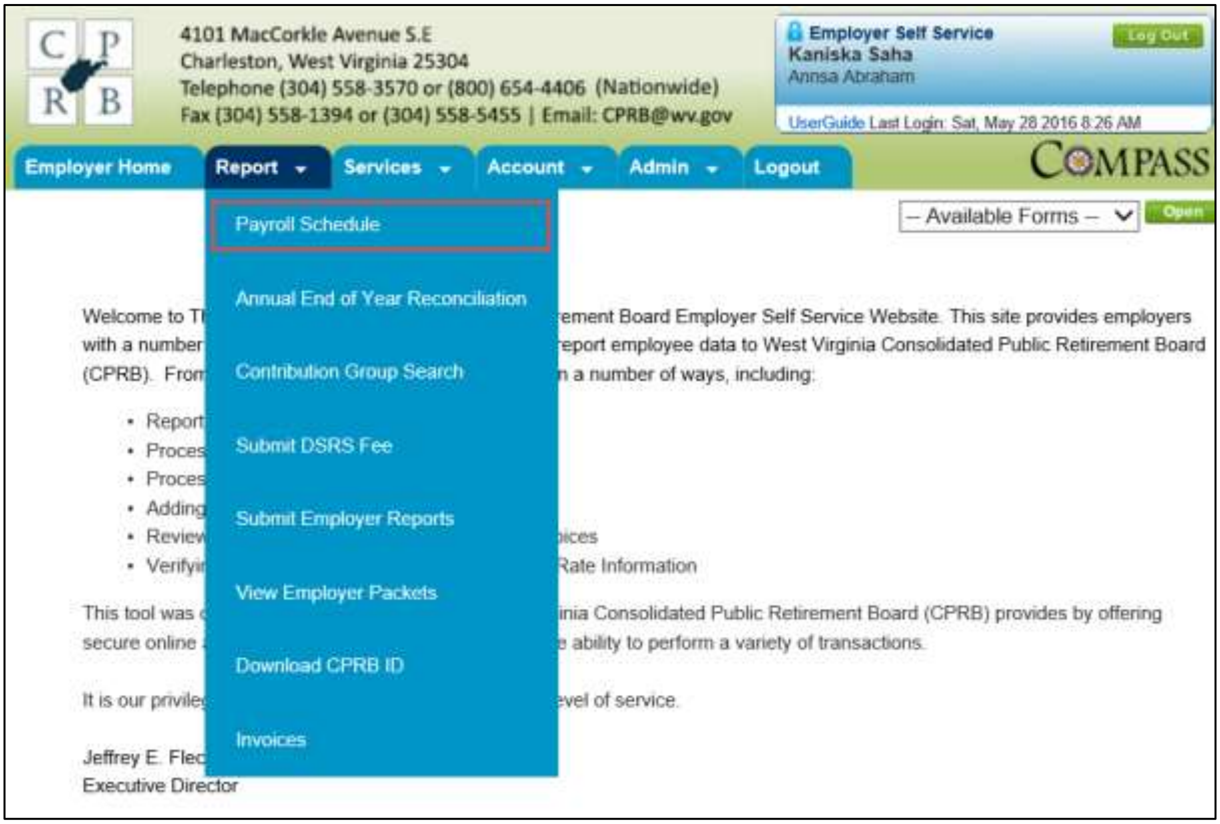
6.2 View Payroll Schedule Information

Once a **Payroll Schedule** has been added, employers can verify the pay dates which are projected by the system. When the payroll schedules are reported through the ESS portal to CPRB, the Report Date (the period for which the employer is submitting the contribution report) will coincide with the pay dates provided by the employer to CPRB during the beginning of the plan year, unless the employer is reporting monthly, then the Report Date will be defaulted to the first of the month being reported.

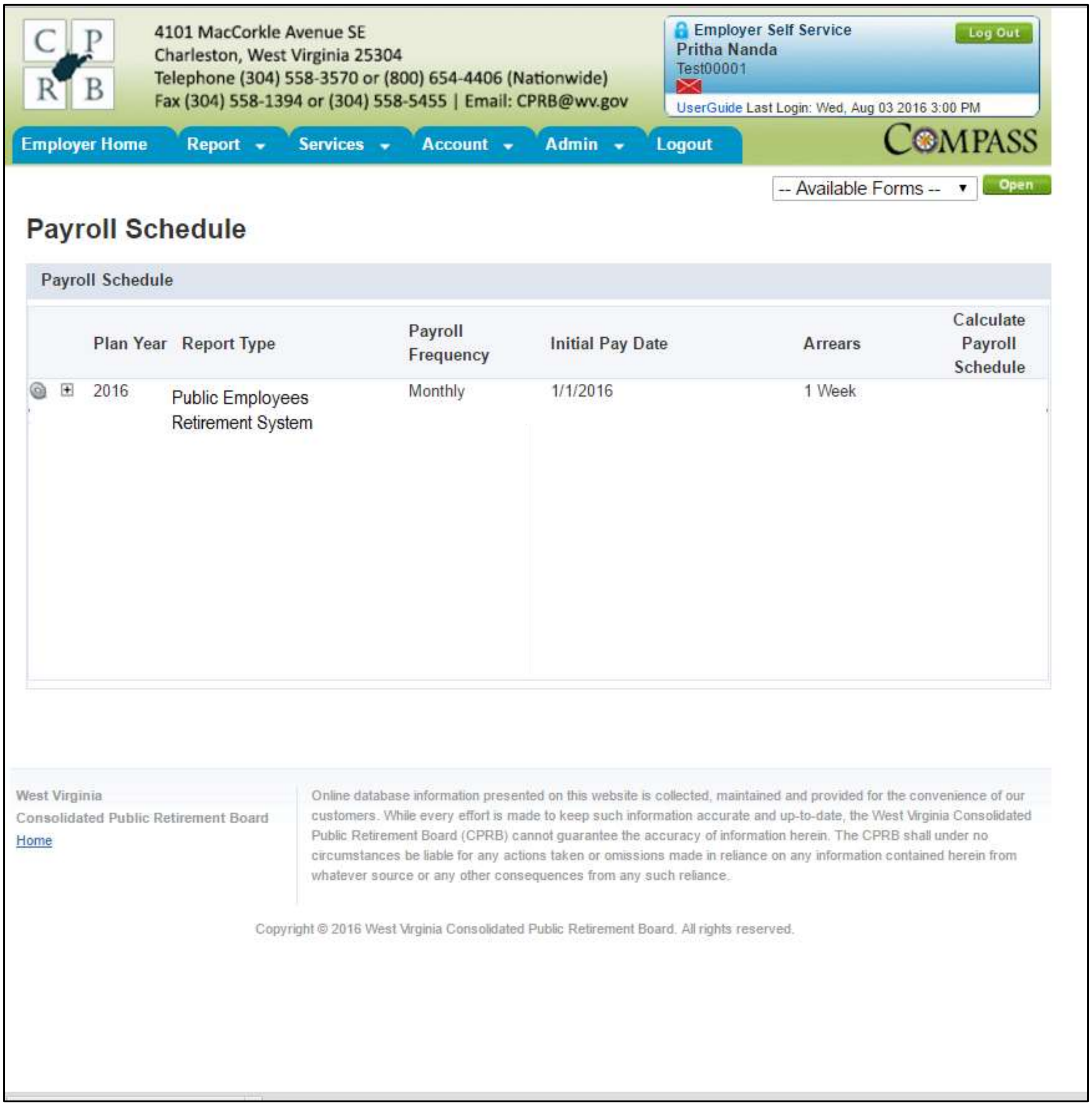
Perform the steps below to view the Payroll Schedule information:

Step 1 -- To navigate to the **Payroll Schedule** screen, click the following menu options:

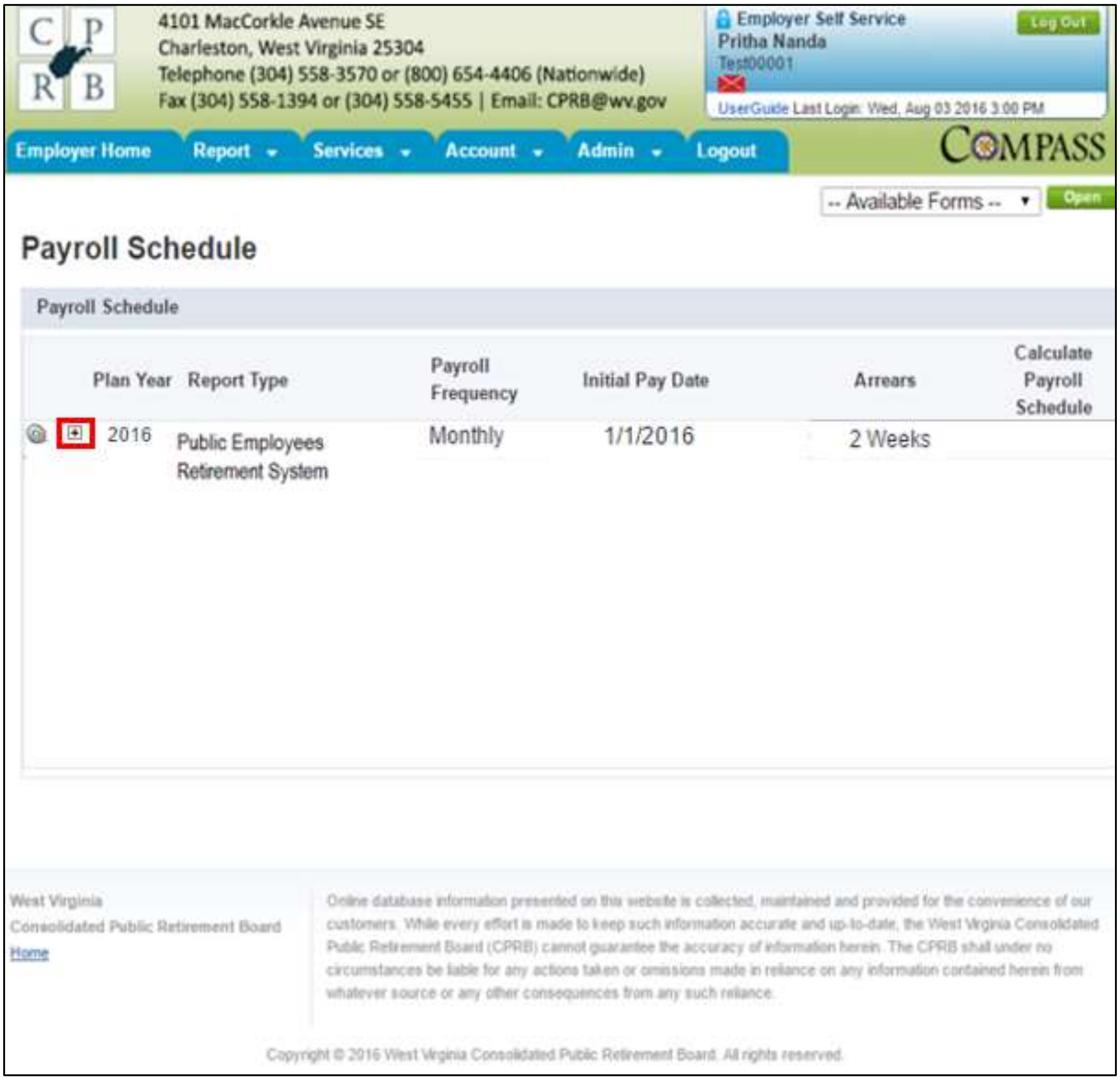
Report > **Payroll Schedule**



Step 2 -- The **Payroll Schedule** screen displays.

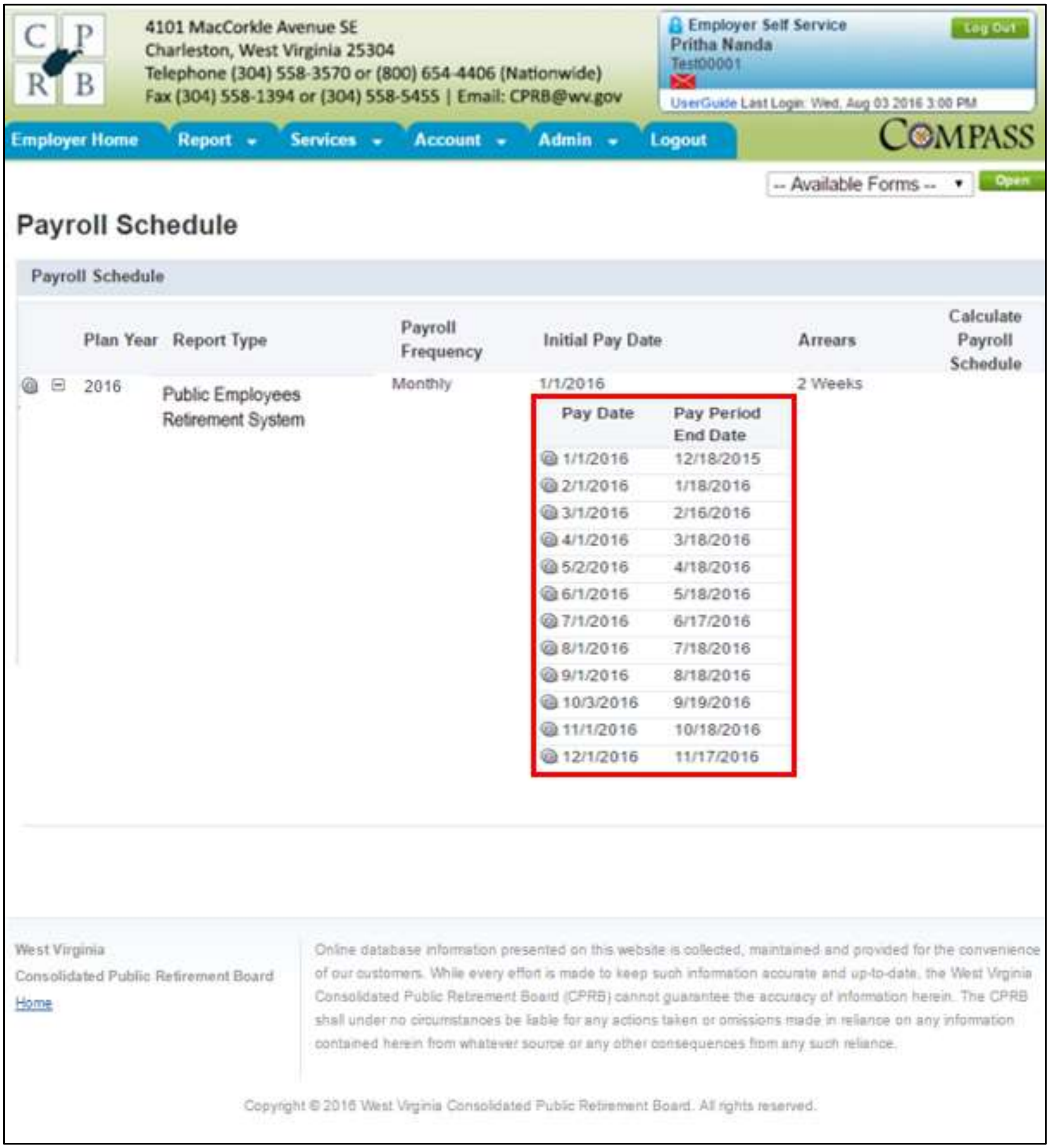


Step 3 -- Click the **expand** icon next to the Plan Year to view the payroll schedule information.



Step 4 -- The detailed **Payroll Schedule** is displayed with the Pay Date and Pay Period End Date.

Note: A Pay Period End Date is the year, month, and day which reflects the end of the period in which the wages were earned (regardless of when they were paid).



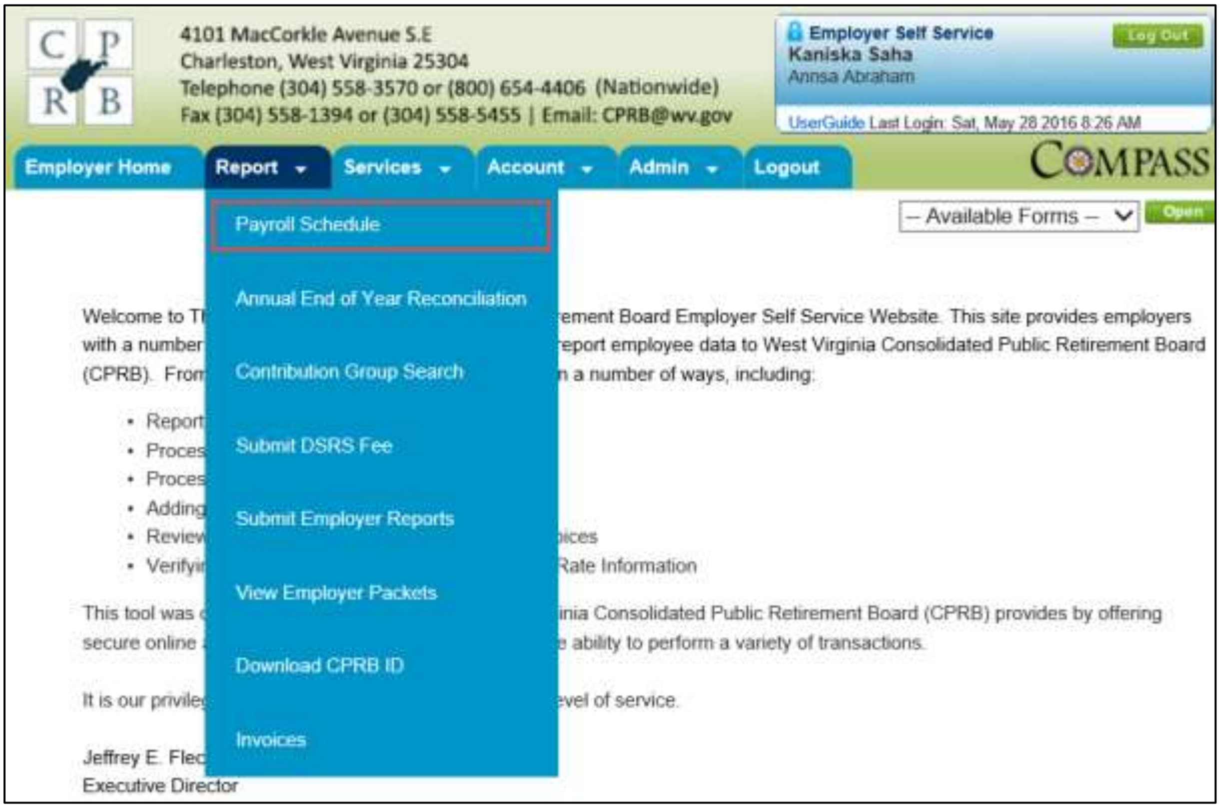
6.3 Edit Payroll Schedule Information

The **Payroll Schedule** can be edited using the gear icon on the **Payroll Schedule** screen. Upon clicking the Calculate button, the Payroll Schedule is re-calculated for that Plan Year and Retirement System.

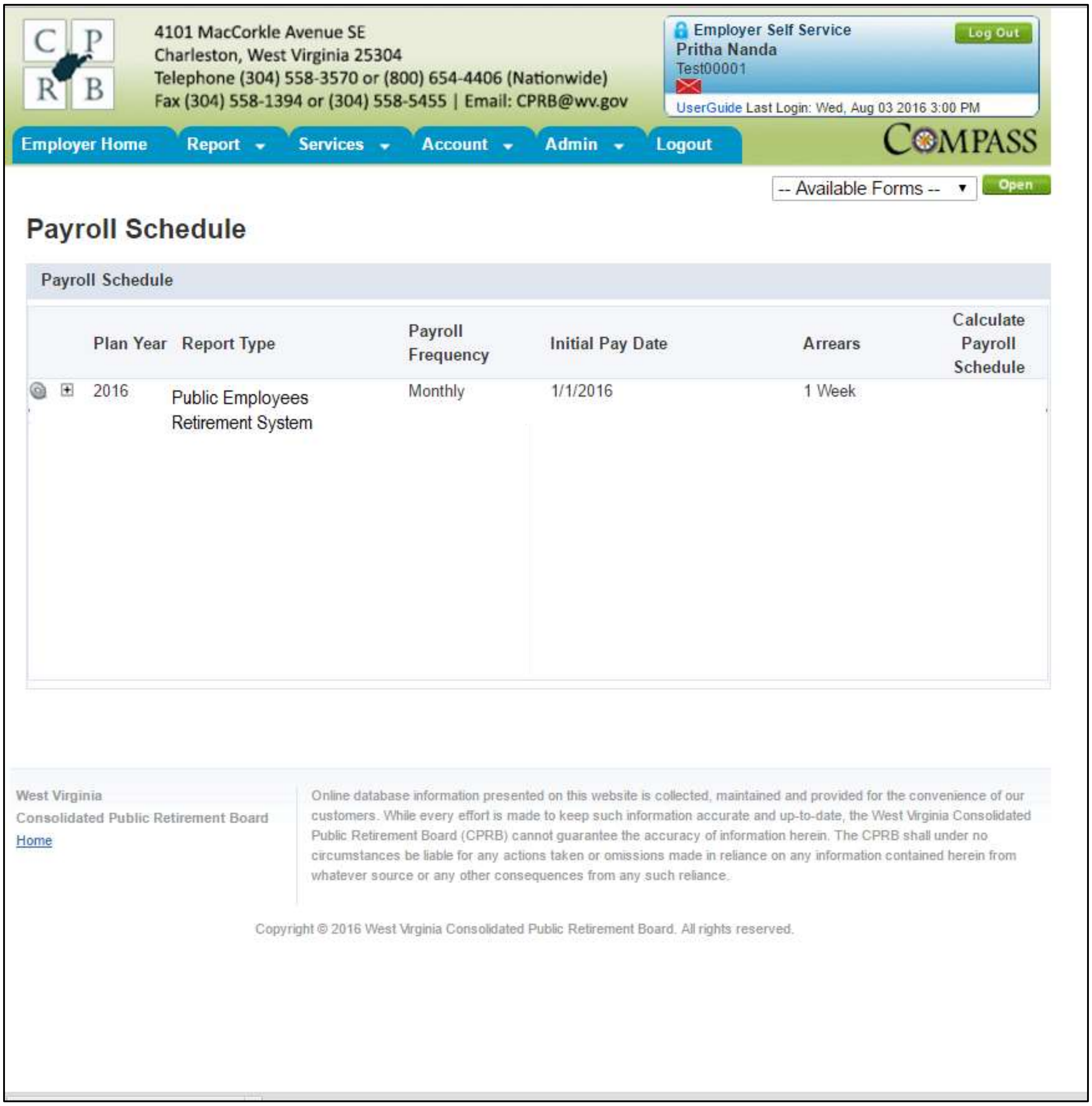
Note: The Payroll Schedule will be locked in the Employer Self Service module once the first contribution report is submitted by the employer for the selected Plan Year. If there is a need to edit the Payroll Schedule after the first report has been submitted, the employer must contact CPRB.

Step 1 -- To navigate to the **Payroll Schedule** screen, click the following menu options:

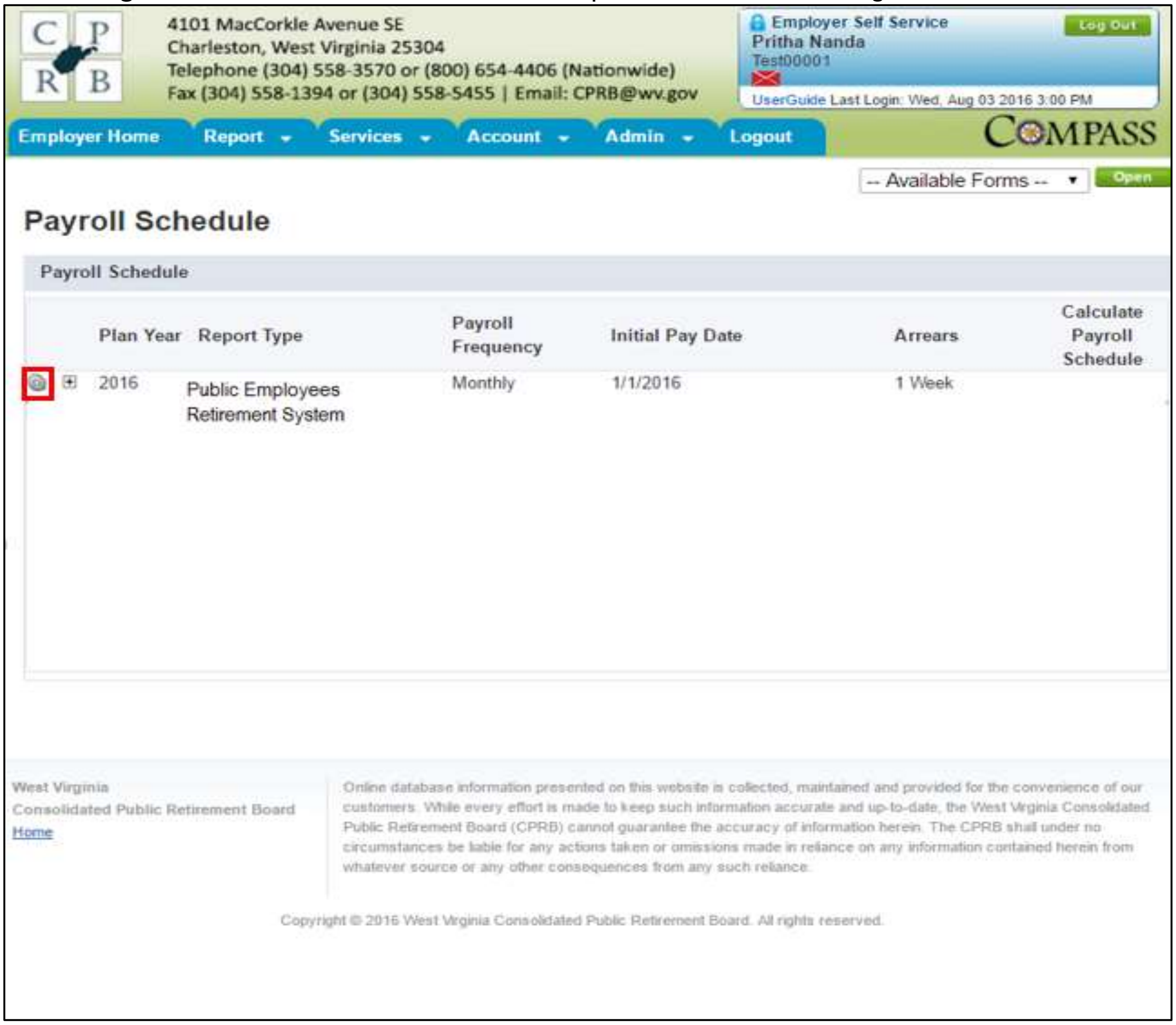
Report > **Payroll Schedule**



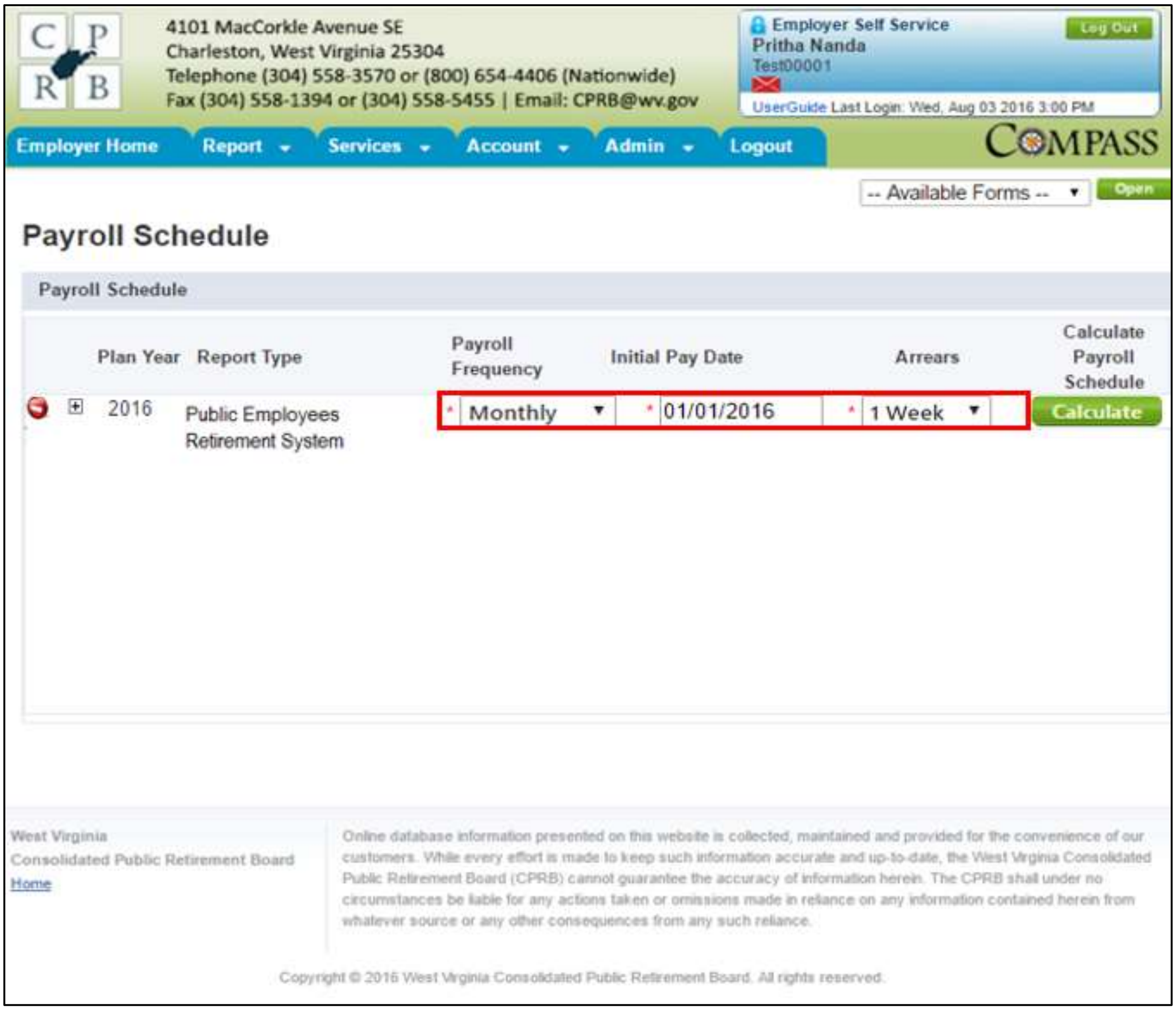
Step 2 -- The **Payroll Schedule** screen displays.



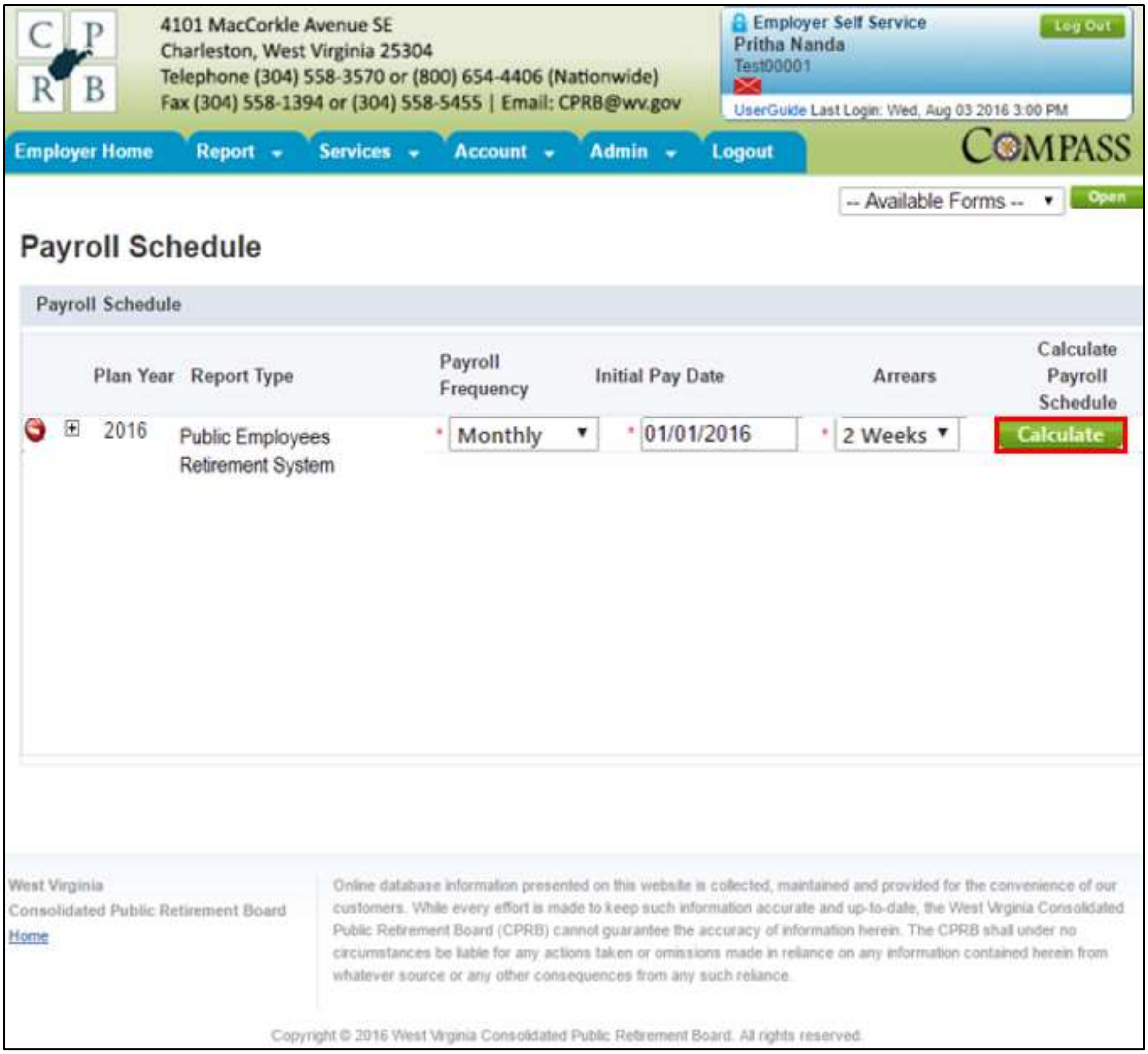
Step 3 -- Click the **gear** icon next to a Plan Year to open that item for editing.



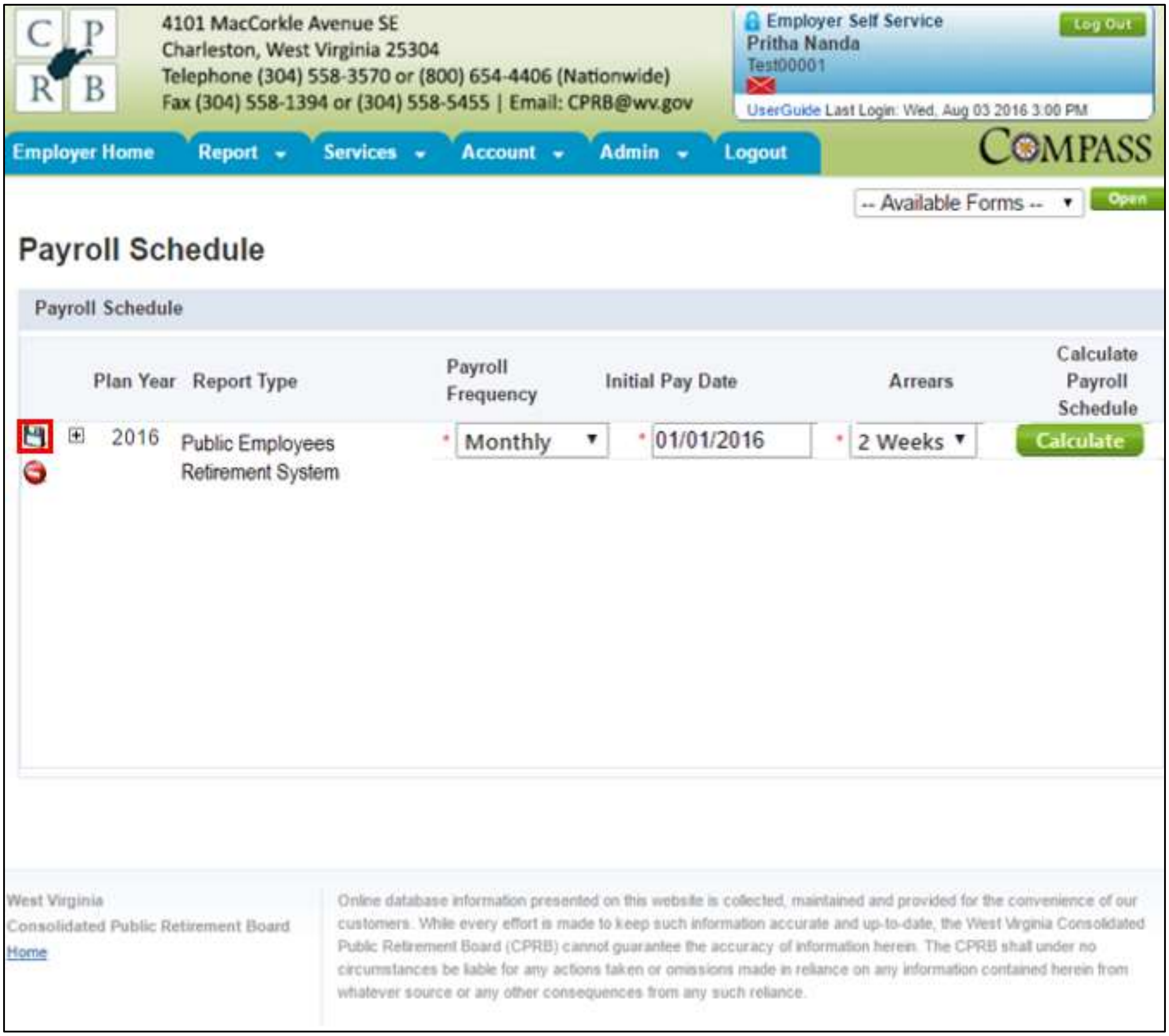
Step 4 -- Make edits to the payroll schedule information.



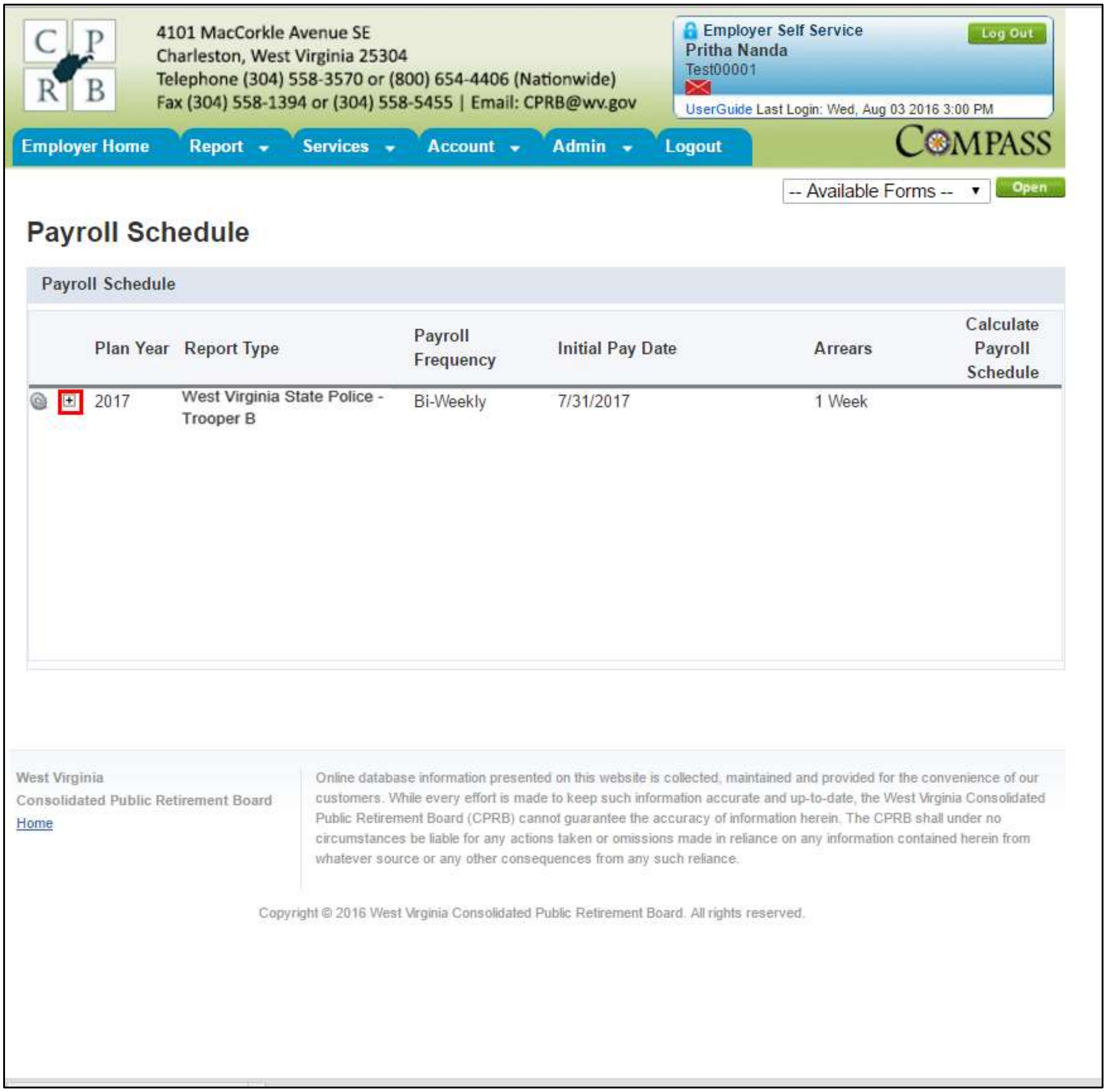
Step 5 -- Click the  button.



Step 6 -- Click the **save** icon to save the edits made to the payroll schedule.

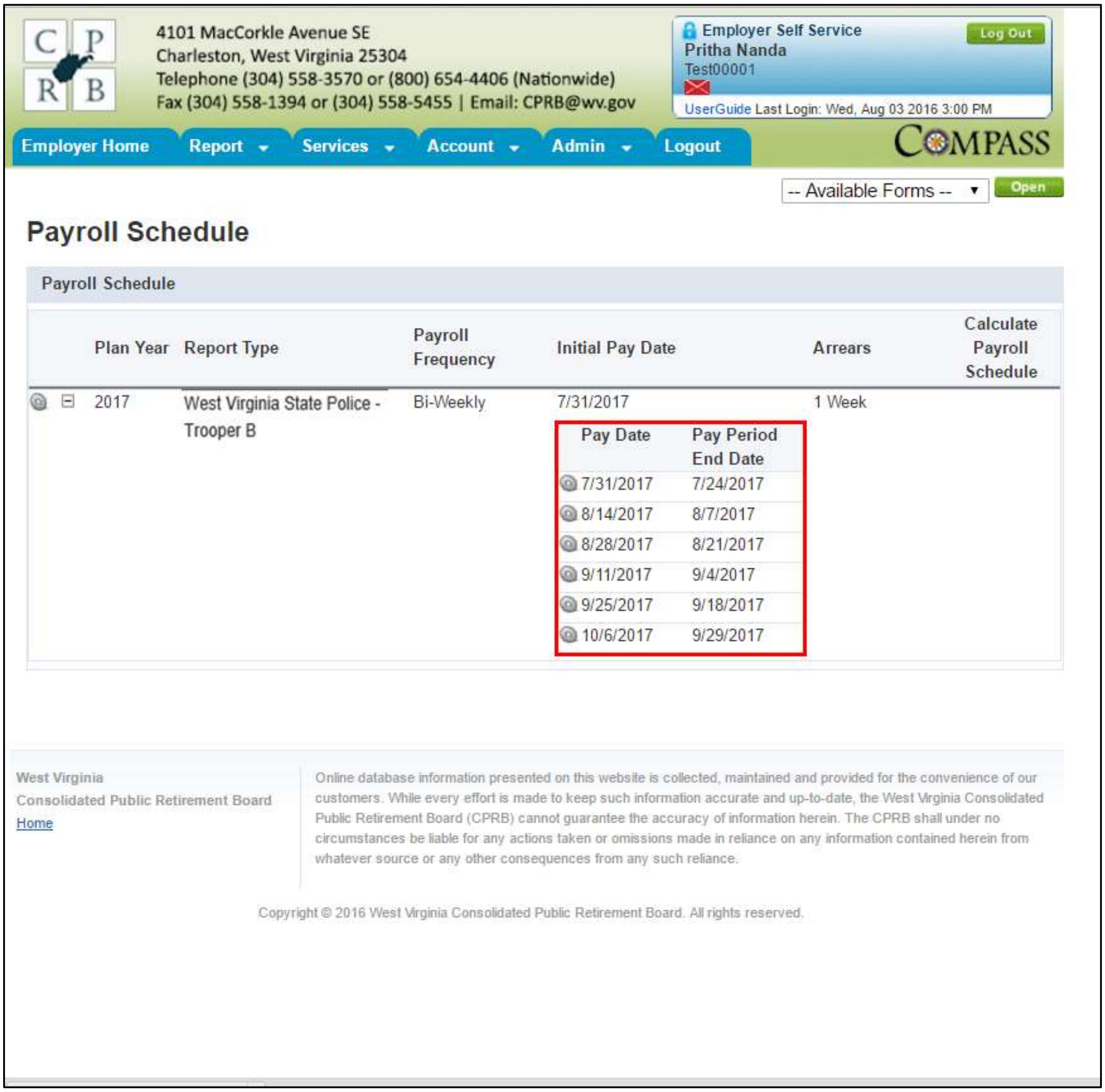


Step 7 -- Upon saving the **Payroll Schedule**, click the **expand** icon to view the detailed payroll schedule.



Step 8 -- The detailed **Payroll Schedule** is displayed with the Pay Date and Pay Period End Date.

Note: A Pay Period End Date is the year, month and day which reflects the end of the period in which the wages were earned (regardless of when they were paid).



7. Submit Employer Reports

The **Submit Employer Reports** functionality enables the employers to submit only Employment Classification information, only Contribution information, or both Employment Classification and Contribution information together to CPRB. The employers can submit their reports to CPRB through two different methods:

1. **Upload File** (a new COMPASS file format has been defined for employers to submit the information in a flat file, typically used by employers with large employee populations), or
2. **Enter On-Line** (enables employers to review, update, and submit the information which is replicated from previous reports, mainly used by employers with smaller employee populations).

Employers can submit the following three types of reports:

- **Employment Classification Information** - Submit the Employment Classification report containing the employee demographic and employment information to CPRB in order to enroll an employee in one of the CPRB administered retirement systems.
- **Contribution Information** - Submit wage / salary and contribution information to CPRB for the employees. This information can be submitted only if the employee already has their employment classification and demographic information reported to CPRB.
- **Employment Classification and Contribution Information** - Submit both Employment Classification and Contribution information combined in one file for the employees. This option requires an employer to submit the employment classification and contribution information using the new COMPASS file format.

7.1 Submit Employment Classification Information

Employers must **Submit Employment Classification Information** to CPRB in order to report their employees in one of the CPRB administered retirement systems.

The key information required for an Employment Classification is the employee's job position, position status, contribution group, and agency. The Employment Classification information is critical for the validation of contributions and posting of service credit. In addition to the above key information, the other details that are included in an Employment Classification are the employee's first name, last name, CPRB ID (optional), birth date, SSN, employment begin and end dates, employment end reason (if applicable), Contract Days, Scheduled Hours Per Day, Payroll Frequency, Rate of Pay, Type of Rate of Pay and Employment Payment Type (if applicable).

Once the Employment Classification information is reported (through either the Upload File or Enter On-Line function), the demographic and employment classification information is validated by COMPASS and any errors identified must be resolved by the employer prior to submitting to CPRB.

For example, validations based on the employment begin date being reported are performed so that the employee is enrolled in the correct contribution group. So, employees belonging to the Public Employees Retirement System (PERS) who first participated in PERS on or after 7/1/2015 will be enrolled in the PERS Tier 2 contribution group, while PERS employees who first participated in PERS prior to 7/1/2015 are enrolled in the PERS Tier 1 contribution group.

Once the Employment Classification information has been submitted and errors (if any) have been corrected, employers will be able to view the **Employment Classification Summary.** The **Employment Classification Summary** indicates the total number of new Employment Classification that were created or updated in COMPASS based on the demographic and Employment Classification information provided by the employer. COMPASS generates a new person record (CPRB ID) for a new member, creates / updates memberships, and Employment Classification.

7.1.1 Submit Employment Classification – Upload File

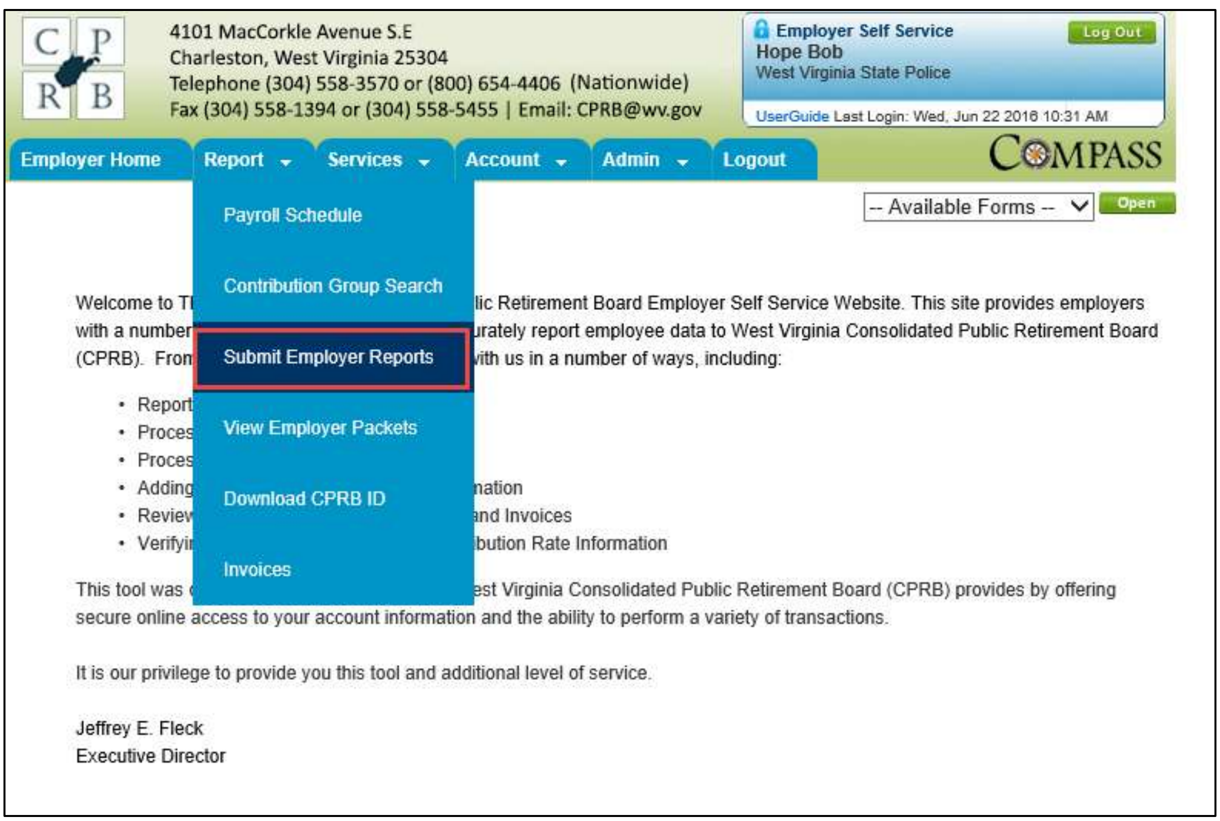
If the employer chooses to submit the Employment Classification to CPRB using the Upload File medium, then the Employment Classification must be in the new COMPASS file format. Please refer to the COMPASS Employer Reporting File Format, which was first distributed to employers in March of 2016, which can be found here: http://www.wvretirement.com/Forms/COMPASS-Eer-ReportingFile.pdf.

1. **Upload File** (a new COMPASS file format has been defined for employers to submit the information in a flat file, typically used by employers with large employee populations), or
2. **Enter On-Line** (enables employers to review, update, and submit the information which is replicated from previous reports, mainly used by employers with smaller employee populations).

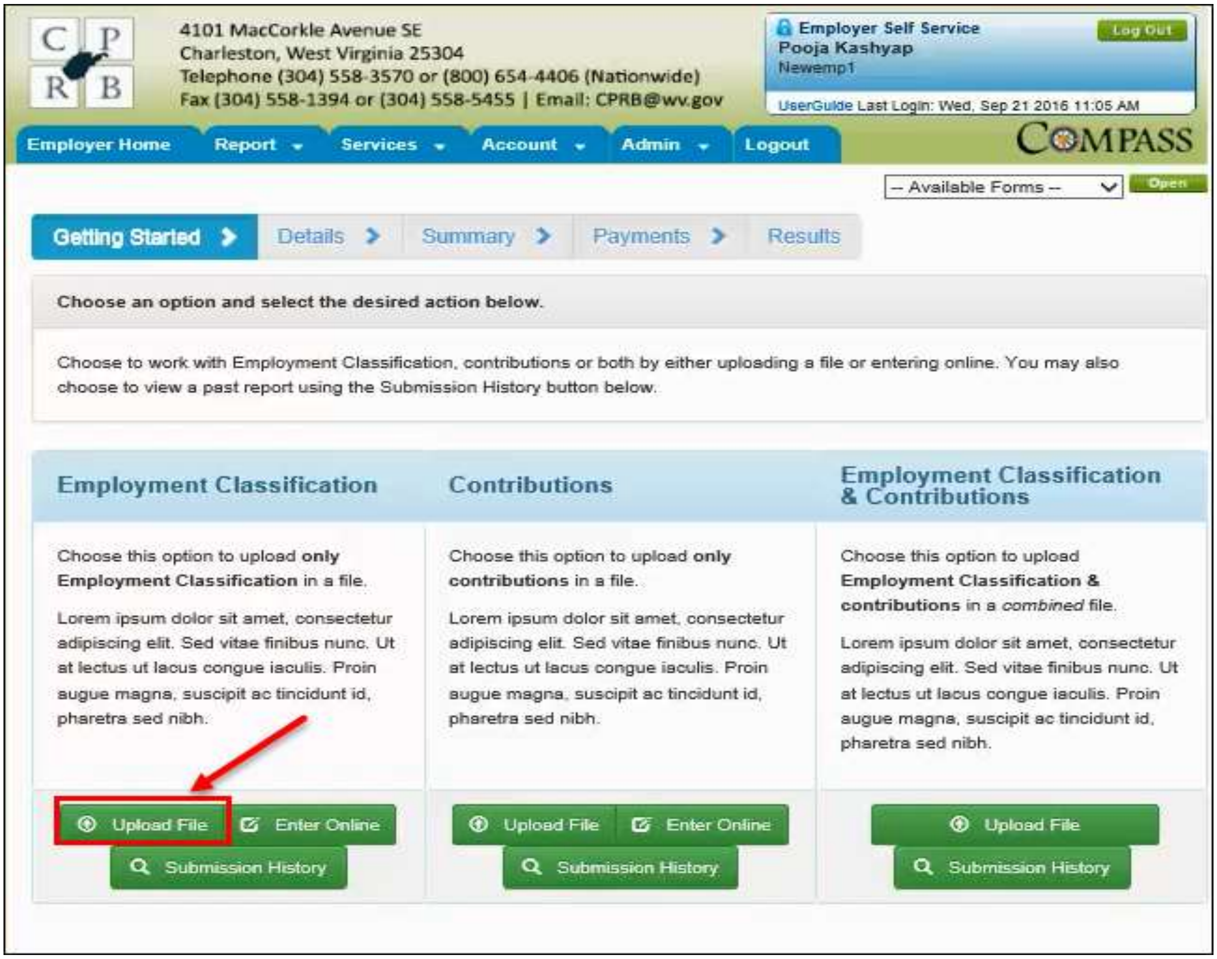
Follow the steps to upload the Employment Classification Information using the Upload File method:

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

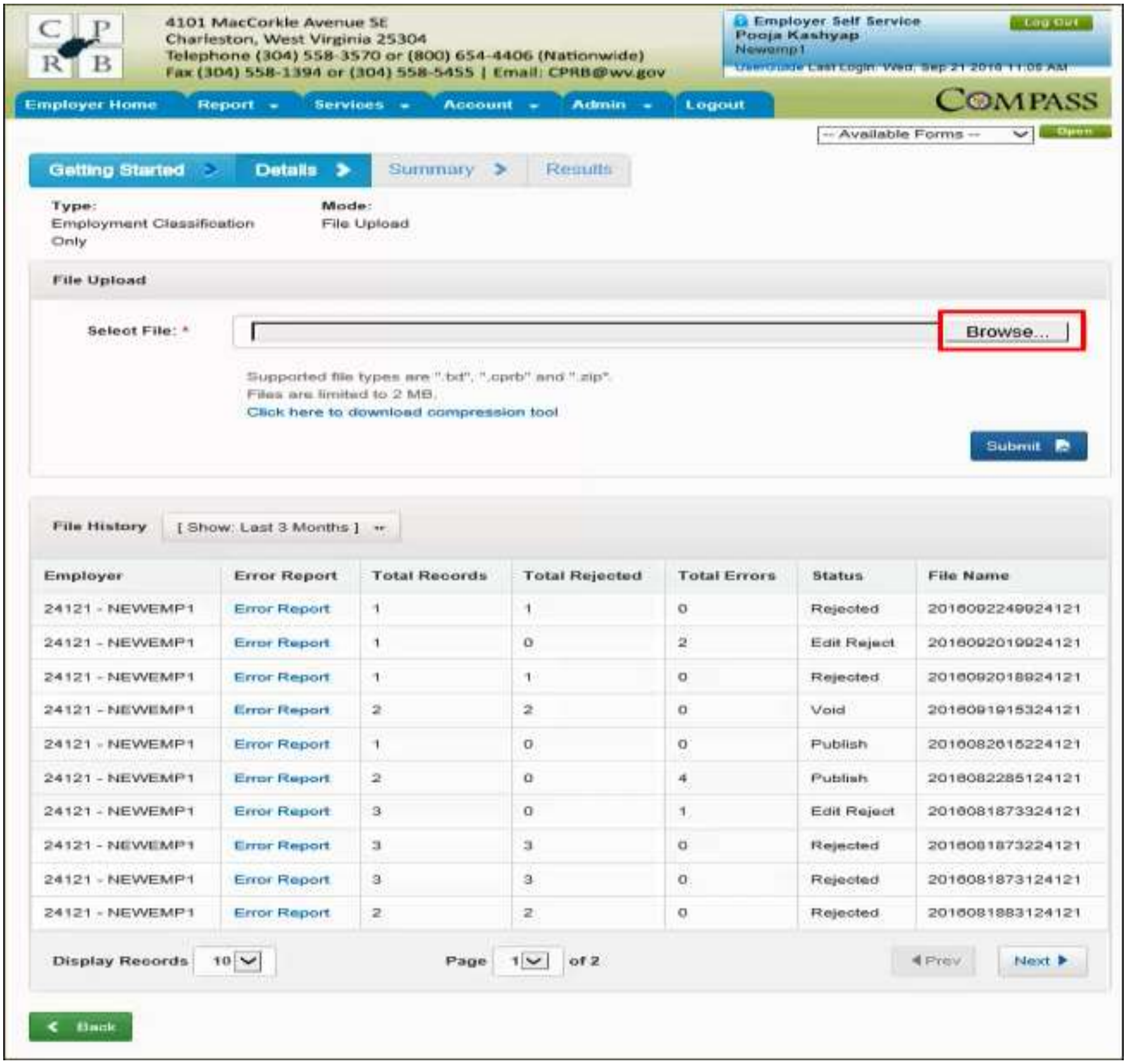
Report > **Submit Employer Reports**

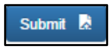


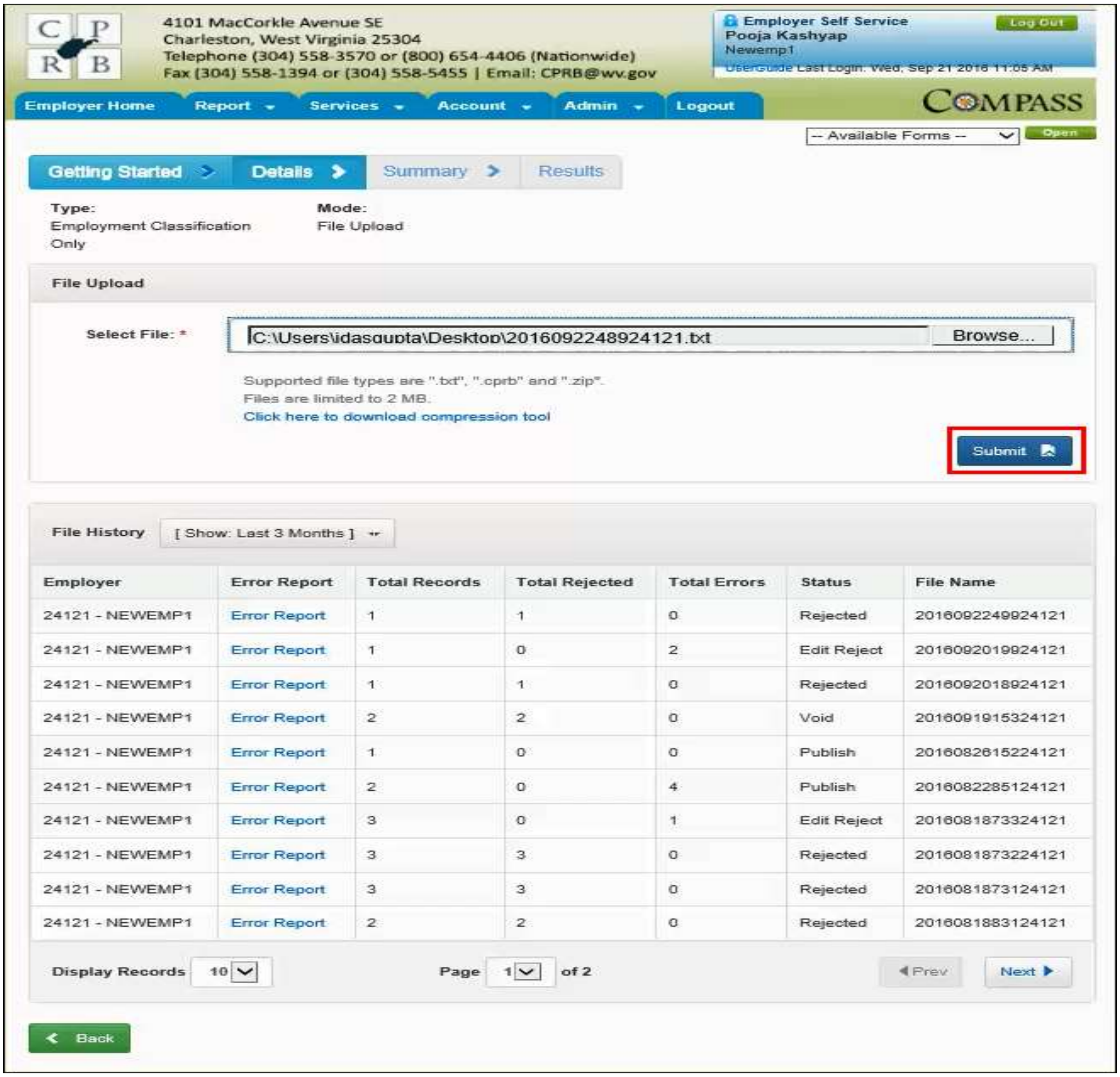
Step 2 -- The **Getting Started** screen displays. In the **Employment Classification** section, click the  button.



Step 3 -- Click the  button to select the **Employment Classification** file to be submitted through a browse function that will allow for the selection of a saved file.

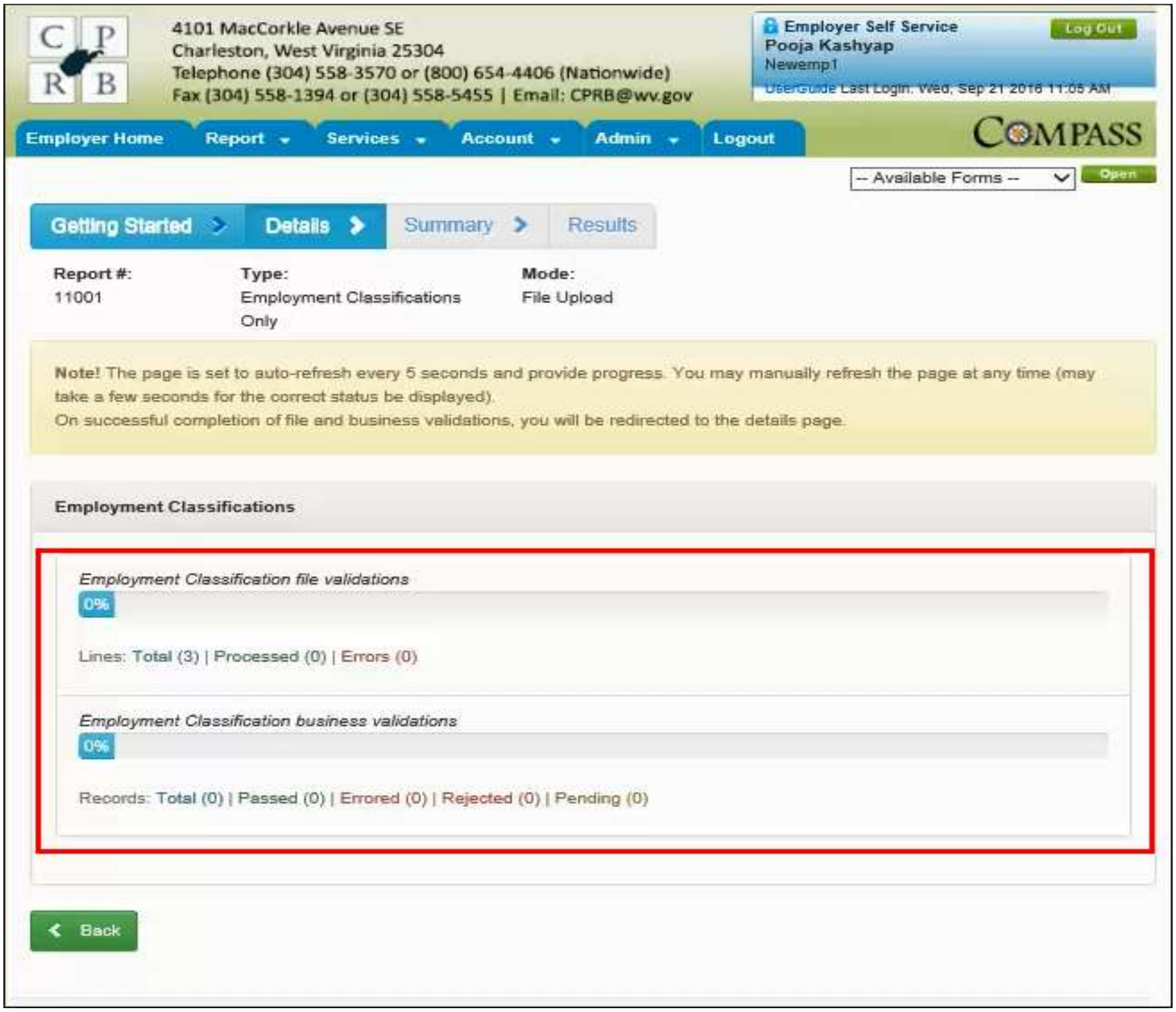


Step 4 -- Click the  button.



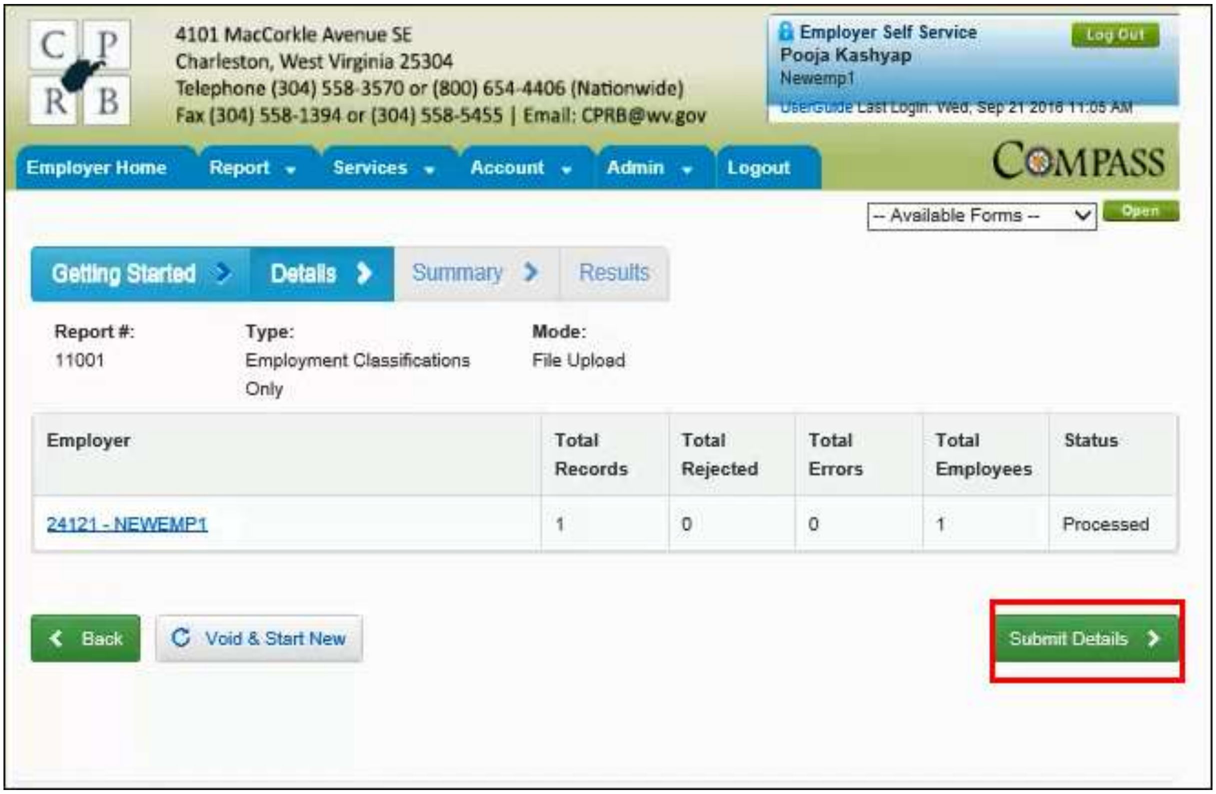
Step 5 -- The **Submit Employer Report – File Progress** screen will show the Employment Classification file upload progress. The screen will also show any errors identified in the file and successful completion of uploading the Employment Classification file.
Note: Once the Employment Classification file processing is complete, the Primary Payroll Coordinator will receive an email with the results from the submission. The Payroll Coordinator is a functional role within the ESS portal, and can have the security access of either the ESS Administrator role or the Employer Reporting role.

Note: If the **Submit Employer Report – File Progress** screen displays an error message, navigate to Section 7.1.1.1 to view the errors in the uploaded Employment Classification file.



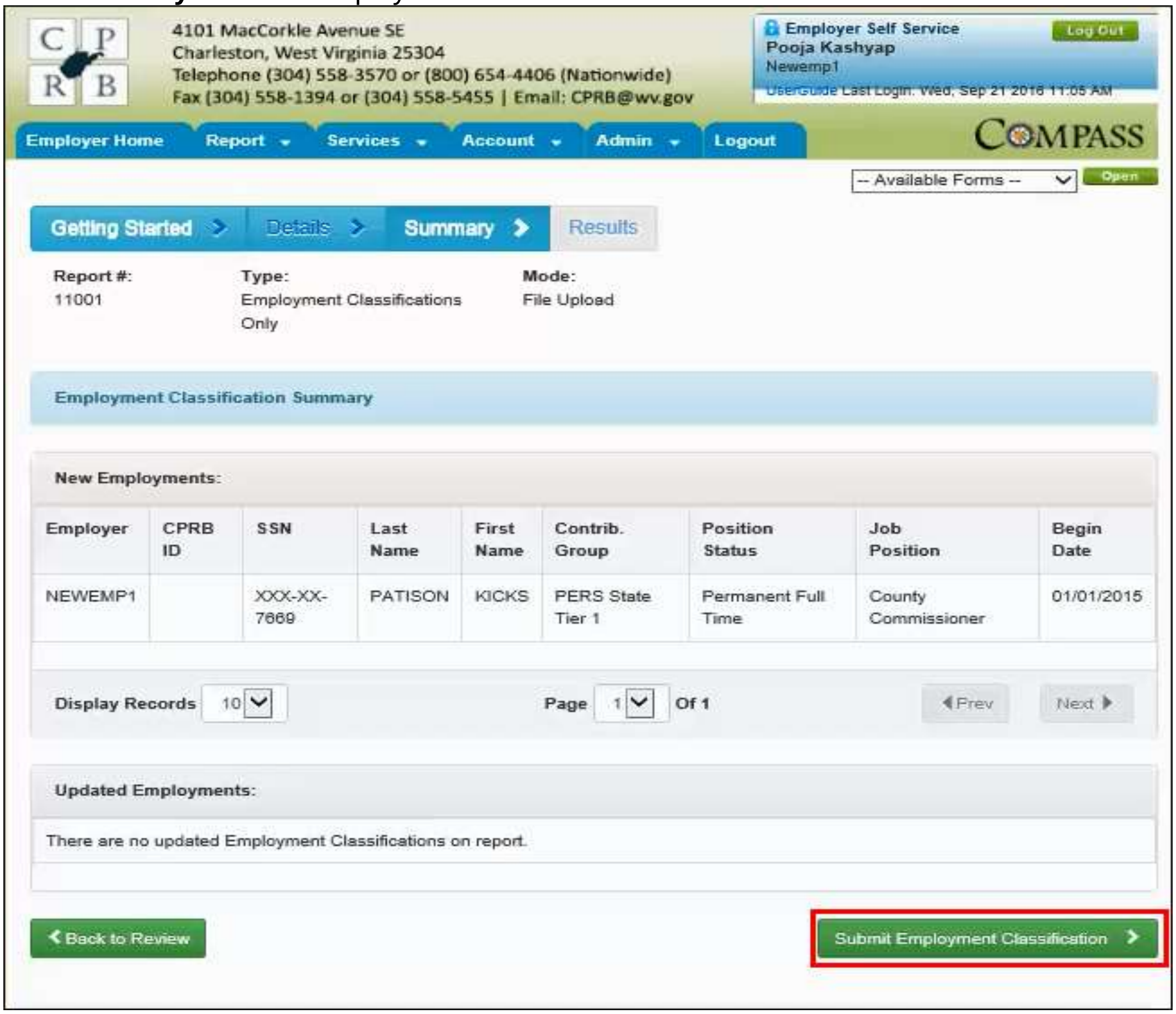
Step 6 -- Click the **Submit Details** button.

Note: The **Submit Details** button will be disabled if there are any **Errors** in the file. (Follow the steps in Section 7.1.1.2 Correct Employment Classification Upload File Errors to correct remaining errors).

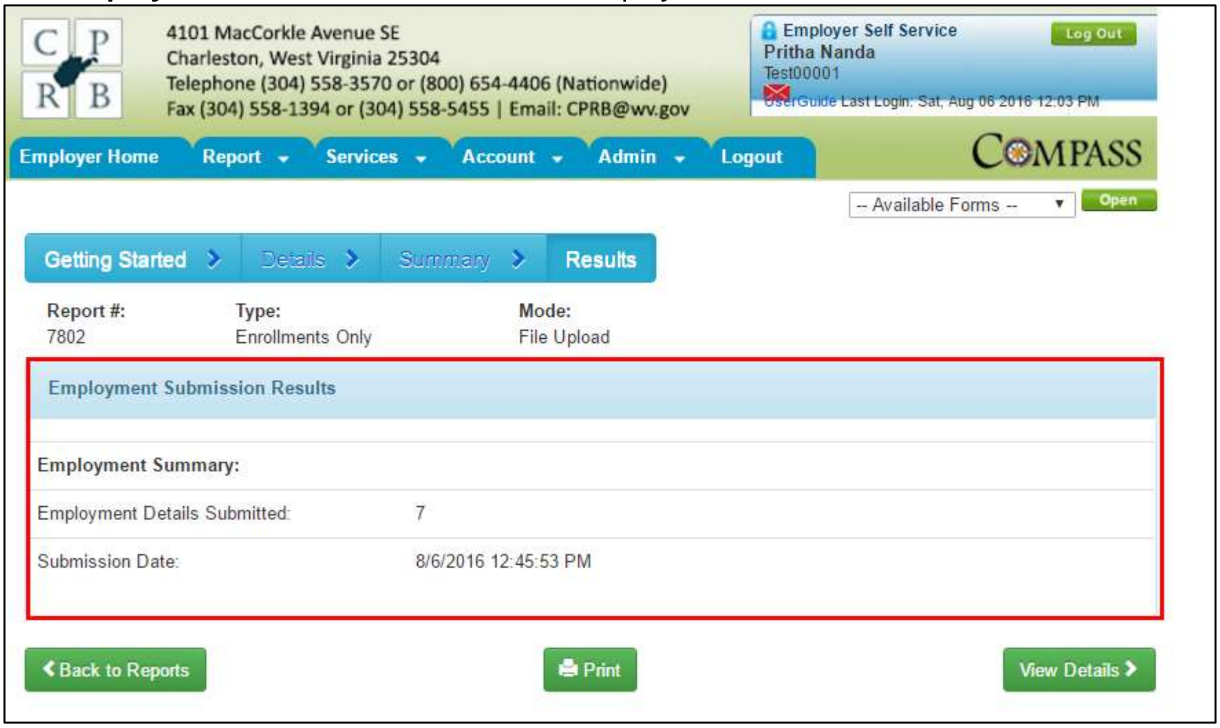


Step 7 -- The **Summary** screen is displayed. Click the 

button.



Step 8 -- The **Employment Submission Results** are displayed.

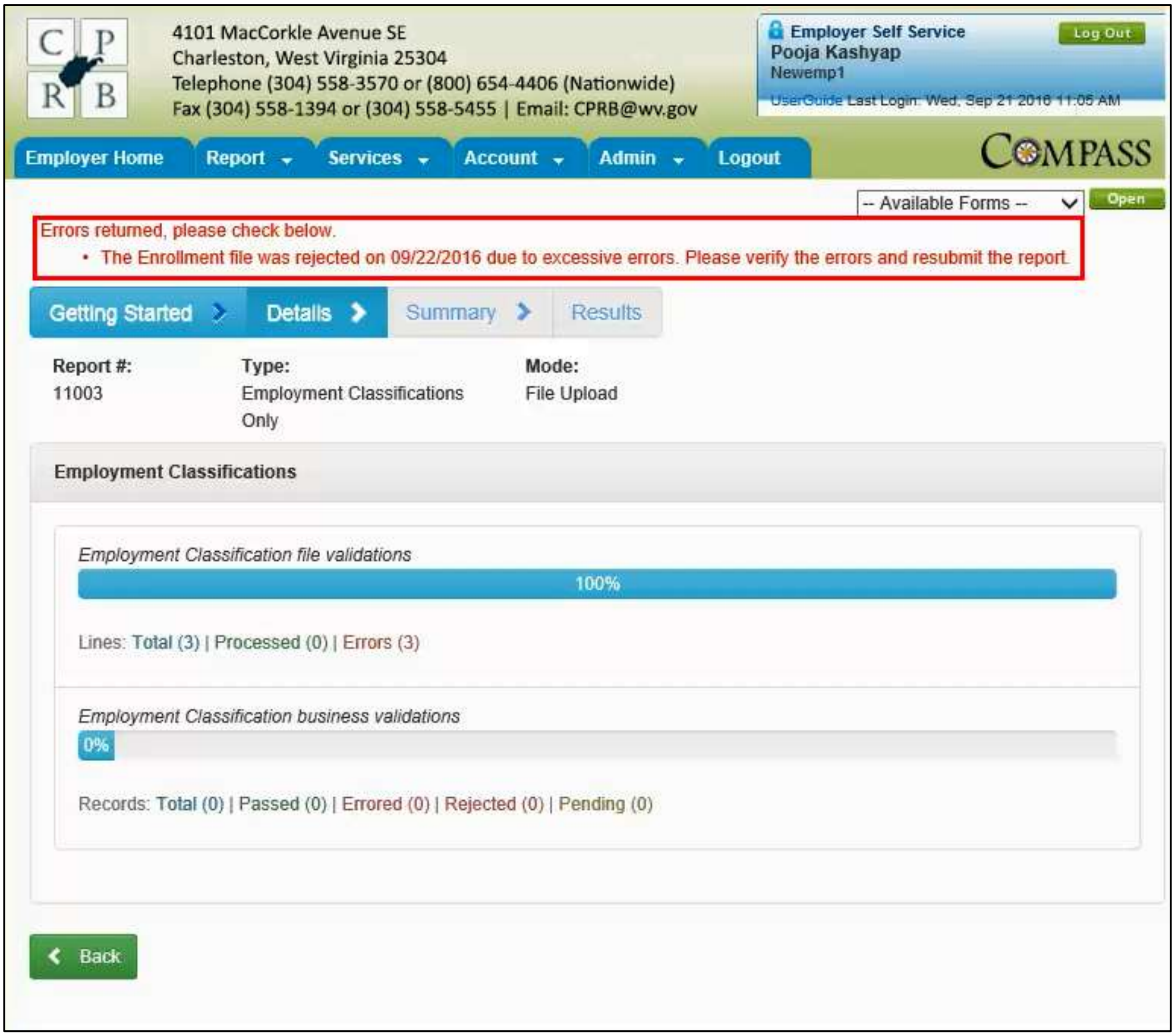


7.1.1.1 View Employment Classification – Upload File Rejection Details

When submitting the Employment Classification report through the Upload File option, validations are run on the report automatically to ensure the information in the file is formatted correctly and is accurate. If the file has too many errors or is not in the proper file layout, the file will be rejected with an error status displayed in the Details screen.

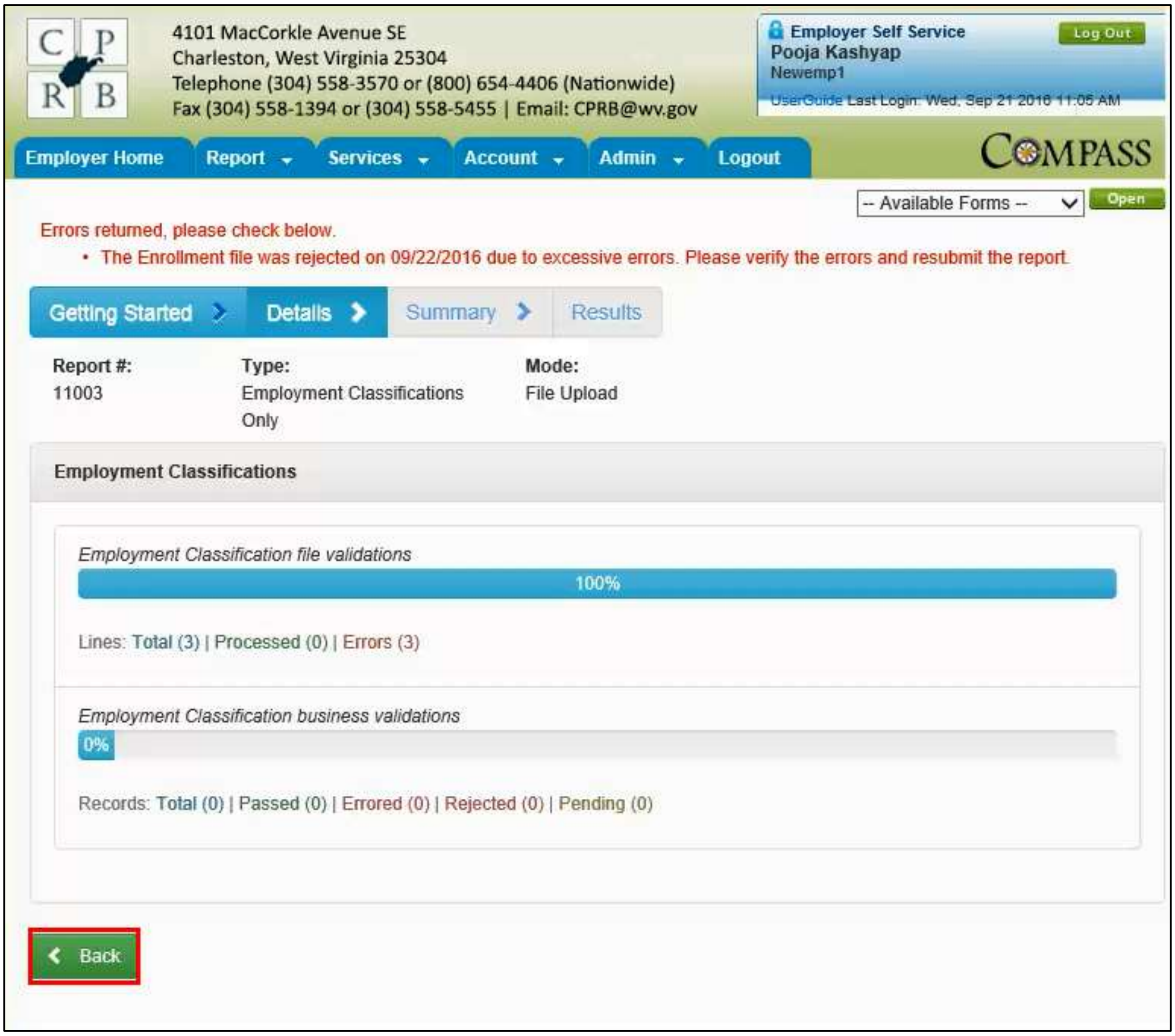
Follow the steps below to **View Employment Classification Upload File Rejection** details.

Step 1 -- Upon the completion of steps 1 - 4 in Section 7.1.1 Submit Employment Classification – Upload File, if the file is rejected, the error message will be displayed in the **Details** screen.



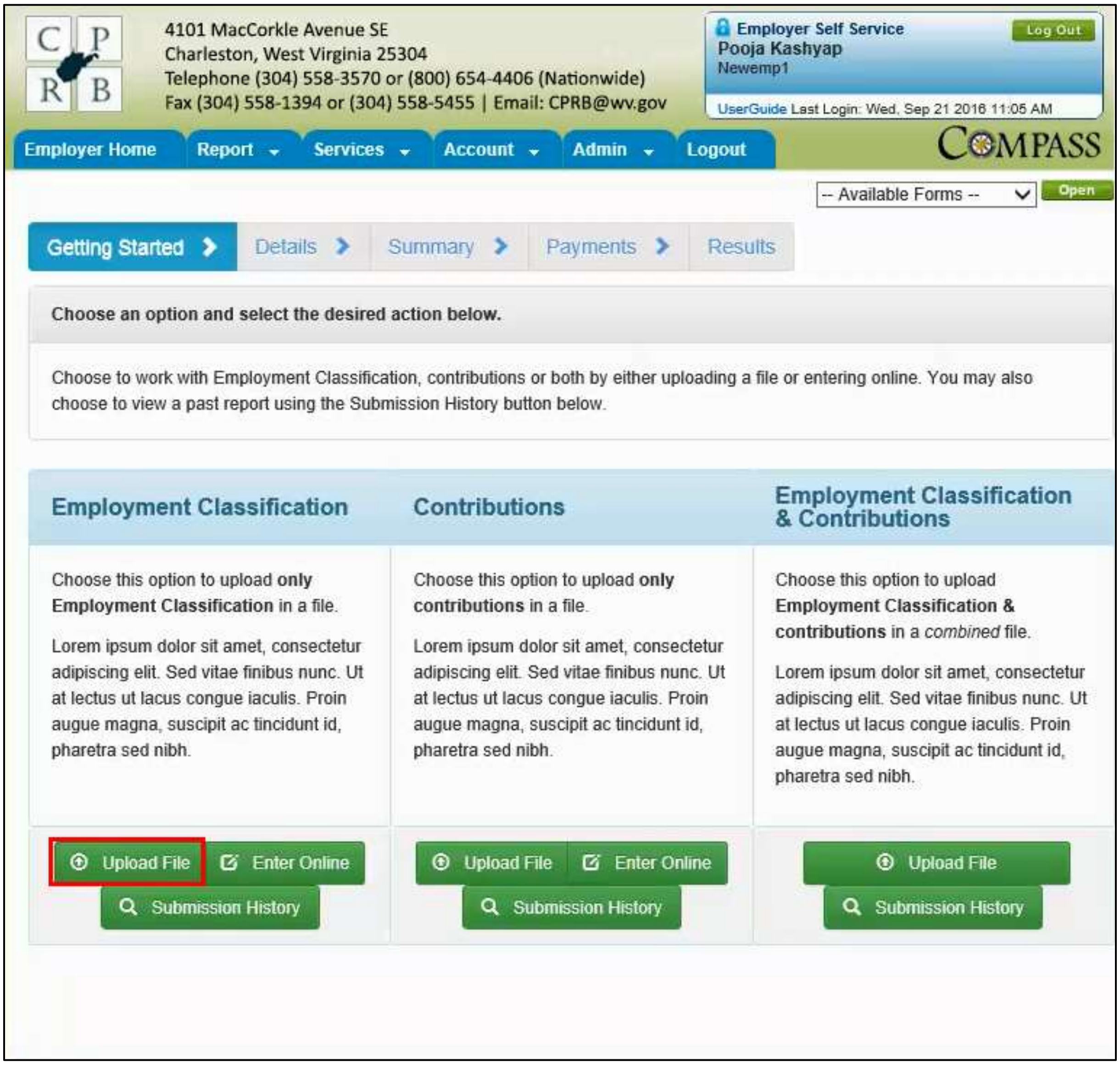
Step 2 -- Click the 

button.

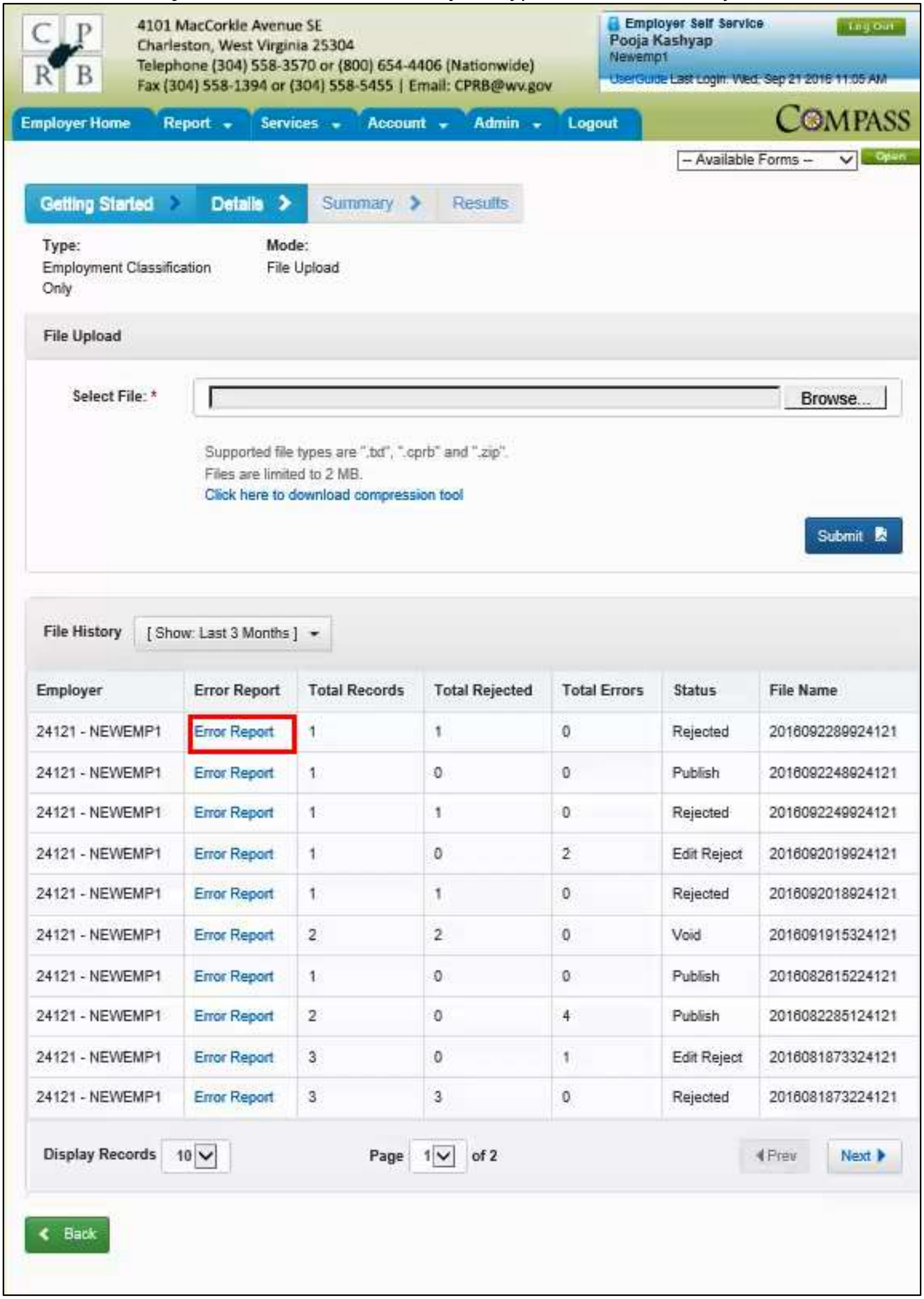


Step 3 -- The **Getting Started** screen is displayed. In the **Employment Classification** section, click the 

button.



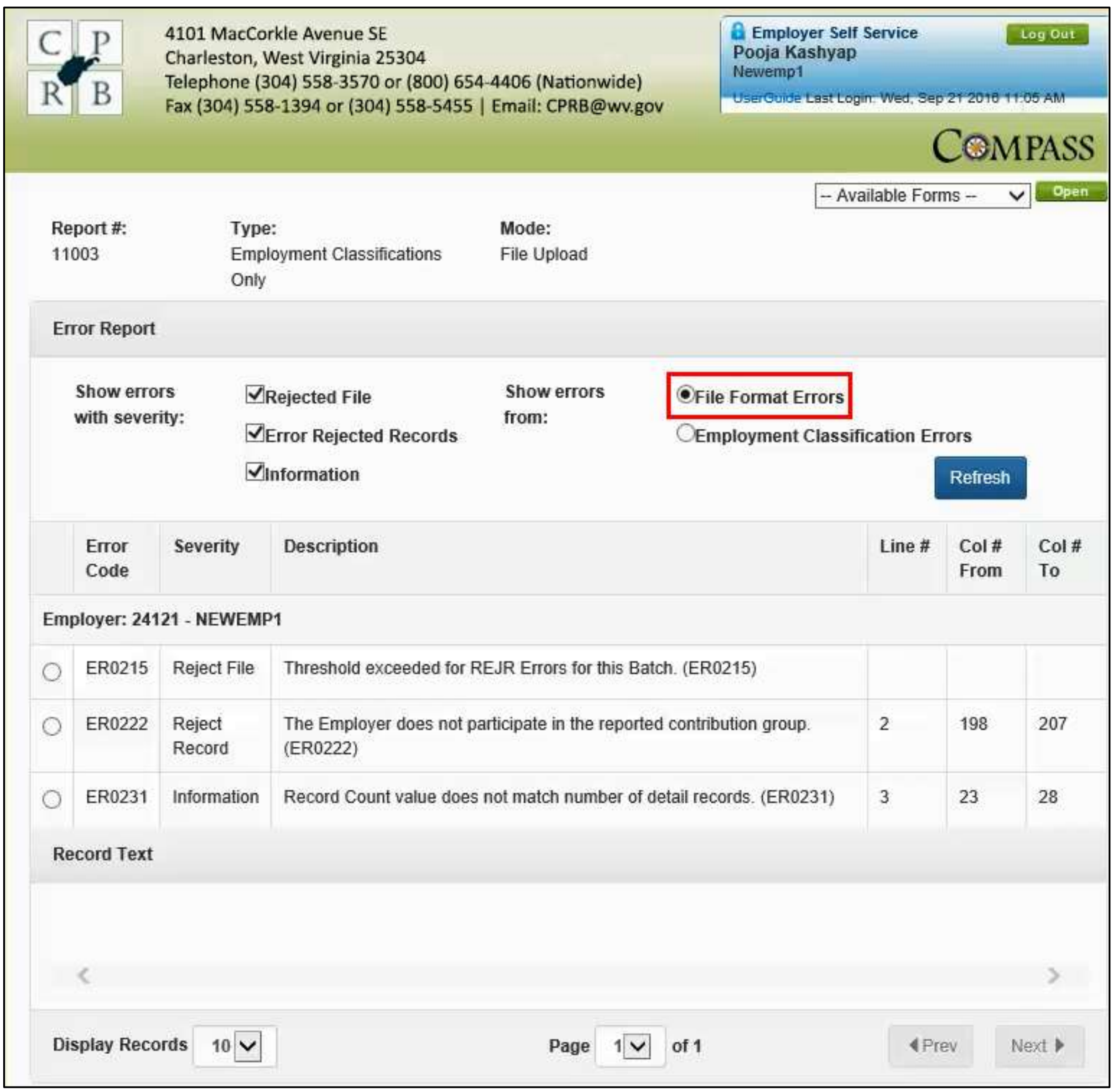
Step 4 -- In the **File History** section, click the **Error Report** hyperlink to view the rejection details.



Step 5 -- The selected employer's Error Report details display, and selecting the File Format radio button allows the ability to filter the results:

- Show errors with severity:
  - Rejected File – must correct formatting errors to resubmit
  - Error Rejected Records – if the file is not rejected then the rejected detail records can be corrected in ESS
  - Information – no correction required, informational only
- Show errors from:
  - File Format Error – these errors are a result of formatting issues in the file.

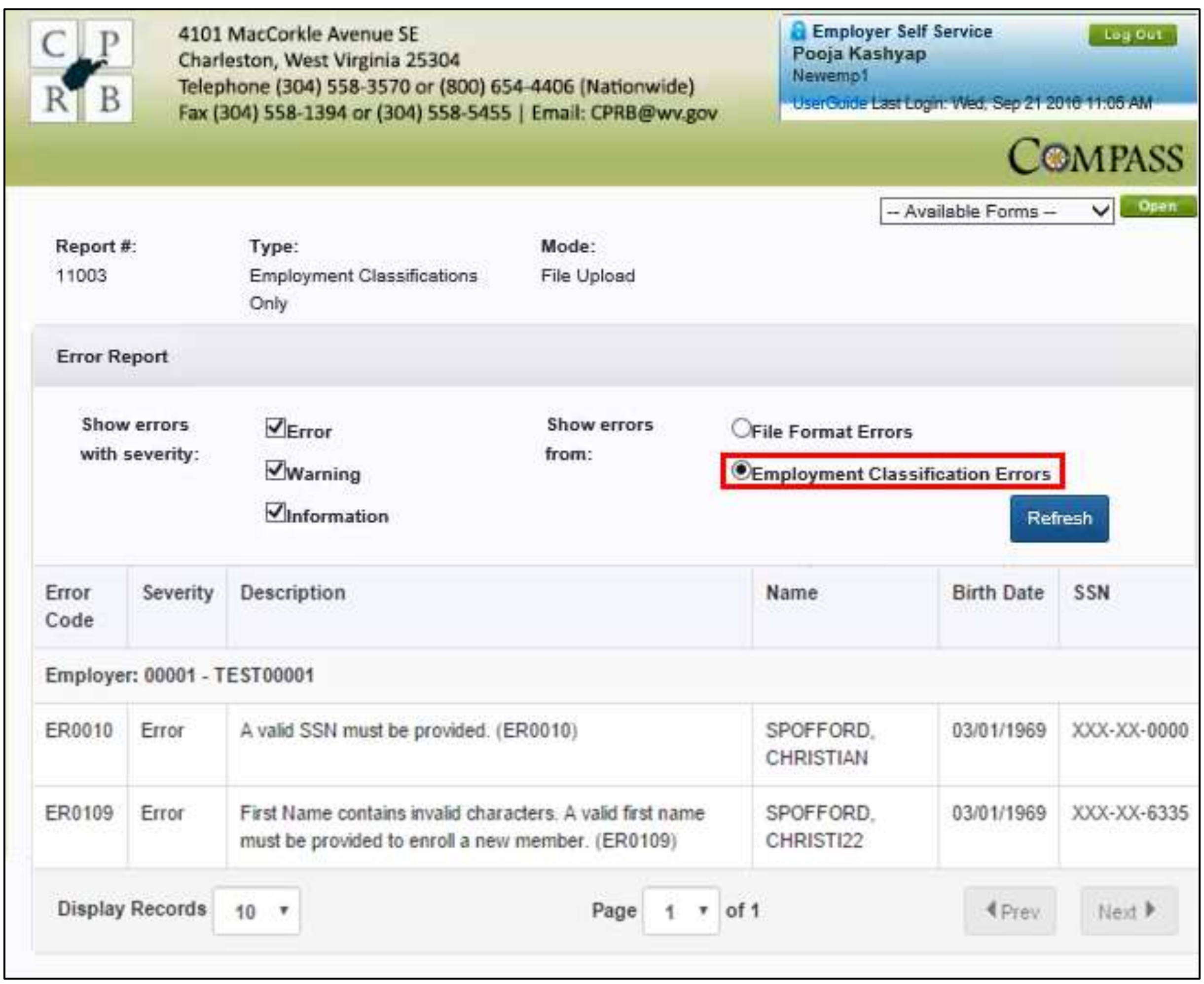
    For ex. if an SSN has the letter "O" rather than the number "0" (zero) the record will be flagged as having an error.



Step 6 -- The selected employer's Error Report details display, and selecting the Employment Classification Errors radio button allows the ability to filter:

- Show errors with severity:
  - Error – must correct formatting errors to resubmit
  - Warning – may require action however can be overridden
  - Information – no correction required, informational only
- Show errors from:
  - Employment Classification Errors – these errors are a result of information reported that does not adhere to CPRB regulations.

    For example, if the date of birth entered means the employee would be 5 years old, the validations within the ESS portal would flag this record as an error because the legal working age is 14 years old.



Step 7 -- If the file has been accepted, follow the steps in 7.1.1.2 Correct Employment Classification Upload File Errors in to correct errors. If the file has been rejected, correct the rejected file and re-upload the file.

Note: Use the descriptions provided for the rejected files to make corrections and use the file layout document to ensure the file has the proper layout and/or verify the information in the file is correct prior to re-uploading the file.

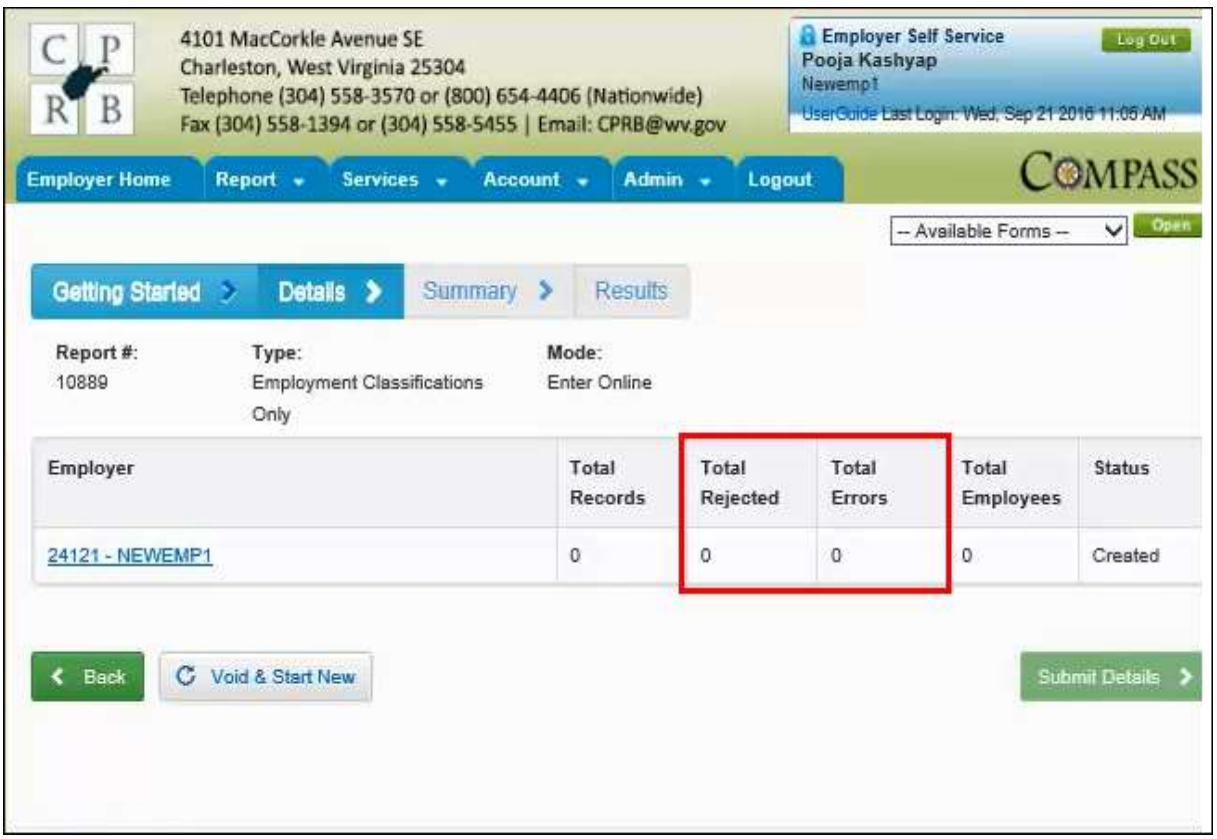
7.1.1.2 Correct Employment Classification – Upload File Errors

There may be records in error in the Employment Classification file which must be corrected and/or records which were rejected must be added prior to submitting the files to CPRB.

Follow the steps below to add Employment Classification records to the uploaded report.

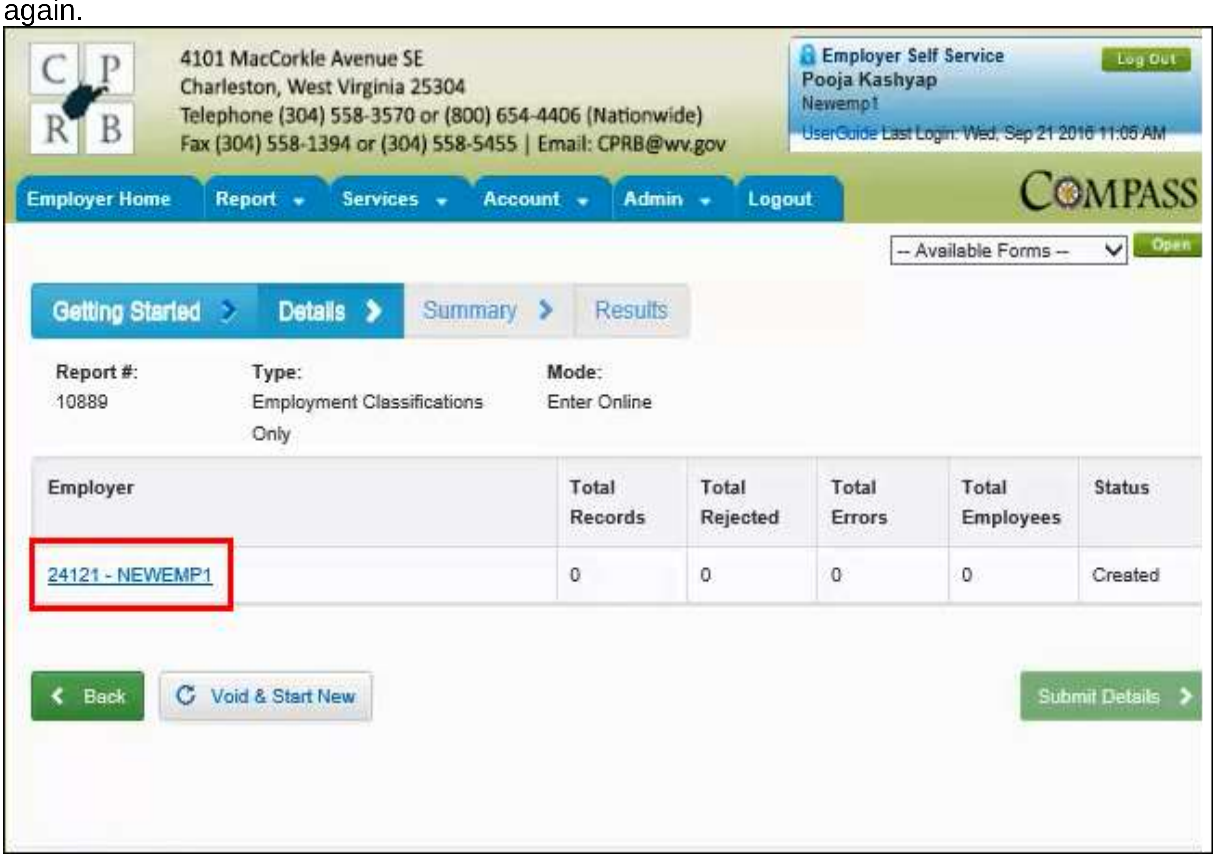
Note: For error corrections, skip to step 18 in this Section.

Step 1 -- Upon the completion of steps 1 - 5 in Section 7.1.1 Submit Employment Classification – Upload File Section, if the file has rejected records or errors, they will be displayed in the **Total Rejected** and/or **Total Errors** columns.



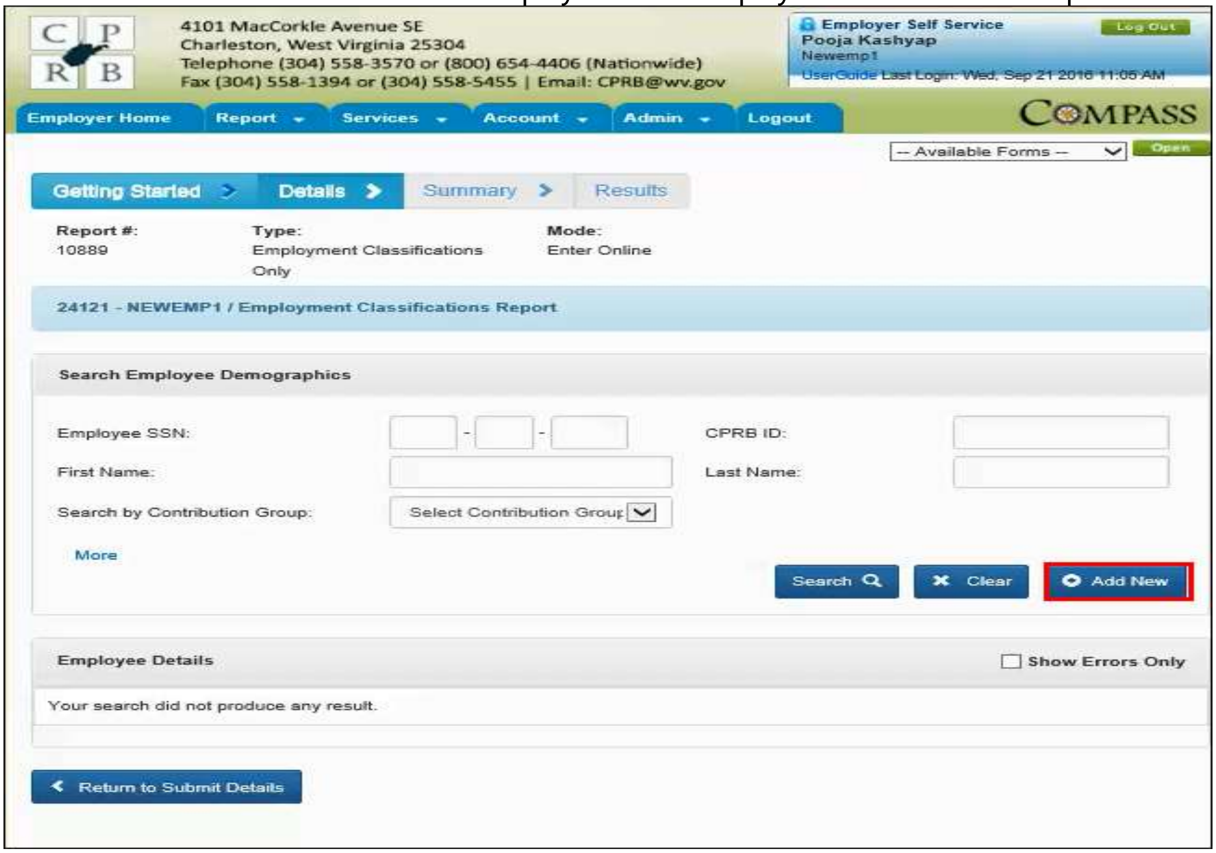
Step 2 -- Click the **Employer** hyperlink to add a rejected record or correct errors.

Note: The **Void and Start New** button will void the submission and start the process again.



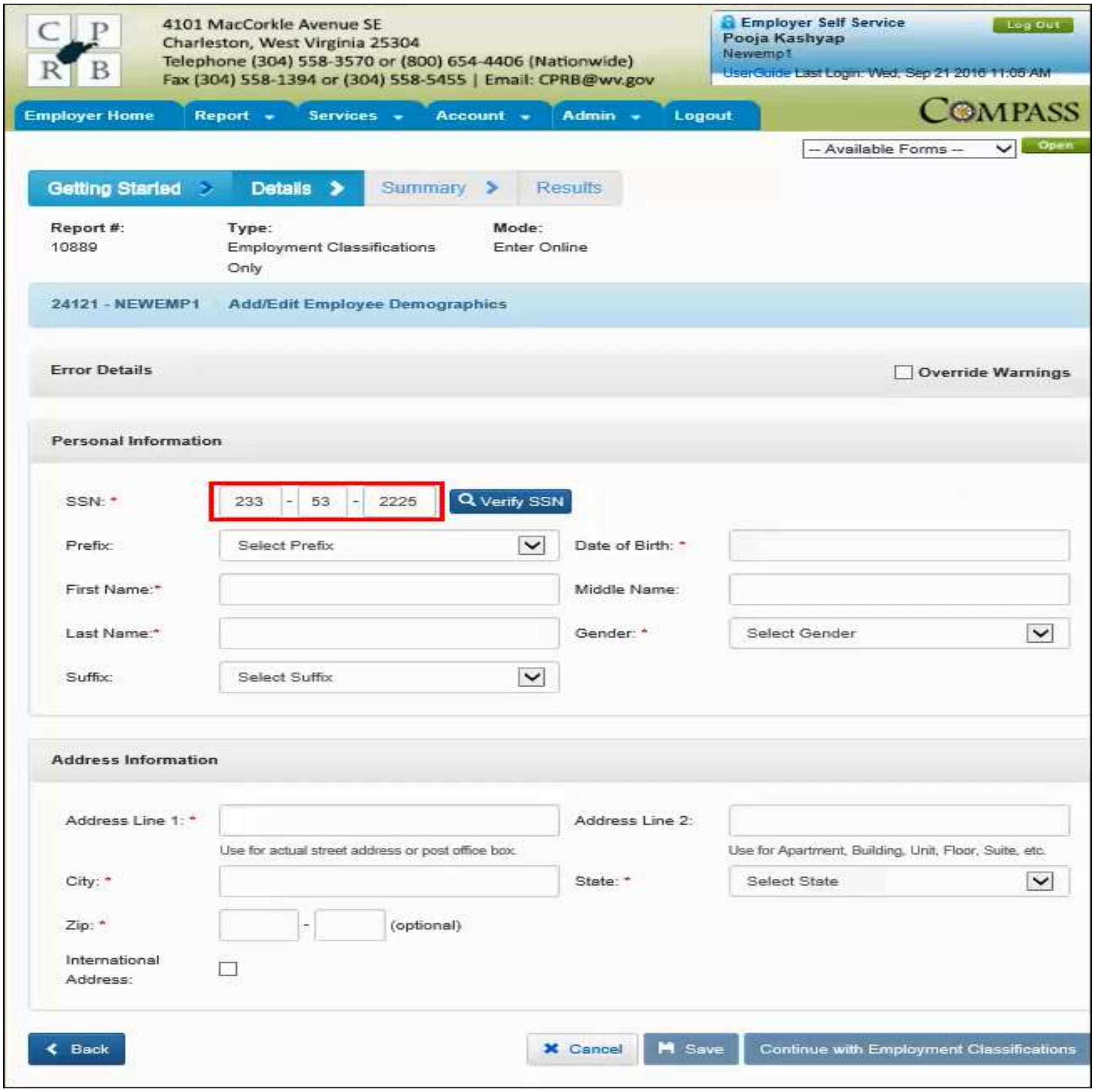
Step 3 -- Click the 

button to add an employee to the employment classification report.

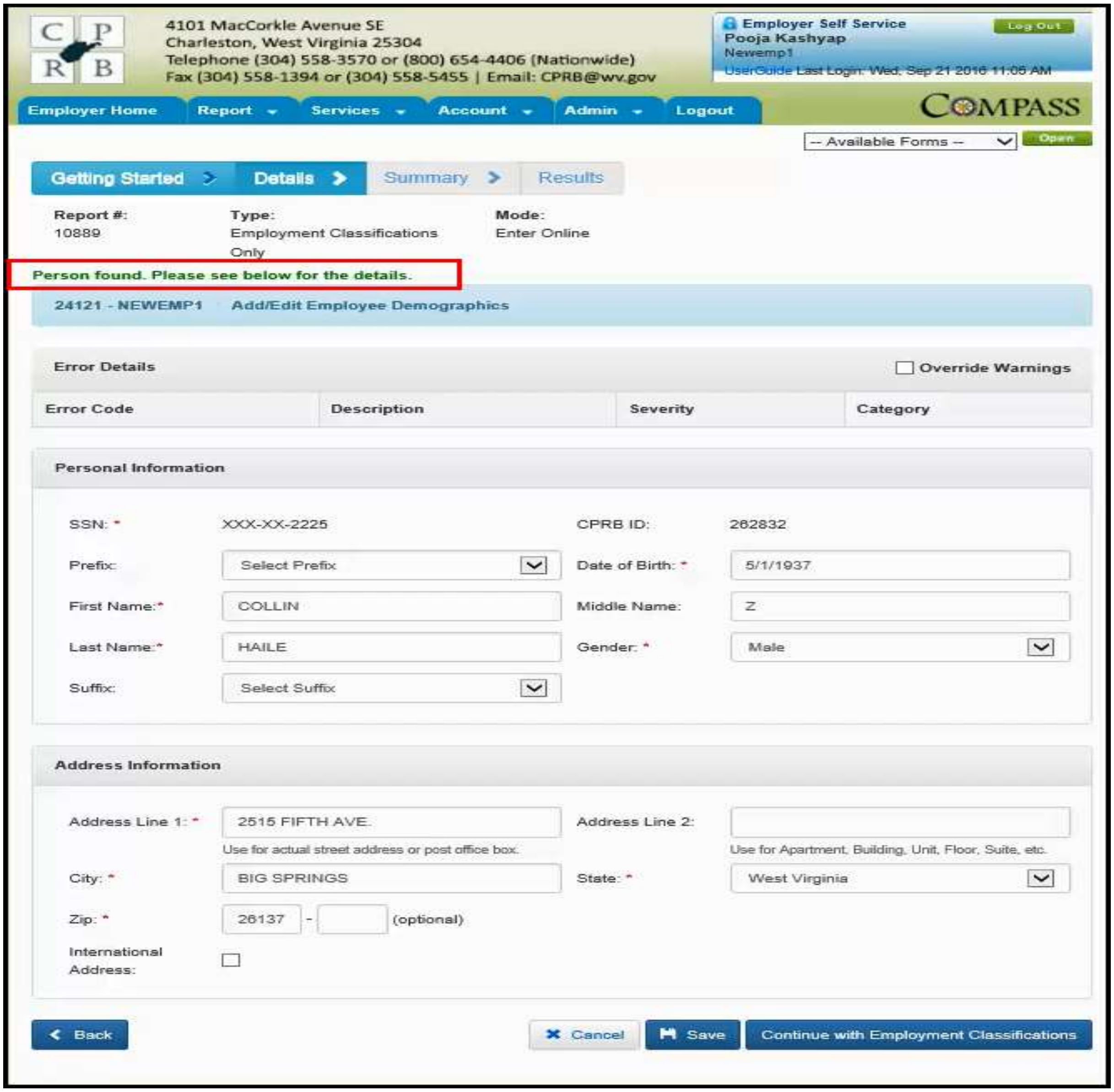


Step 4 -- In the **Personal Information** section, enter the SSN of the employee and click the Verify SSN button. If the employee already has a record with CPRB, the **Personal Information** section will automatically populate the employee's information.

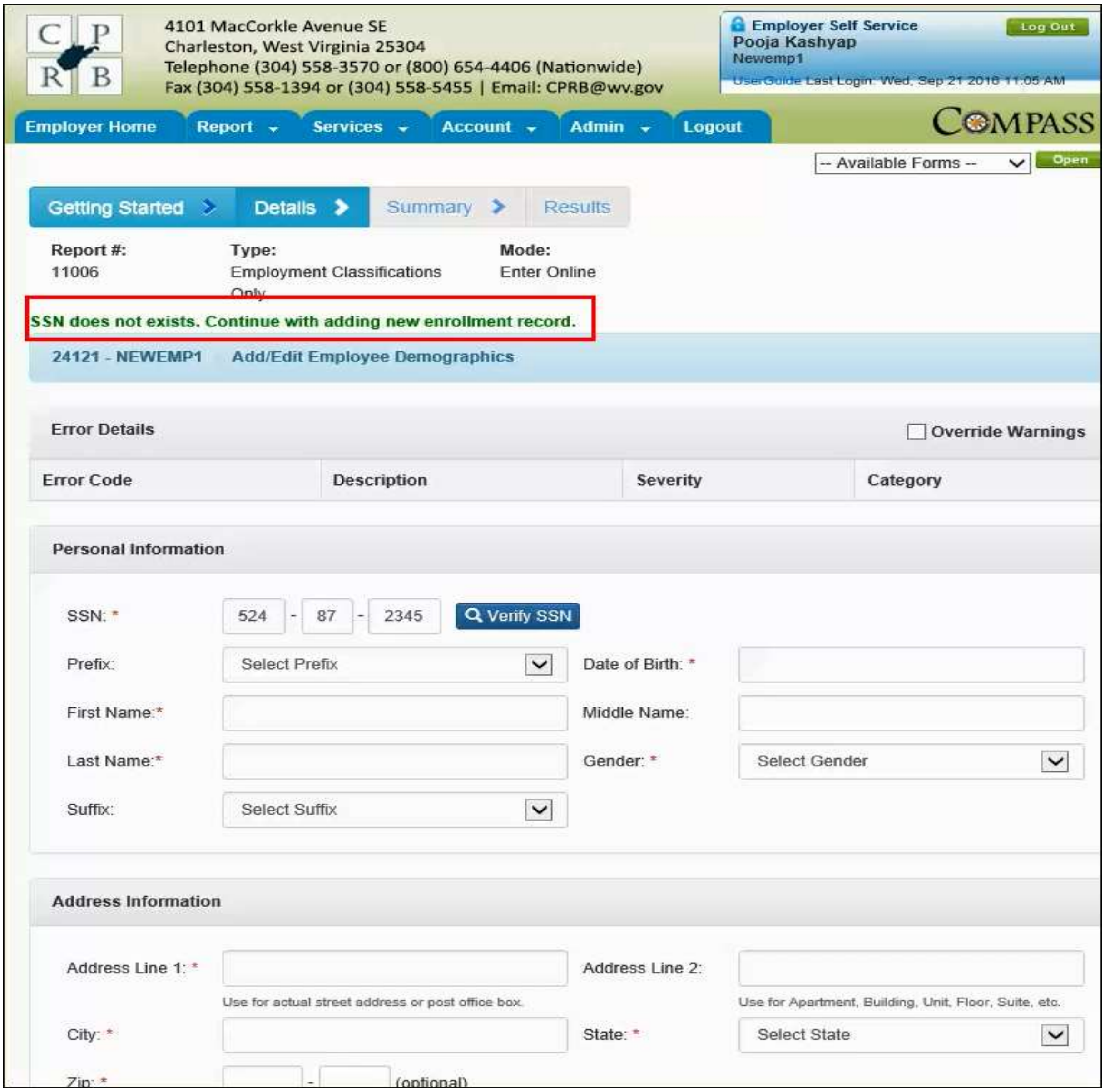
Note: If the employee's personal information is pre-populated skip to step 13 of this Section.



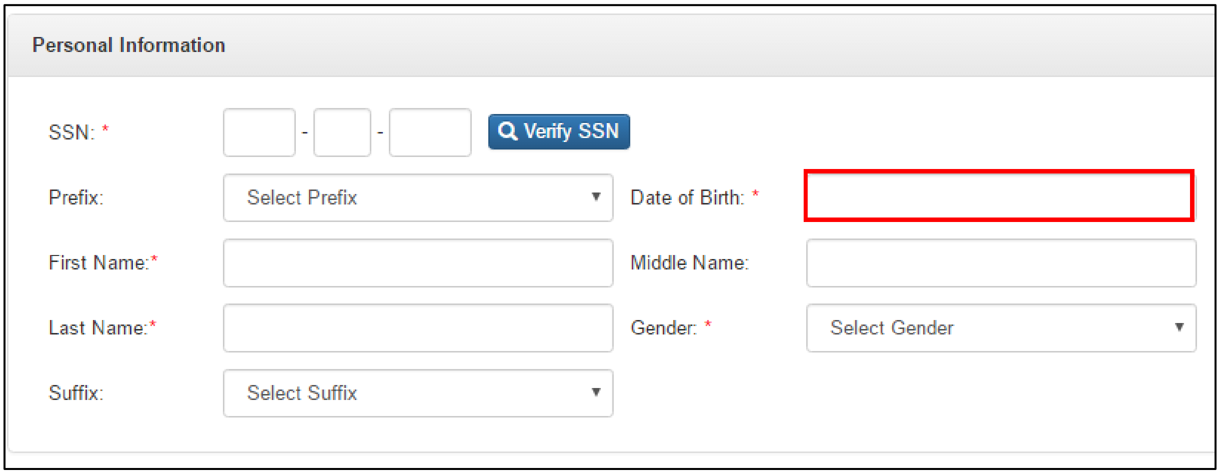
Step 5 -- "**Person found. Please see below for the details.**" message will display with the details. COMPASS will prepopulate all the demographic information.



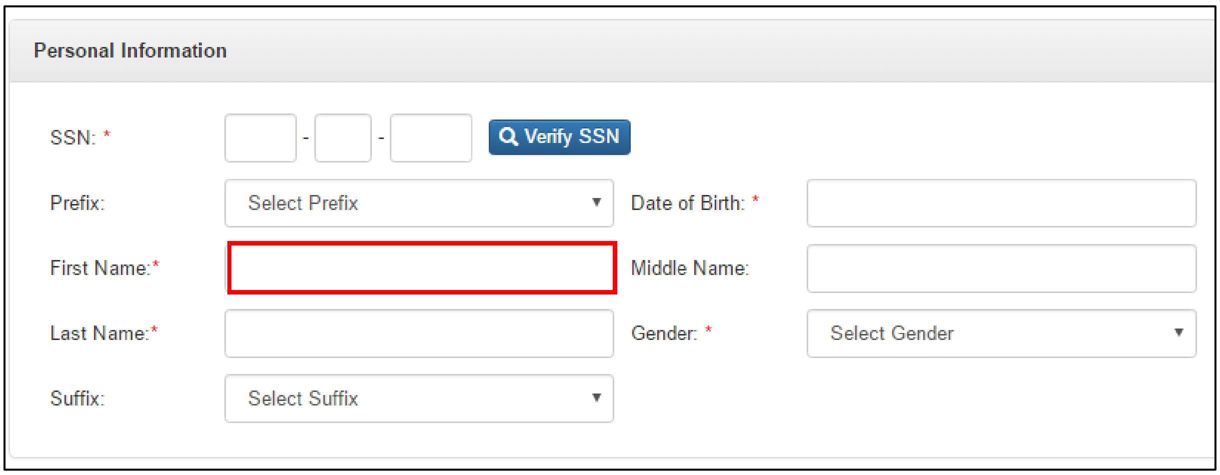
Step 6 -- If the employee **does not have an existing record with CPRB in COMPASS**, enter the **SSN**, click the Verify SSN button and enter the demographic information in the required fields (steps 7- 15).



Step 7 -- Enter the **Date of Birth** (mm/dd/yyyy) in the field.

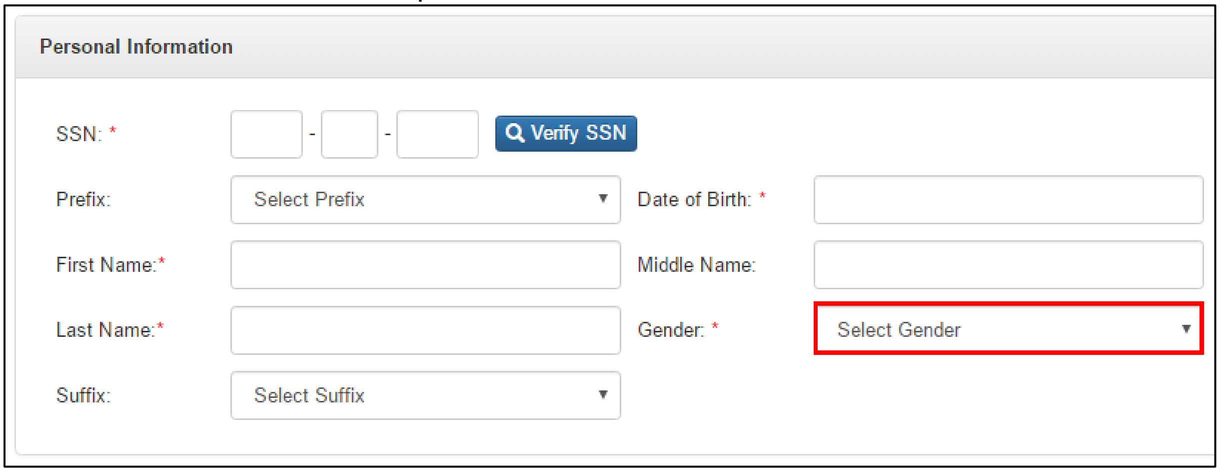


Step 8 -- Enter the **First Name** in the text field.

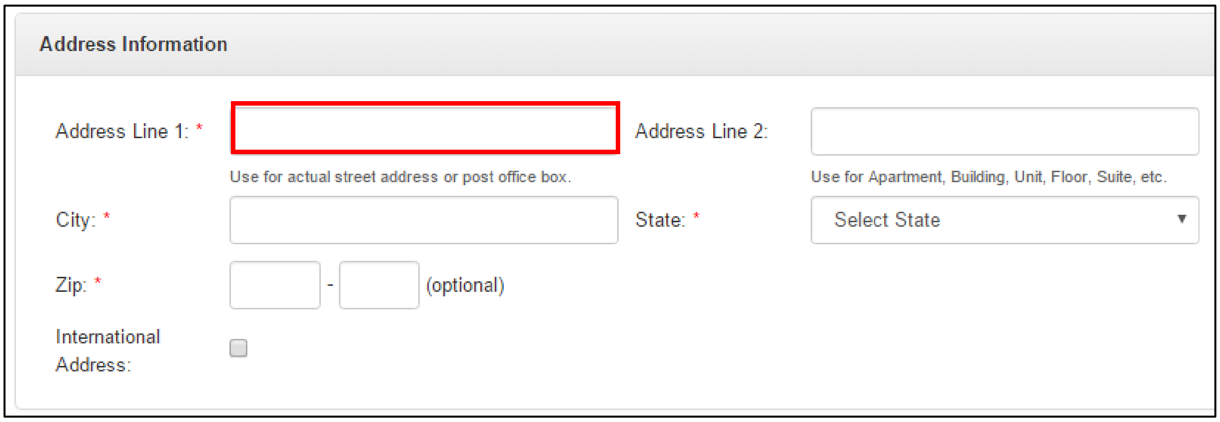


Step 9 -- Enter the **Last Name** in the text field.

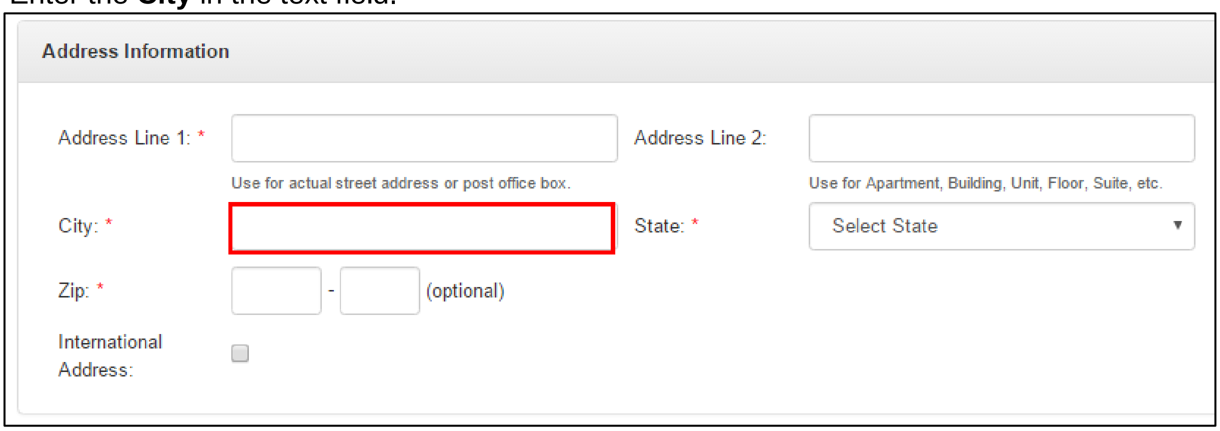
Step 10 -- Select the **Gender** from the drop down menu.



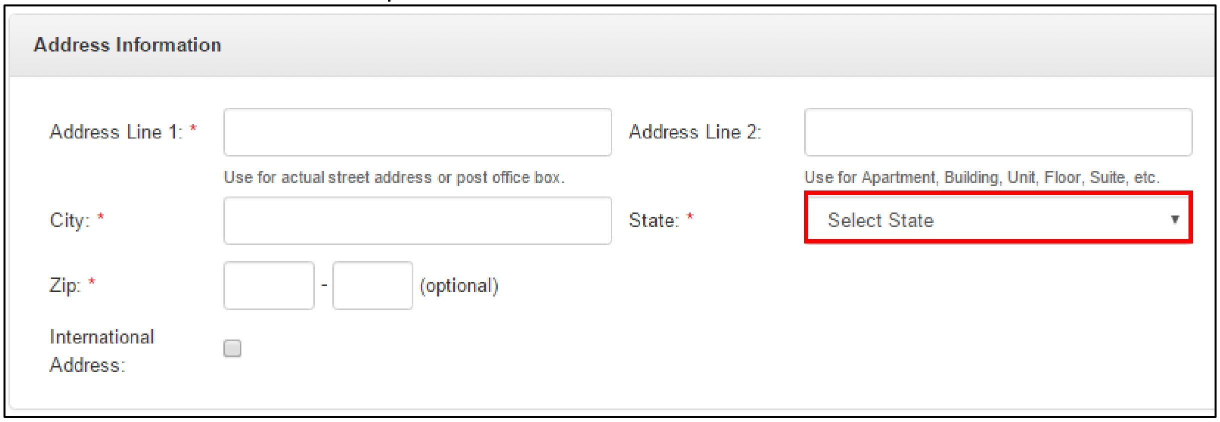
Step 11 -- In the Address Information section, enter the **Address Line 1** in the text field.



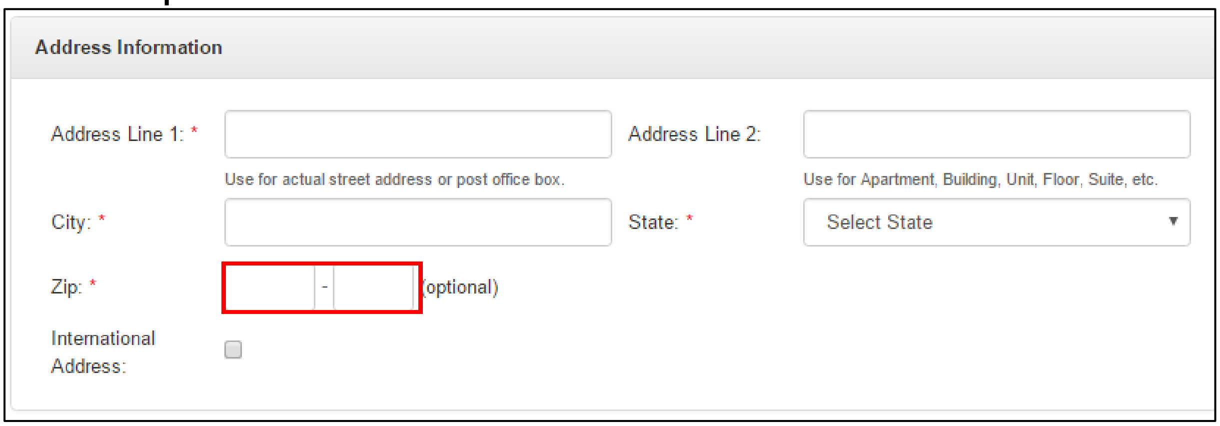
Step 12 -- Enter the **City** in the text field.



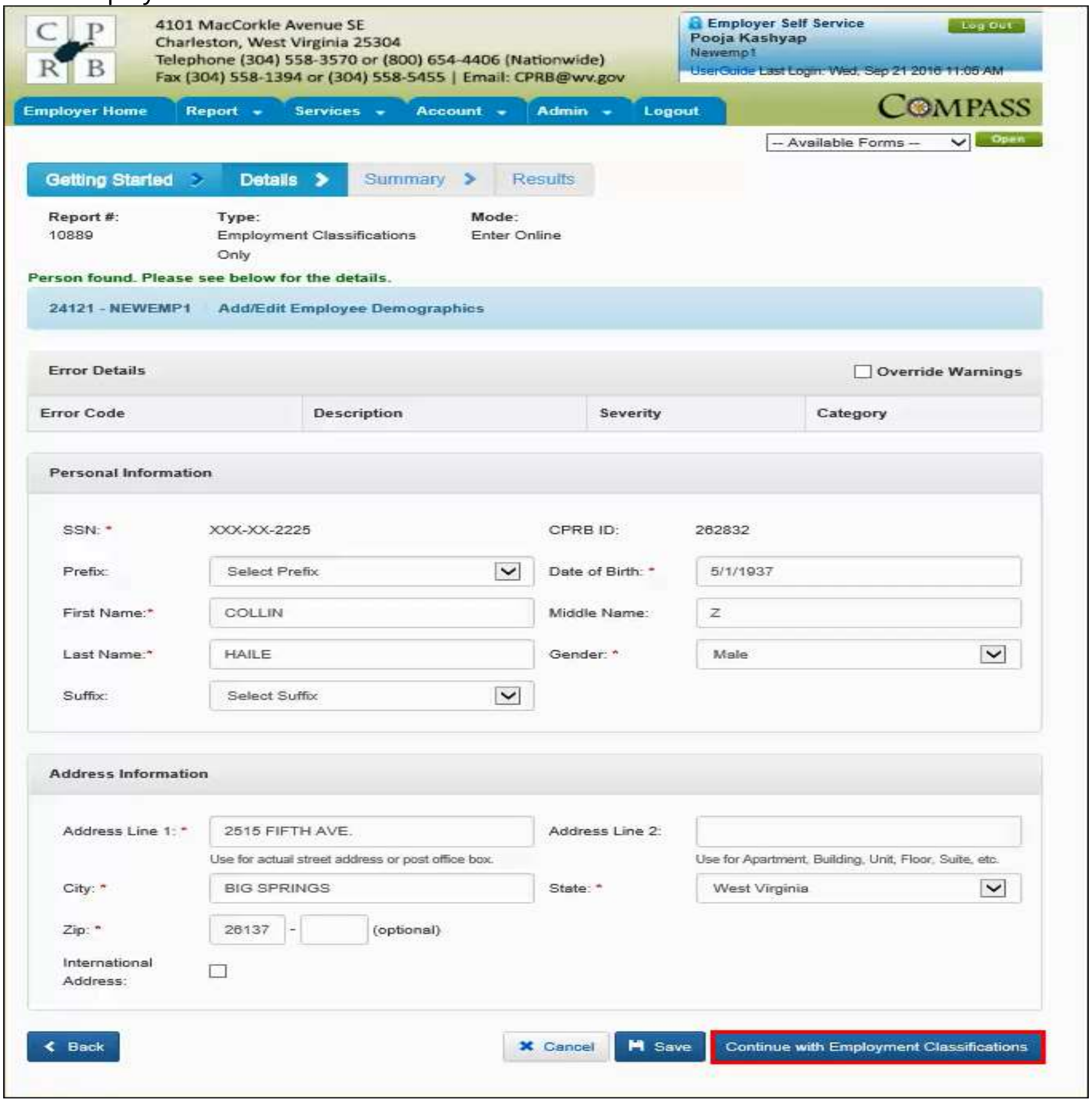
Step 13 -- Select the **State** from the drop down menu.



Step 14 -- Enter the **Zip** in the text field.

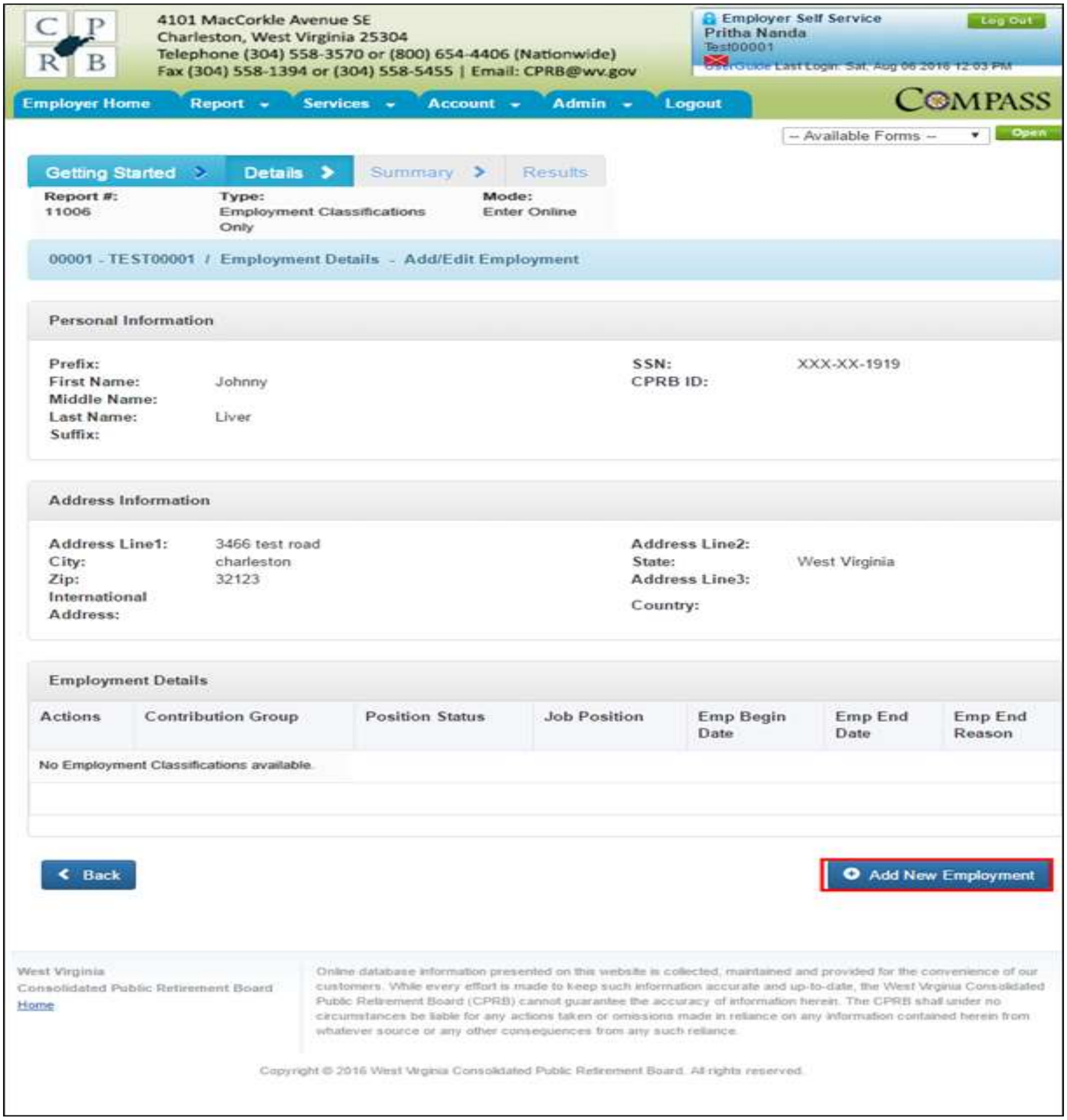


Step 15 -- Click the Save button to save the details and then click the Continue with Enrollments button to enter employment classification information.



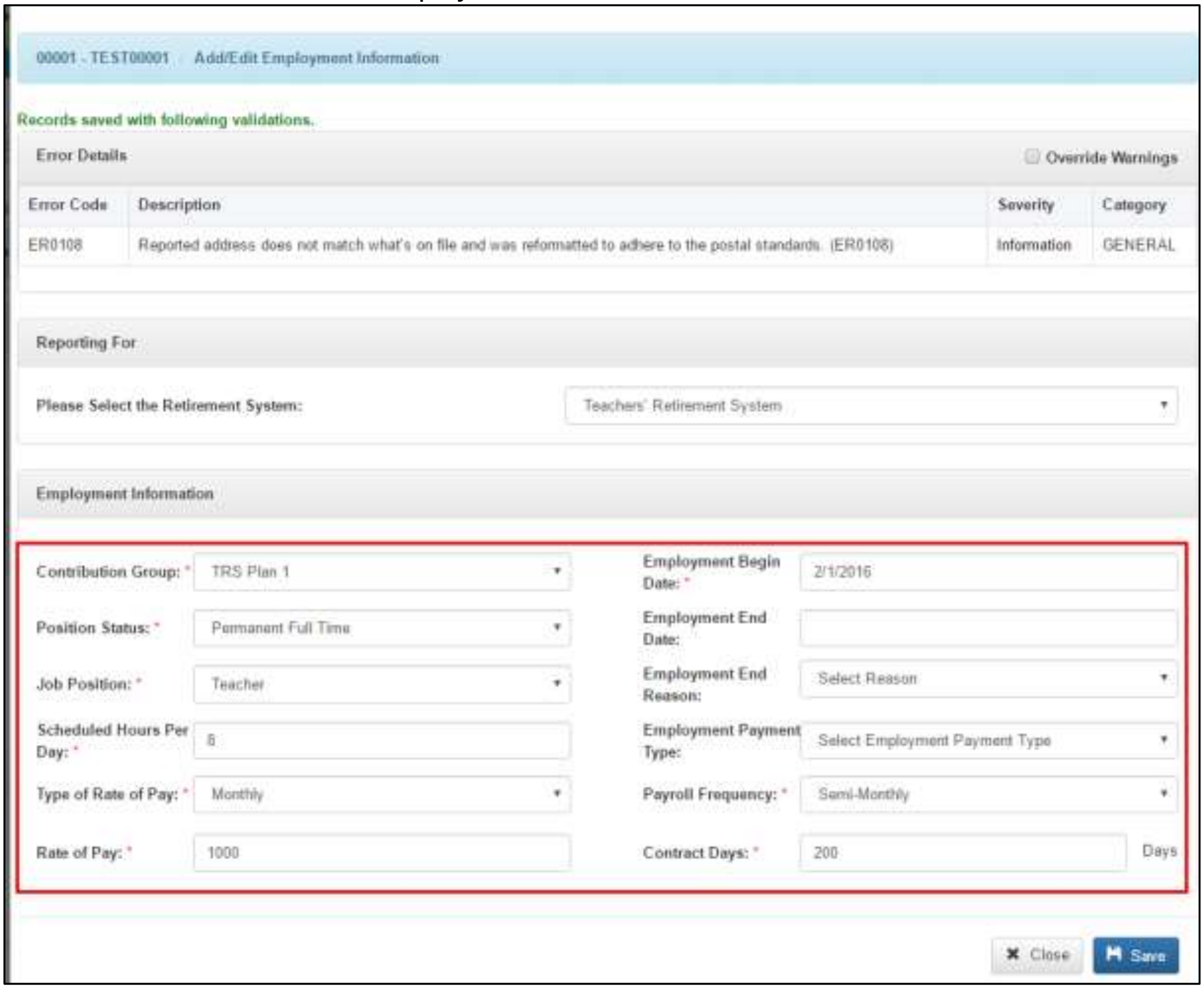
Step 16 -- Add new employment by clicking on the 

button.

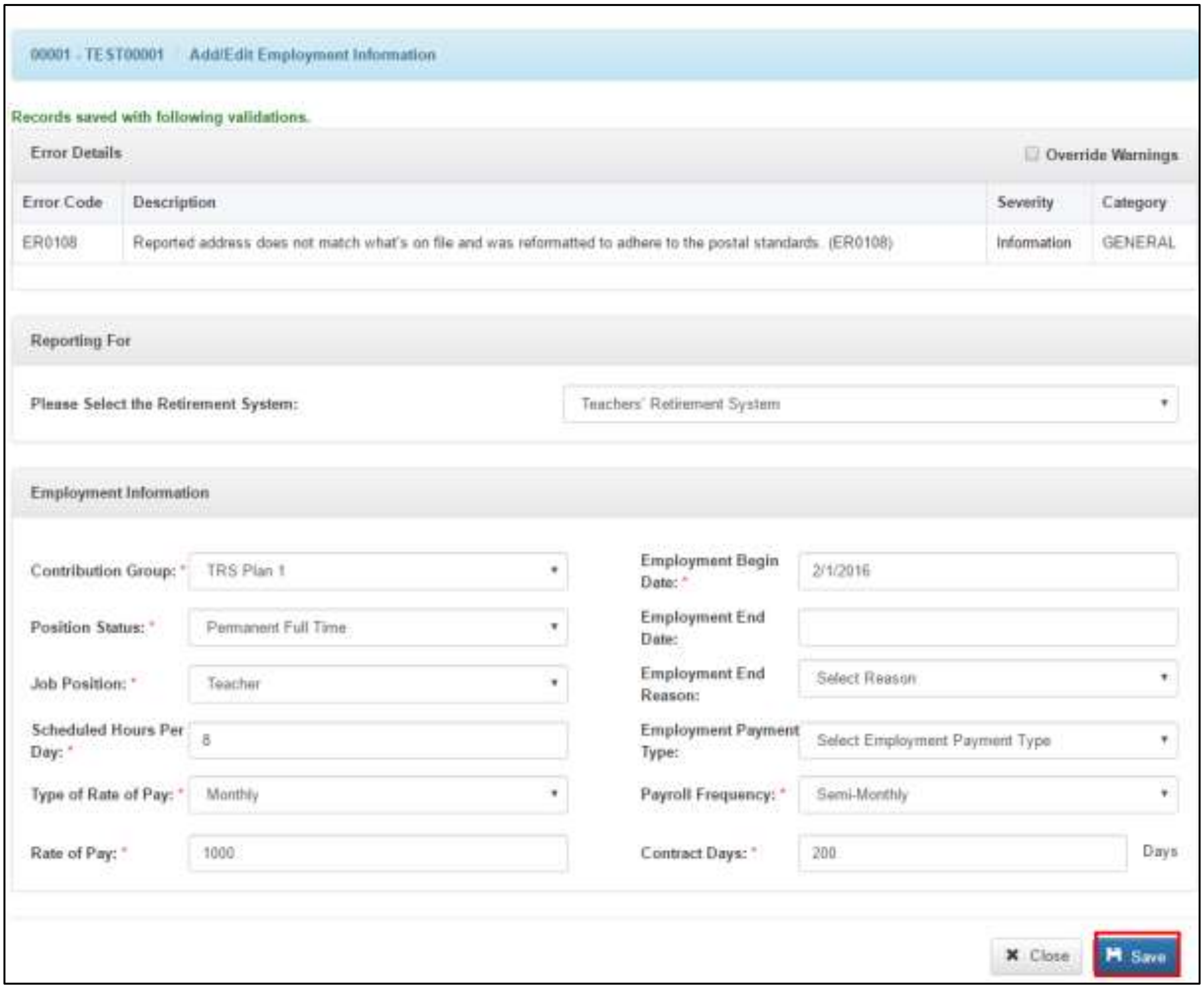


Step 17 -- The **Add/Edit Employment Information** screen displays. Enter the employment classification information or update the necessary information.

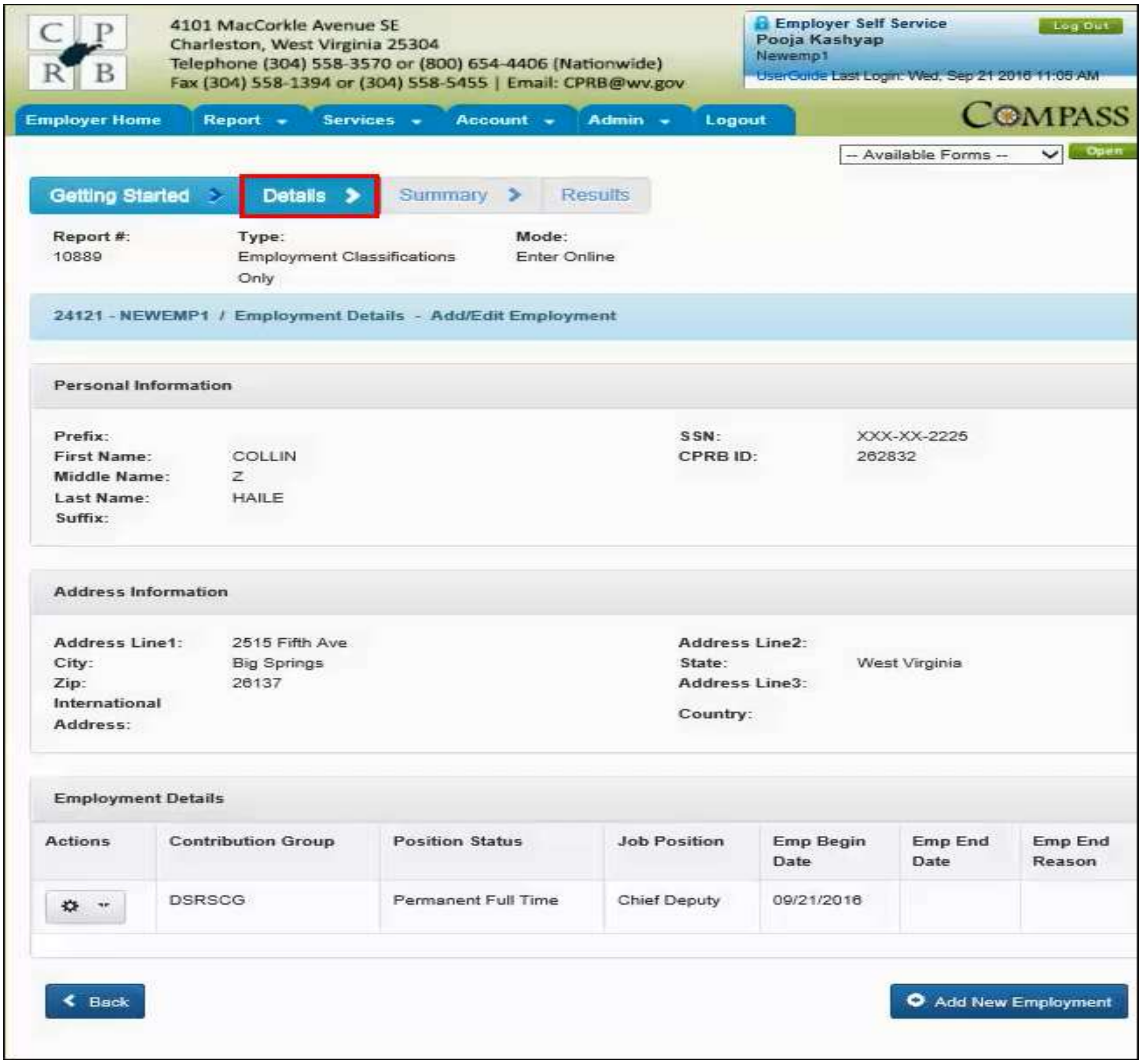
Note: An employment classification will be created only when both demographic and employment classification information is entered. Only entering the demographic information will not create an employment classification.



Step 18 -- Click the  button.



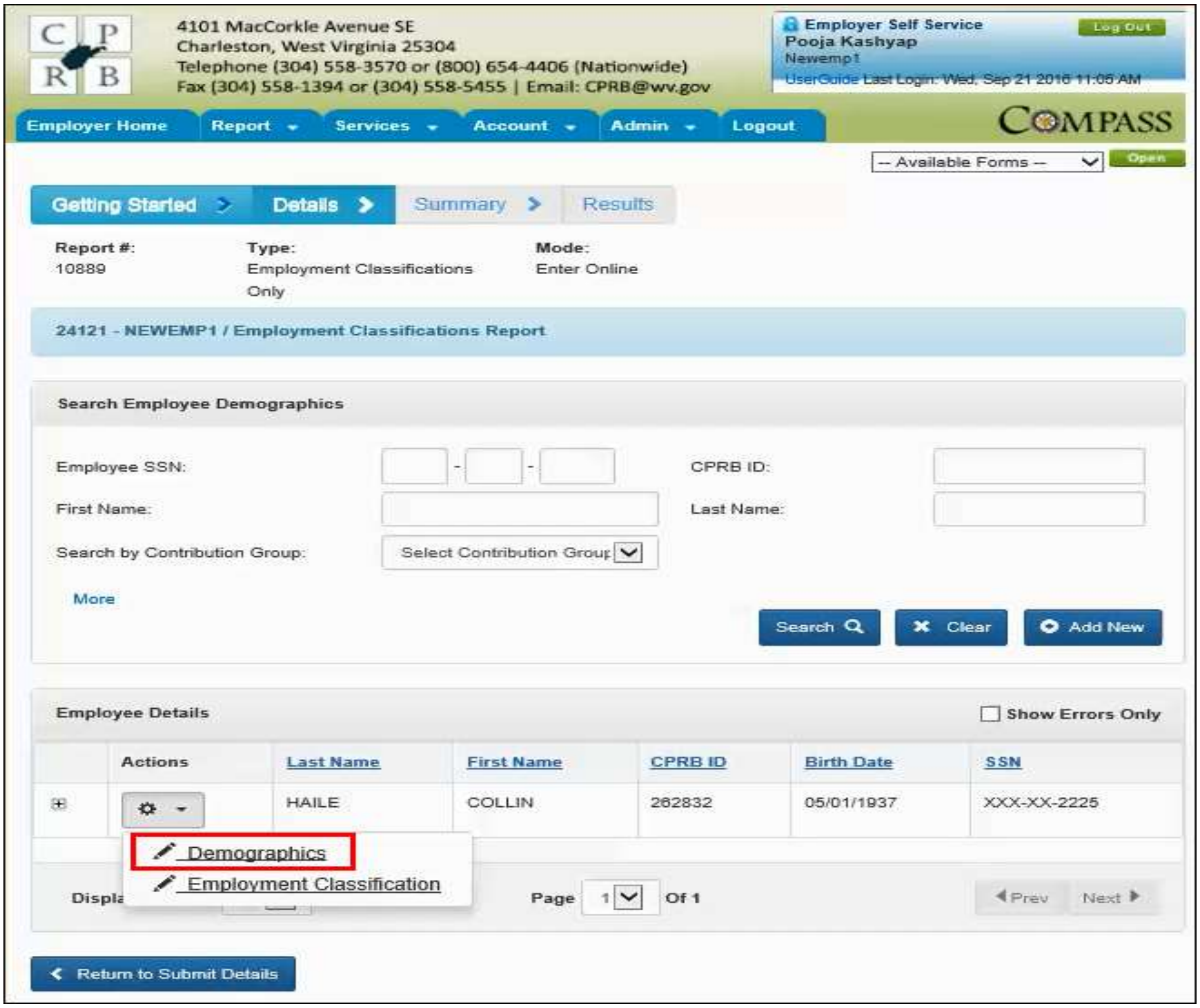
Step 19 -- Click in the **Details** link to return the Employment Classification Upload File Details screen.



Follow the steps below to correct errors in the Employment Classification records in the uploaded report.

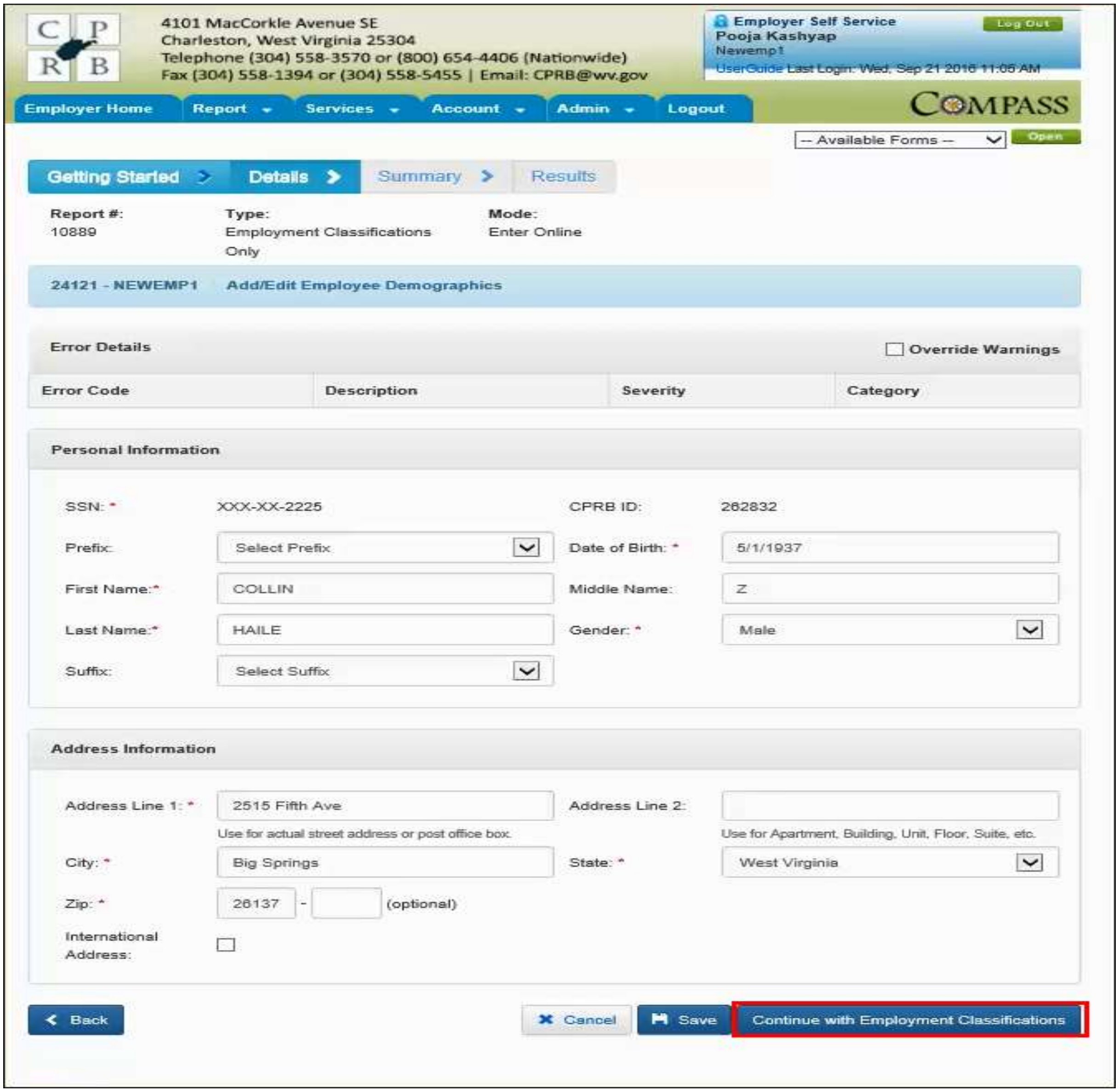
Note: For adding records, follow steps 1 – 17; skip to step 23 in this sections.

Step 20 -- Click the ⚙ button to update a record from the **Actions** drop down menu. Click the **Demographics** option.

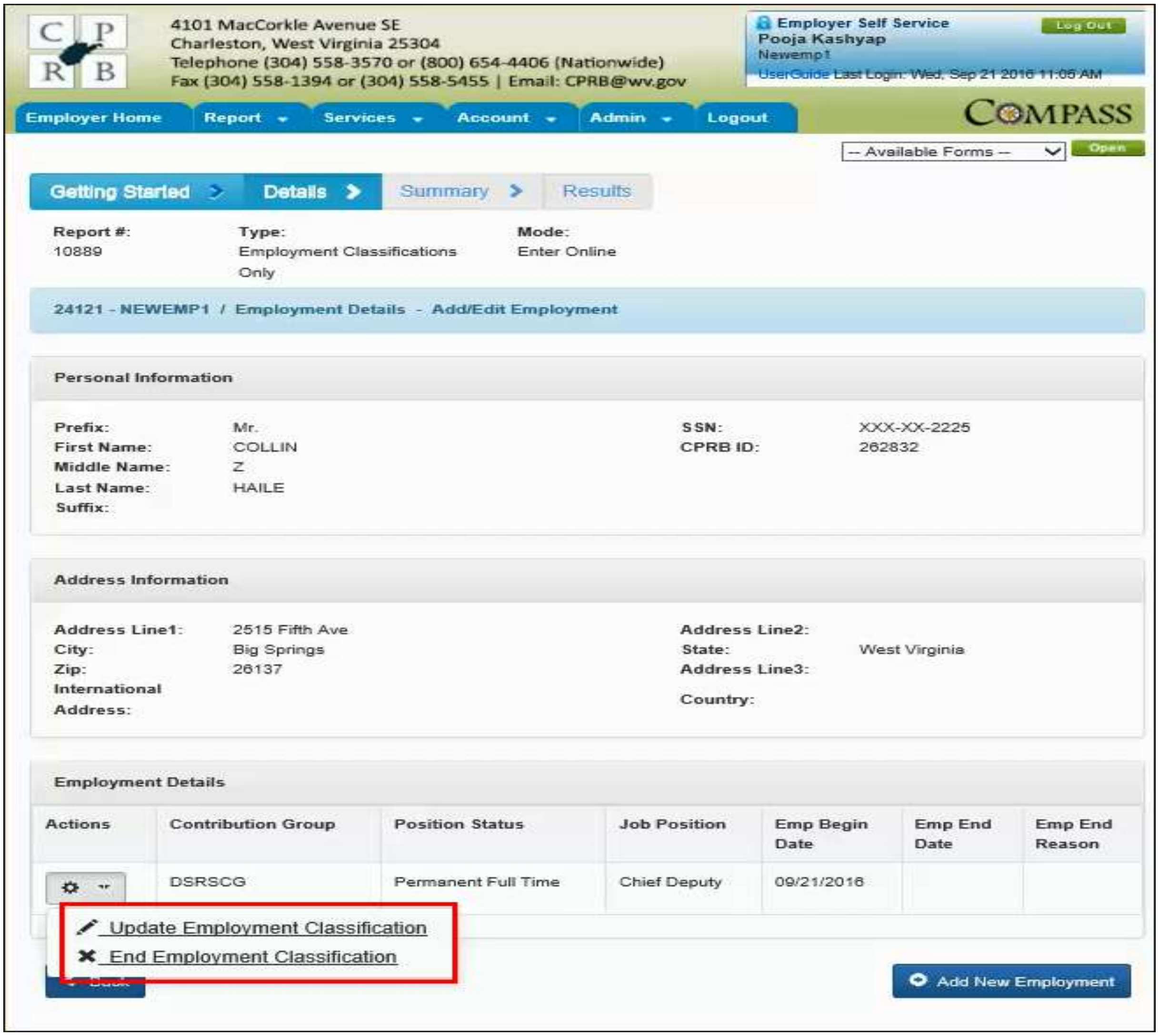


Step 21 -- Update the **Personal Information** section, click the 

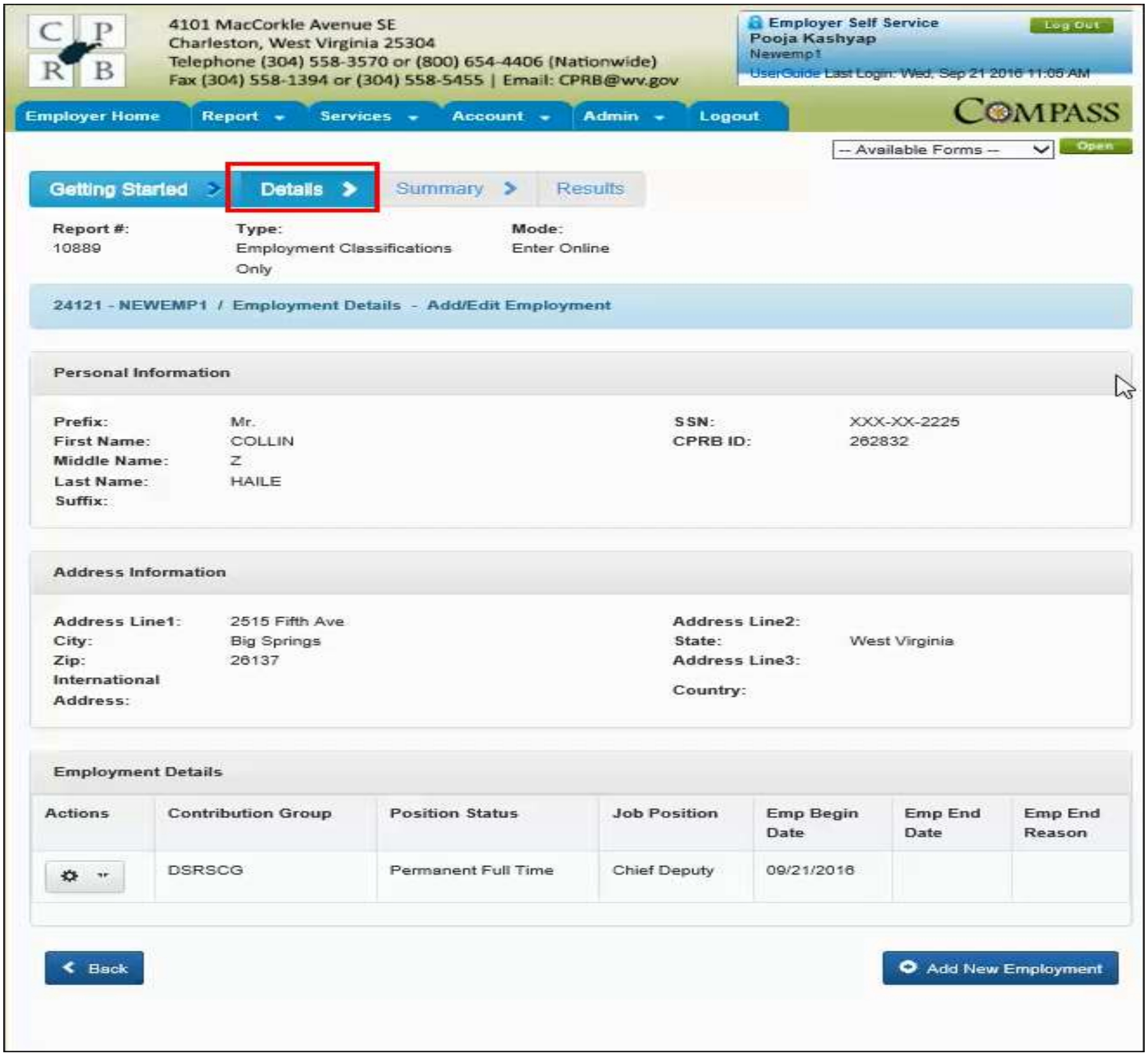
button to proceed further.



Step 22 -- Click the button to update a record from the **Actions** drop down menu. Click the **Update Employment Classification** (to resolve errors) or **End Employment Classification** (to end enrollments) option.

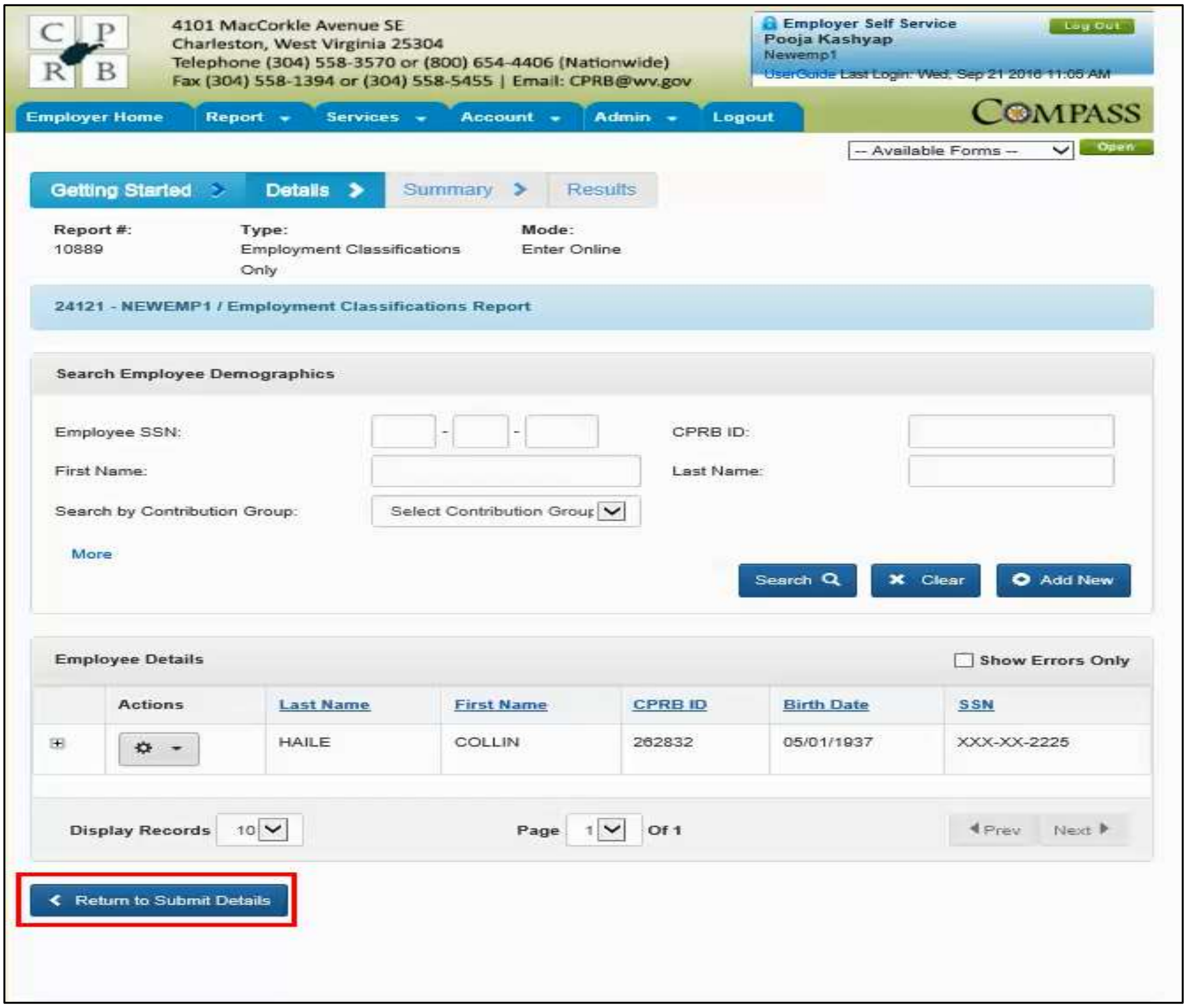


Step 23 -- Click in the **Details** link to return to the **Employment Classification Upload File Details** screen.



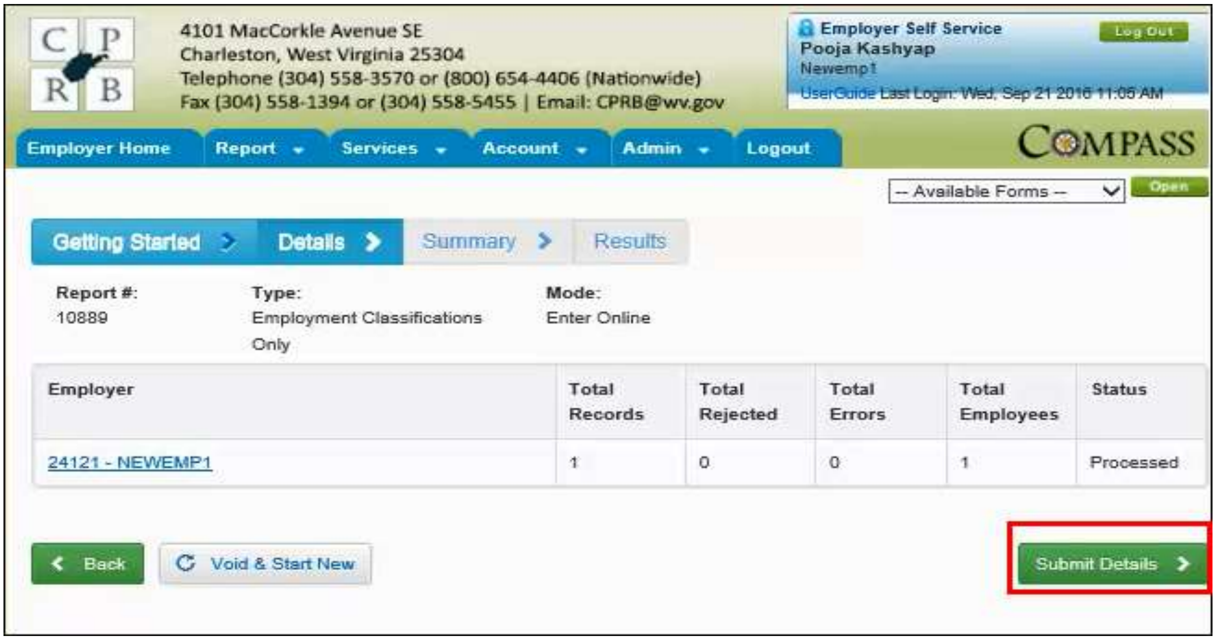
Step 24 -- After all updates are complete, click the 

button to submit the Employment Classification report.



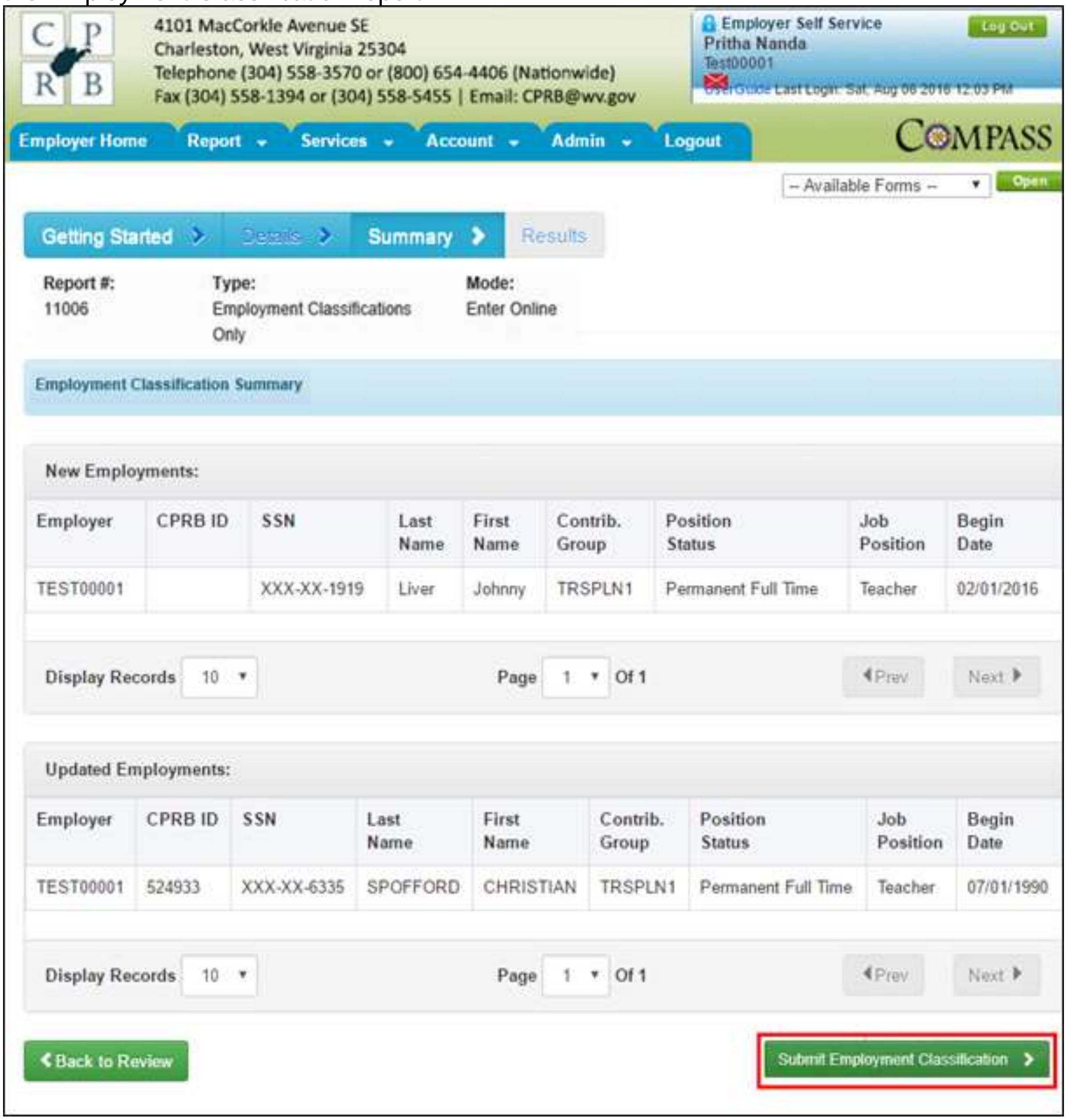
Step 25 -- Click the 

button to submit the Employment Classification report.

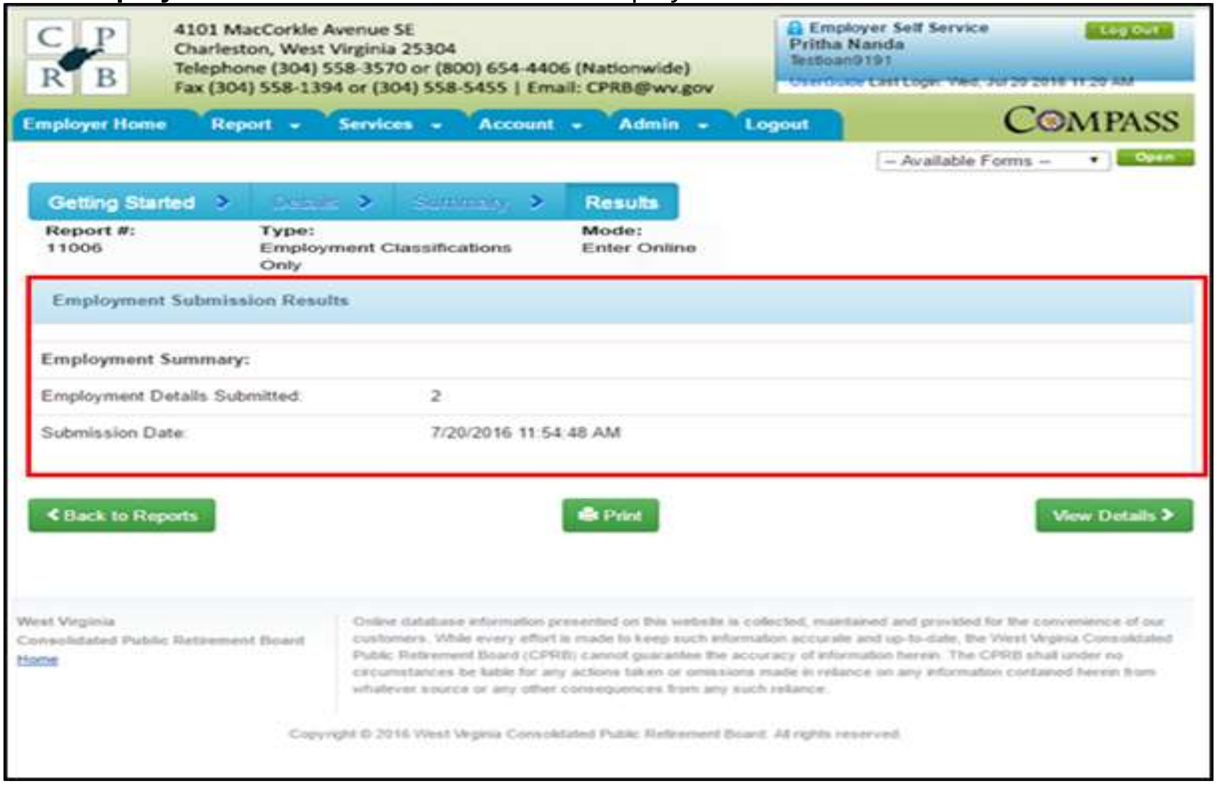


Step 26 -- The **Summary** screen displays, showing **New Employment Classification** and **Updated Employment Classification** sections. Click the 

button to submit the Employment Classification report.



Step 27 -- The **Employment Submission Results** are displayed.



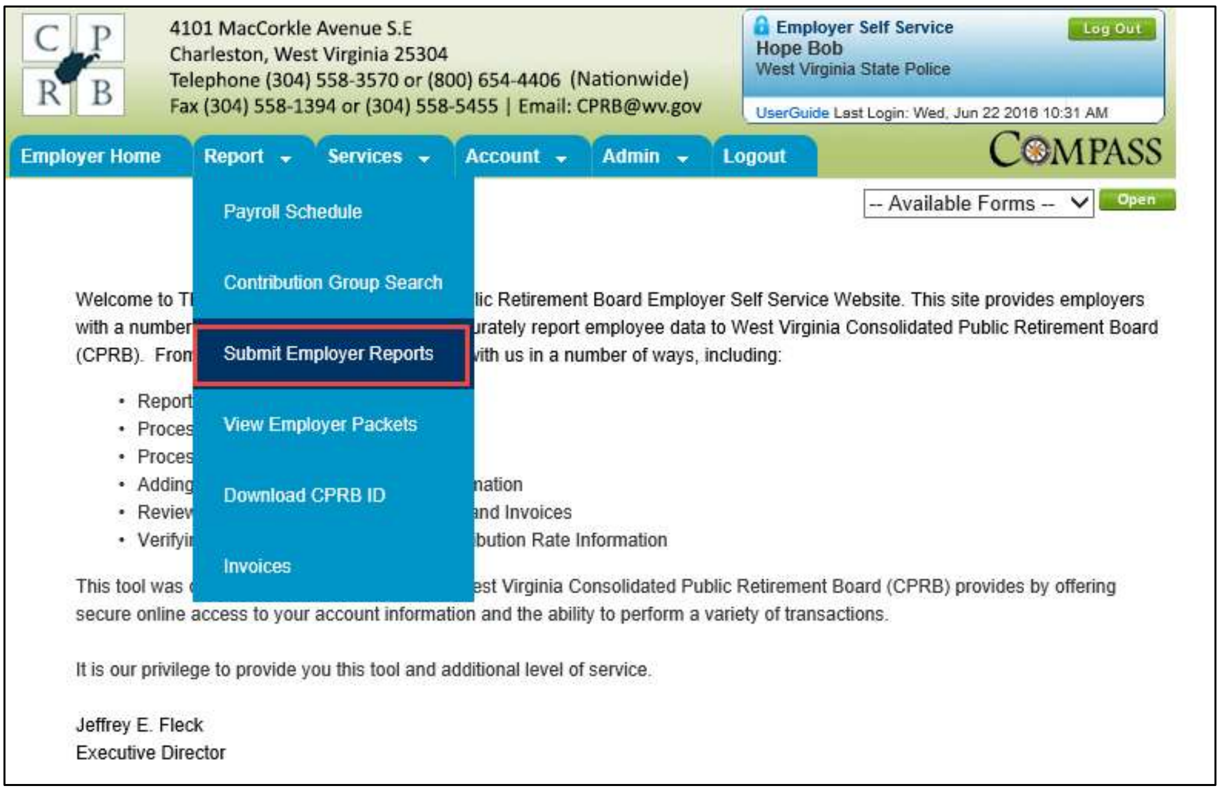
7.1.2 Submit Employment Classification – Enter On-line

The **Enter On-line** method provides the functionality to **Submit Employment Classification** directly in the ESS portal through entering employee demographic and employment information.

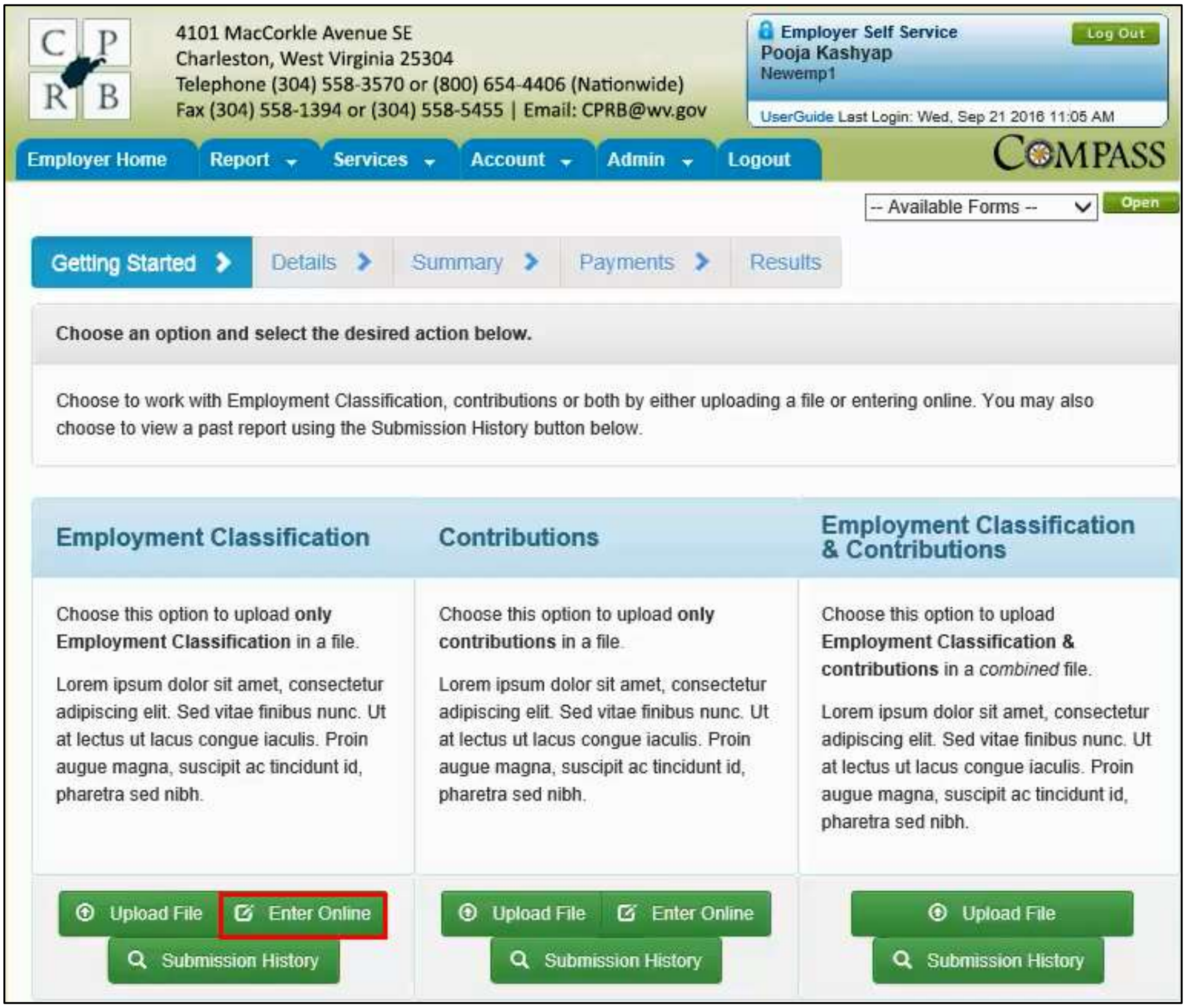
1. **Upload File** (a new COMPASS file format has been defined for employers to submit the information in a flat file, typically used by employers with larger employee populations), or
2. **Enter On-Line** (enables employers to review, update, and submit the information which is replicated from previous reports, mainly used by employers with smaller employee populations).

Step 1 -- To navigate to the Sumit Employer Reports screen, click the following menu options:

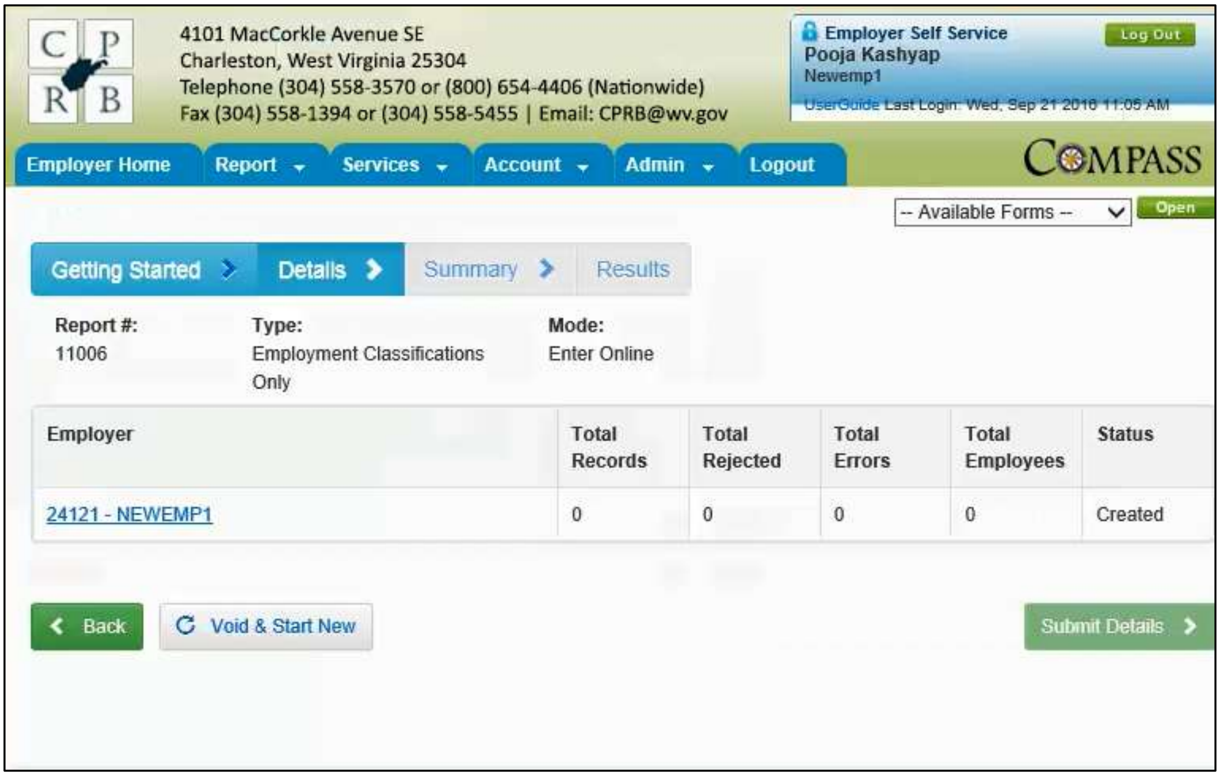
Report > **Submit Employer Reports**



Step 2 -- The **Getting Started** screen displays. In the **Employment Classification** section, click the **Enter Online** button.

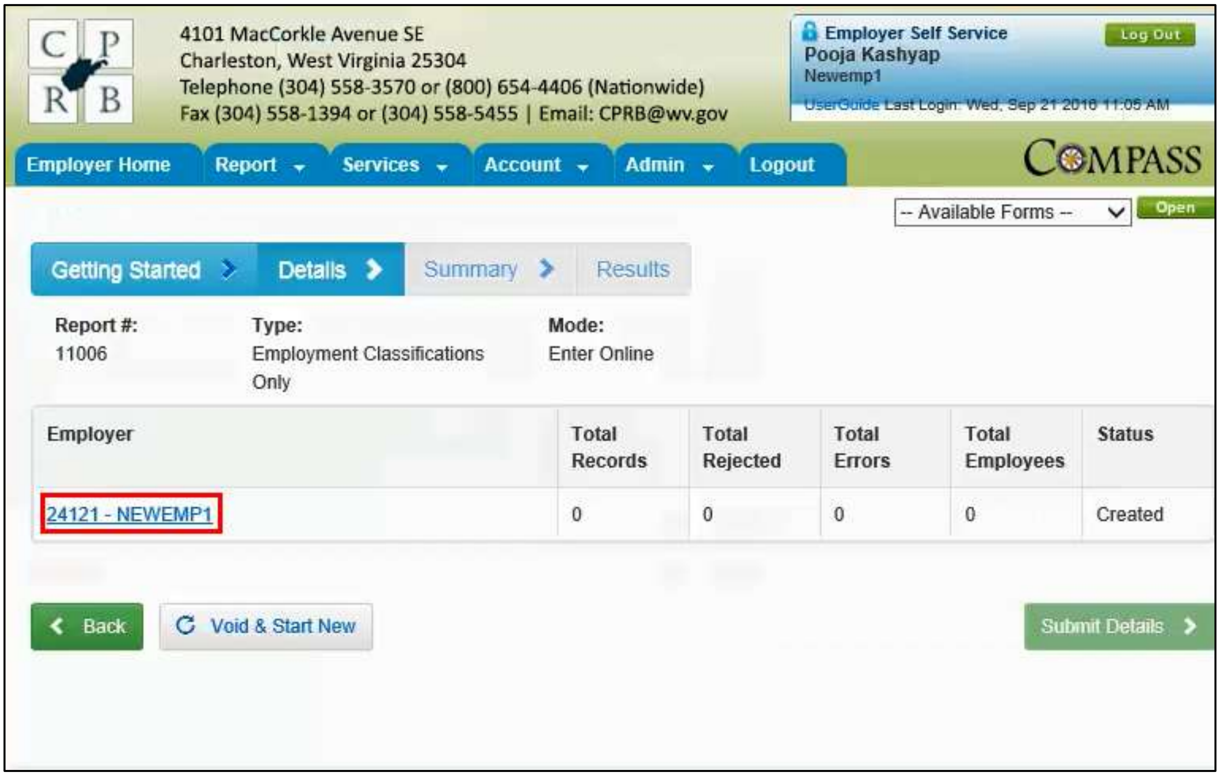


Step 3 -- The **Employment Details** screen displays. The submission details can be viewed on this screen.

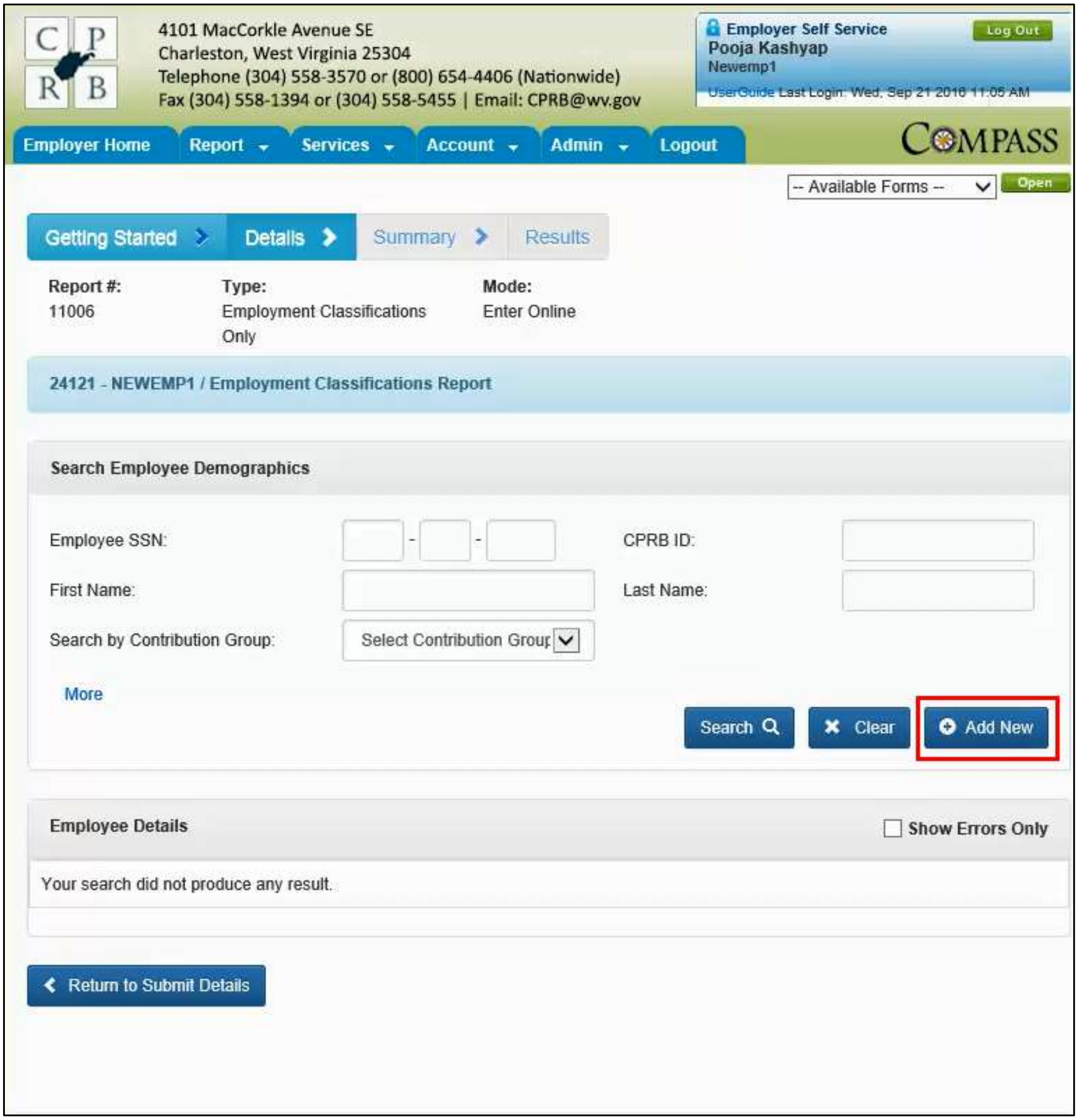


Step 4 -- Click the **hyperlink** (employer name) to enter Employment Classification information.

Note: The **Void and Start New** button will void the submission and start the process again.



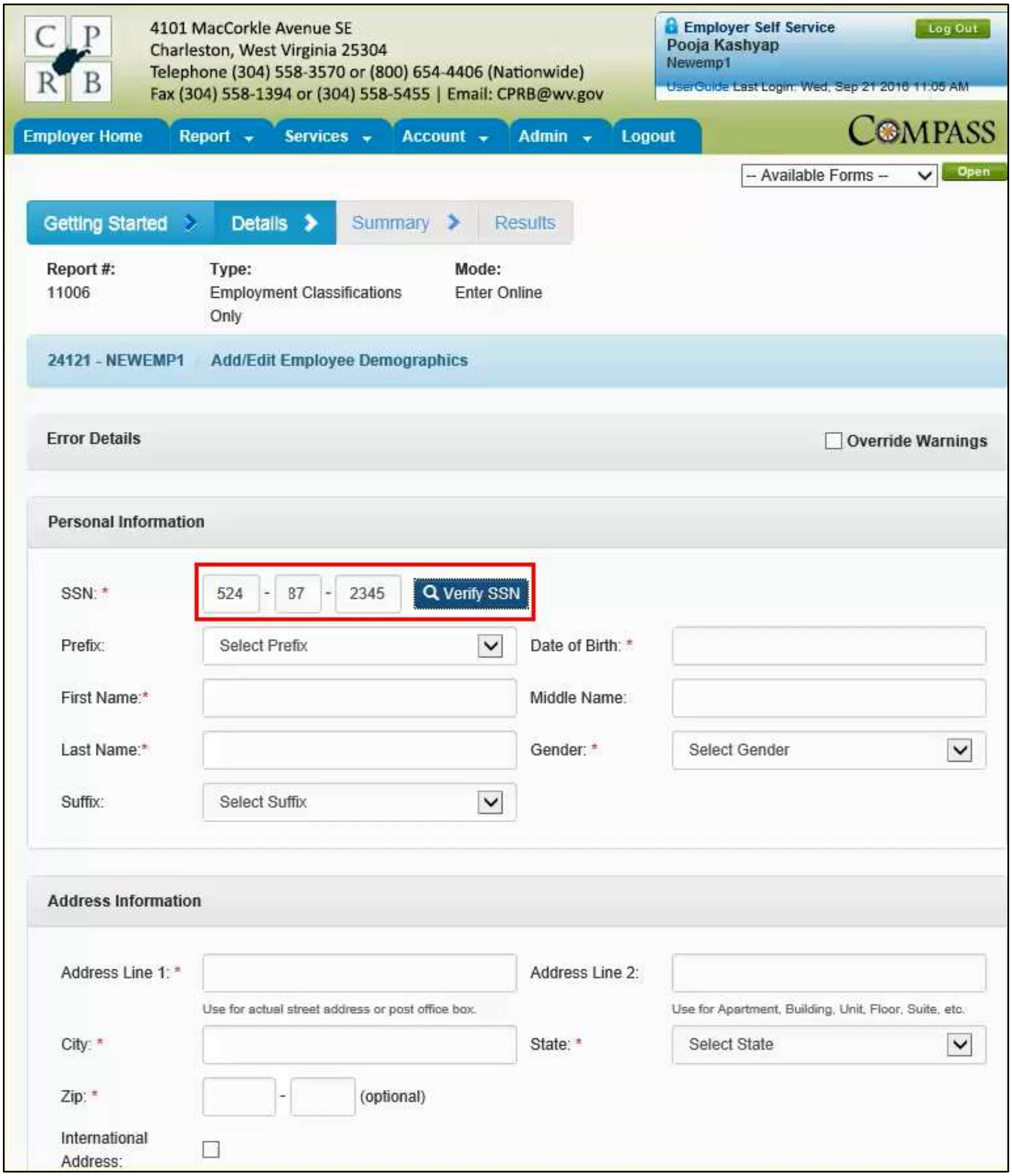
Step 5 -- Click the Add New button to add a new employee to the employment classification report.



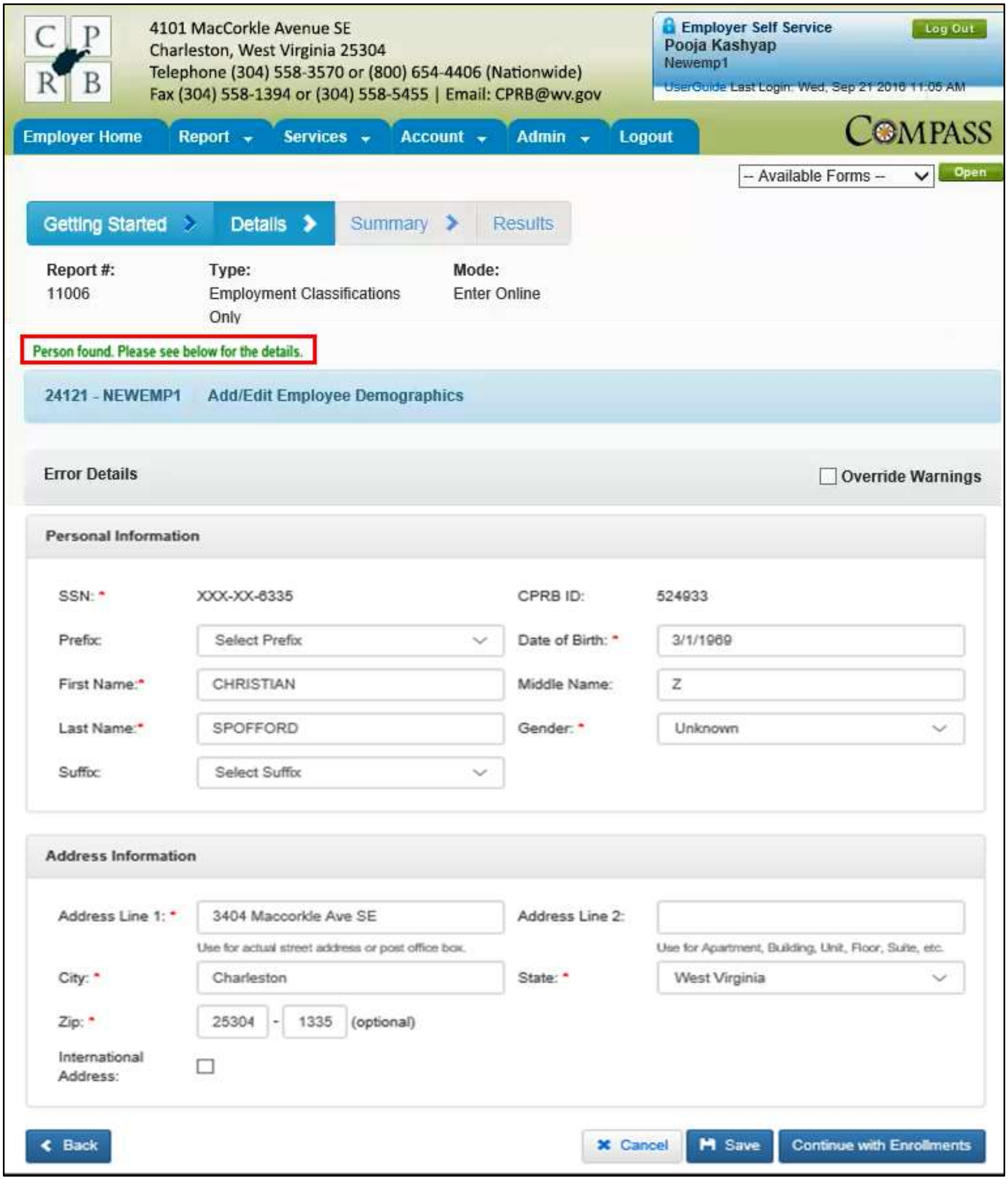
Step 6 -- In the **Personal Information** section, enter the SSN of the employee and click the 

button. If the employee has a record with CPRB, the **Personal Information** section will automatically populate with the employee's information.

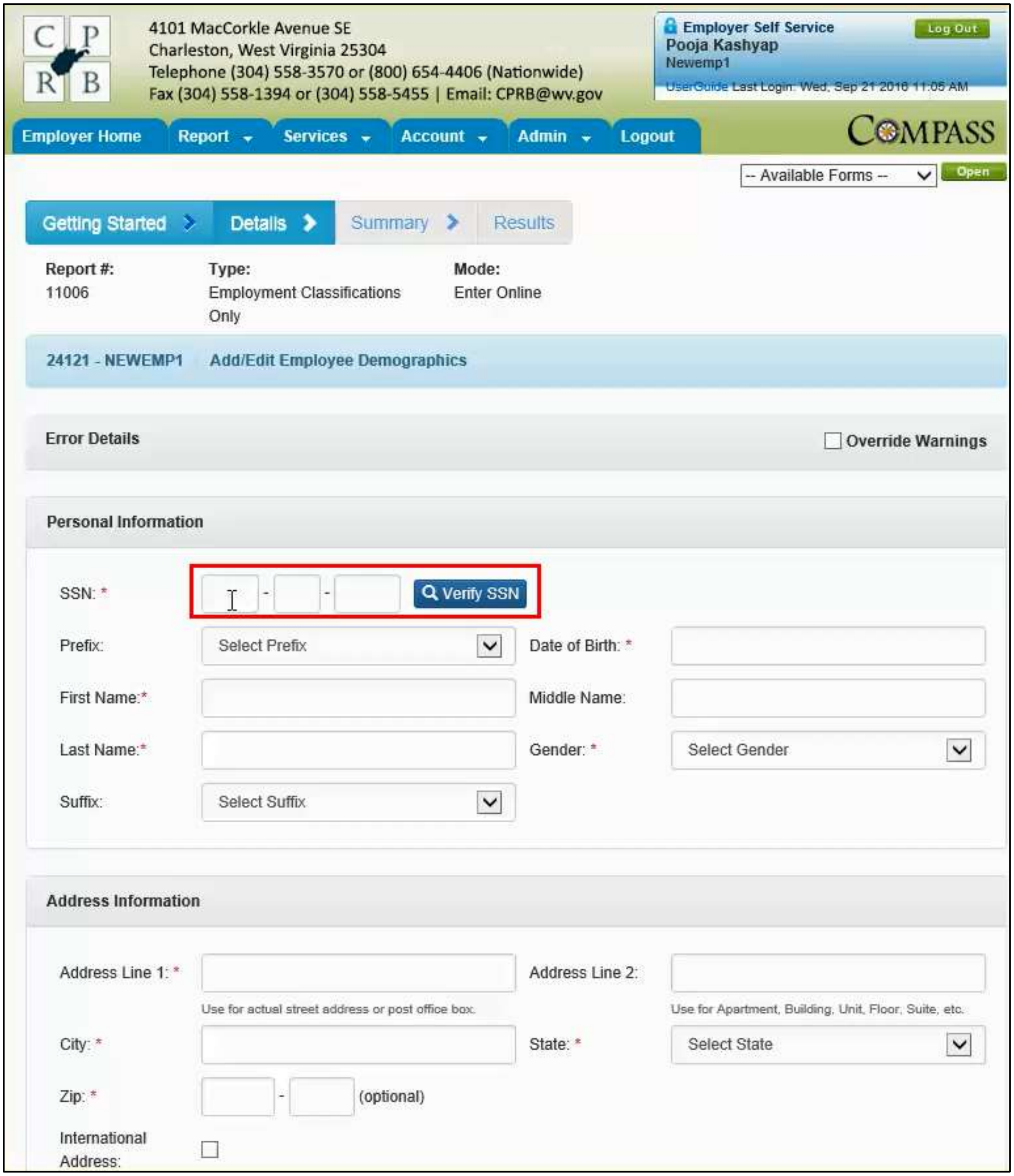
Note: If the employee's personal information is pre-populated skip to step 17 of this Section.



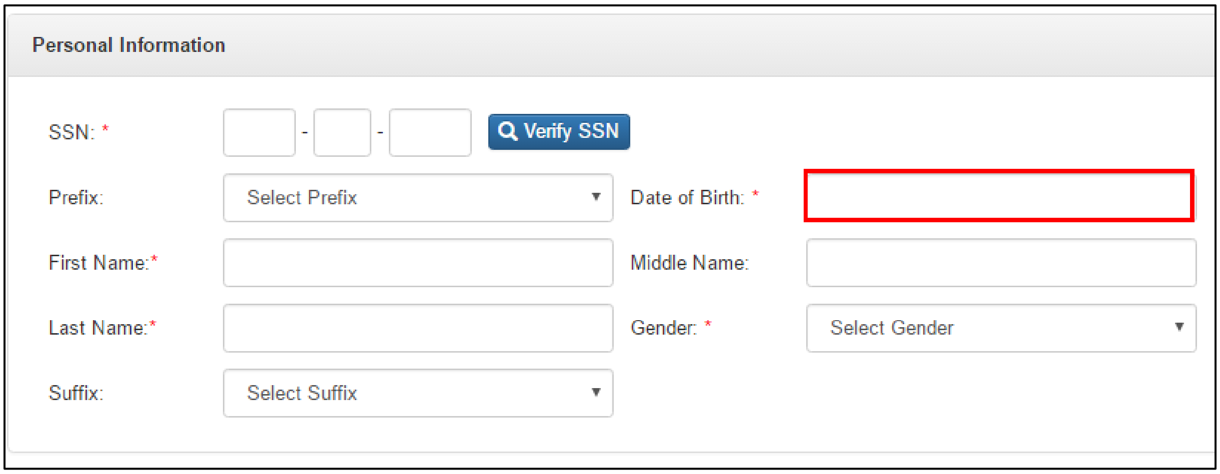
Step 7 -- "**Person found. Please see below for the details.**" message will display with the details. COMPASS will prepopulate all the demographic information.



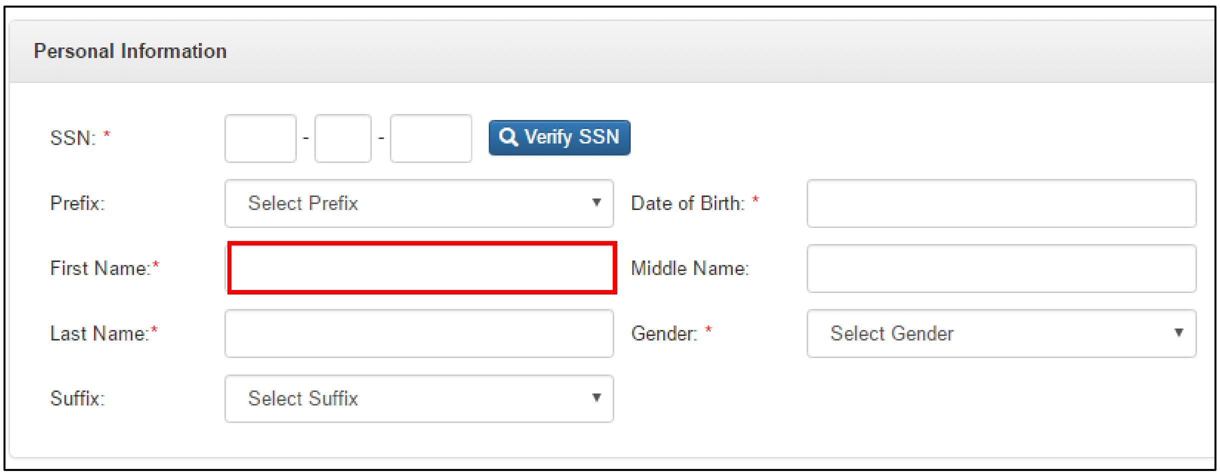
Step 8 -- If the employee **does not have an existing record in COMPASS** (CPRB), enter the **SSN**, click the Verify SSN button and enter the employee's demographic information in the required fields (steps 9 – 16).



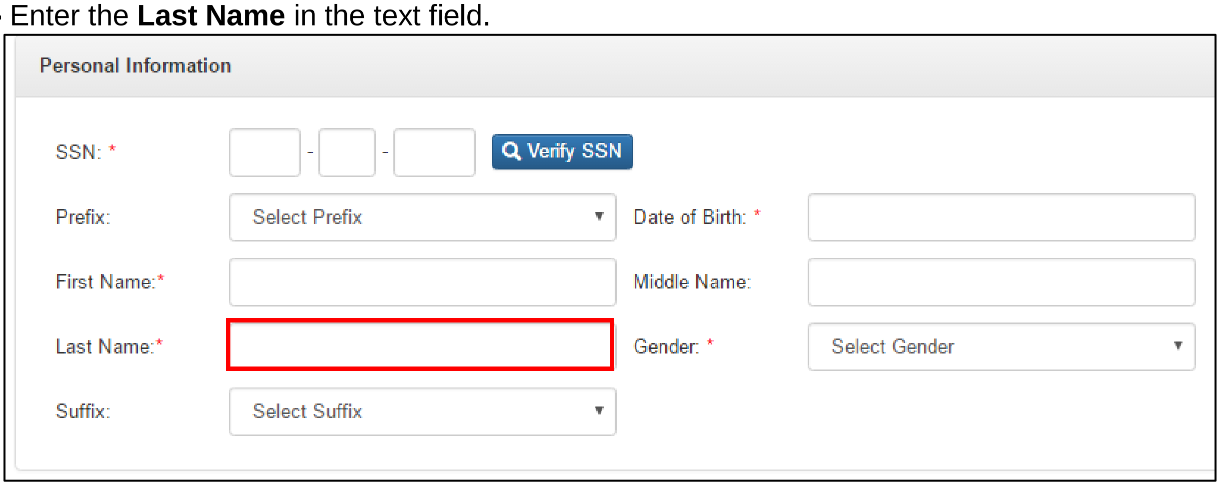
Step 9 -- Enter the **Date of Birth** in the text field.



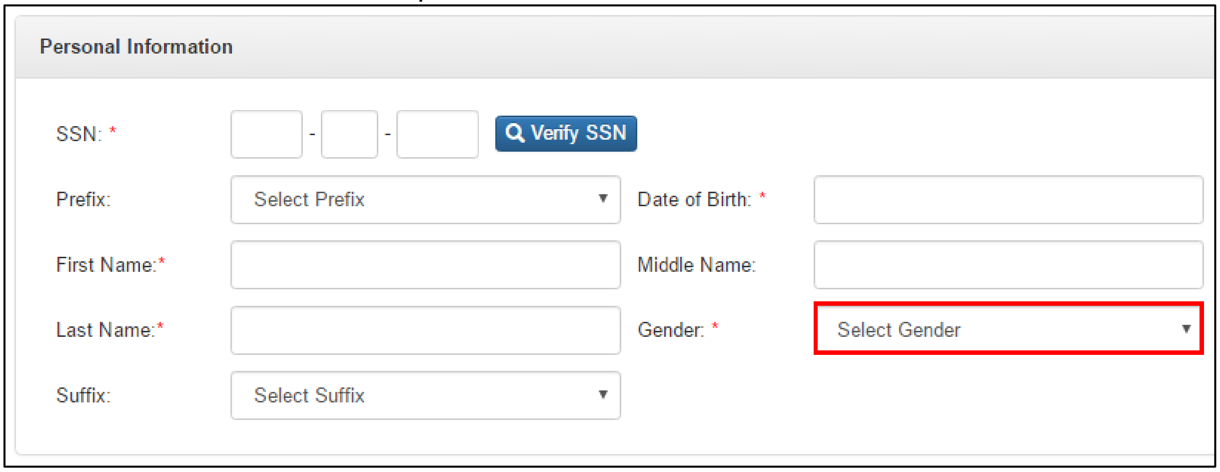
Step 10 -- Enter the **First Name** in the text field.



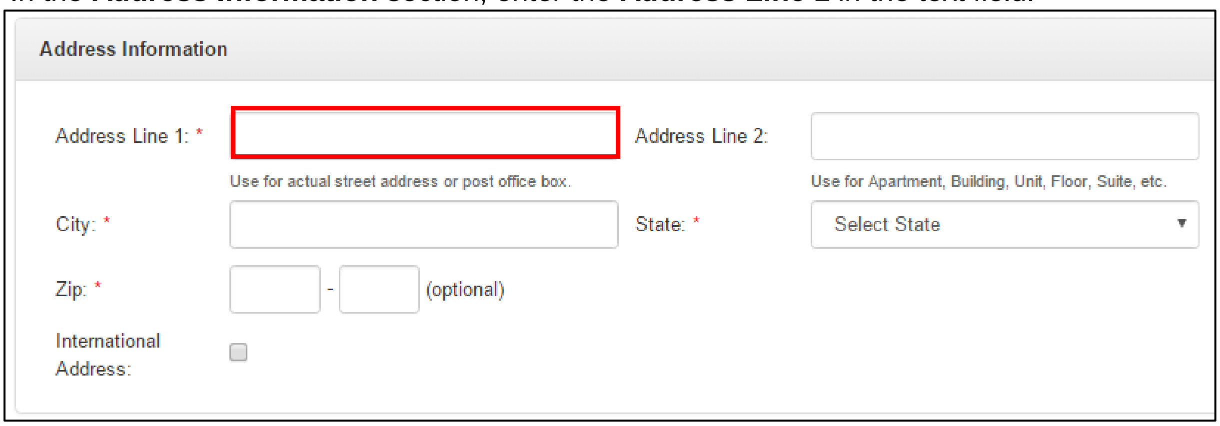
Step 11 -- Enter the **Last Name** in the text field.



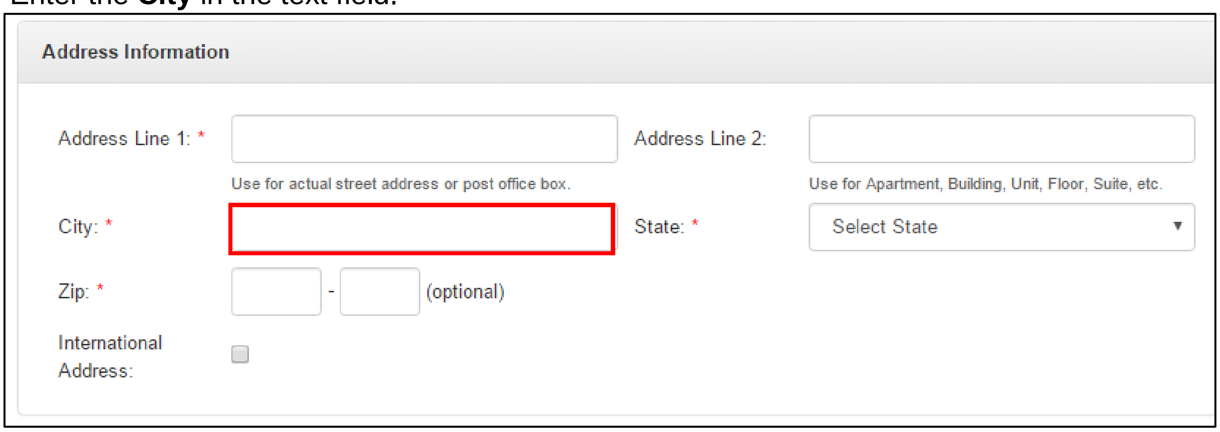
Step 12 -- Select the **Gender** from the drop down menu.



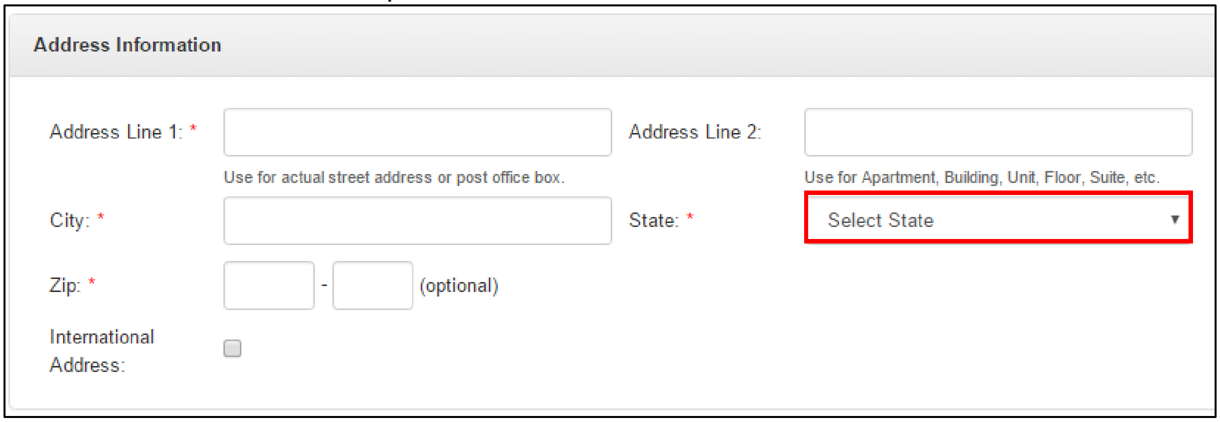
Step 13 -- In the **Address Information** section, enter the **Address Line 1** in the text field.



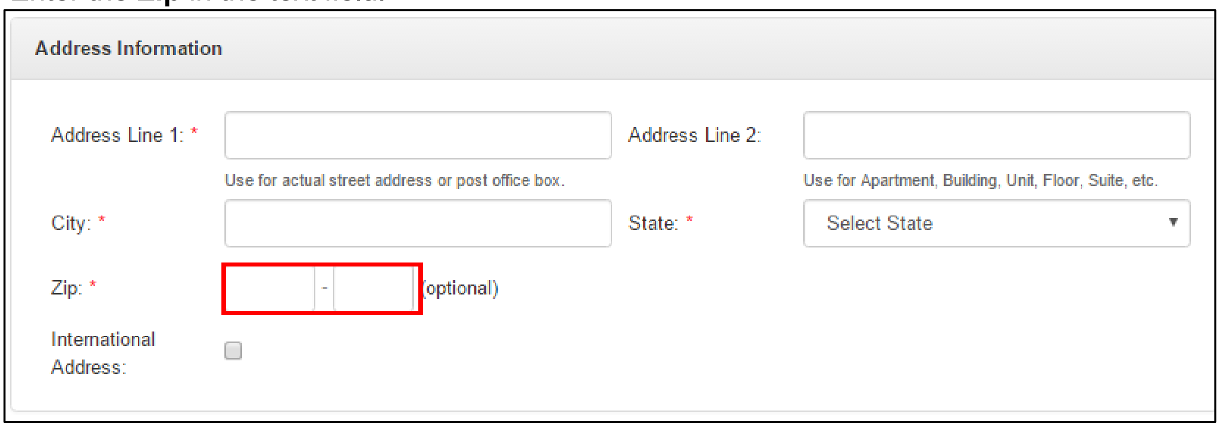
Step 14 -- Enter the **City** in the text field.



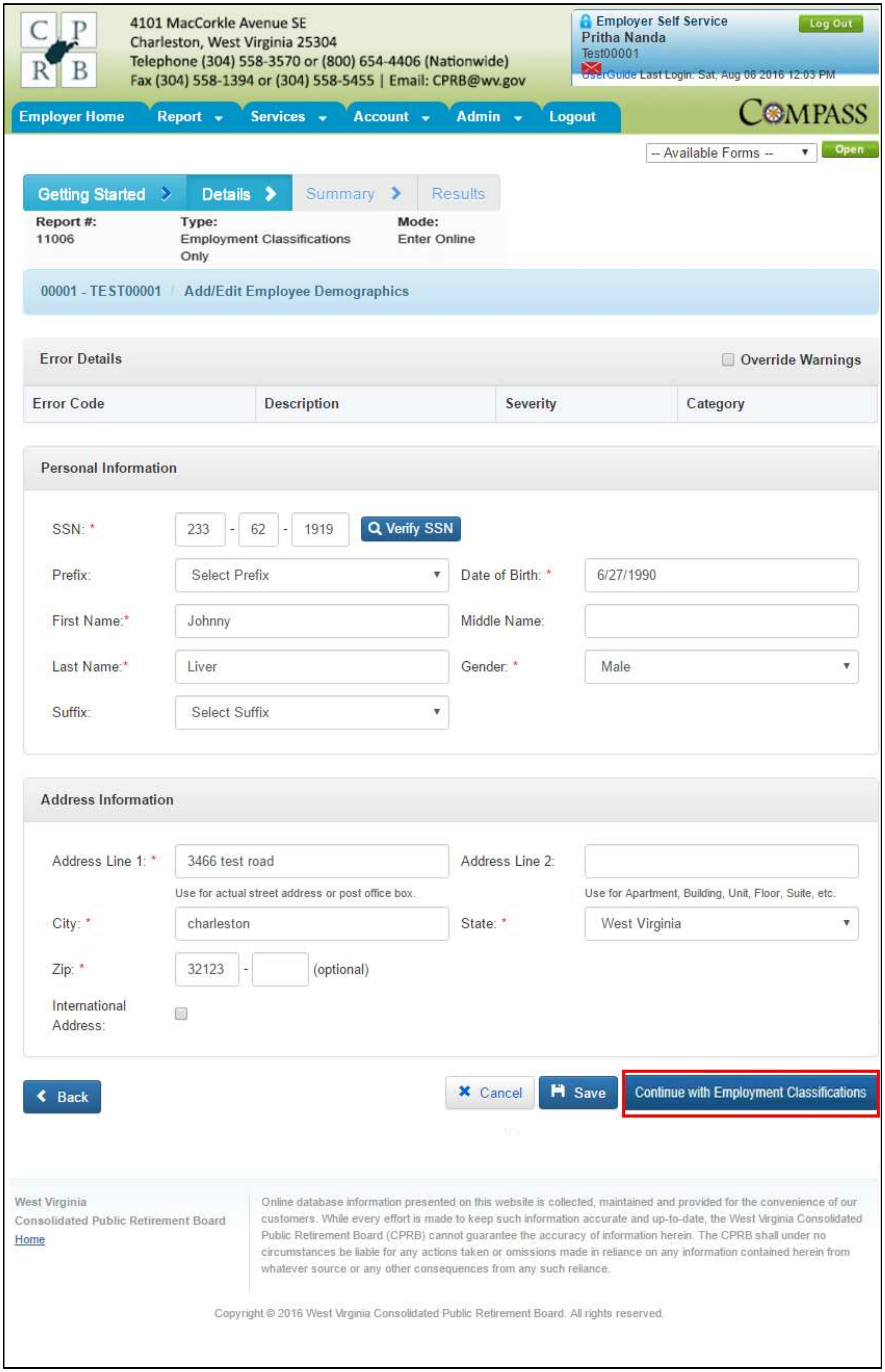
Step 15 -- Select the **State** from the drop down menu.



Step 16 -- Enter the **Zip** in the text field.

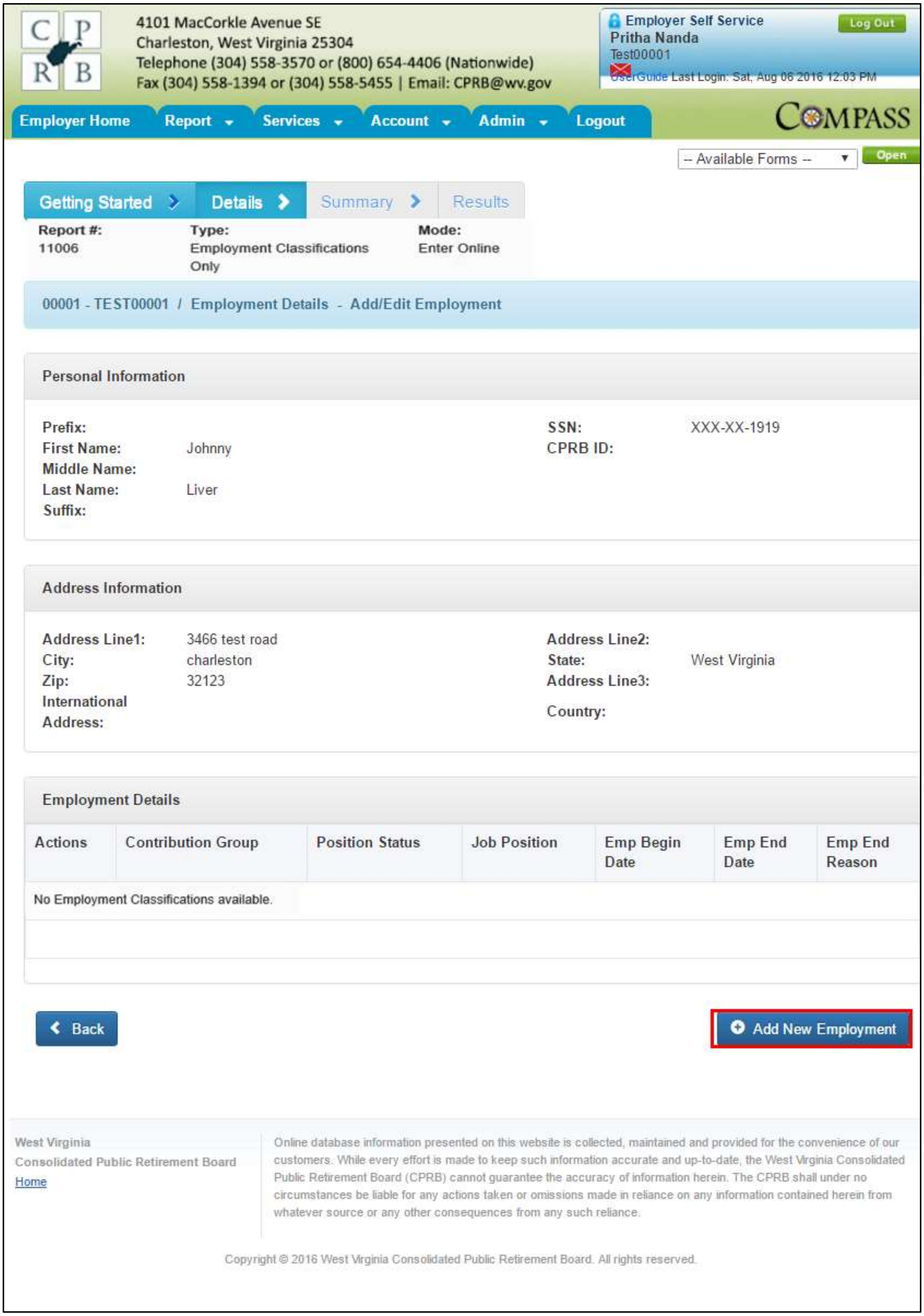


Step 17 -- Click the Save button to save the details and then click the Continue with Employment Classifications button to continue working with Employment Classification details.



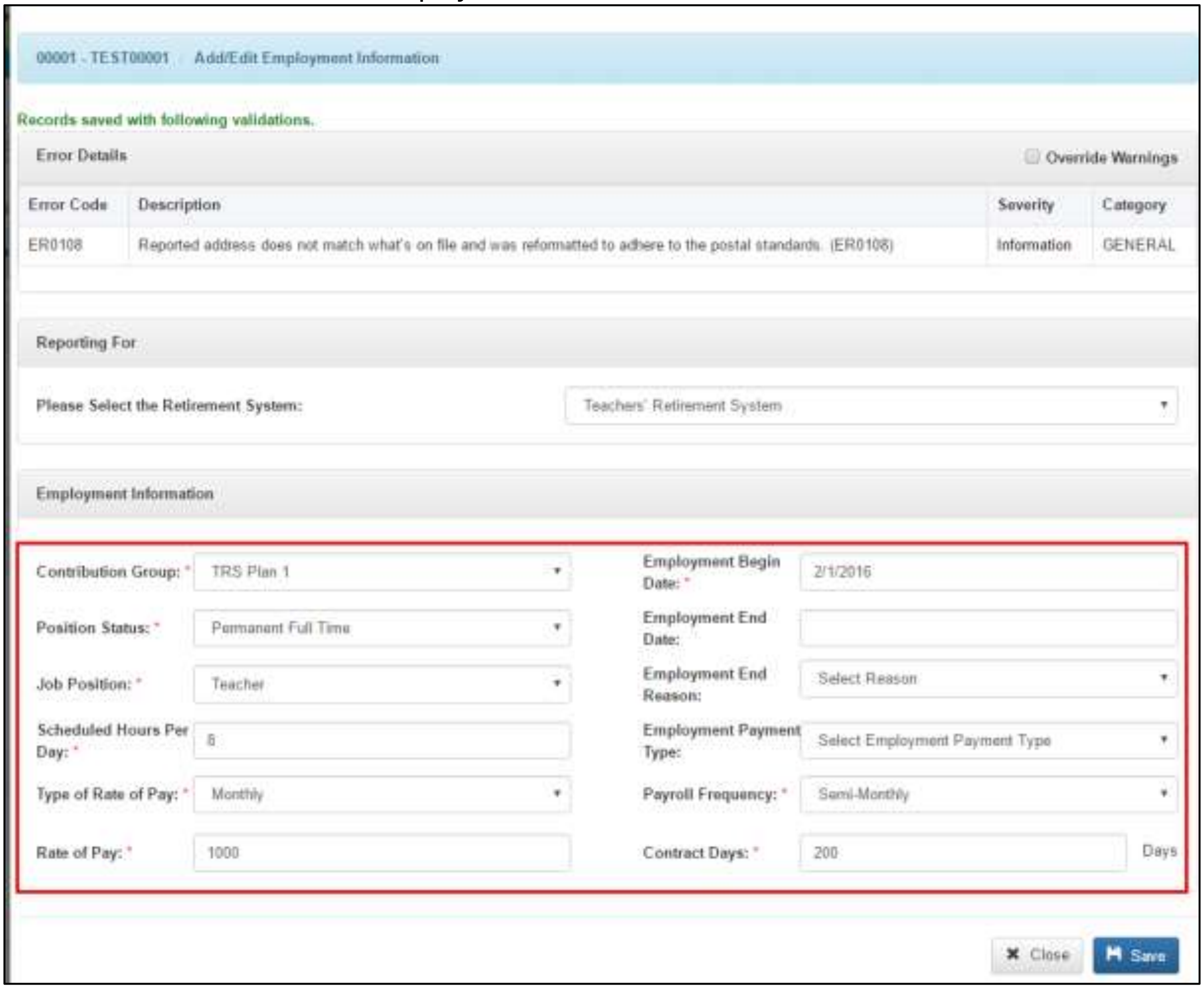
Step 18 -- Add new employment classification by clicking on the 

button.



Step 19 -- The **Add/Edit Employment Classification Information** screen displays, add the Employment Classification information in the appropriate fields.

Note: An employment classification will be created only when both demographic and employment classification information is entered. Only entering the demographic information will not create an employment classification.



00001 - TEST00001 / Add/Edit Employment Information

Records saved with following validations.

Error Details — Override Warnings

Error Code	Description	Severity	Category
ER0108	Reported address does not match what's on file and was reformatted to adhere to the postal standards. (ER0108)	Information	GENERAL

Reporting For

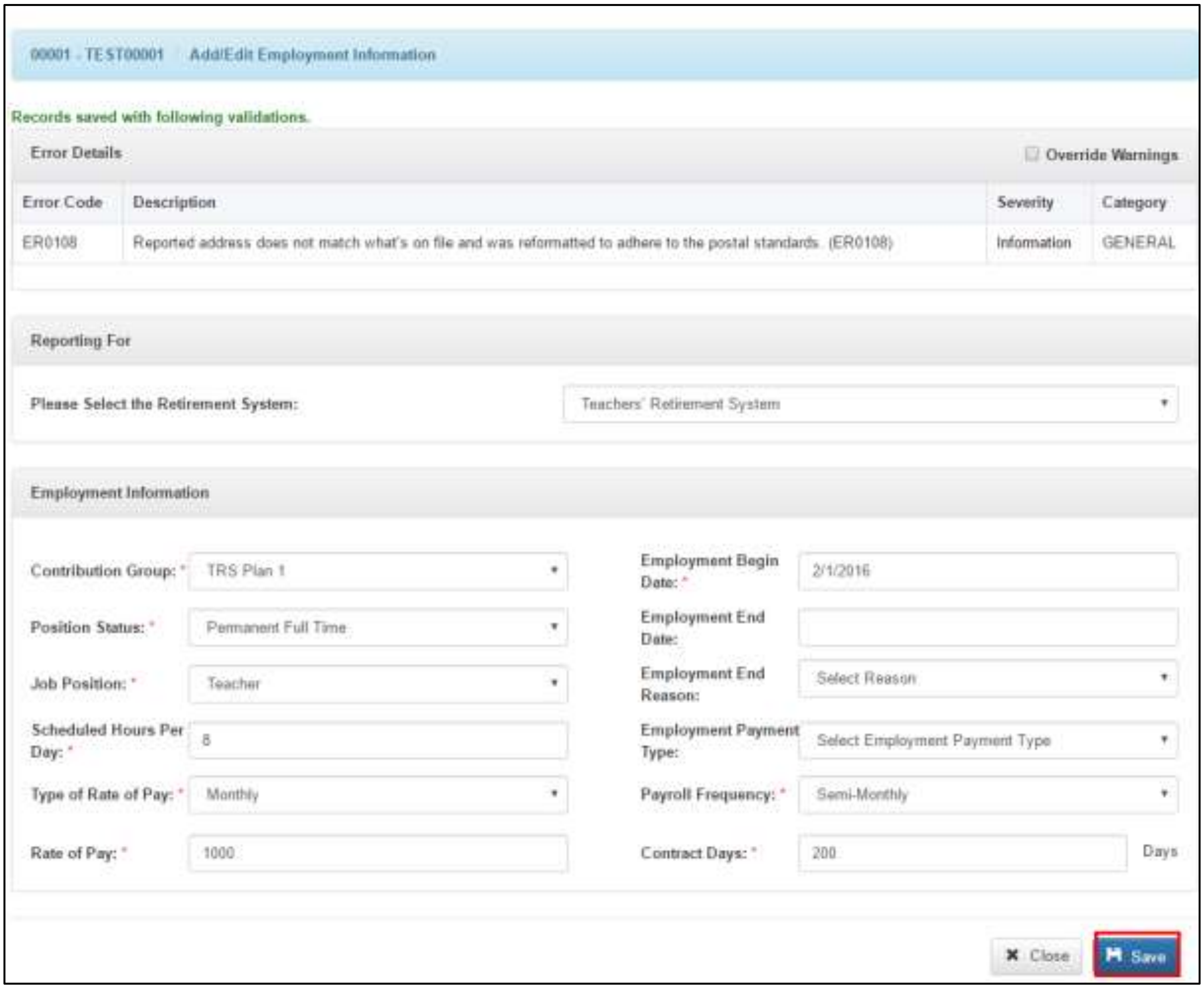
Please Select the Retirement System: Teachers' Retirement System

Employment Information

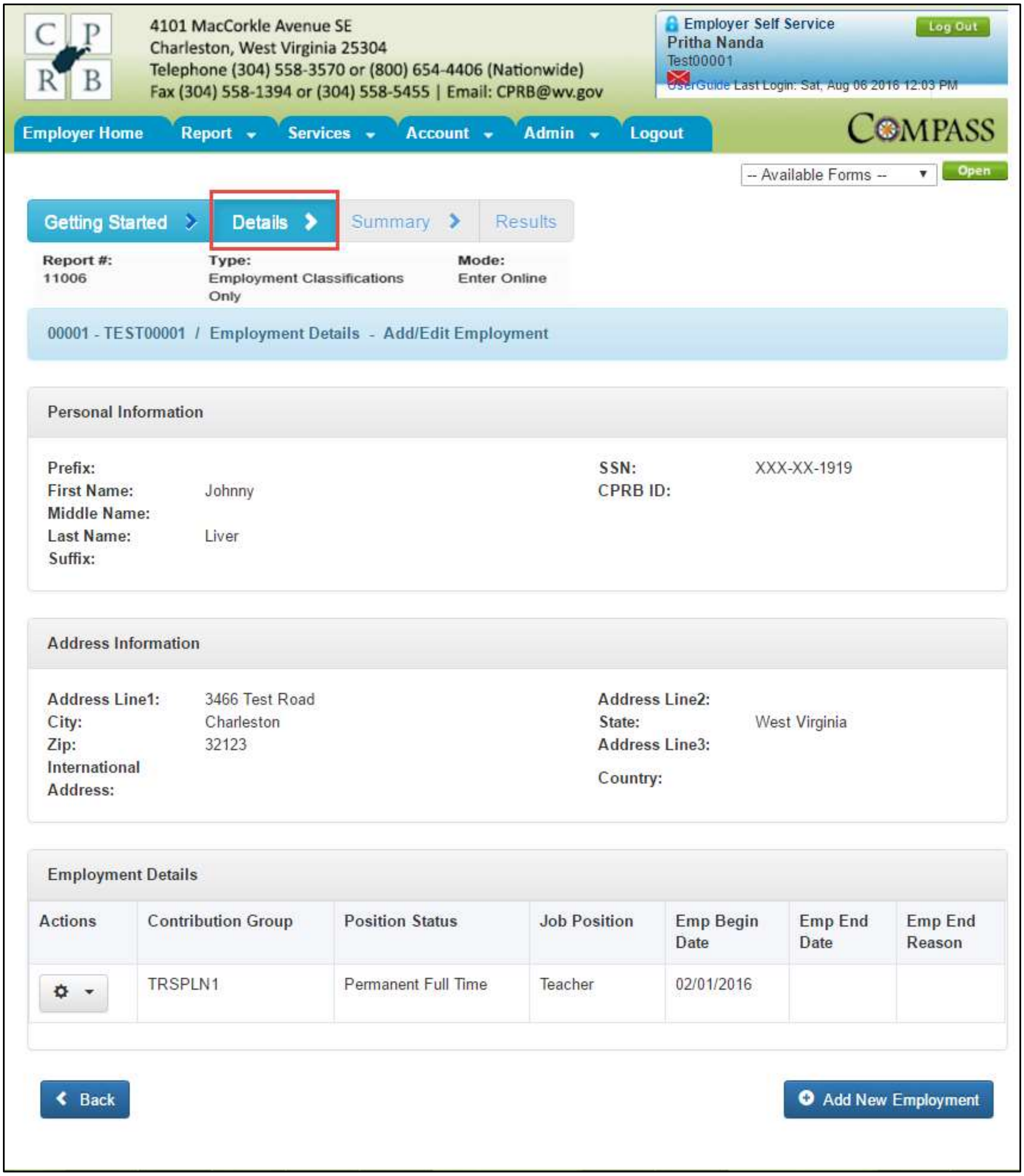
Contribution Group: *	TRS Plan 1	Employment Begin Date: *	2/1/2016
Position Status: *	Permanent Full Time	Employment End Date:	
Job Position: *	Teacher	Employment End Reason:	Select Reason
Scheduled Hours Per Day: *	6	Employment Payment Type:	Select Employment Payment Type
Type of Rate of Pay: *	Monthly	Payroll Frequency: *	Semi-Monthly
Rate of Pay: *	1000	Contract Days: *	200 Days

Close Save

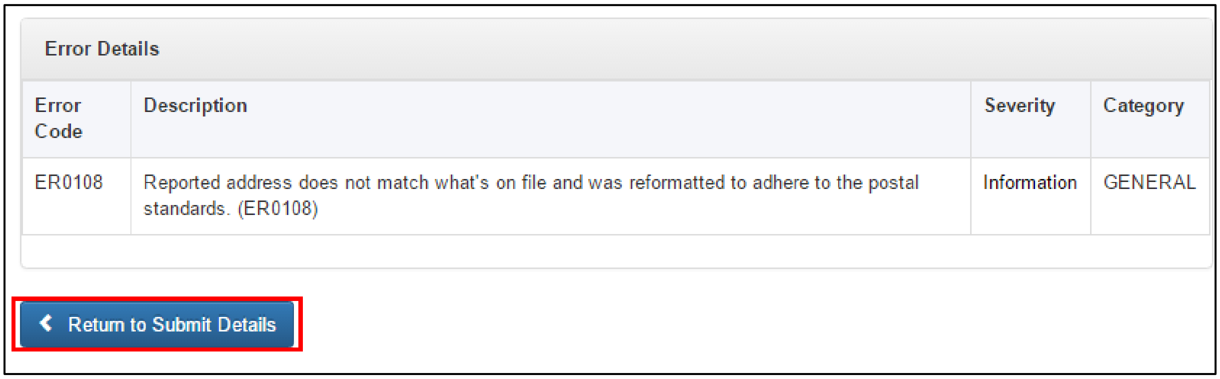
Step 20 -- Click the  button.



Step 21 -- Click in the **Details** screen to submit the Employment Classification file.

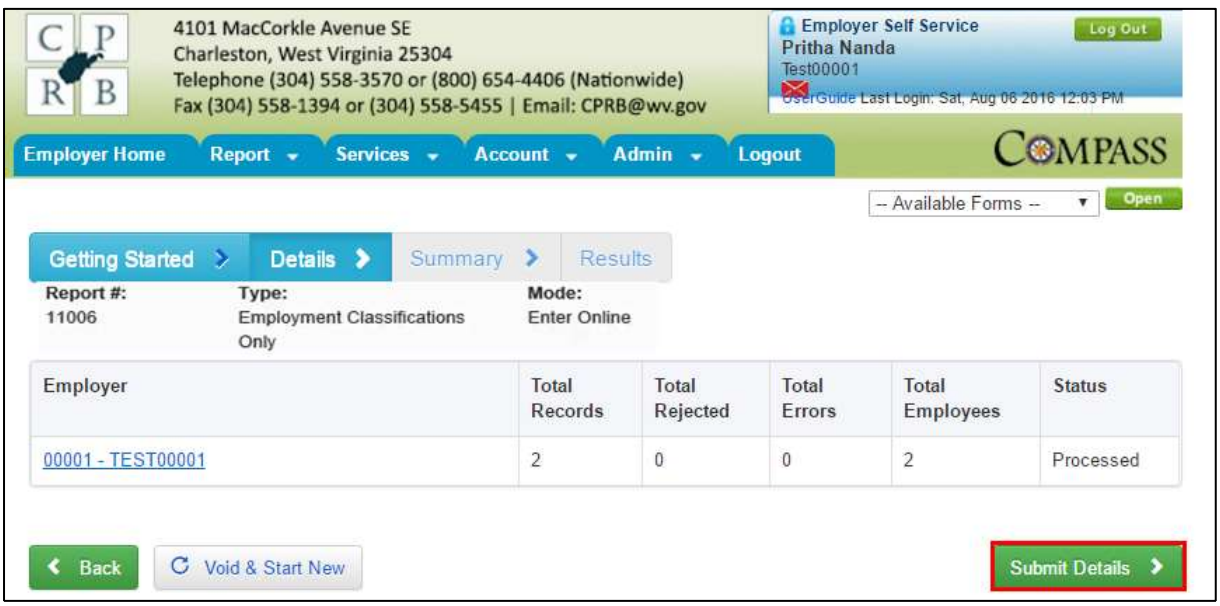


Step 22 -- After all Employment Classification information has been added and/or updated, click the Return to Submit Details button.

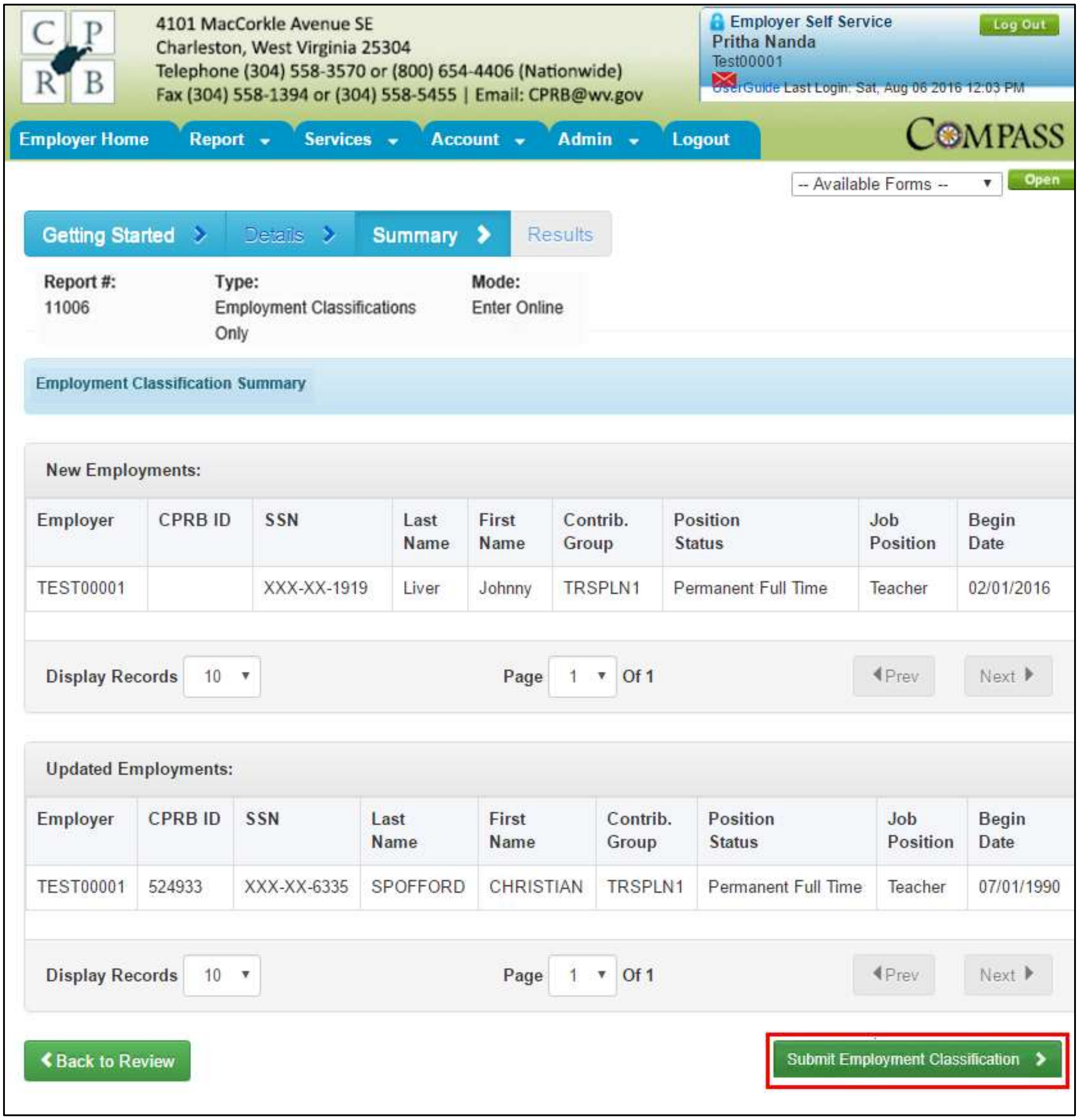


Step 23 -- Click the Submit Details button.

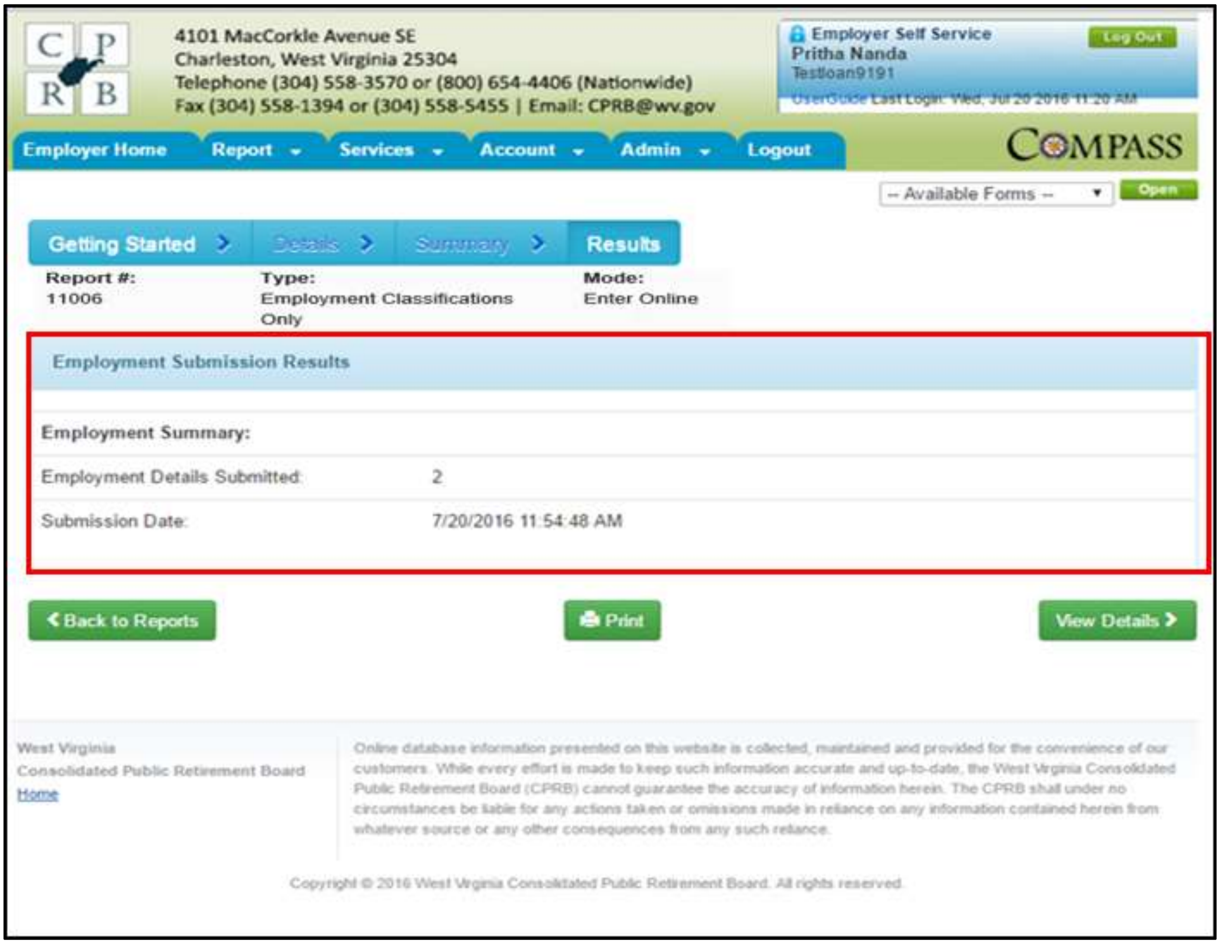
Note: Following the Employment Classification information entered through the Enter Online option, the Total Records column has been updated to 2.



Step 24 -- Click the  button to submit the employment classification information.



Step 25 -- The **Employment classification Submission Results** are displayed stating that the employment classification has been successfully submitted.



7.2 Submit Contributions

An employee and an employer monetary contribution to a retirement plan is due on pensionable wages earned by participating members. Employers can **Submit Contribution** reports containing the information regarding the wages earned and contributions remitted via the ESS portal for employees that have been previously enrolled, by virtue of reporting their required employment classification information, in one of the CPRB administered retirement systems.

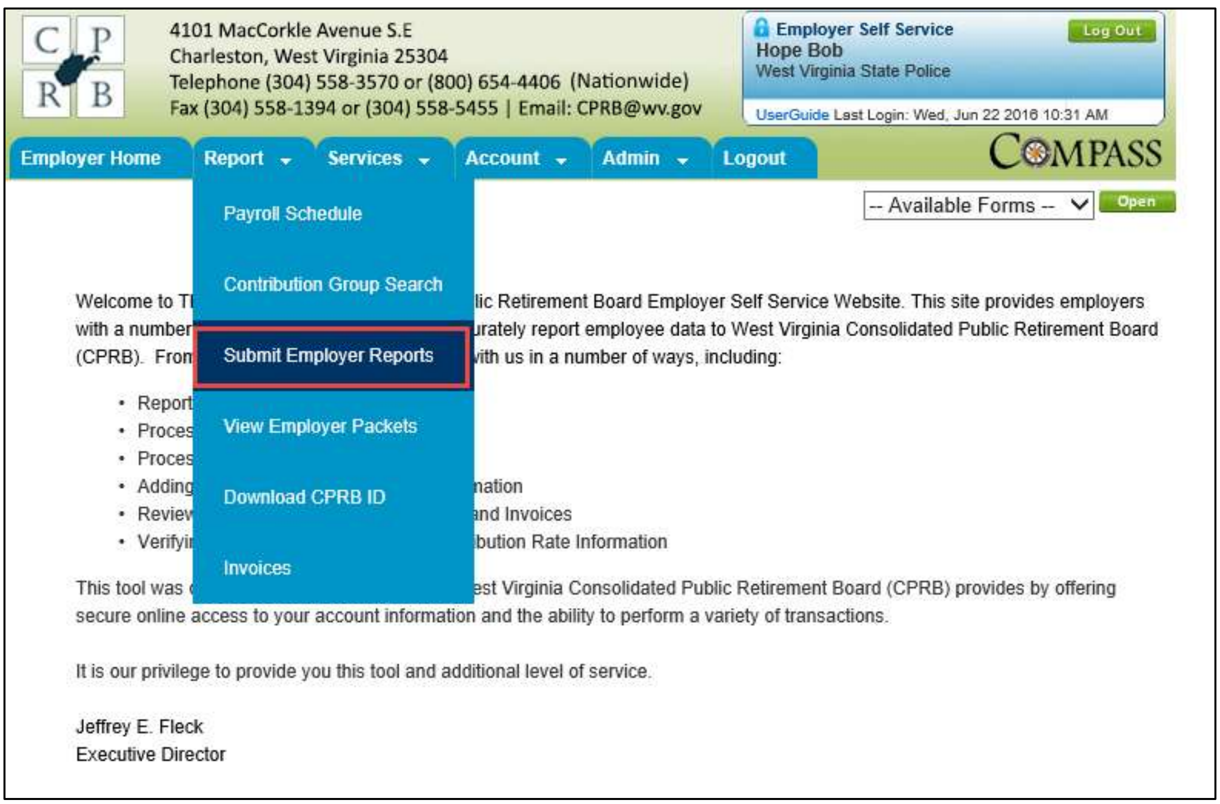
Employers can submit wage and contribution information for an employee through either the **Upload File** or **Enter On-Line** file submission methods. Regardless of which submission option is chosen (i.e. Upload File or Enter On-Line), the salary and contribution information is validated by COMPASS and any errors identified must be resolved by the employer prior to successfully submitting the information to CPRB. The information provided in the contribution reports is used by CPRB to ensure an employee's contributions are reported accurately.

Following the submission and correction of errors to the contribution details, the employer can review and finalize the **Contribution Summary**, remit electronic payments, and print the **Contribution Summary** screen to include with mailed checks and/or Lockbox payments.

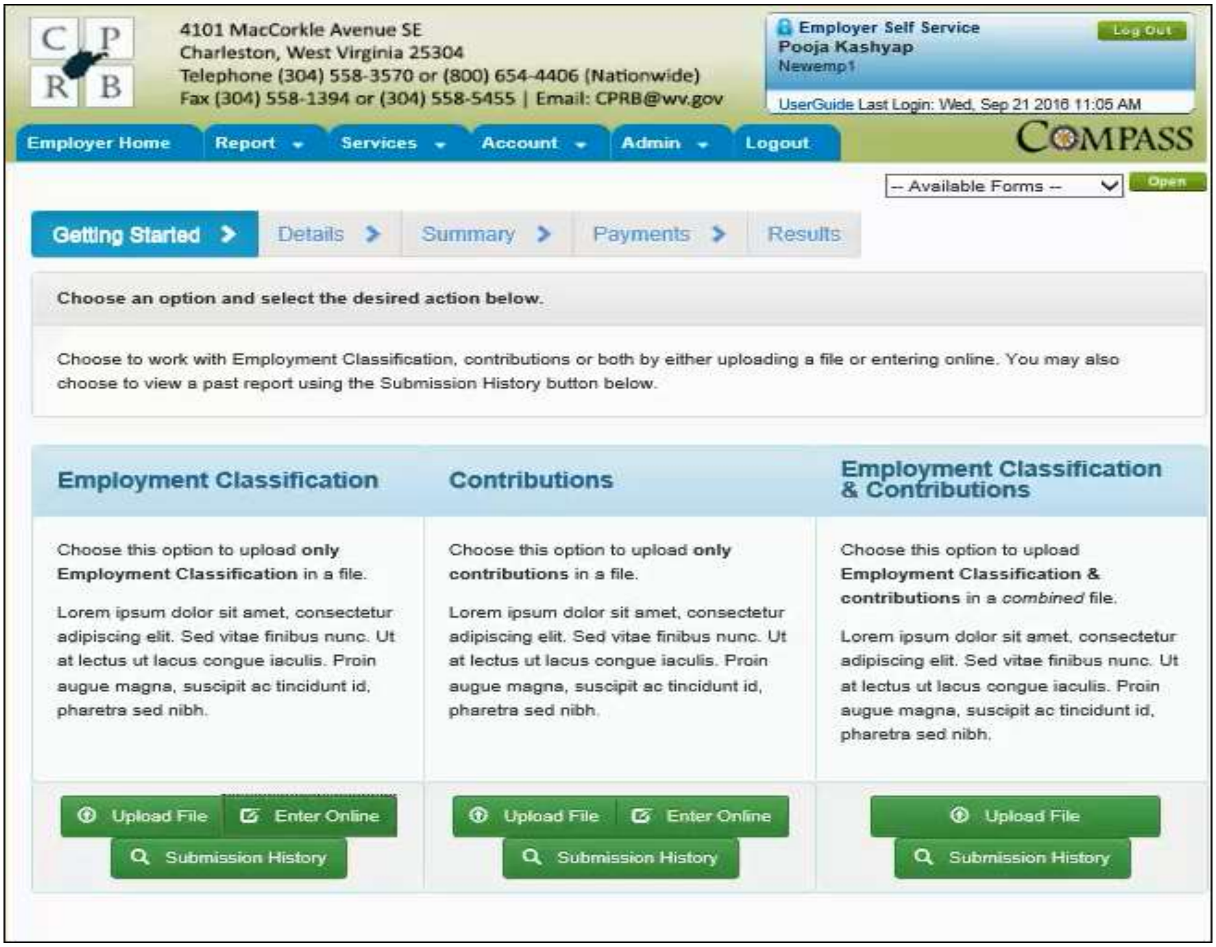
Employers can follow the process below to submit Contribution Reports for their employees:

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

Report > **Submit Employer Reports**



Step 2 -- The **Getting Started** screen displays.



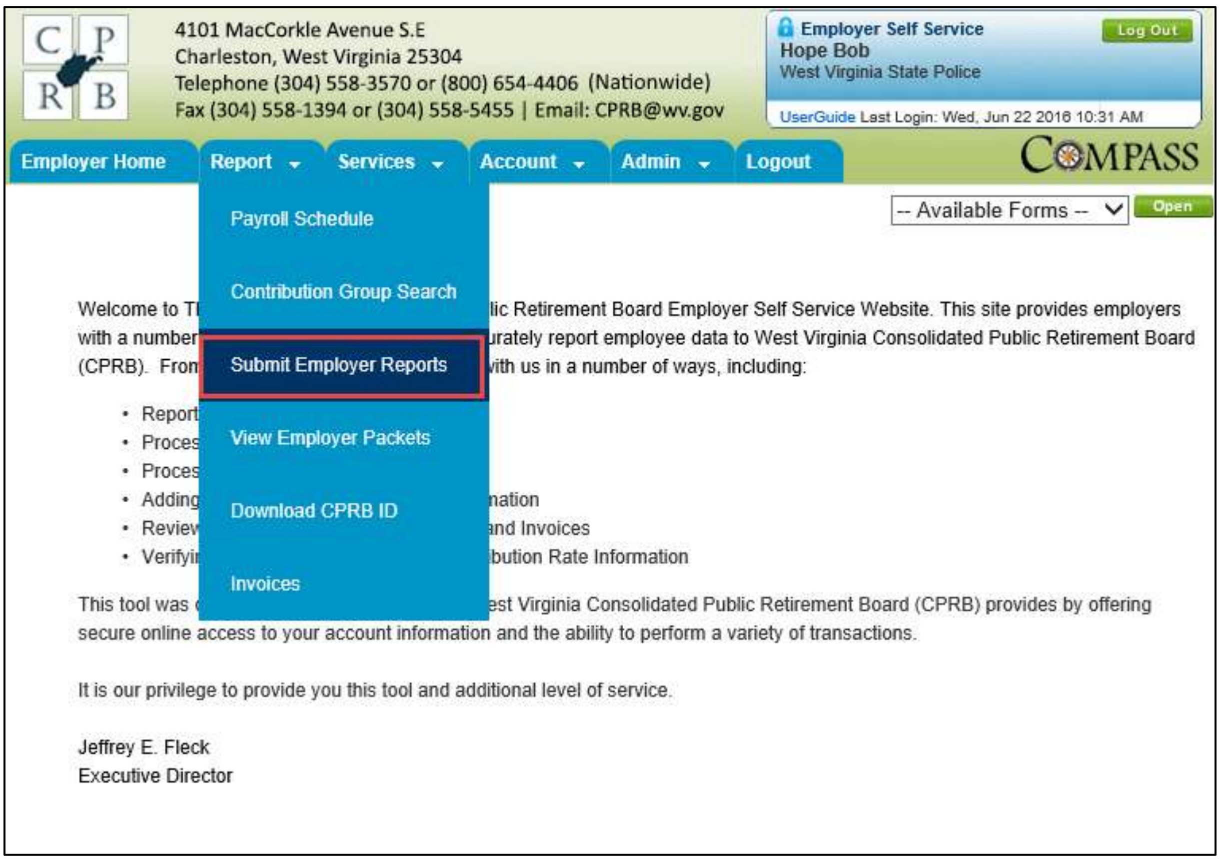
7.2.1 Submit Contributions – Upload File

If the employer chooses to submit the Contribution file to CPRB using the Upload File medium, then the Contribution file must be in the new COMPASS file format (refer to the COMPASS Employer Reporting File Format, which was first circulated to employers in March 2016, and can be found here: http://www.wvretirement.com/Forms/COMPASS-Eer-ReportingFile.pdf)

1. **Upload File** (a new COMPASS file format has been defined for employers to submit the information in a flat file, typically used by employers with larger employee populations), or
2. **Enter On-Line** (enables employers to review, update, and submit the information which is replicated from previous reports, mainly used by employers with smaller employee populations).

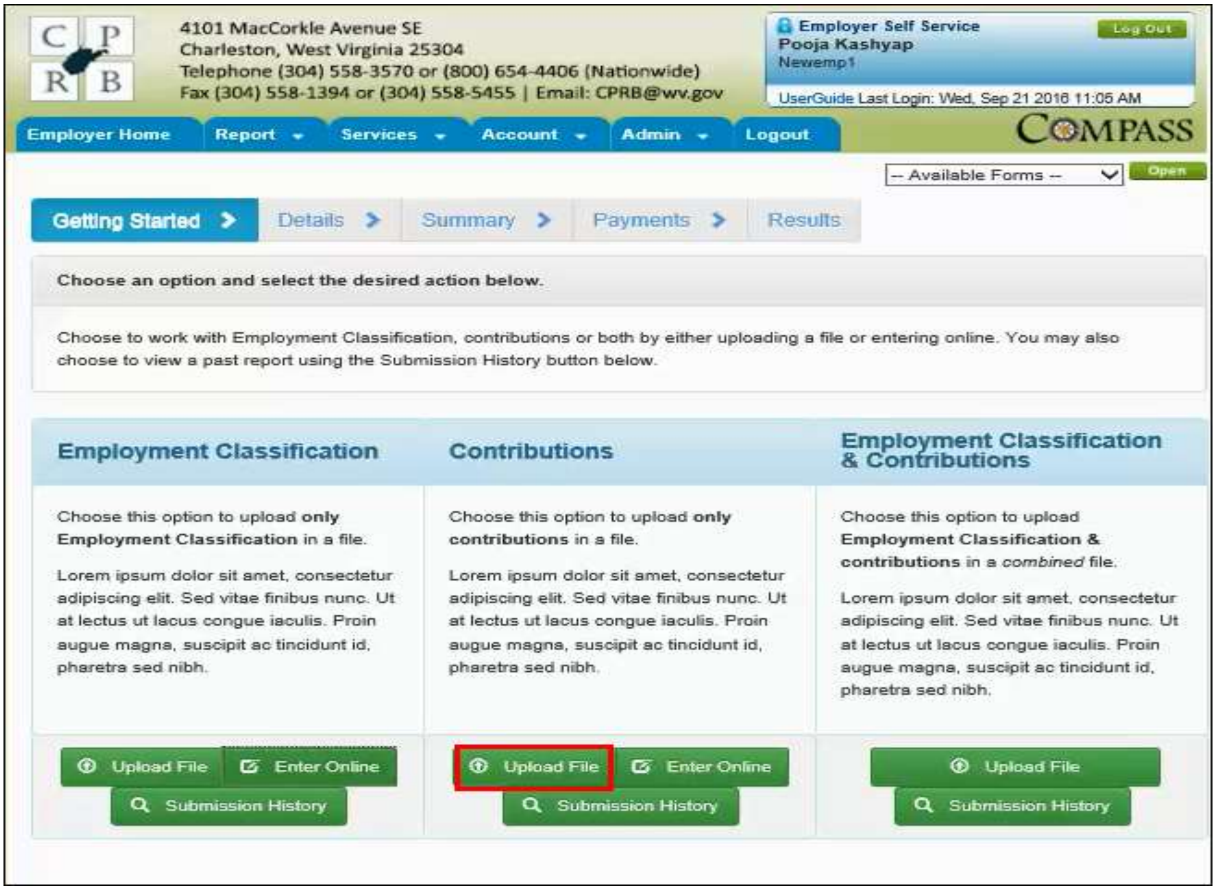
Follow the steps to upload the Contribution file using the Upload File method:

Step 1 -- To navigate to the **Sumit Employer Reports** screen, click the following menu options: **Report** > **Submit Employer Reports.**

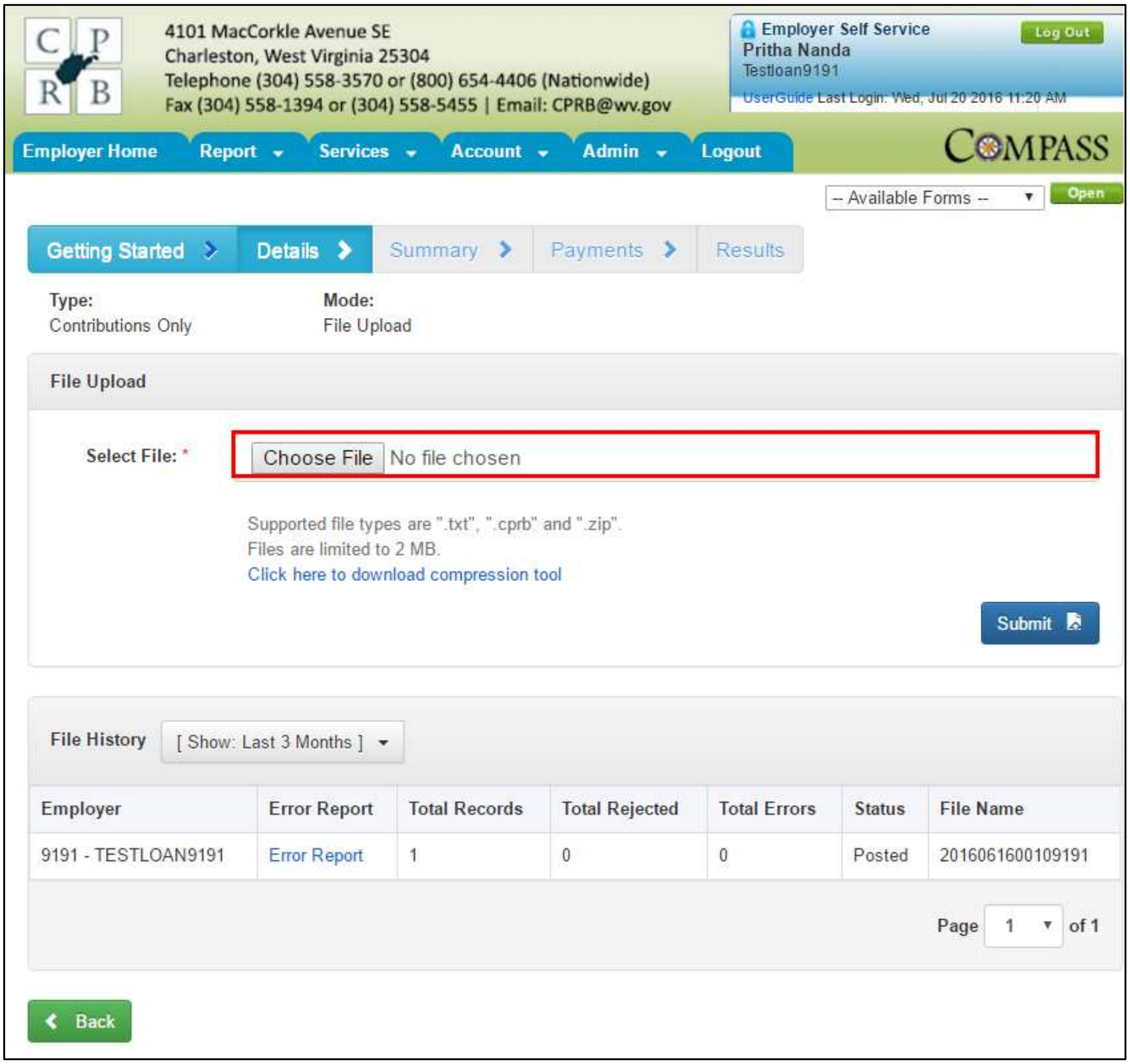


Step 2 -- The **Getting Started** screen displays. Under the **Contributions** section, click the 

button.

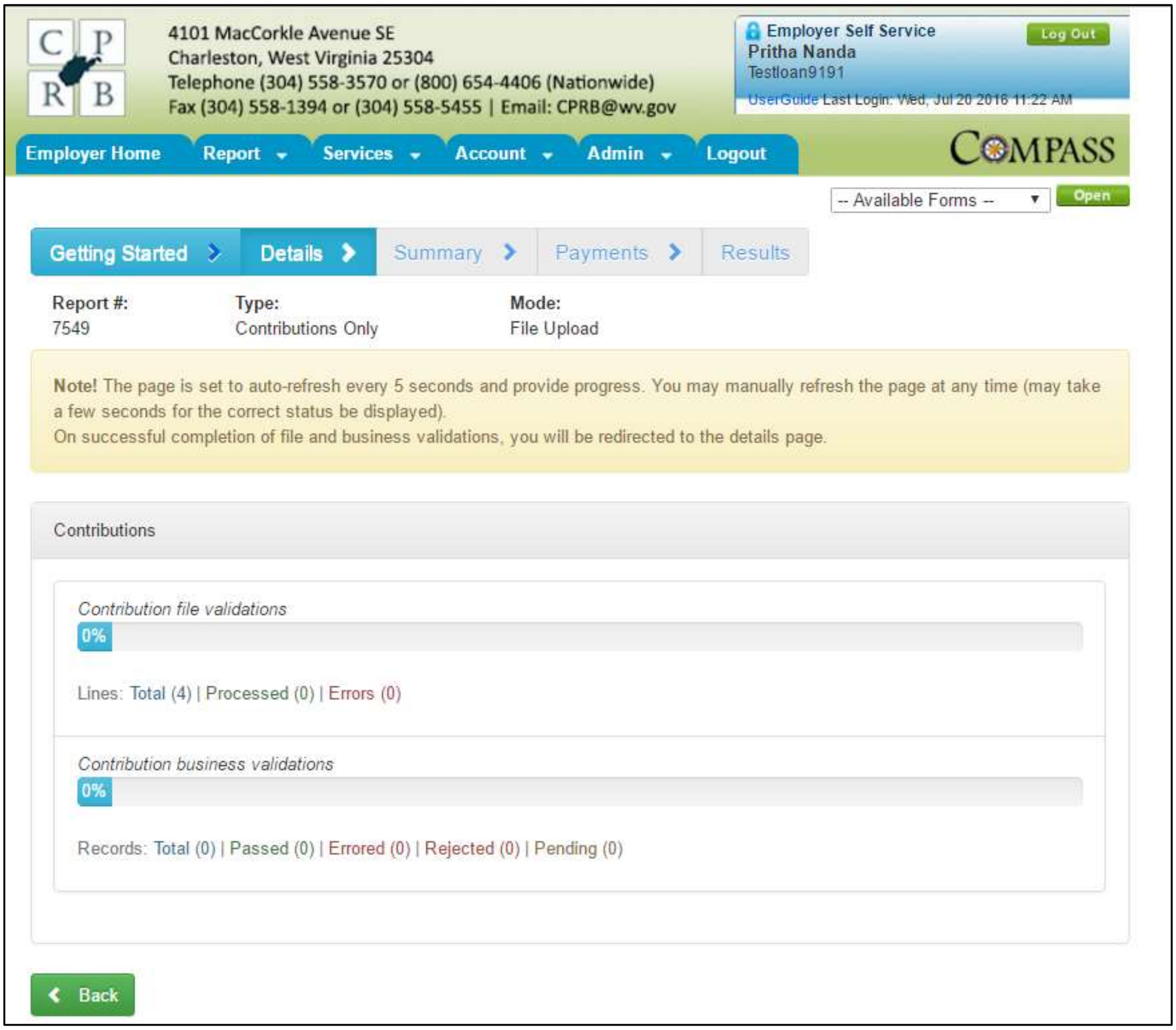


Step 3 -- Select a file to be uploaded by clicking the Choose File button.



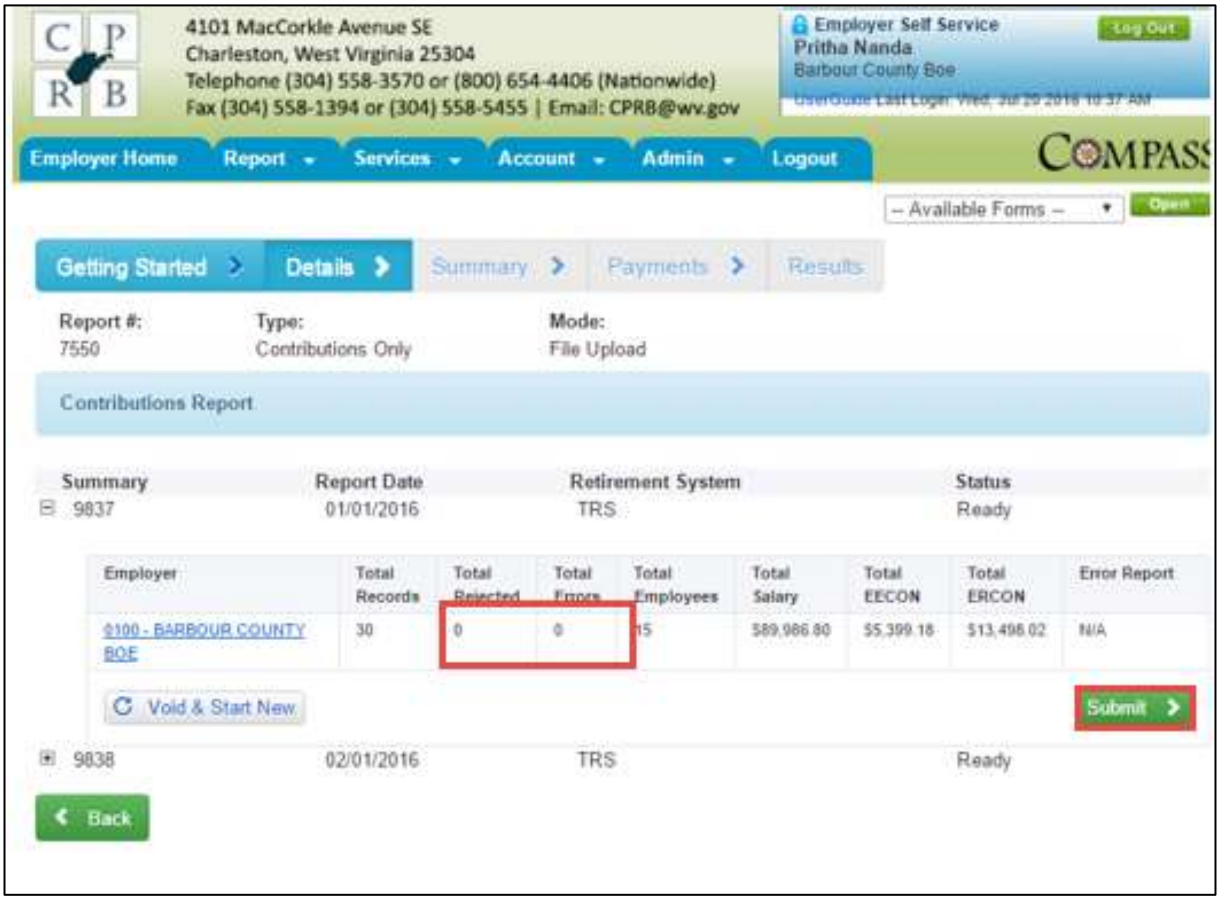
Step 4 -- The **Submit Employer Report – File Progress** screen will show the Contribution file upload progress. The screen will also show any errors identified in the file and successful completion of uploading the Contribution file.

Note: If the **Submit Employer Report – File Progress** screen displays an error message, navigate to Section 7.2.1.1 to view the errors in the uploaded Contributions file.



Step 5 -- Click the Submit button.

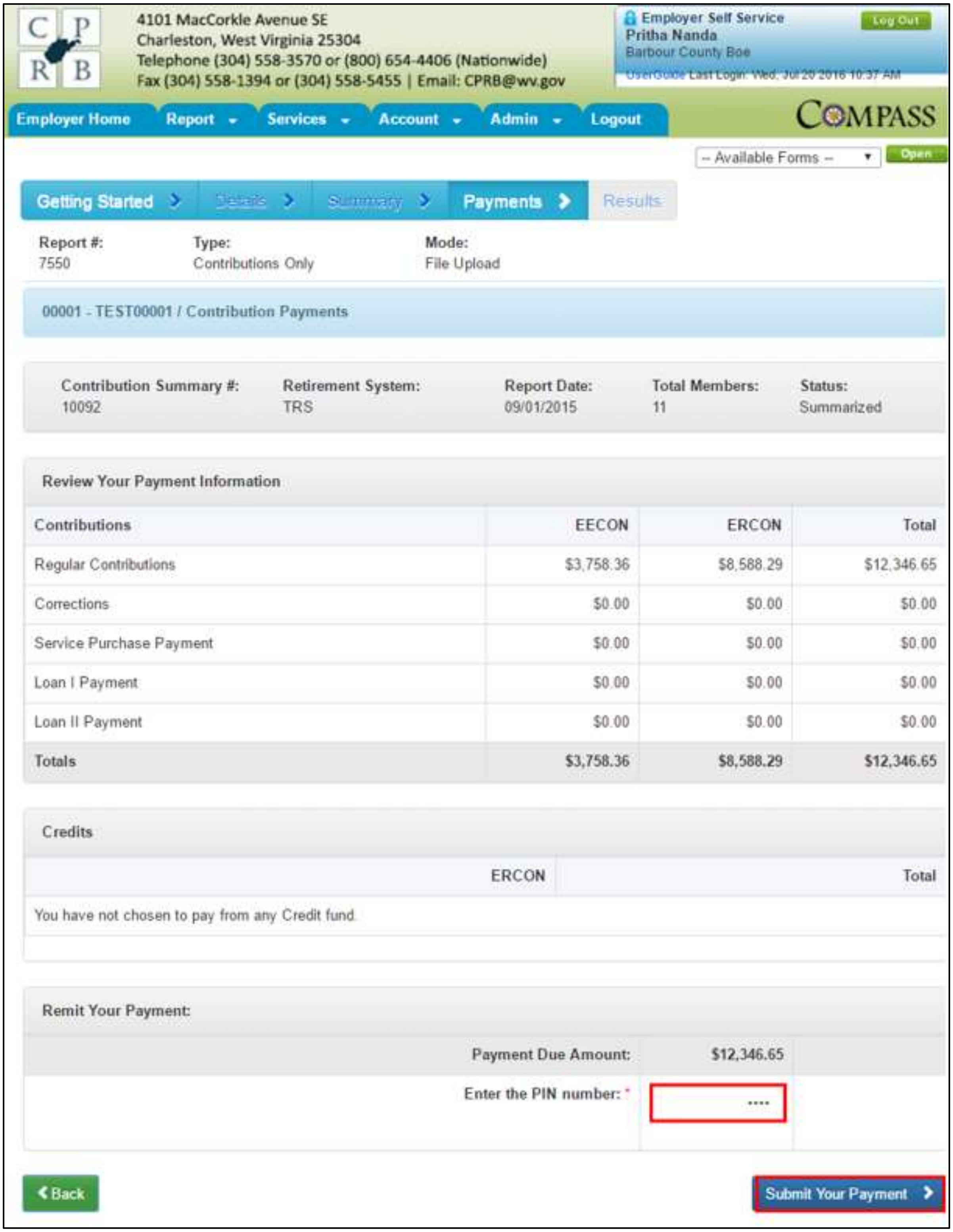
Note: The Submit button will be disabled if there are any **Errors** in the file. (Follow the steps in Section 7.2.1.2 Correct Contributions Upload File Errors to correct remaining errors).



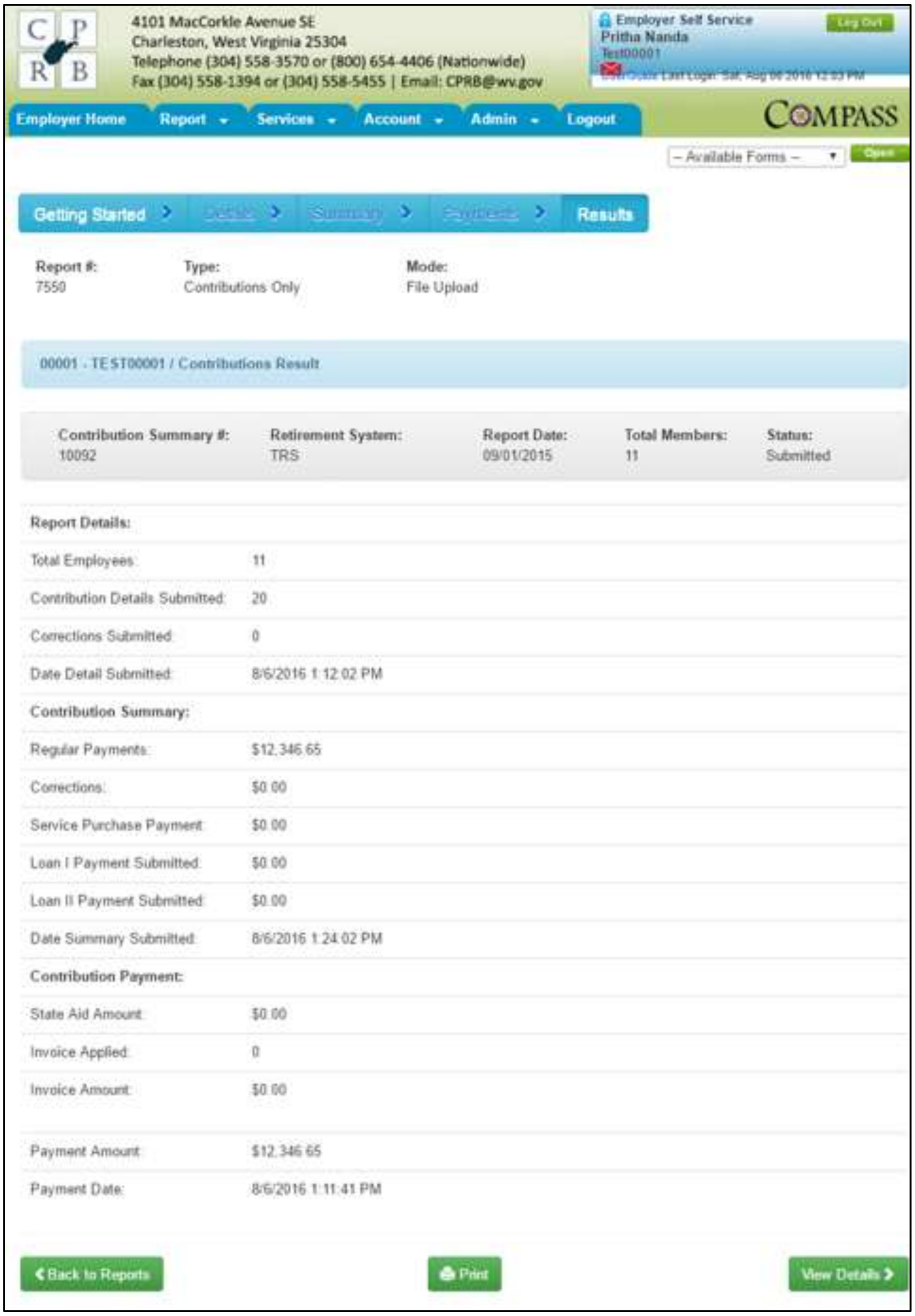
Step 6 -- The **Summary** screen is displayed. Click the Save and Proceed to Payment button.

Step 7 -- Enter the **PIN Code** and click the Submit Your Payment button.

Note: The ESS Admin and Employer Reporting user roles will have the required PIN to submit the contribution report.



Step 8 -- The **Contributions Results** screen is displayed.

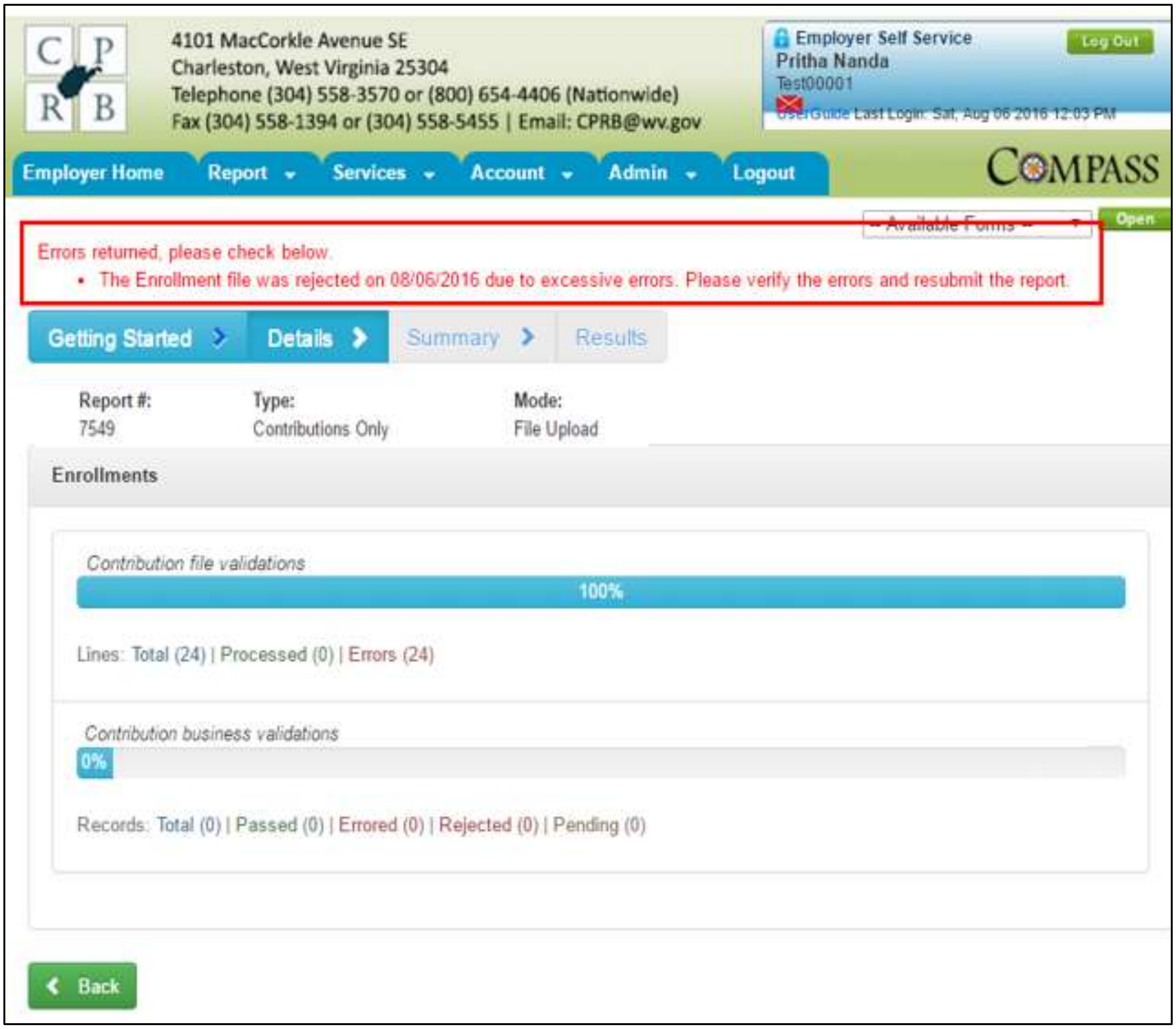


7.2.1.1 View Contributions – Upload File Rejection Details

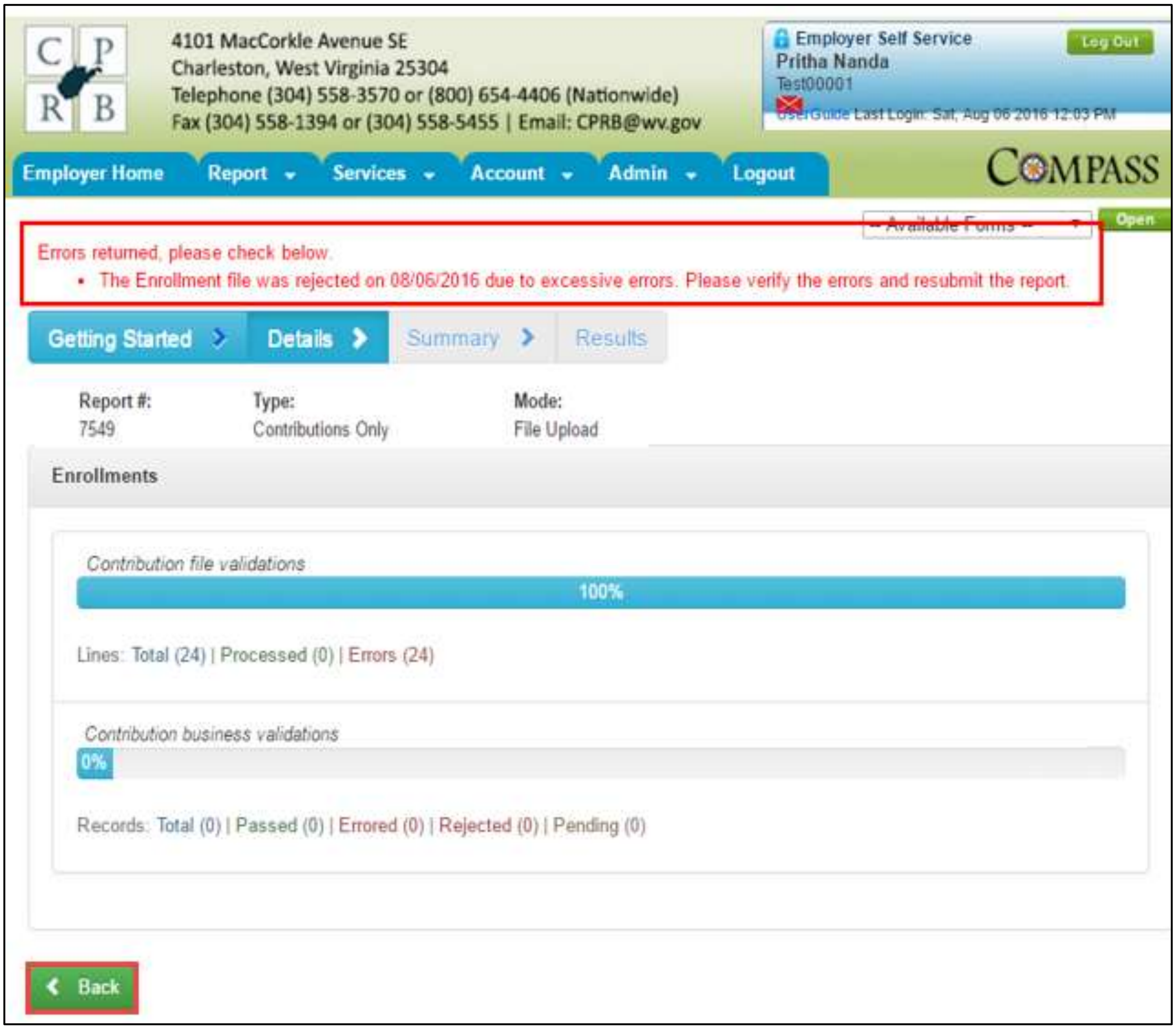
When submitting the Contributions through the Upload File option, validations are run on the automatically to ensure the information in the file is formatted correctly and is accurate. If the file has too many errors or is not in the proper file format layout, the file will not be uploaded and will be rejected with an error status displayed in the Details screen. The report will need to be resubmitted if it is rejected during the file upload validation process.

Follow the steps below to view the **View Contributions Report Upload File Rejection** details.

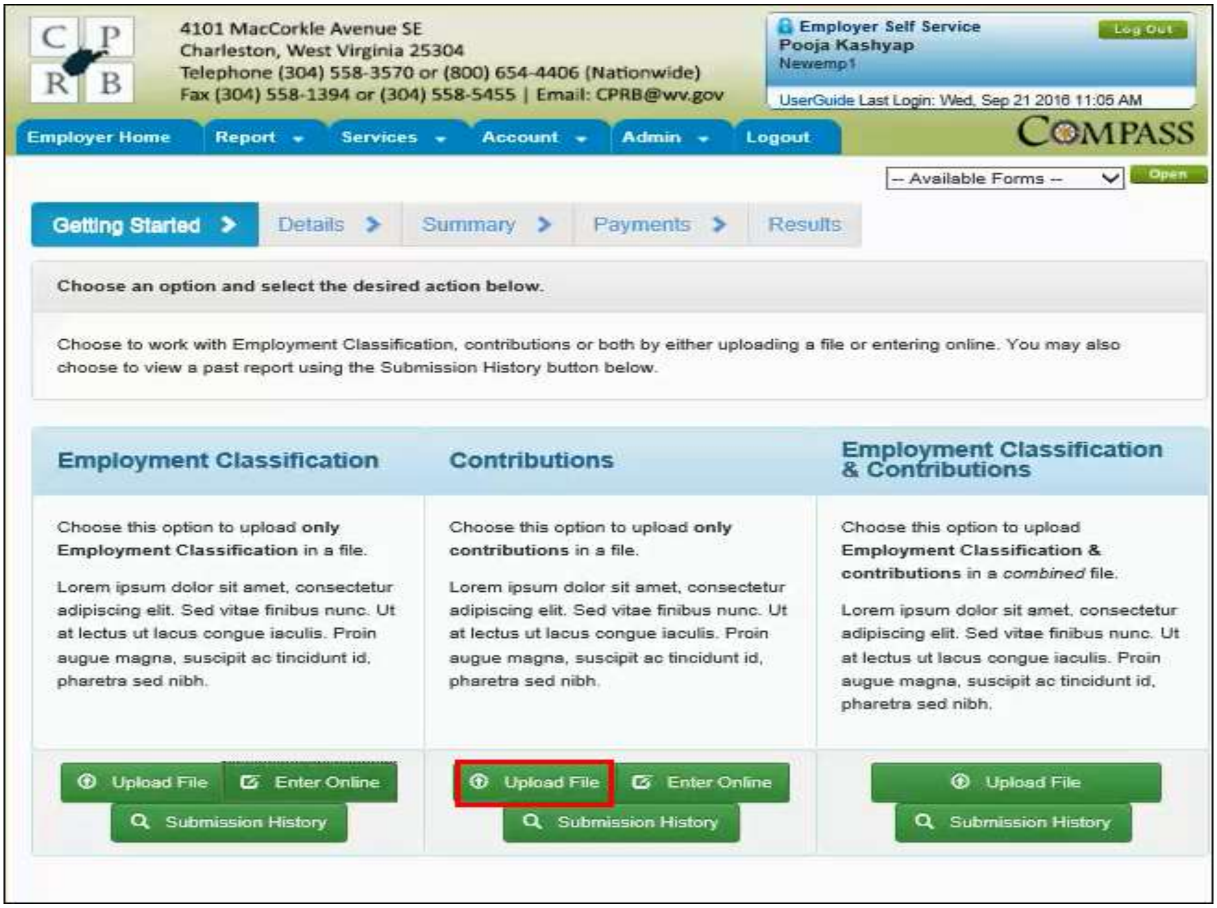
Step 1 -- Upon the completion of steps 1 - 4 in section 7.2.1 Submit Contributions – Upload File, if the file is rejected, the error message will be displayed in the **Details** screen.



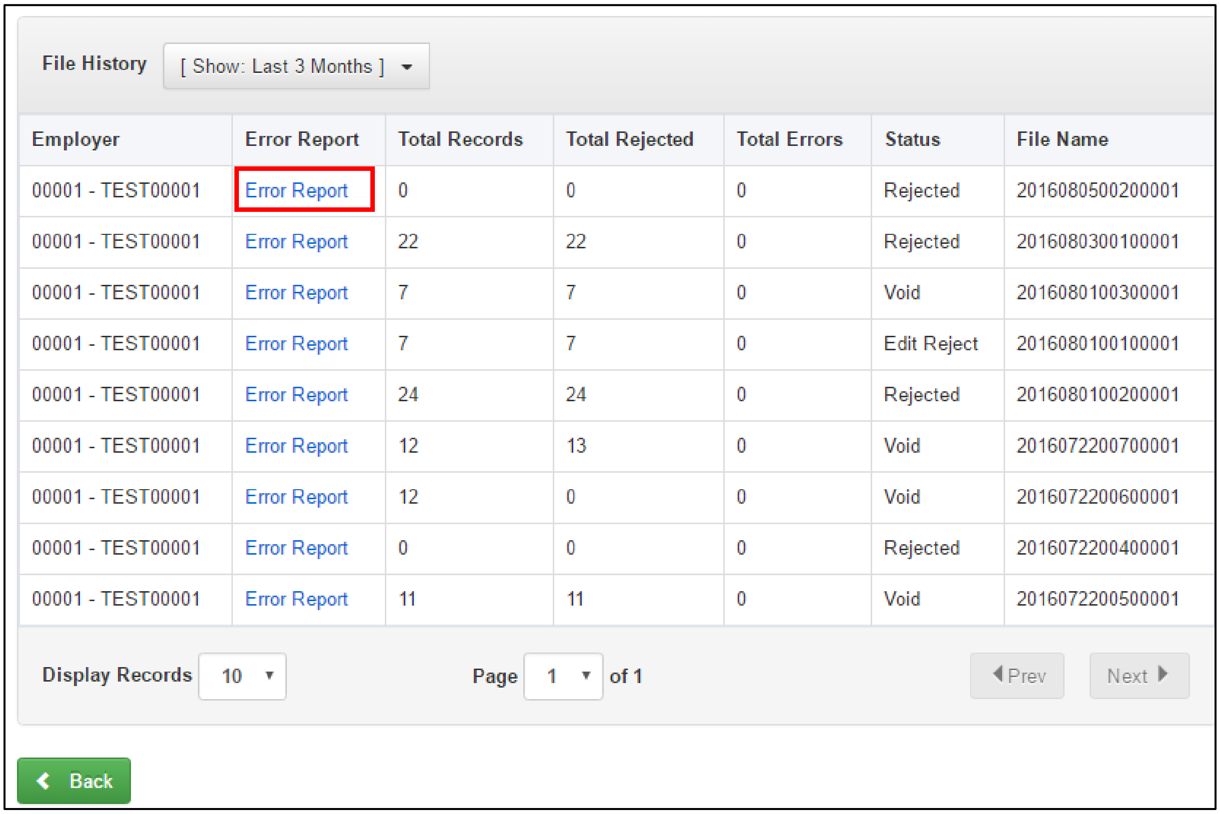
Step 2 -- Click the  button.



Step 3 -- The **Getting Started** tab is displayed. In the **Employment Classification** section, click the **Upload File** button.



Step 4 -- Click the **Error Report** hyperlink to view the rejection details.



File History [Show: Last 3 Months]

Employer	Error Report	Total Records	Total Rejected	Total Errors	Status	File Name
00001 - TEST00001	Error Report	0	0	0	Rejected	2016080500200001
00001 - TEST00001	Error Report	22	22	0	Rejected	2016080300100001
00001 - TEST00001	Error Report	7	7	0	Void	2016080100300001
00001 - TEST00001	Error Report	7	7	0	Edit Reject	2016080100100001
00001 - TEST00001	Error Report	24	24	0	Rejected	2016080100200001
00001 - TEST00001	Error Report	12	13	0	Void	2016072200700001
00001 - TEST00001	Error Report	12	0	0	Void	2016072200600001
00001 - TEST00001	Error Report	0	0	0	Rejected	2016072200400001
00001 - TEST00001	Error Report	11	11	0	Void	2016072200500001

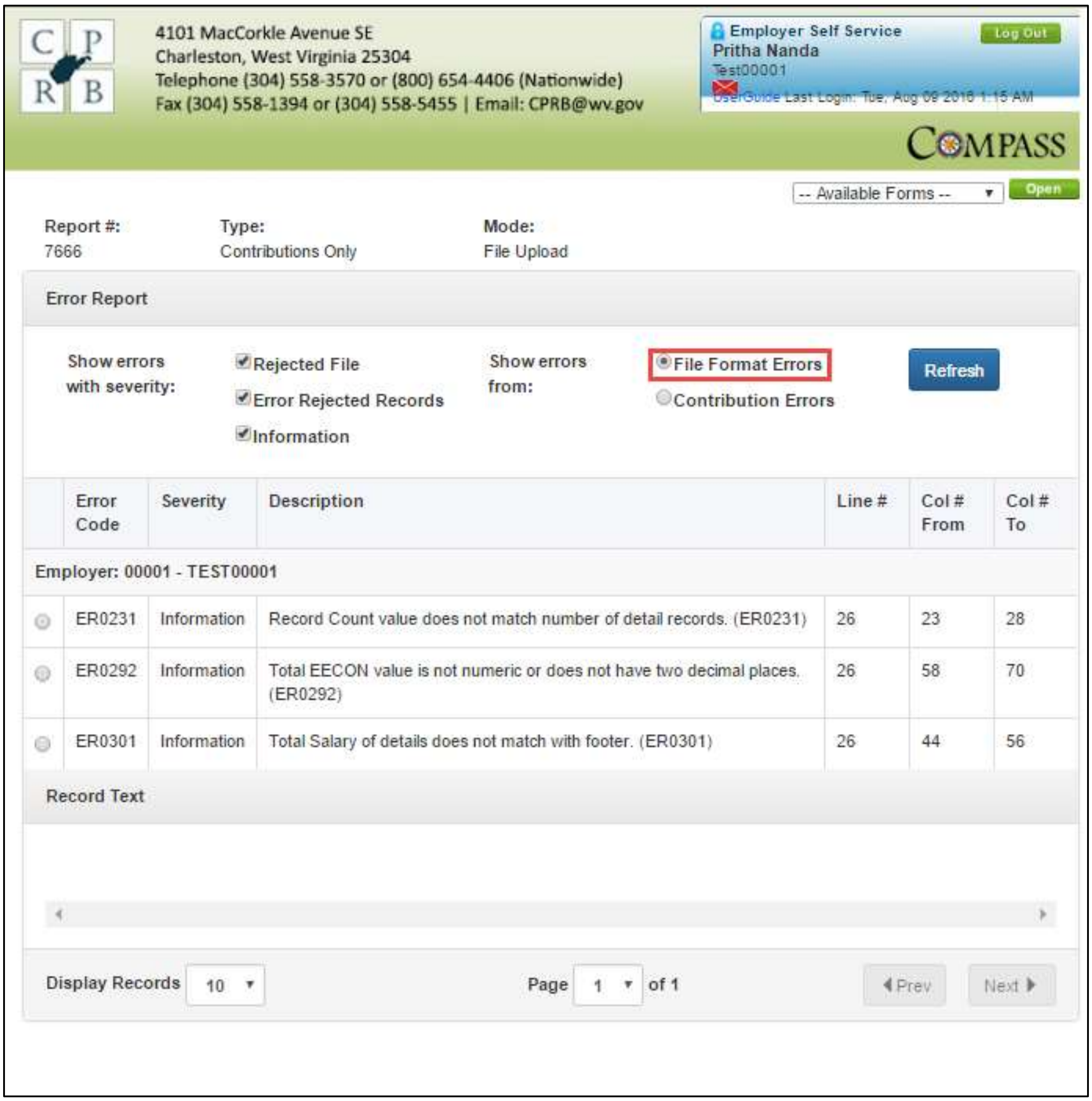
Display Records 10 Page 1 of 1 Prev Next

Back

Step 5 -- The selected employer's Error Report details displays, by selecting the **File Format** radio button allows the ability to filter by:

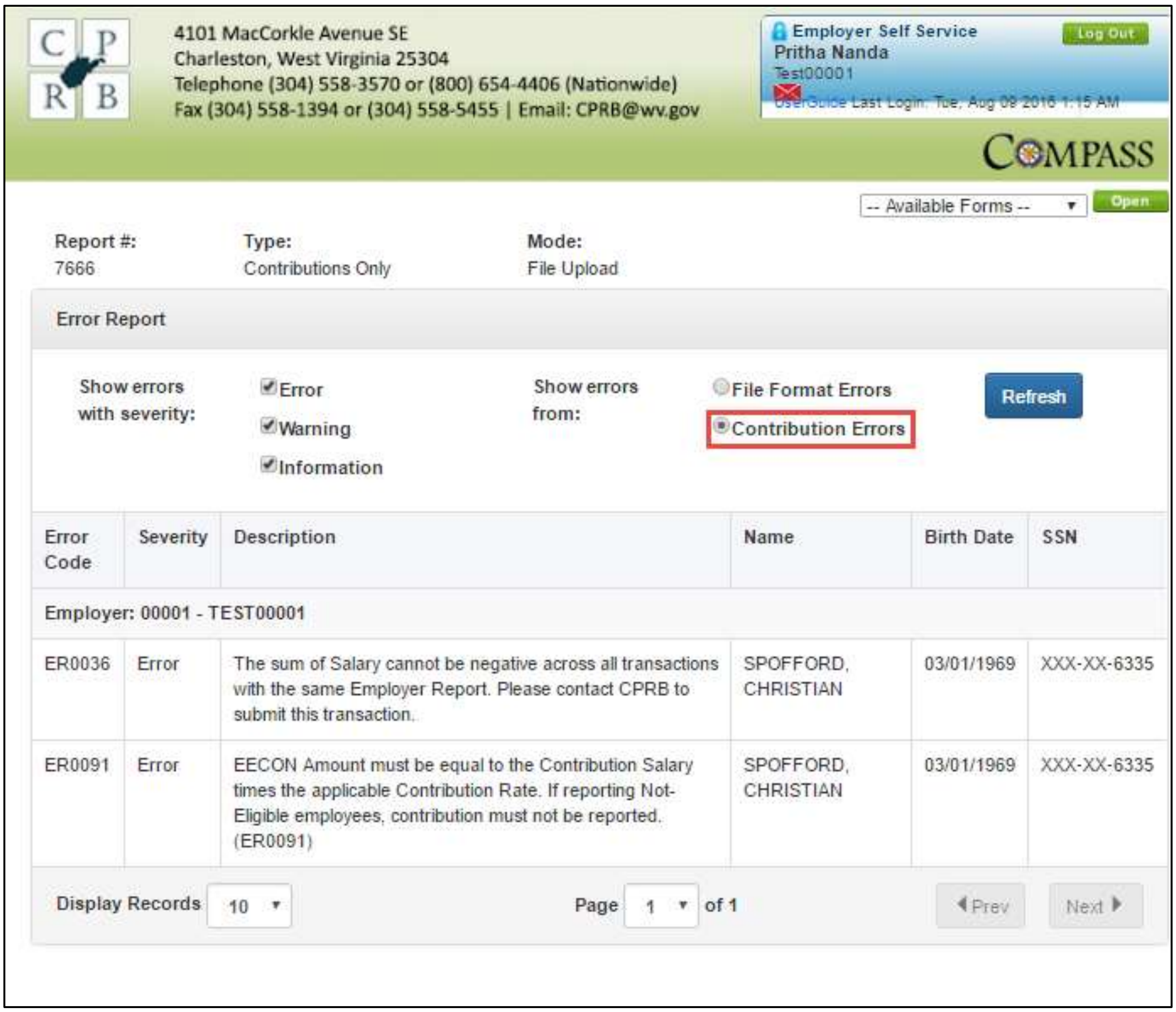
- Show errors with severity:
  - Rejected File – must correct formatting errors to resubmit
  - Error Rejected Records – if the file is not rejected then the rejected records can be corrected in ESS
  - Information – no correction required, informational only
- Show errors from:
  - File Format Error – these errors are a result of formatting issues in the file.

    For ex. if an SSN has the letter "O" rather than the number "0" (zero) the record will be flagged as having an error.



Step 6 -- The selected employer's Error Report details displays, by selecting **Contribution Errors** radio button allows the ability to filter by:

- Show errors with severity:
  - Error – must correct formatting errors to resubmit
  - Warning – may require action however can be overridden
  - Information – No correction required, informational only
- Show errors from:
  - Contribution Errors – these errors are a result of information reported that does not adhere to CPRB regulations.
  - For example, if the date of birth entered means the employee would be 5 years old, the validations within the ESS portal would flag this record as an error because the legal working age is 14 years old.



Step 7 -- If the file has been accepted, follow the steps in 7.2.1.2 Correct Contributions Upload File Errors in to correct errors. If the file has been rejected, correct the rejected file and re-upload the file.

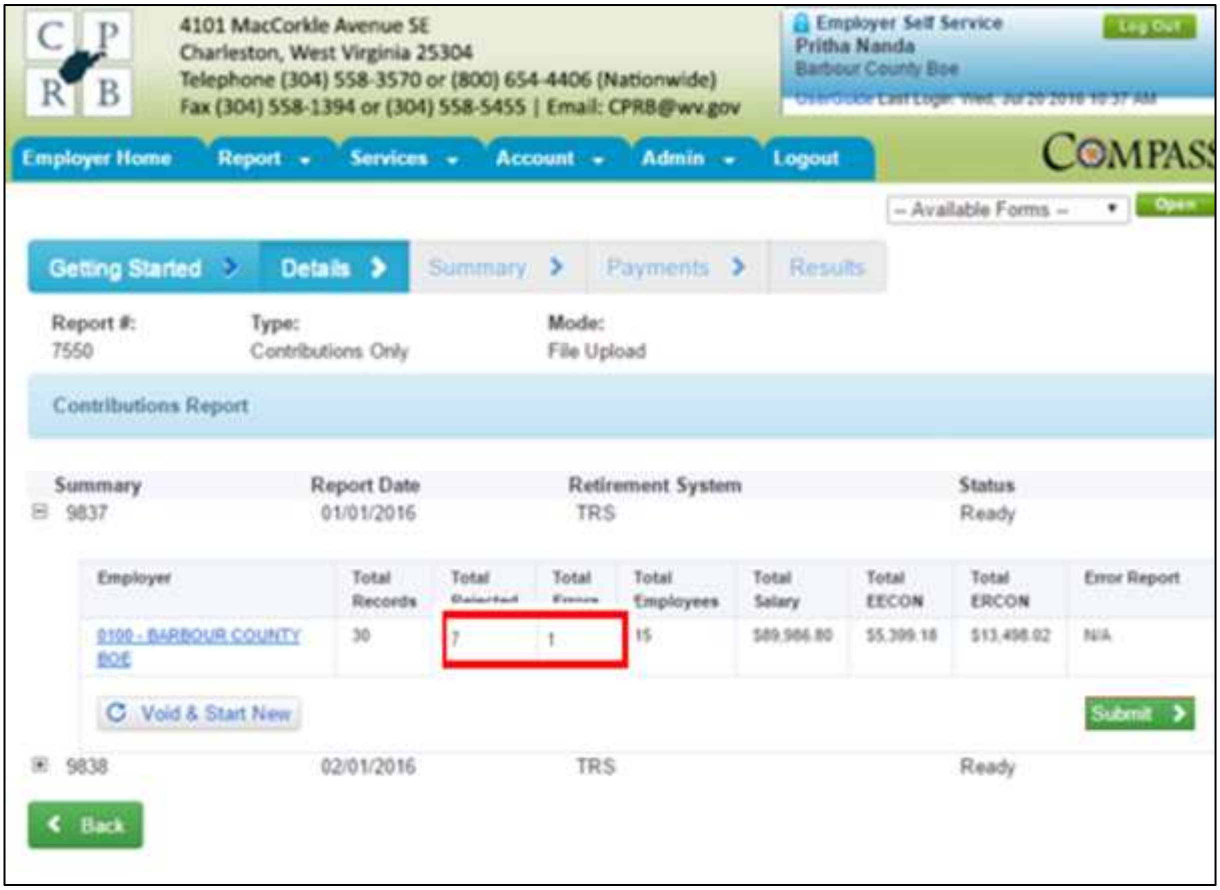
Note: Use the descriptions provided for the rejected files to make corrections and use the file layout document to ensure the file has the proper layout and/or verify the information in the file is correct before re-uploading the file.

7.2.1.2 Correct Contributions – Upload File Errors

There may be records in error in the Contributions files which must be corrected and/or records which were rejected must be added prior to submitting the files to CPRB.

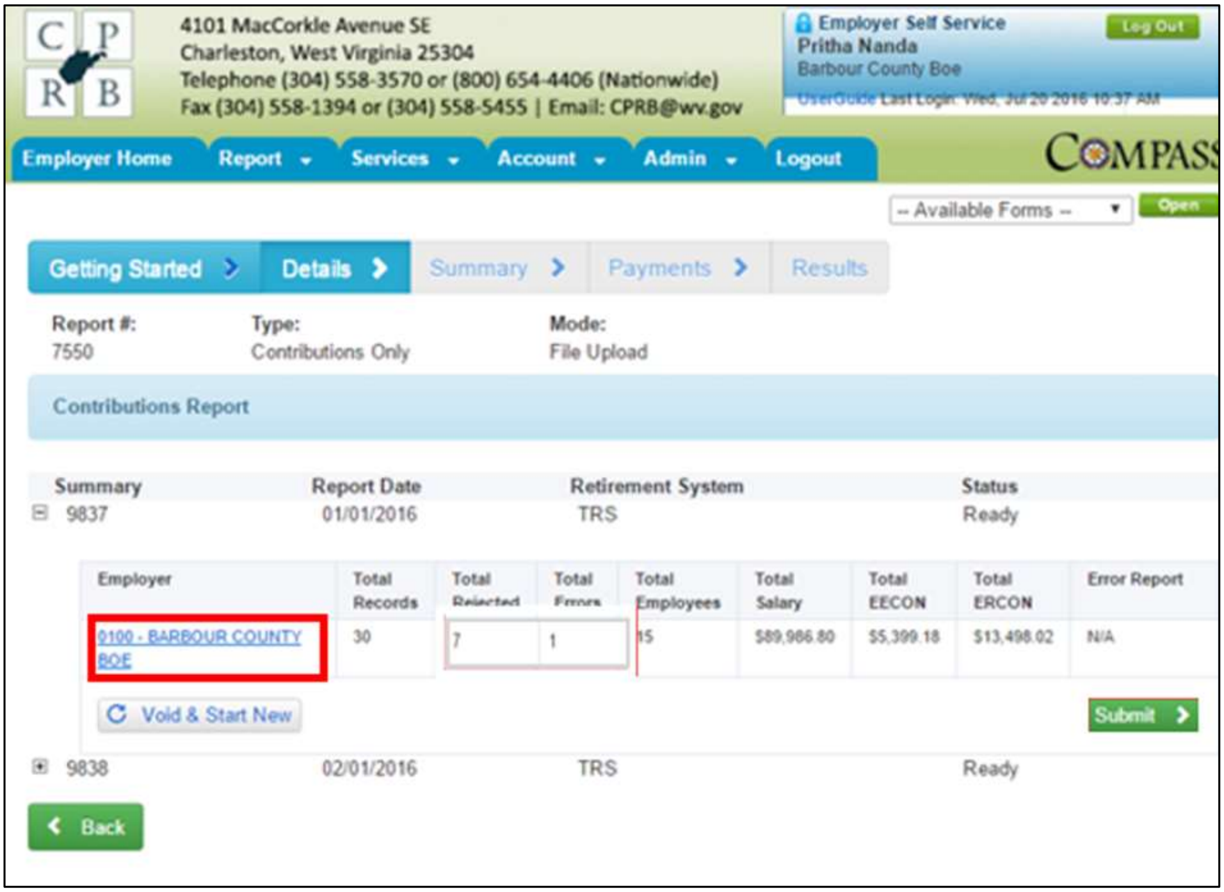
Follow the steps below to add Contributions records to the uploaded report:

Step 1 -- Upon the completion of steps 1 - 5 (found in Section 7.2.1 Submit Employment Contributions – Upload File), if the file has rejected records or errors, they will be displayed in the **Total Rejected** and/or **Total Errors** columns.

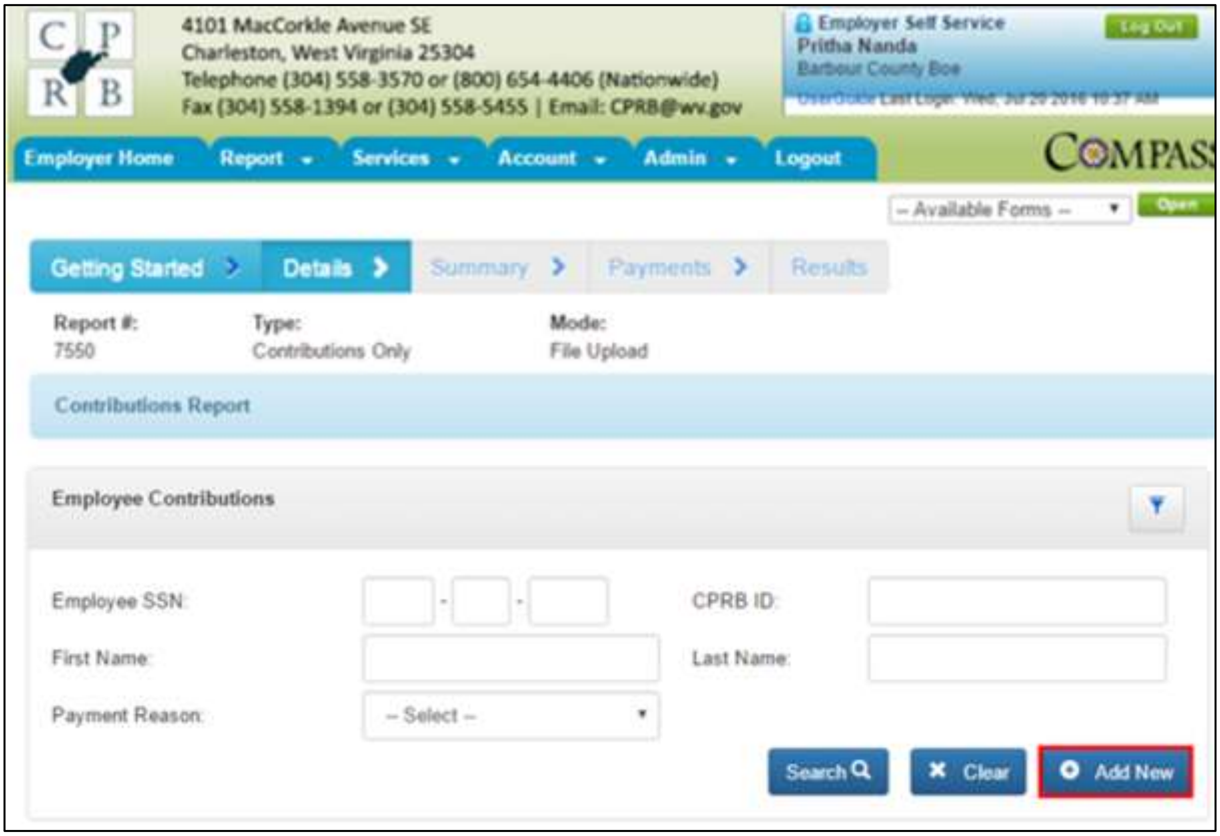


Step 2 -- Click the **Employer** hyperlink to add a rejected record or correct errors.

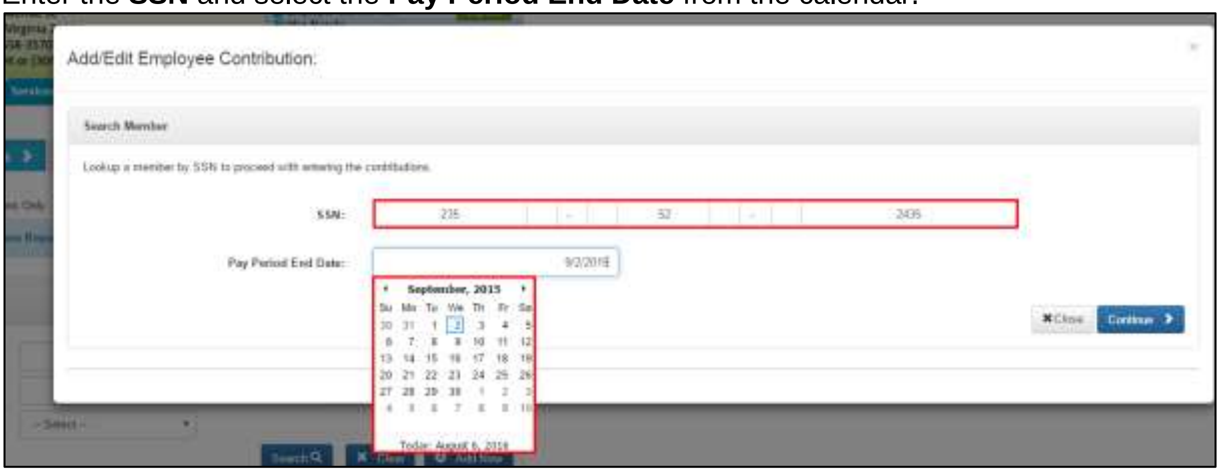
Note: The **Void and Start New** button will void the submission and start the process again.



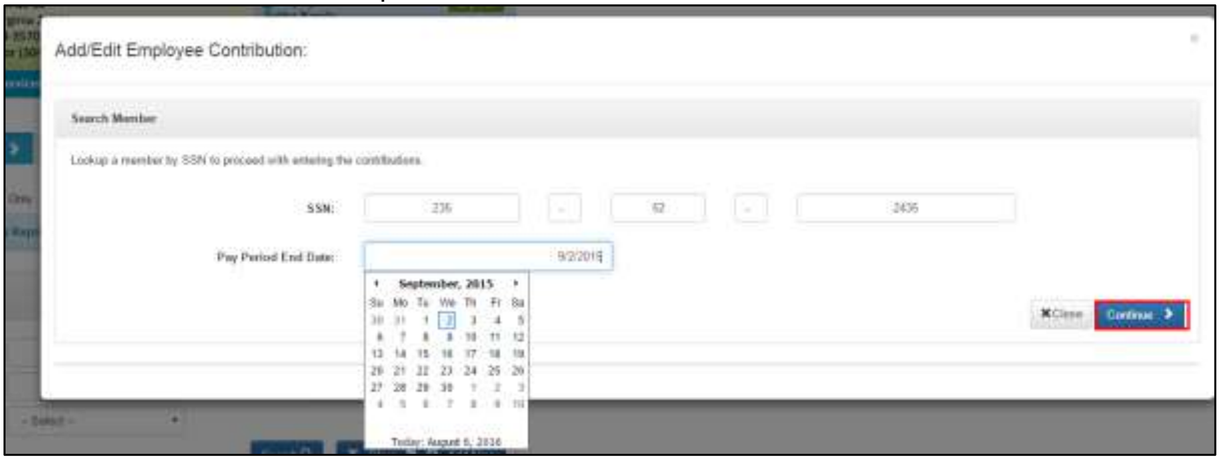
Step 3 -- Click the Add New button to add a new employee to the contributions report.



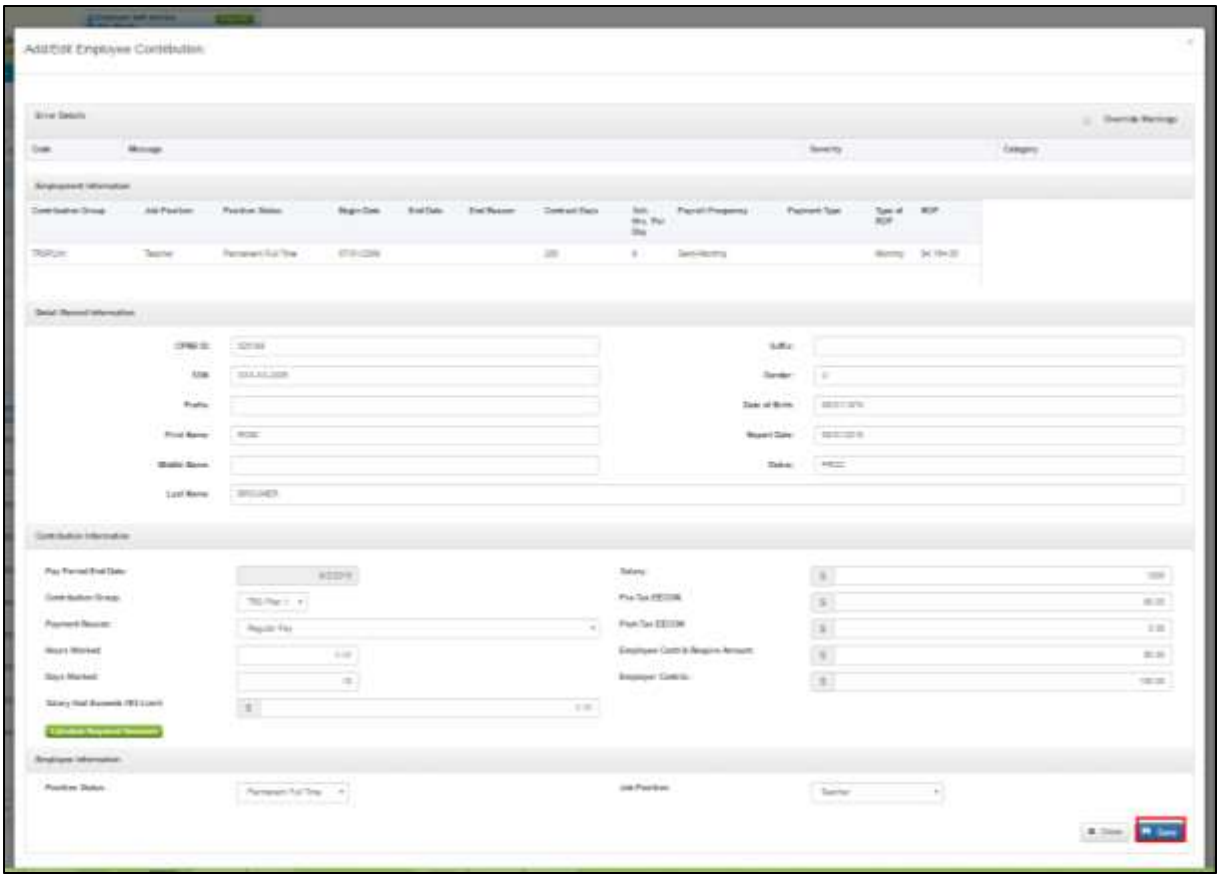
Step 4 -- Enter the **SSN** and select the **Pay Period End Date** from the calendar.



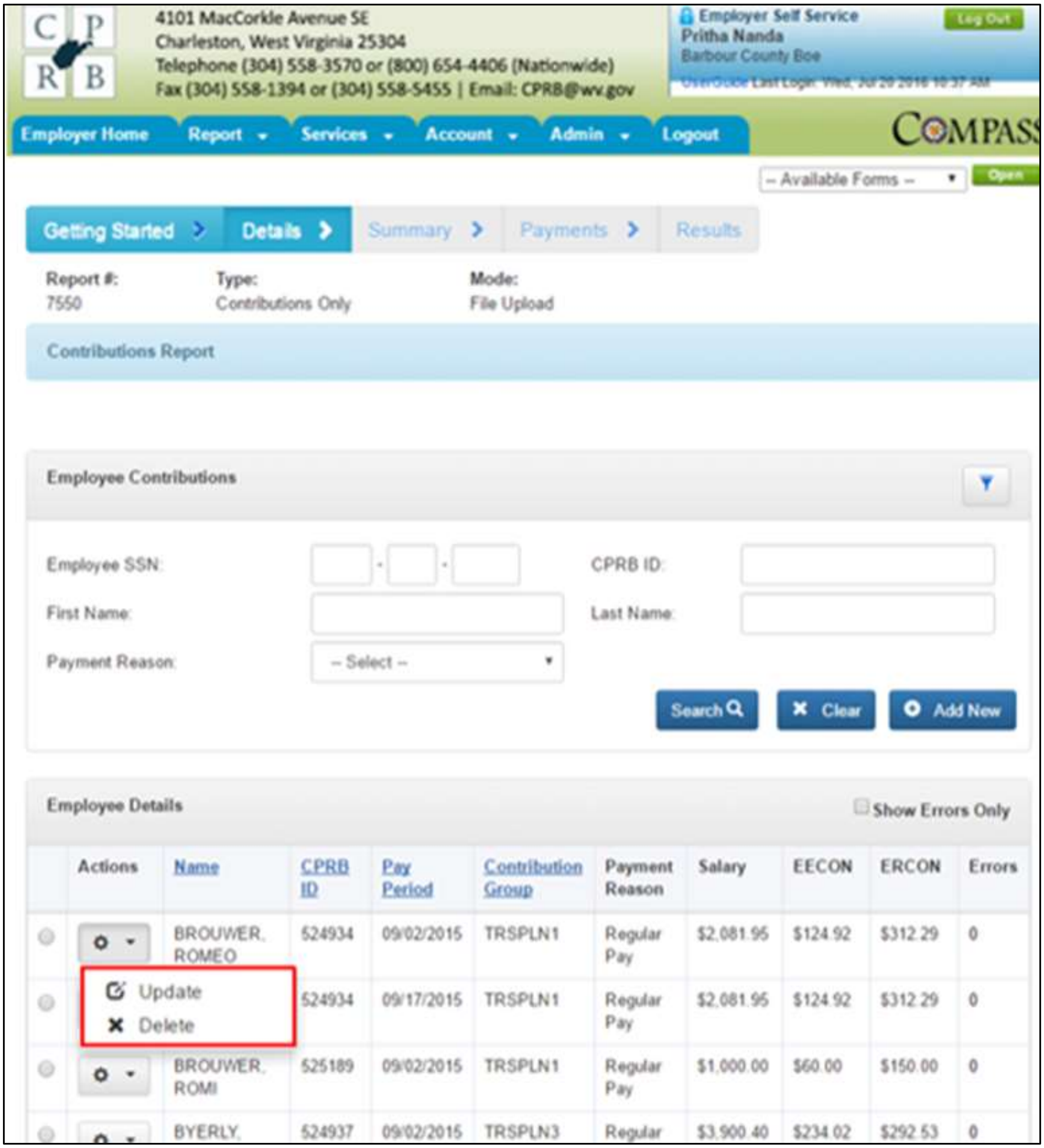
Step 5 -- Click the **Continue** button to proceed.



Step 6 -- Enter the details and click the **Save** button.

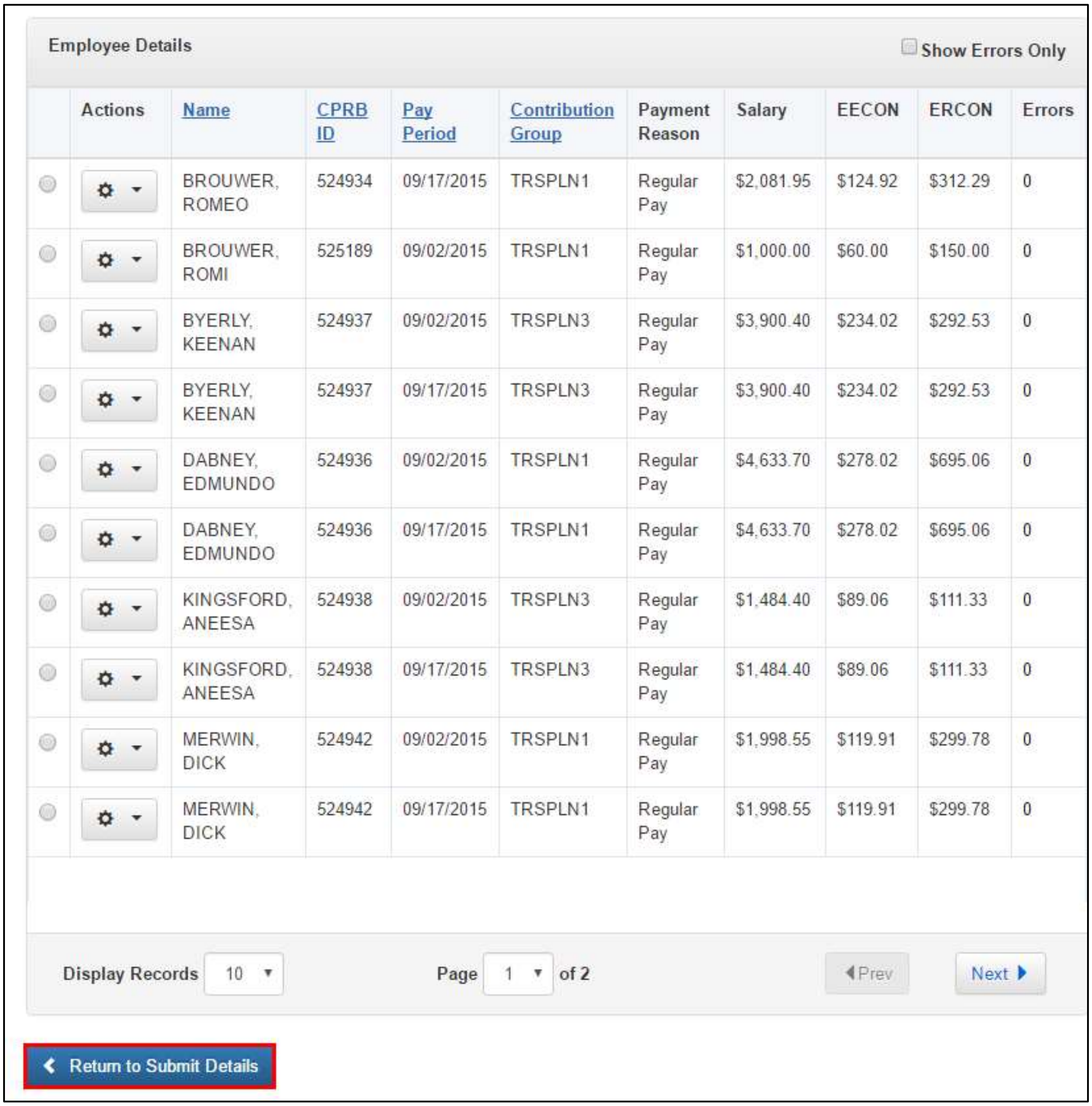


Step 7 -- Click **Update** or **Delete** from the **Actions** drop down menu in the **Employee Details** section to edit or delete the employee details.
Note: Click the delete option to delete the particular employee details.



Step 8 -- Click the 

button to submit the Contributions file.



Employee Details

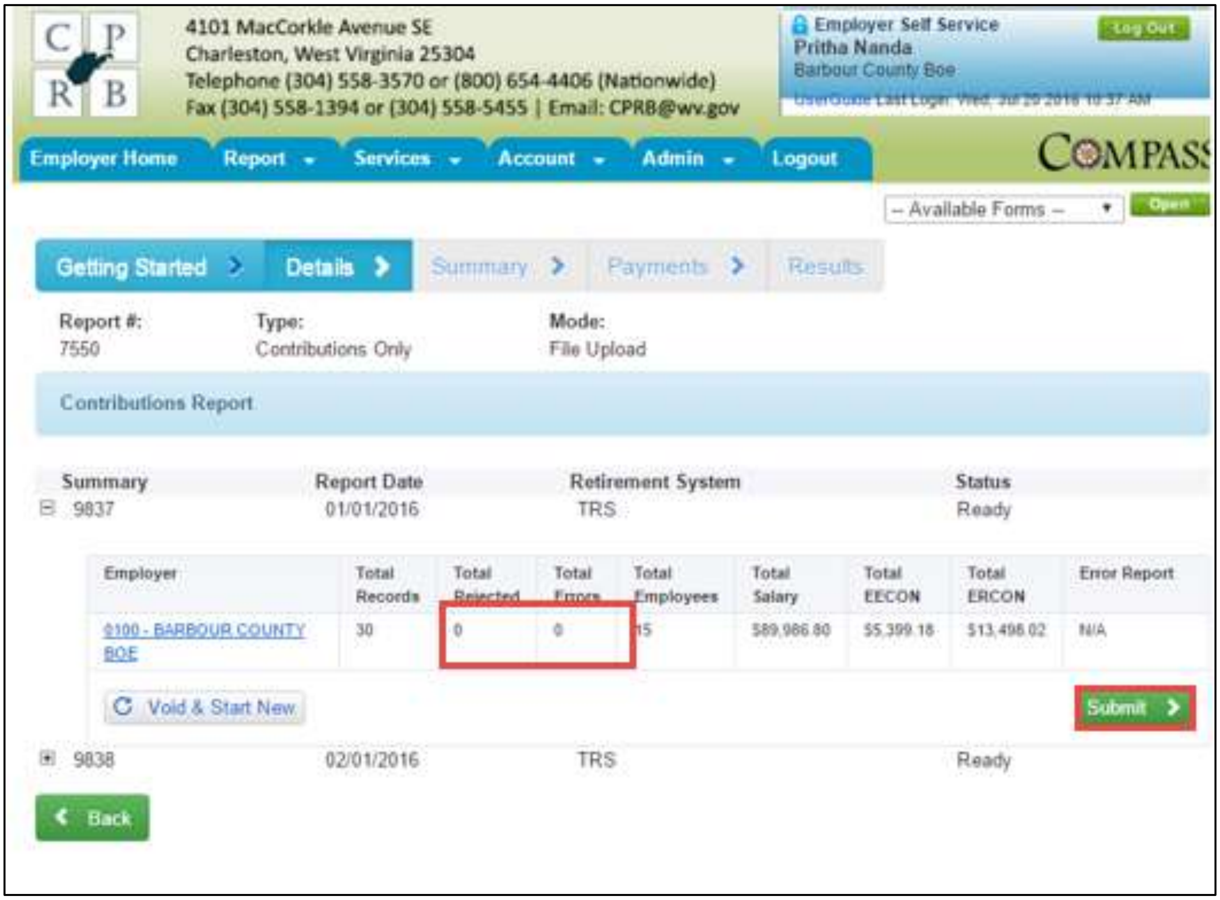
Show Errors Only

	Actions	Name	CPRB ID	Pay Period	Contribution Group	Payment Reason	Salary	EECON	ERCON	Errors
		BROUWER, ROMEO	524934	09/17/2015	TRSPLN1	Regular Pay	$2,081.95	$124.92	$312.29	0
		BROUWER, ROMI	525189	09/02/2015	TRSPLN1	Regular Pay	$1,000.00	$60.00	$150.00	0
		BYERLY, KEENAN	524937	09/02/2015	TRSPLN3	Regular Pay	$3,900.40	$234.02	$292.53	0
		BYERLY, KEENAN	524937	09/17/2015	TRSPLN3	Regular Pay	$3,900.40	$234.02	$292.53	0
		DABNEY, EDMUNDO	524936	09/02/2015	TRSPLN1	Regular Pay	$4,633.70	$278.02	$695.06	0
		DABNEY, EDMUNDO	524936	09/17/2015	TRSPLN1	Regular Pay	$4,633.70	$278.02	$695.06	0
		KINGSFORD, ANEESA	524938	09/02/2015	TRSPLN3	Regular Pay	$1,484.40	$89.06	$111.33	0
		KINGSFORD, ANEESA	524938	09/17/2015	TRSPLN3	Regular Pay	$1,484.40	$89.06	$111.33	0
		MERWIN, DICK	524942	09/02/2015	TRSPLN1	Regular Pay	$1,998.55	$119.91	$299.78	0
		MERWIN, DICK	524942	09/17/2015	TRSPLN1	Regular Pay	$1,998.55	$119.91	$299.78	0

Display Records 10 Page 1 of 2 Prev Next

Return to Submit Details

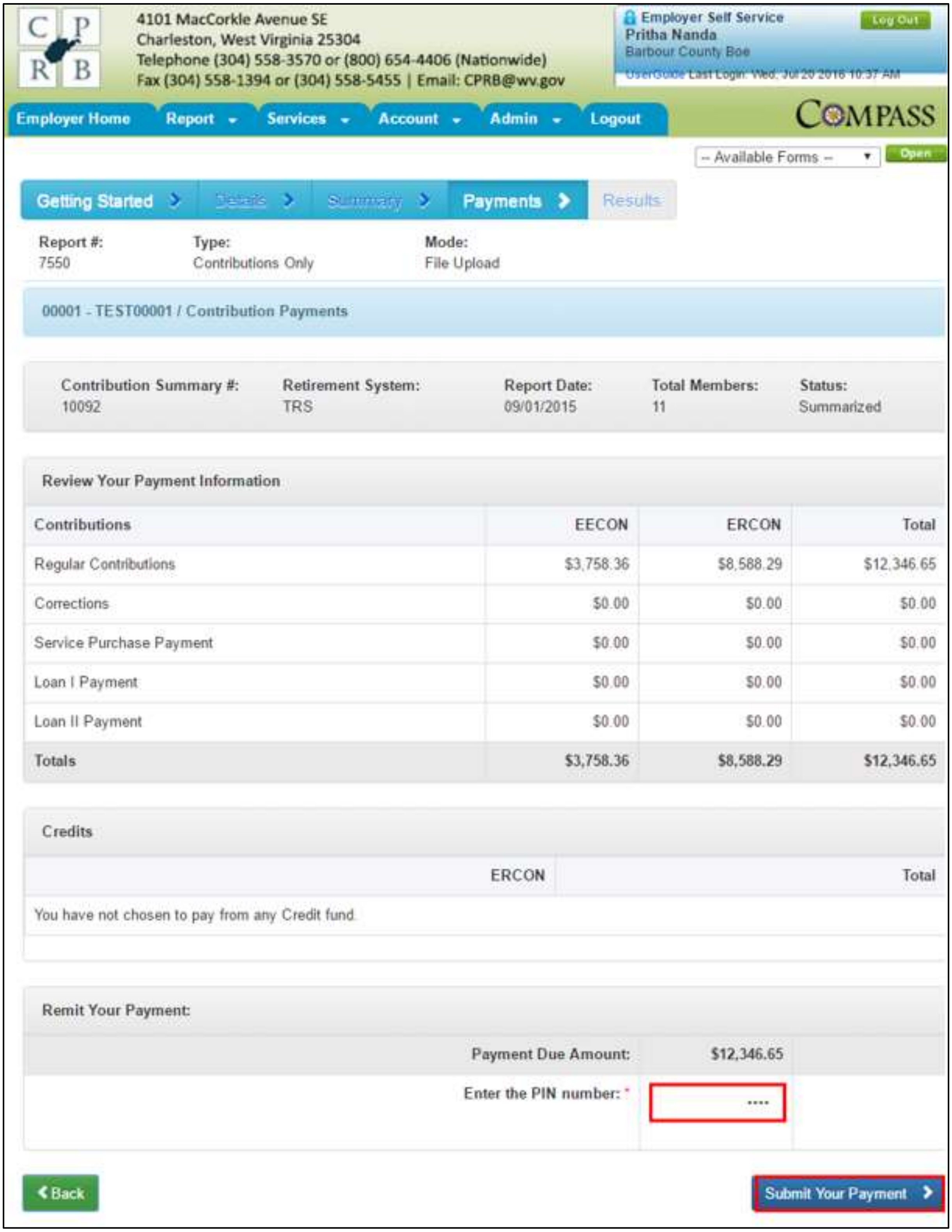
Step 9 -- Click the Submit button.



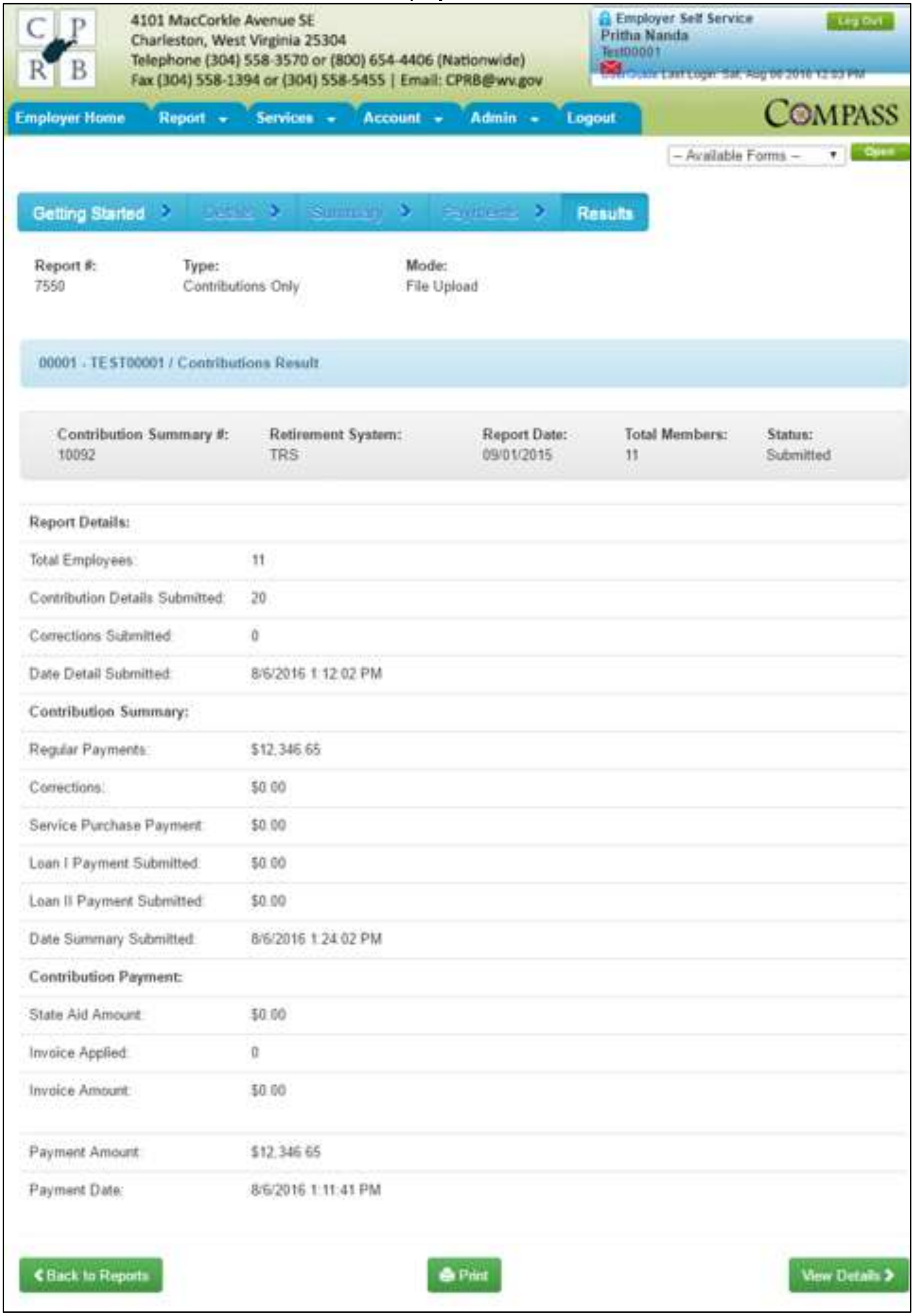
Step 10 -- The **Summary** screen is displayed. Click the 

button.

Step 11 -- Enter the **PIN number** and click the Submit Your Payment button.



Step 12 -- The **Contributions Results** screen is displayed.



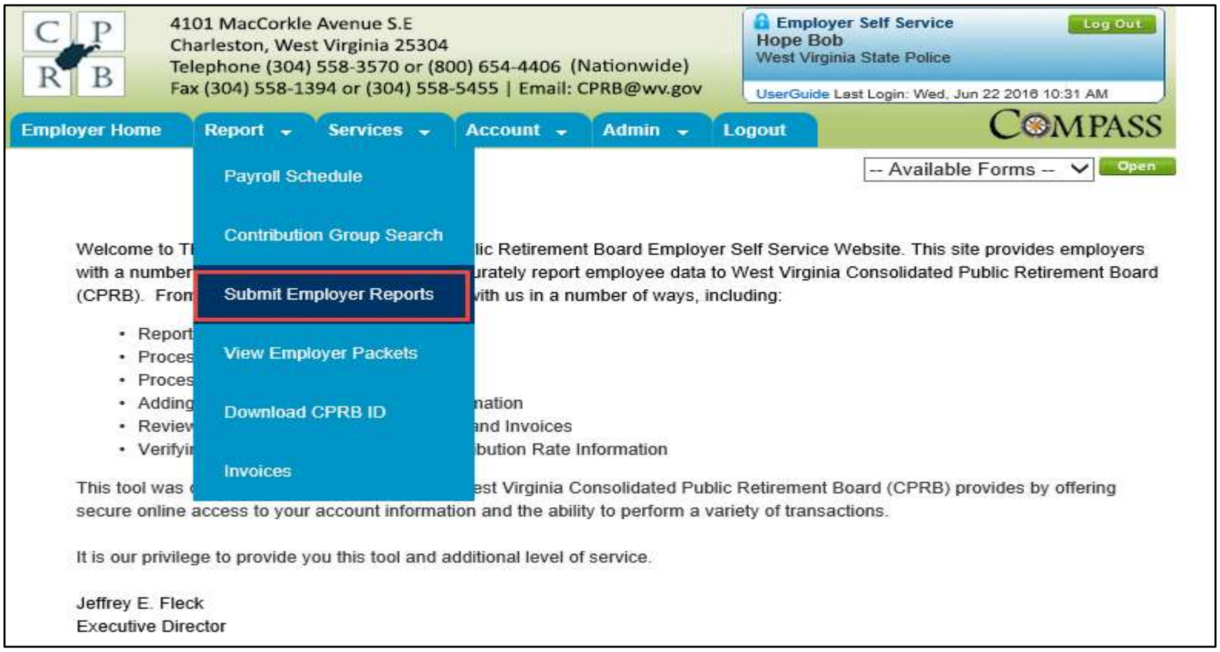
7.2.2 Submit Contributions – Enter Online

In addition to uploading files, contributions can be entered online. Follow the steps below to perform this process:

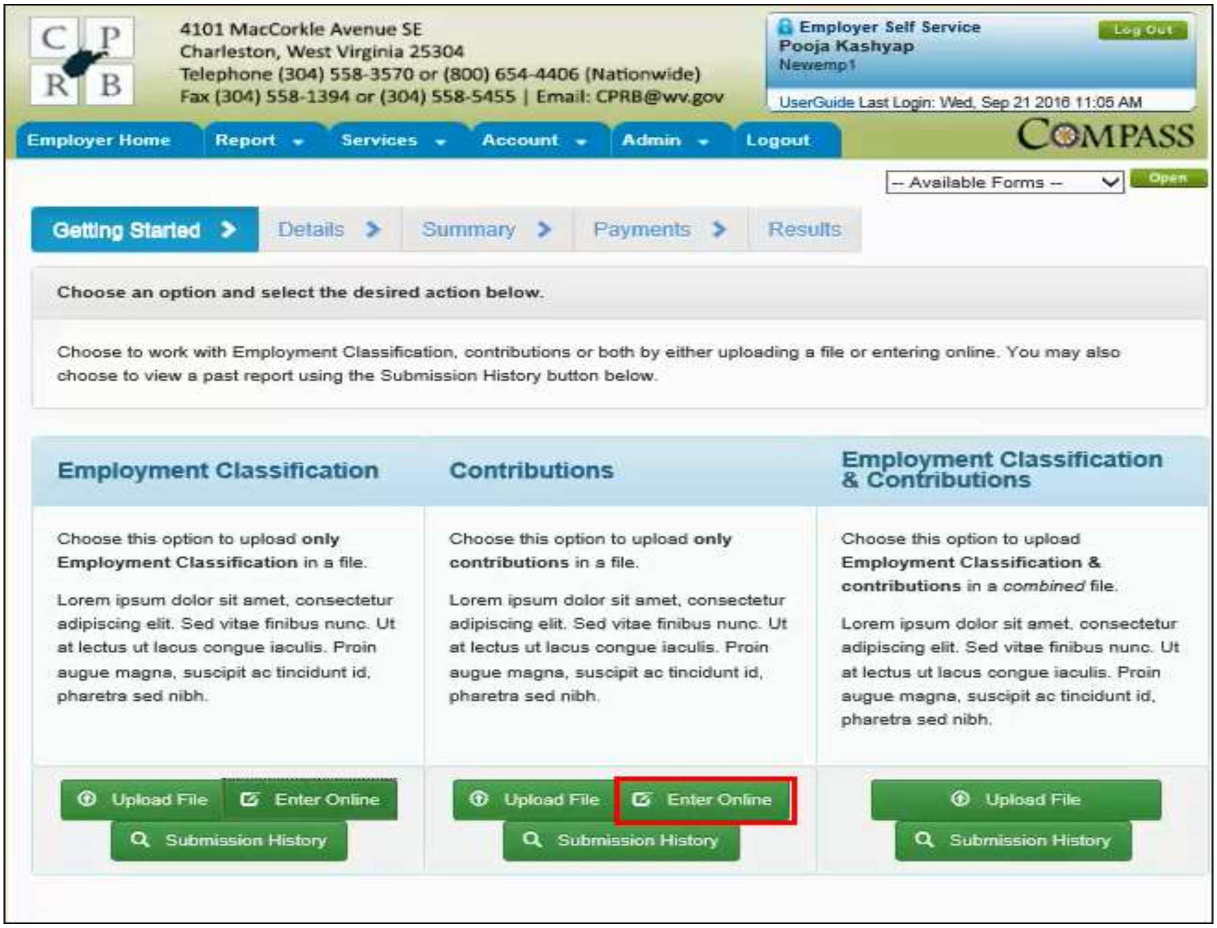
1. **Upload File** (a new COMPASS file format has been defined for employers to submit the information in a flat file, typically used by employers with larger employee populations), or
2. **Enter On-Line** (enables employers to review, update, and submit the information which is replicated from previous reports, mainly used by employers with smaller employee populations).

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

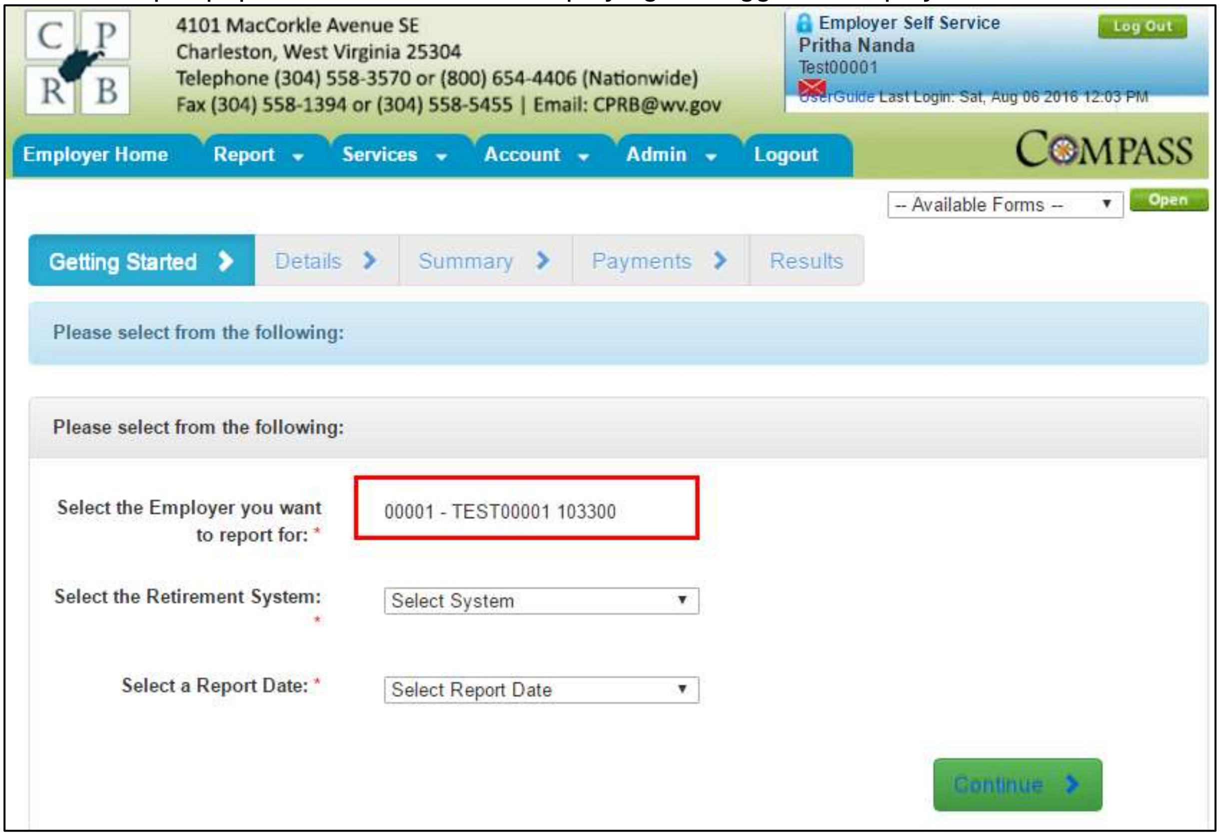
Report > **Submit Employer Reports.**



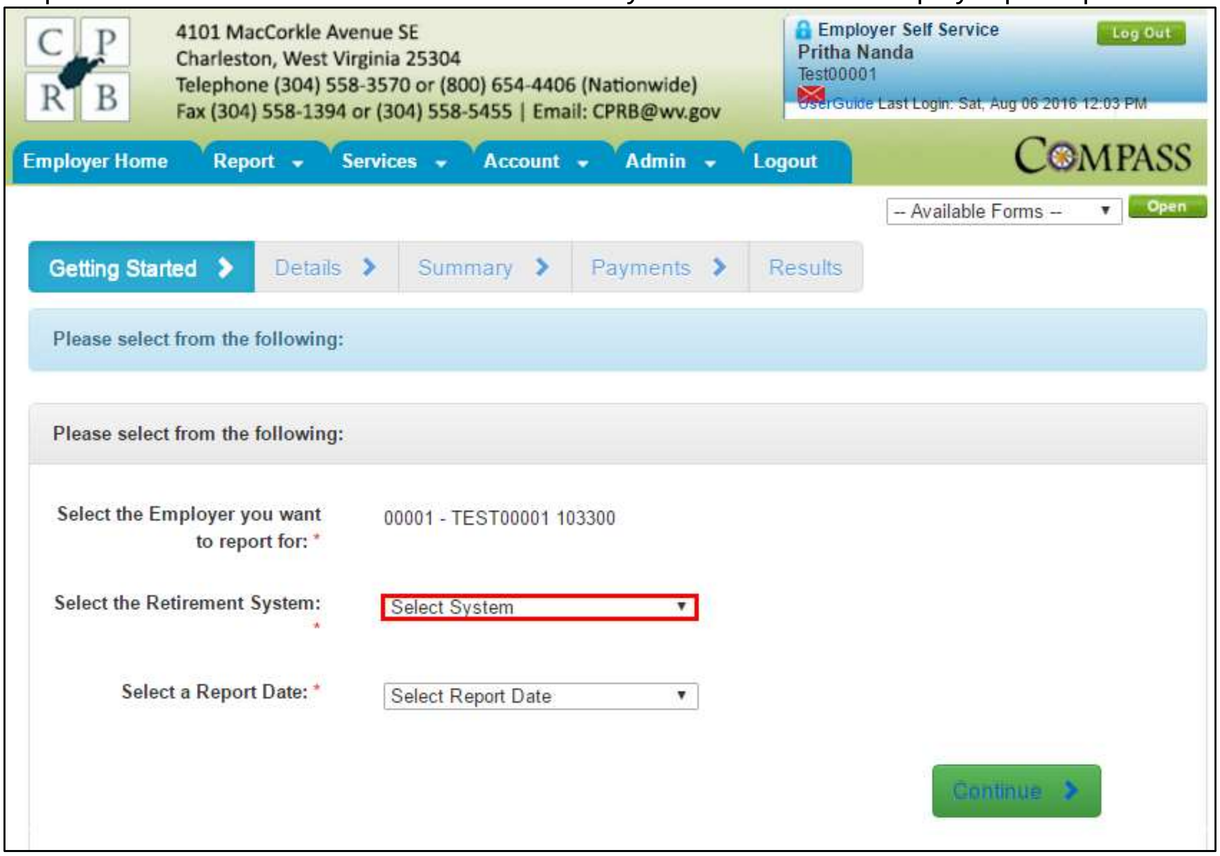
Step 2 -- The **Getting Started** screen displays. In the **Contributions** section, click the **Enter Online** option.



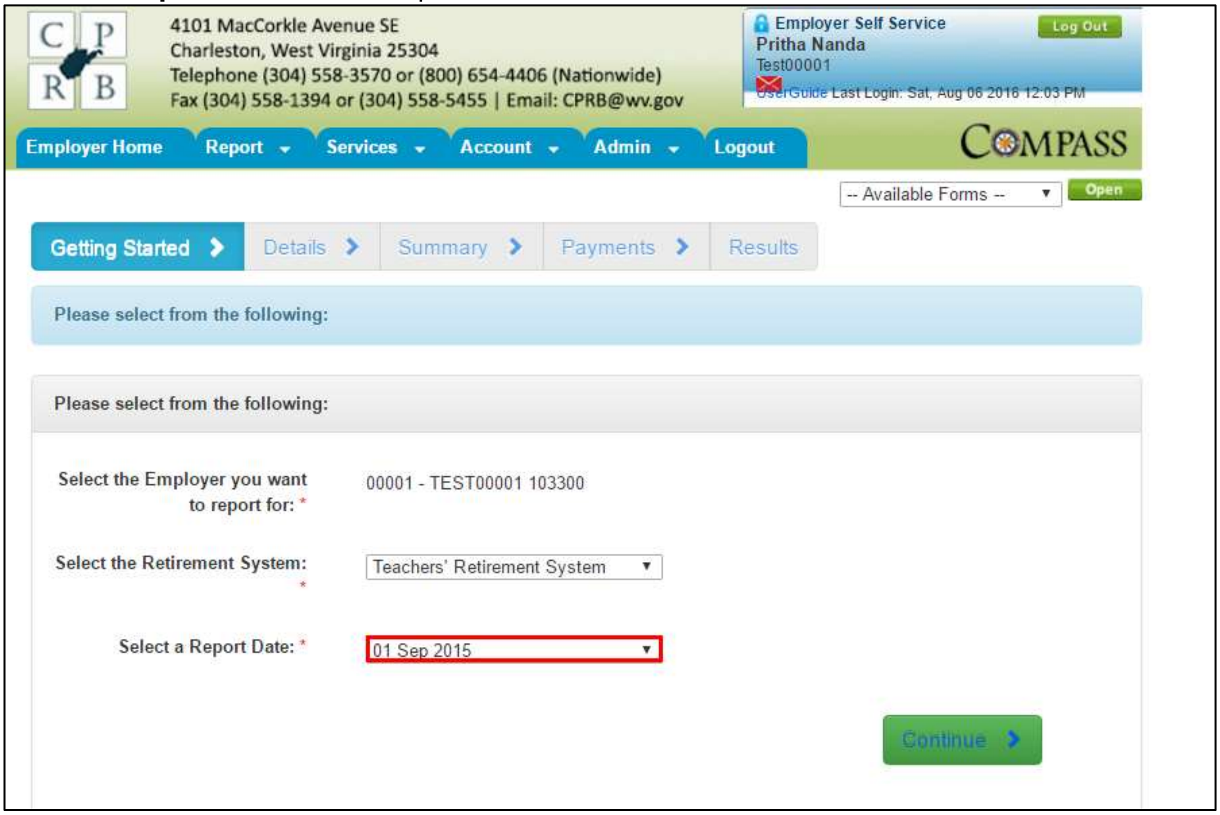
Step 3 -- Select the appropriate option from the **Select the Employer you want to report for** field. **Note**: The **Select the Employer you want to report for** field is a drop down menu only if an organization is a reporting employer that submits contributions report on behalf of more than one employer. Otherwise the **Select the Employer you want to report for** field will be pre-populated on the screen displaying the logged in employer name.



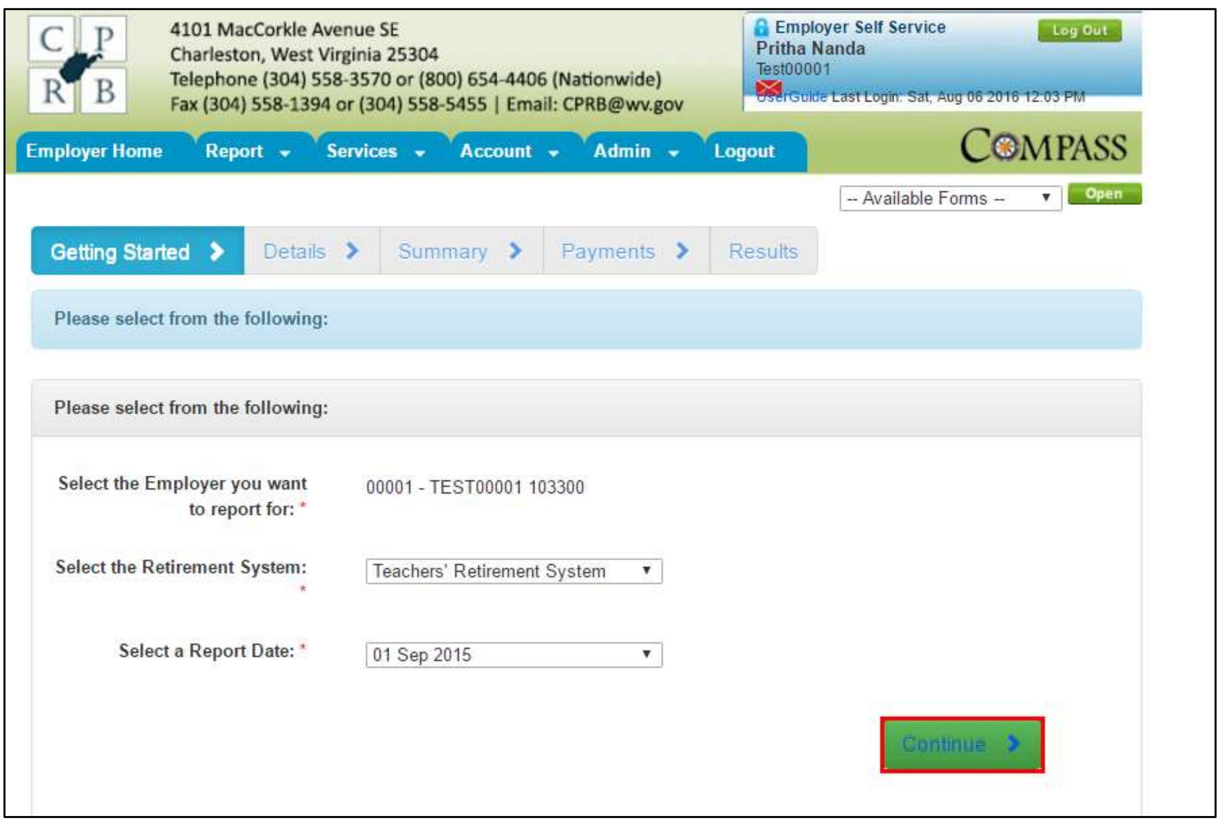
Step 4 -- **Select the Retirement System** from the drop down menu.
Note: If the employer or an organization that is a reporting employer who submits contributions reports on behalf of employers participates in multiple retirement systems then there will be a **Select Retirement System** drop down menu, but if the employer does not participate in multiple retirement systems, then the **Select Retirement System** drop down menu will default to the Retirement System in which the employer participates.



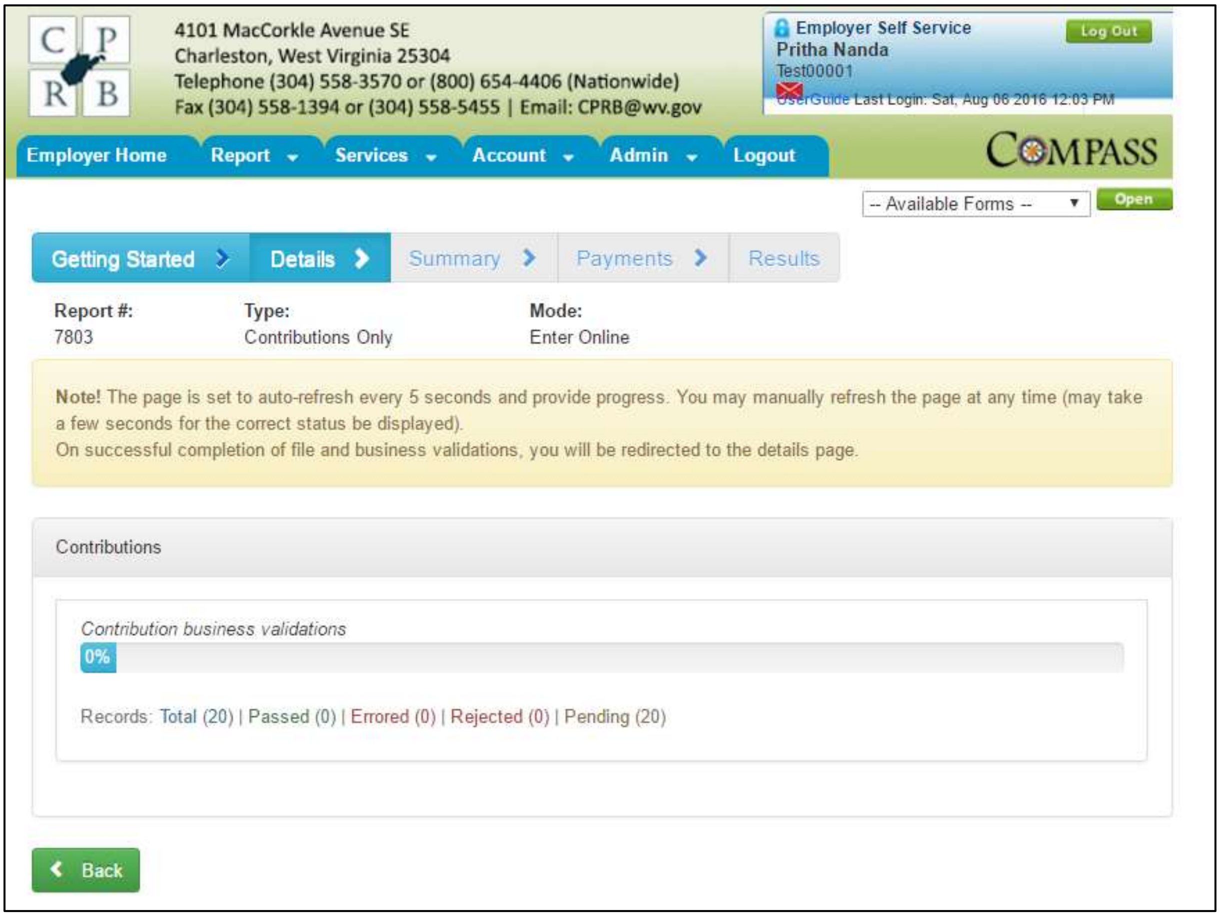
Step 5 -- **Select a Report Date** in the drop down menu.



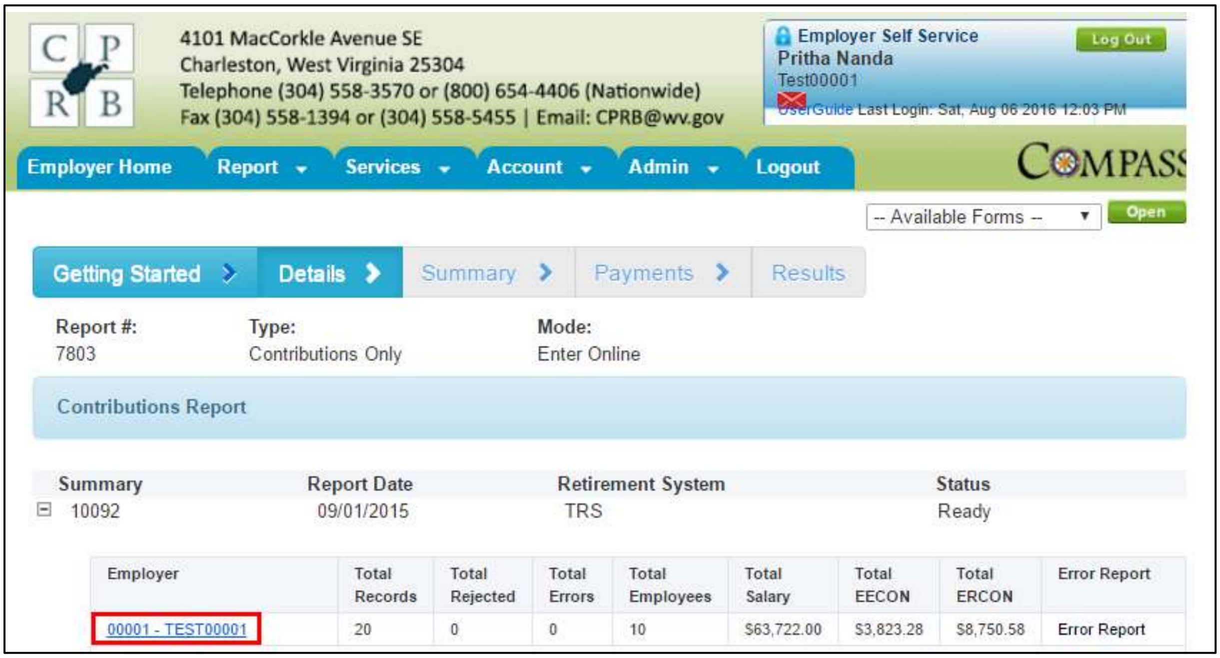
Step 6 -- Click the **Continue** button.



Step 7 -- The **Contribution Report – Upload File Progress** screen will show the Contribution file upload progress. The screen will also show any errors identified in the file and successful completion of uploading the Contribution file.

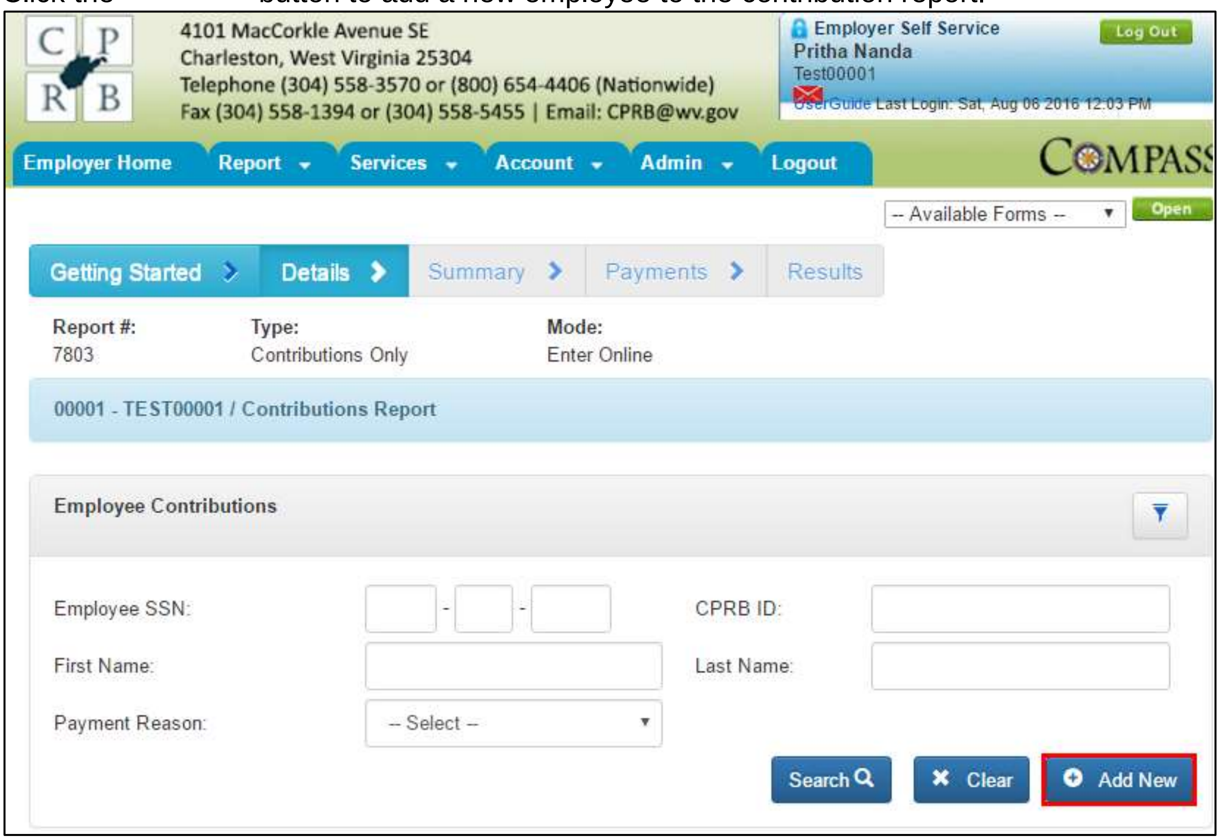


Step 8 -- Click the **link** (employer name) to add contribution information.

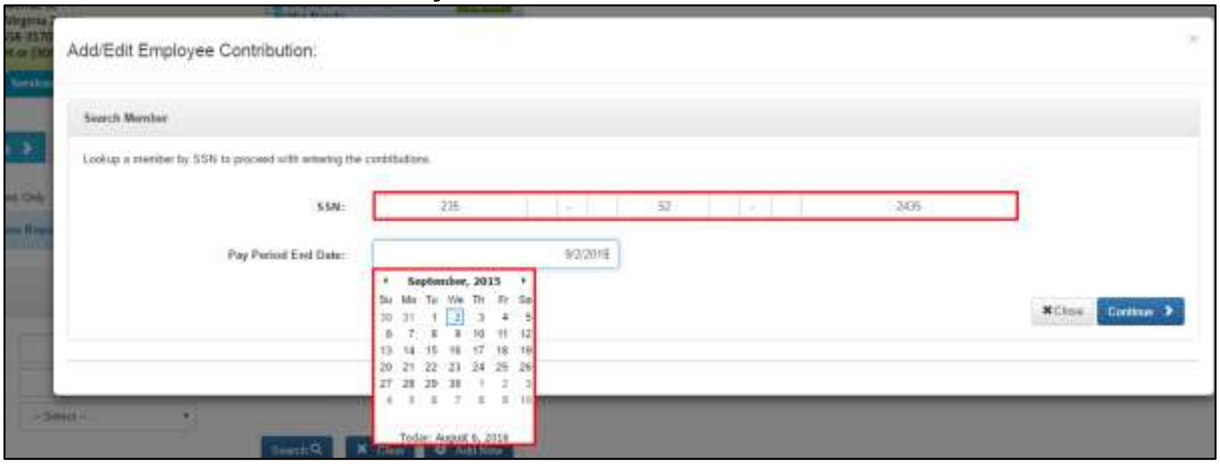


Step 9 -- Click the 

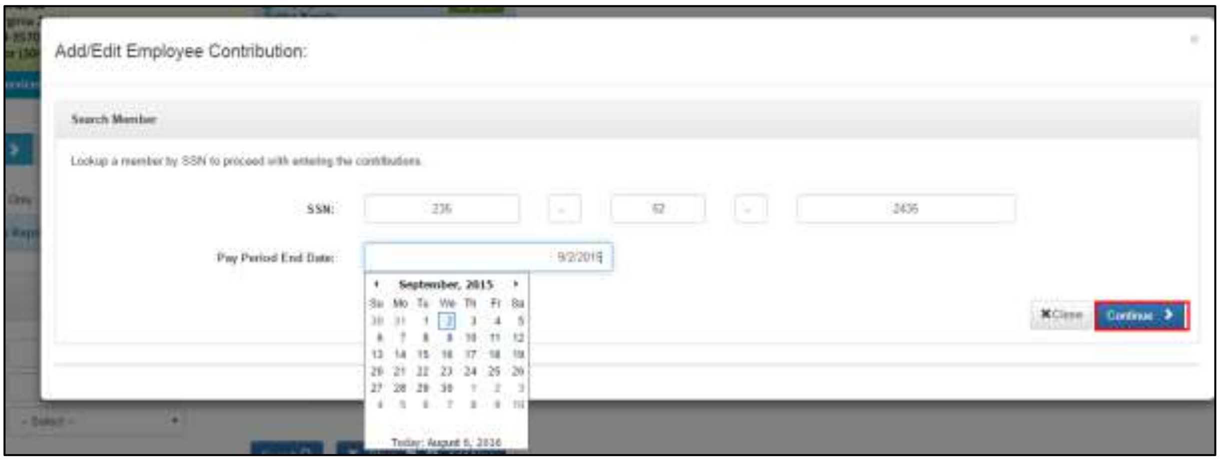
button to add a new employee to the contribution report.



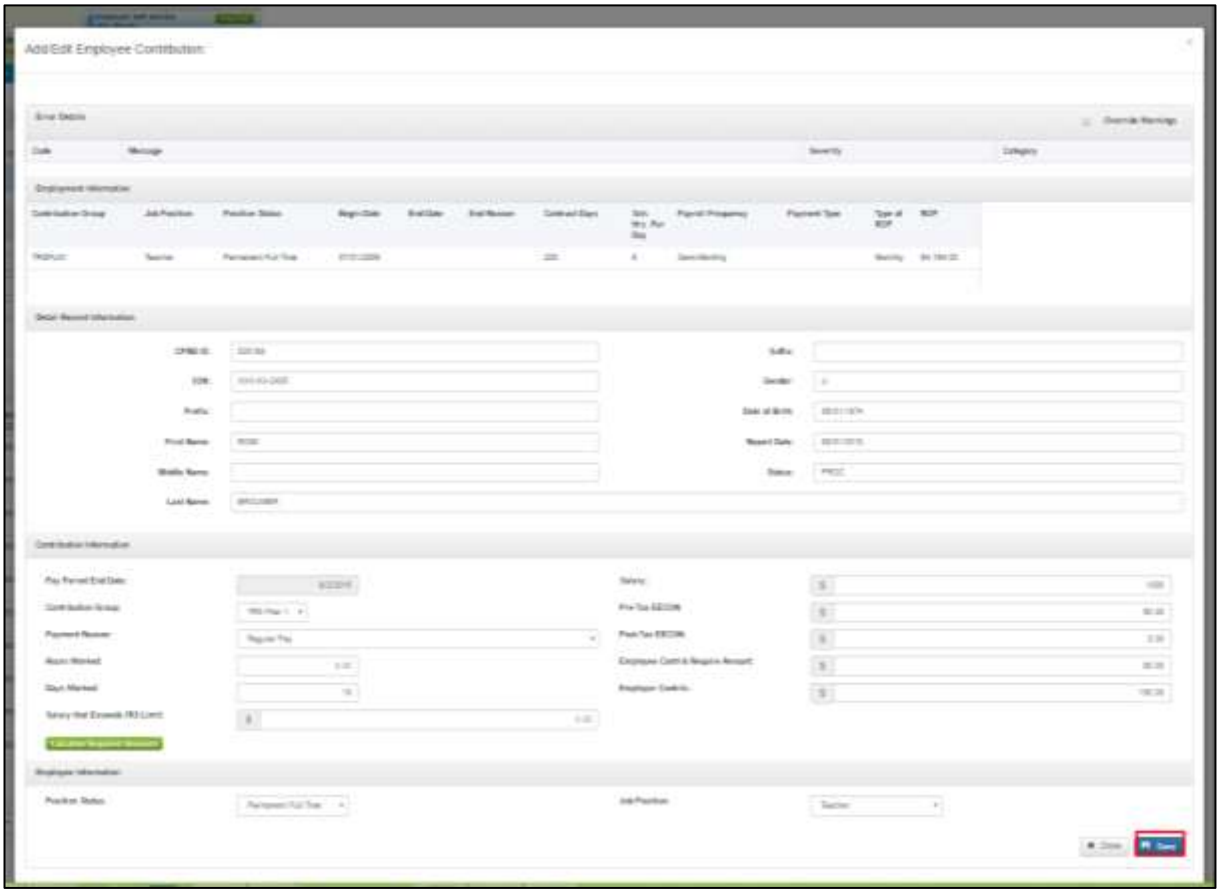
Step 10 -- Enter the **SSN** and select the **Pay Period End Date** from the calendar.



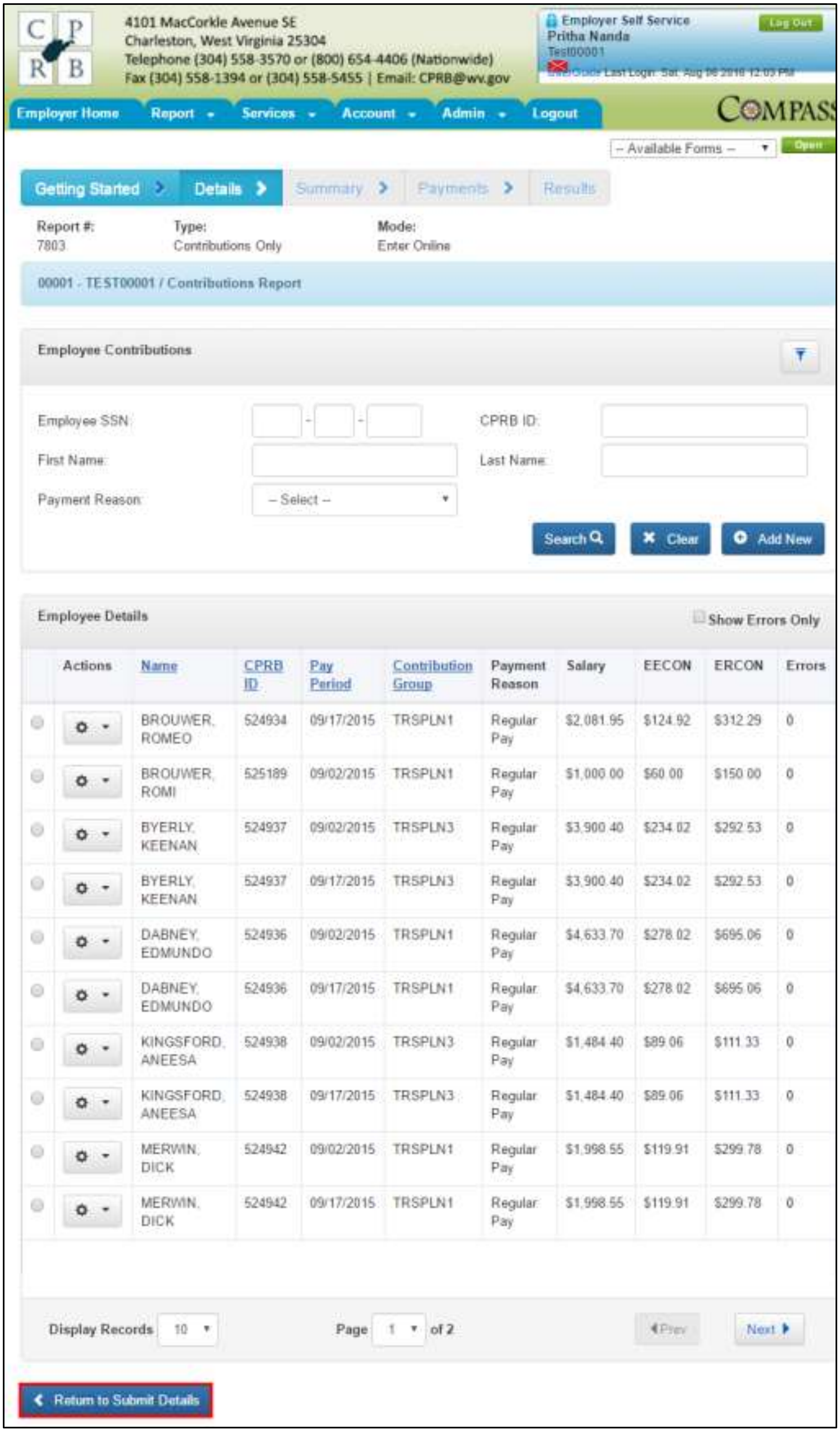
Step 11 -- Click the **Continue** button.



Step 12 -- Enter the details and click the **Save** button.



Step 13 -- Click the **Return to Submit Details** button.


4101 MacCorkle Avenue SE
Charleston, West Virginia 25304
Telephone (304) 558-3570 or (800) 654-4406 (Nationwide)
Fax (304) 558-1394 or (304) 558-5455 | Email: CPRB@wv.gov

Employer Self Service
Pritha Nanda
Test00001
Log Out

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

COMPASS

-- Available Forms -- | Open

Getting Started > Details > Summary > Payments > Results

Report #: 7803 | Type: Contributions Only | Mode: Enter Online

00001 - TEST00001 / Contributions Report

Employee Contributions

Employee SSN:
CPRB ID:
First Name:
Last Name:
Payment Reason: -- Select --

Search | Clear | Add New

Employee Details | Show Errors Only

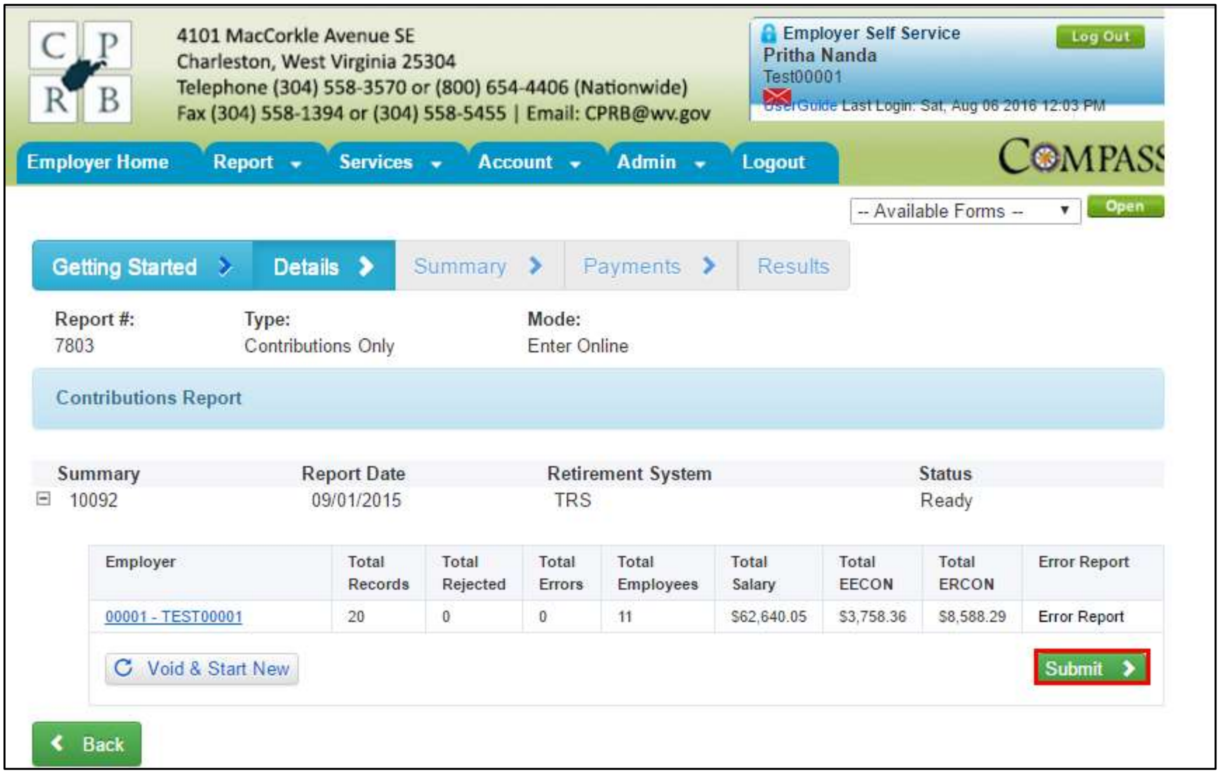
	Actions	Name	CPRB ID	Pay Period	Contribution Group	Payment Reason	Salary	EECON	ERCON	Errors
		BROUWER, ROMEO	524934	09/17/2015	TRSPLN1	Regular Pay	$2,081.95	$124.92	$312.29	0
		BROUWER, ROMI	525189	09/02/2015	TRSPLN1	Regular Pay	$1,000.00	$60.00	$150.00	0
		BYERLY, KEENAN	524937	09/02/2015	TRSPLN3	Regular Pay	$3,900.40	$234.02	$292.53	0
		BYERLY, KEENAN	524937	09/17/2015	TRSPLN3	Regular Pay	$3,900.40	$234.02	$292.53	0
		DABNEY, EDMUNDO	524936	09/02/2015	TRSPLN1	Regular Pay	$4,633.70	$278.02	$695.06	0
		DABNEY, EDMUNDO	524936	09/17/2015	TRSPLN1	Regular Pay	$4,633.70	$278.02	$695.06	0
		KINGSFORD, ANEESA	524938	09/02/2015	TRSPLN3	Regular Pay	$1,484.40	$89.06	$111.33	0
		KINGSFORD, ANEESA	524938	09/17/2015	TRSPLN3	Regular Pay	$1,484.40	$89.06	$111.33	0
		MERWIN, DICK	524942	09/02/2015	TRSPLN1	Regular Pay	$1,998.55	$119.91	$299.78	0
		MERWIN, DICK	524942	09/17/2015	TRSPLN1	Regular Pay	$1,998.55	$119.91	$299.78	0

Display Records 10 | Page 1 of 2 | Prev | Next

Return to Submit Details

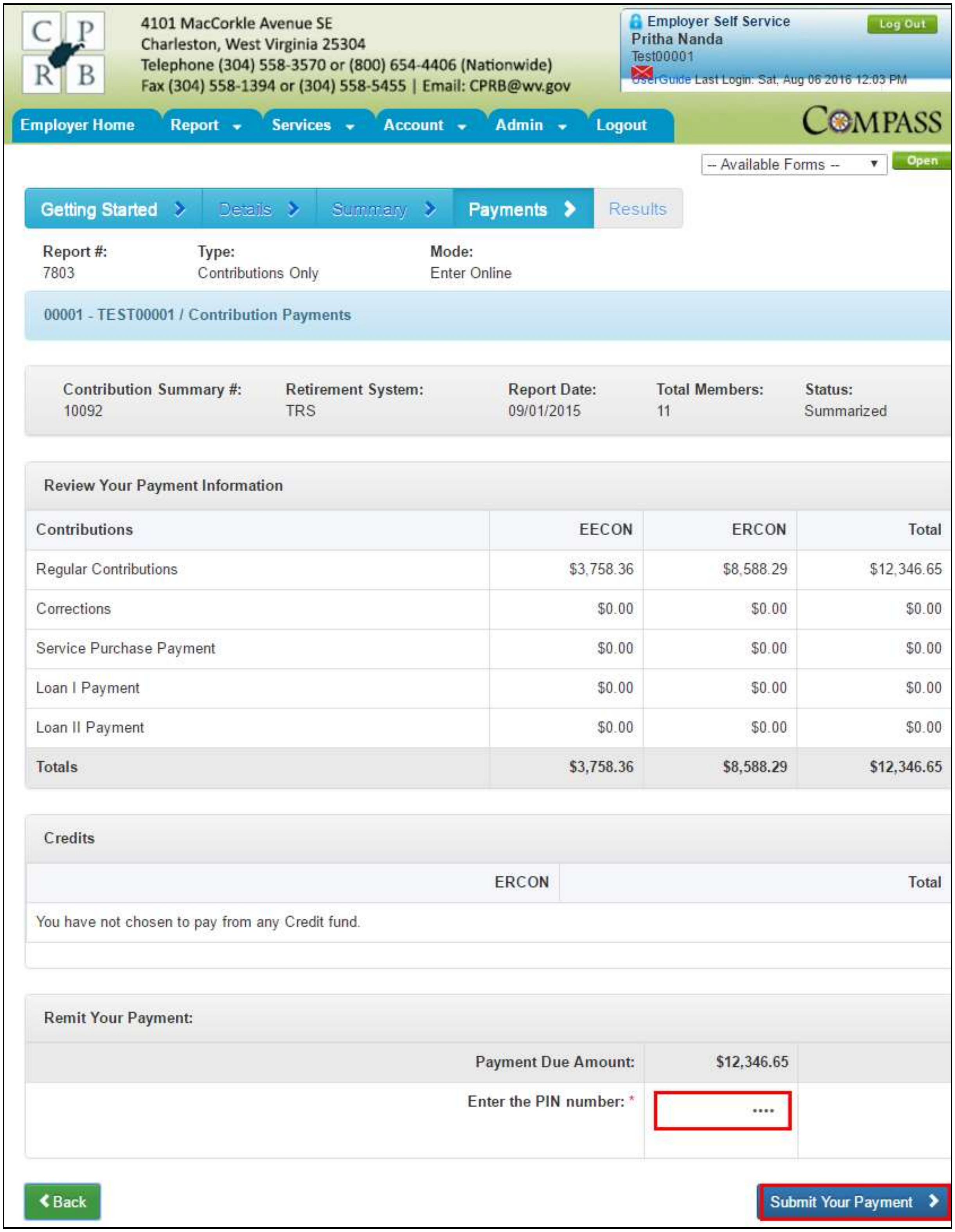
Step 14 -- Click the 

button.



Step 15 -- The **Summary** screen is displayed. Click the **Save and Proceed to Payment** button.

Step 16 -- Enter the **PIN number** and click the Submit Your Payment button.



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Employer Self Service
Pritha Nanda
Test00001
UserGuide Last Login: Sat, Aug 06 2016 12:03 PM
Log Out

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

COMPASS

-- Available Forms -- | Open

Getting Started > Details > Summary > Payments > Results

Report #:	Type:	Mode:
7803	Contributions Only	Enter Online

00001 - TEST00001 / Contribution Payments

Contribution Summary #:	Retirement System:	Report Date:	Total Members:	Status:
10092	TRS	09/01/2015	11	Summarized

Review Your Payment Information

Contributions	EECON	ERCON	Total
Regular Contributions	$3,758.36	$8,588.29	$12,346.65
Corrections	$0.00	$0.00	$0.00
Service Purchase Payment	$0.00	$0.00	$0.00
Loan I Payment	$0.00	$0.00	$0.00
Loan II Payment	$0.00	$0.00	$0.00
Totals	**$3,758.36**	**$8,588.29**	**$12,346.65**

Credits

	ERCON	Total
You have not chosen to pay from any Credit fund.		

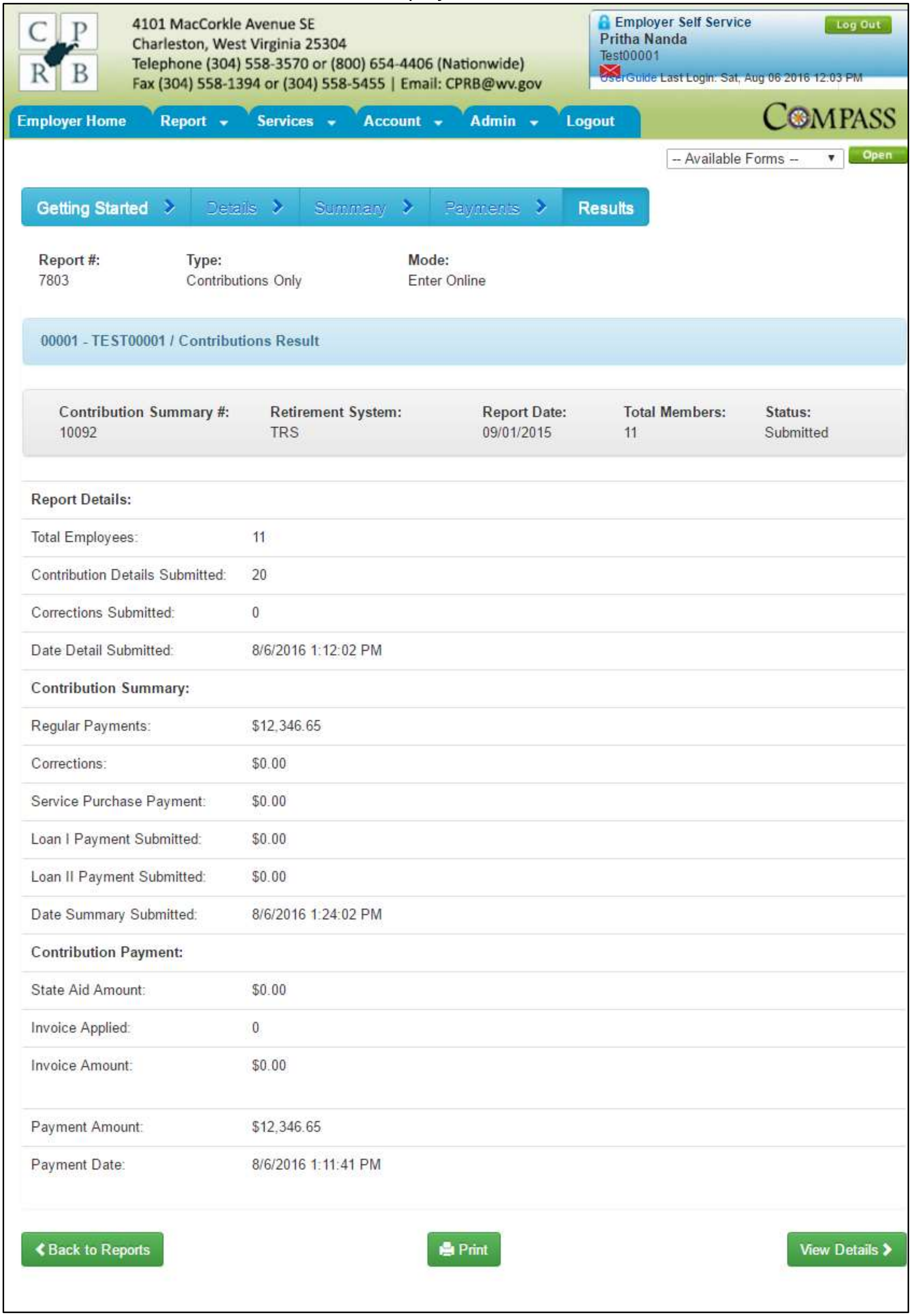
Remit Your Payment:

Payment Due Amount: $12,346.65

Enter the PIN number: * ····

Back | Submit Your Payment

Step 17 -- The **Contributions Results** screen is displayed.



7.3 Submit Employment Classification and Contributions

Employers are required to submit the Employment Classification information, contribution and wage information, and payments (via Check, Automated Clearing House (ACH) or Lockbox) to CPRB.

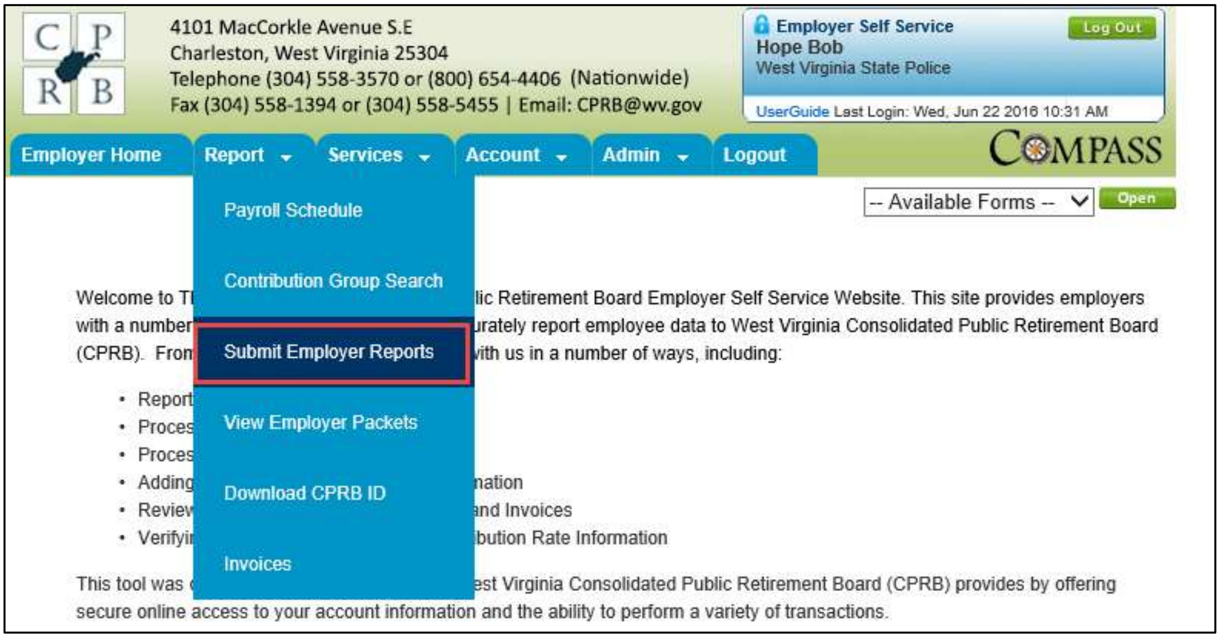
Employers may choose to submit a combined Employment Classification and Contributions report to CPRB on a monthly, semi-monthly, or bi-weekly basis. However, the reporting frequency of an employer must match their payroll frequency.

Note: An employer can choose to report on a monthly basis, regardless of their payroll frequency. However, if they choose to report on any other frequency besides a monthly basis (such as semi-monthly, or bi-weekly), then their reporting frequency must be the same as the payroll frequency. For example, if an employer runs a payroll on a semi-monthly basis, then they must submit a report on a semi-monthly basis as well.

- Uploading the file: The combined Employment Classification and Contributions file can only be submitted using the **Upload File** method and must follow the new COMPASS file format (The COMPASS Employer Reporting File Format, which was first circulated to employers in March 2016, and can be found here: http://www.wvretirement.com/Forms/COMPASS-Eer-ReportingFile.pdf).
- Correcting the errors: Once the combined Employment Classification and Contributions file has been uploaded, the employer will review the feedback provided for each record and review the corresponding details. All the records that have errors associated with them will be displayed on screen by default. The employer must access each record in error and make the necessary updates to the data.
  Note: If the number of error records exceeds the threshold of allowable errors, an email will be sent to the employer's Primary Payroll Coordinator alerting them that the file was rejected and an error message will be displayed on the screen. The employer can re-submit the file once all the errors are addressed.
- COMPASS Validation: The combined Employment Classification and Contributions file is processed and validated by COMPASS. For example, validations based on employment date are performed so that the employee is enrolled in the correct contribution group.
- Following the submission and correction of errors to the contribution details, the employer can review and finalize the **Contribution Summary**, remit electronic payments, then submit the contribution report to CPRB and print the **Contribution Summary** screen to include with mailed checks and/or Lockbox payments. The employer will not be able to make updates to the **Contribution Summary**, except for the Employer Contribution (ERCON) amount. The employer can apply any outstanding credit or debit invoices to the Summary which will alter the total payment due by the employer.
  Note: Only the employers who are participating in the TRS and TDC plans can apply State Aid money in order to pay the ERCON portion of the report. And only TDC employers can apply Forfeiture money in order to pay the ERCON portion of their report.

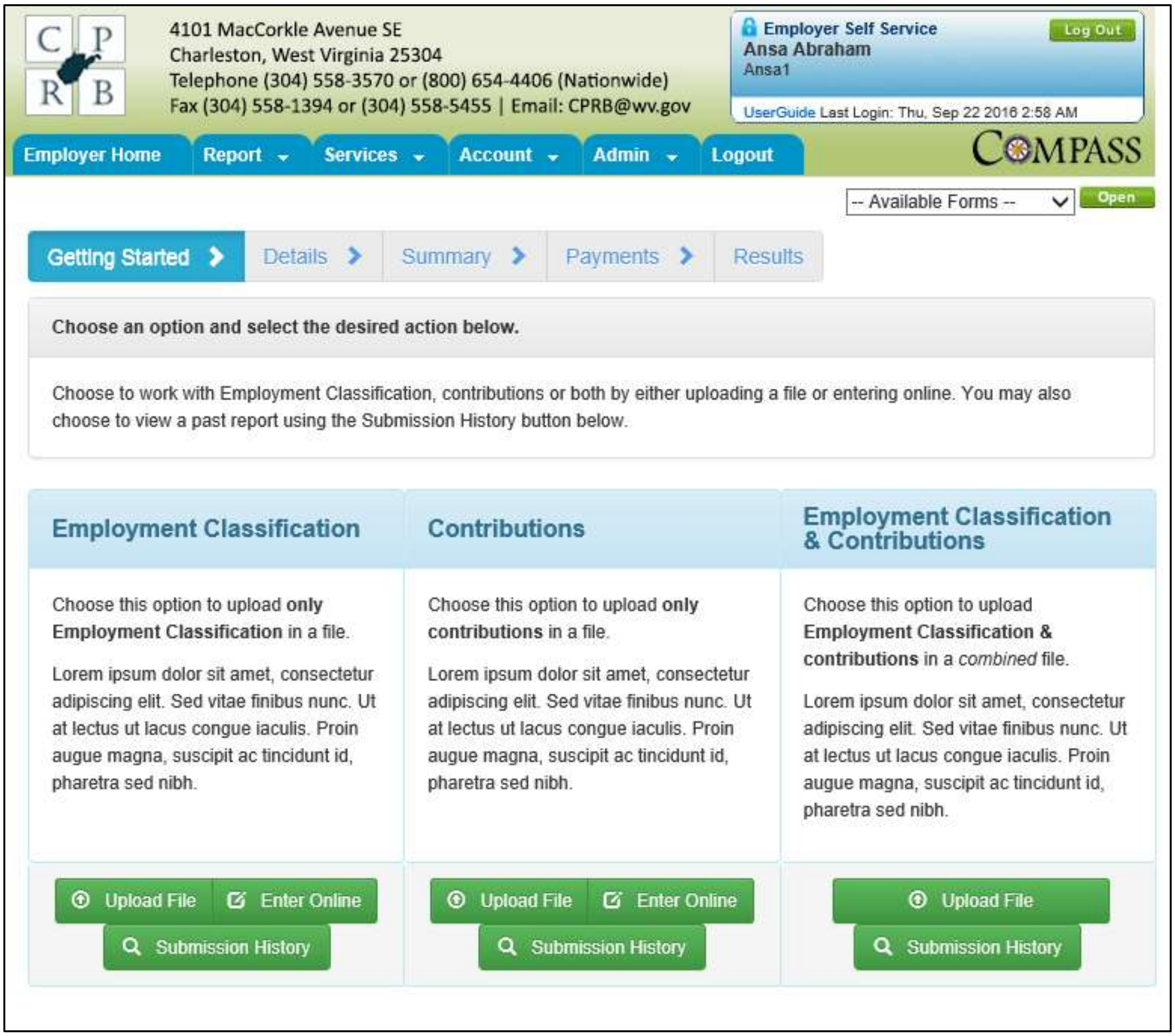
Follow the steps to upload and submit the Employment Classification and Contributions using the Upload File medium:

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

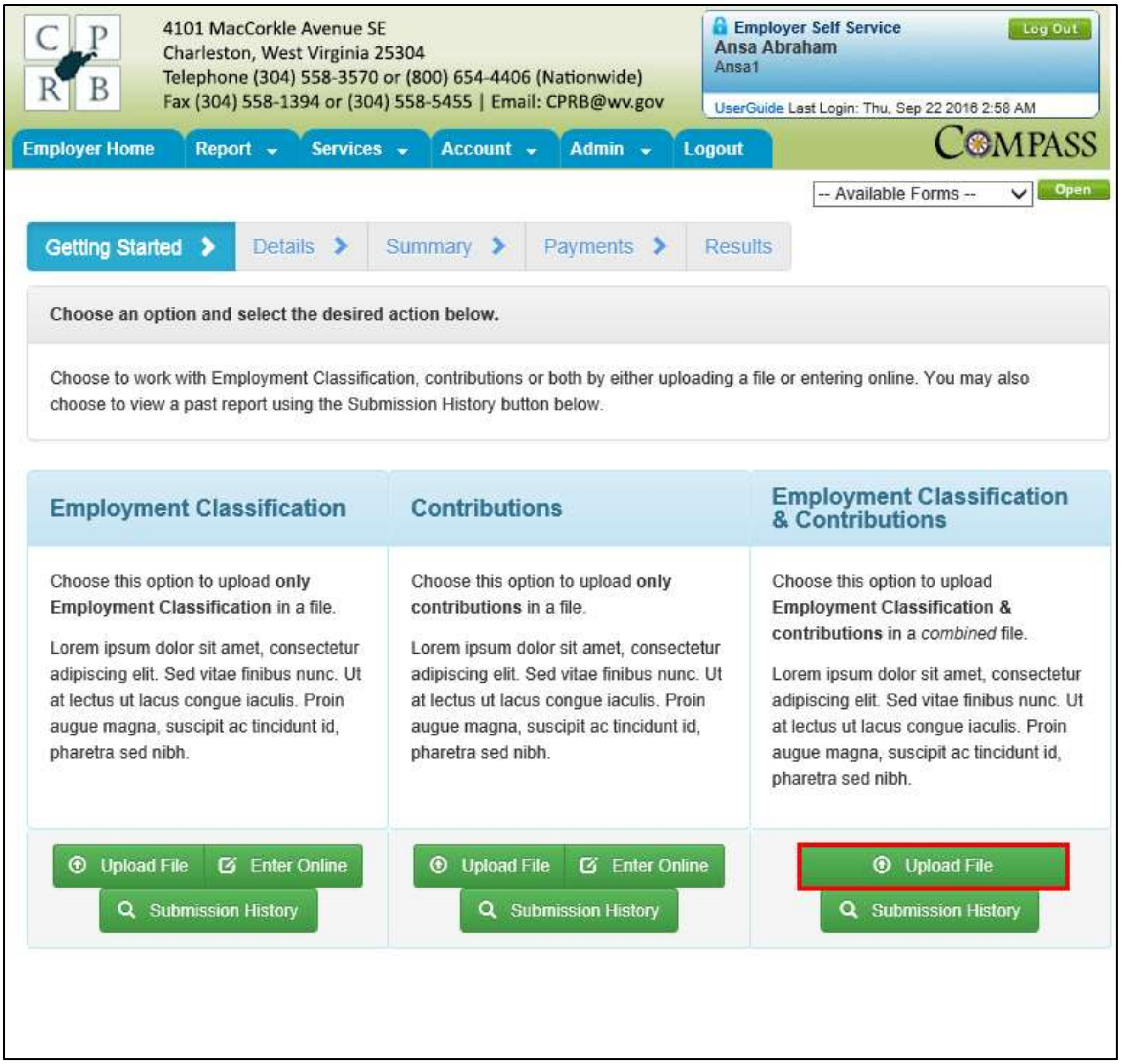


.

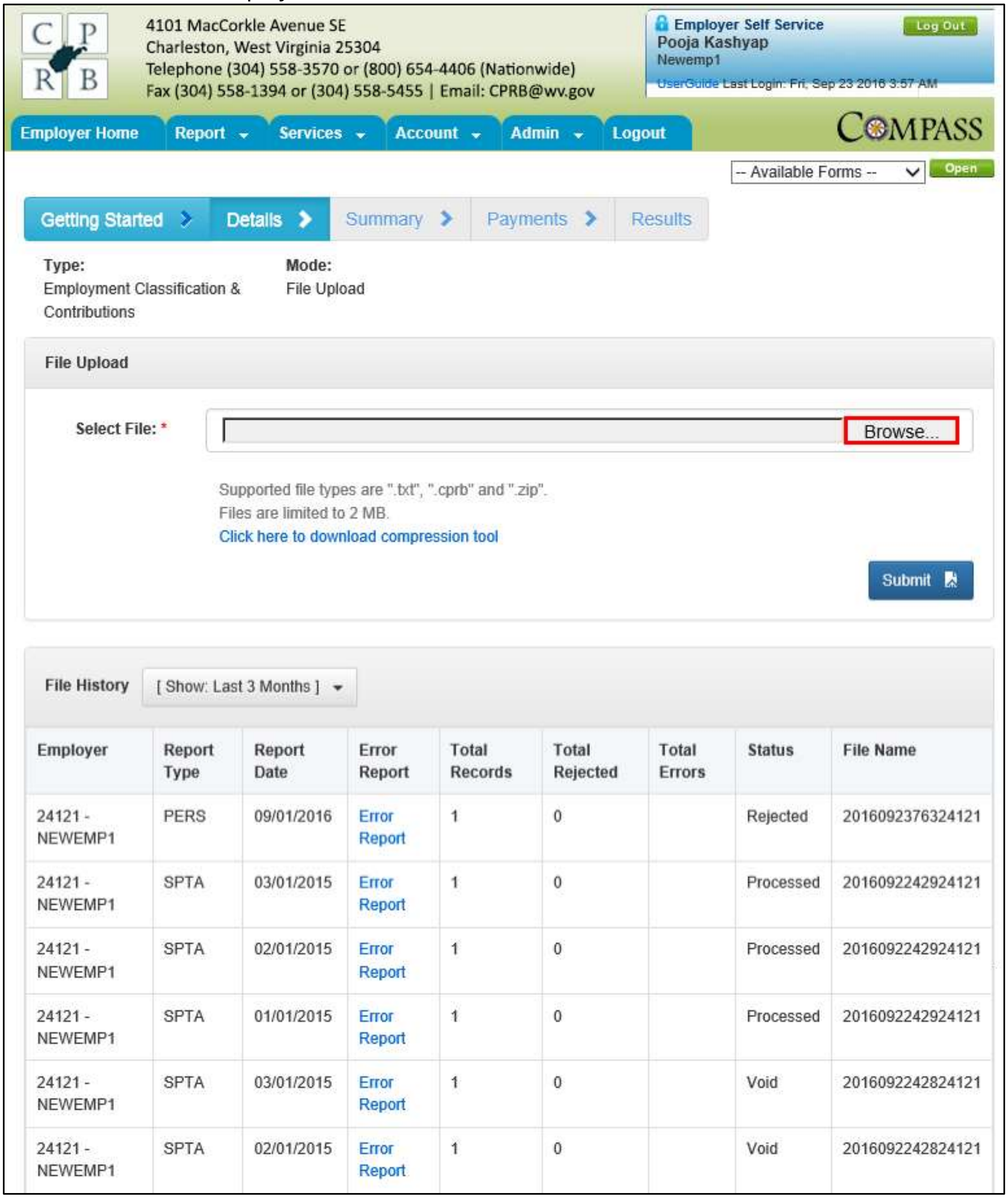
Step 2 -- The **Getting Started** screen displays.



Step 3 -- In the **Employment Classification & Contributions** section, click the Upload File button.

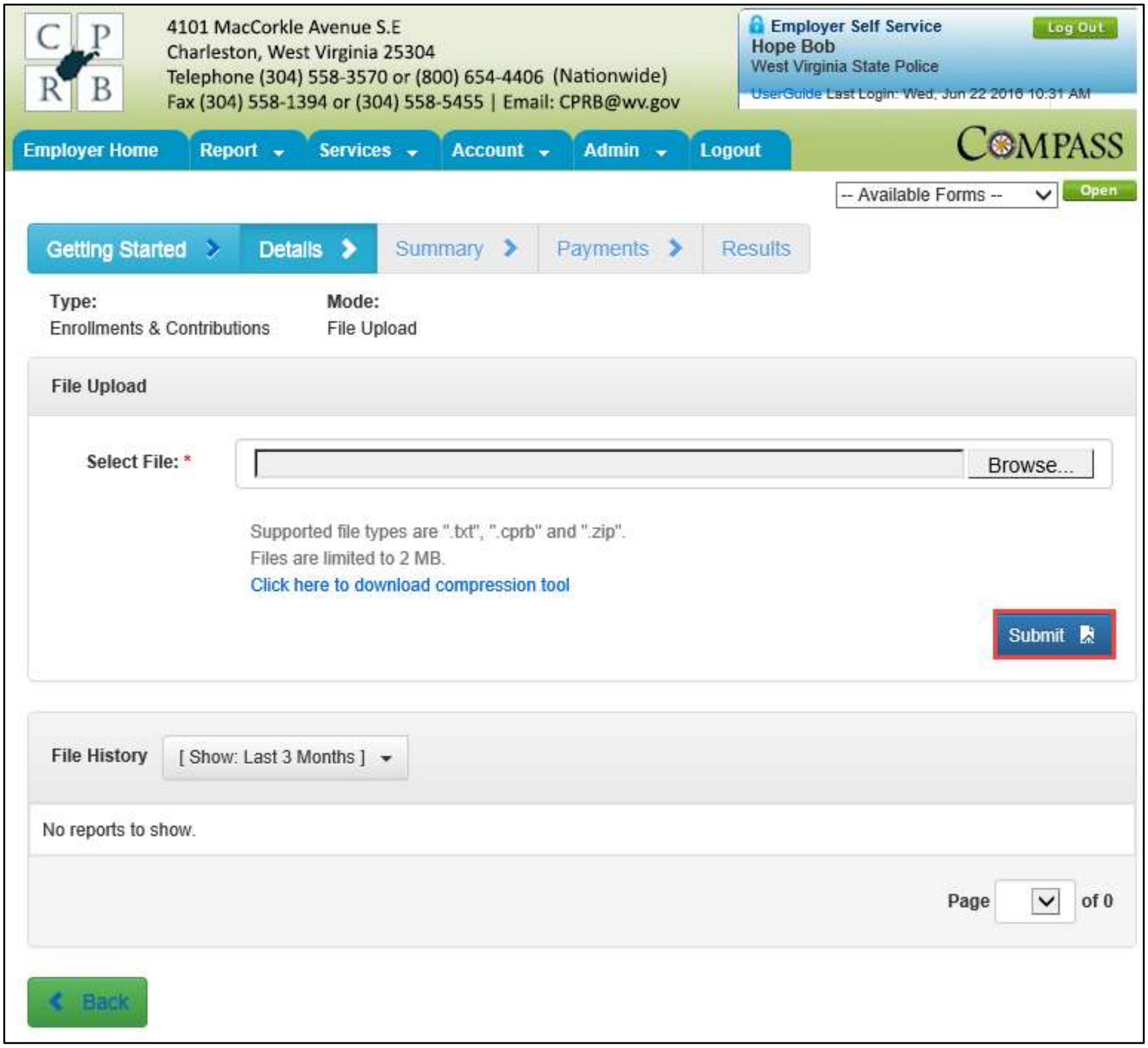


Step 4 -- The **Details** screen displays. Click the **Browse** button to select a file.



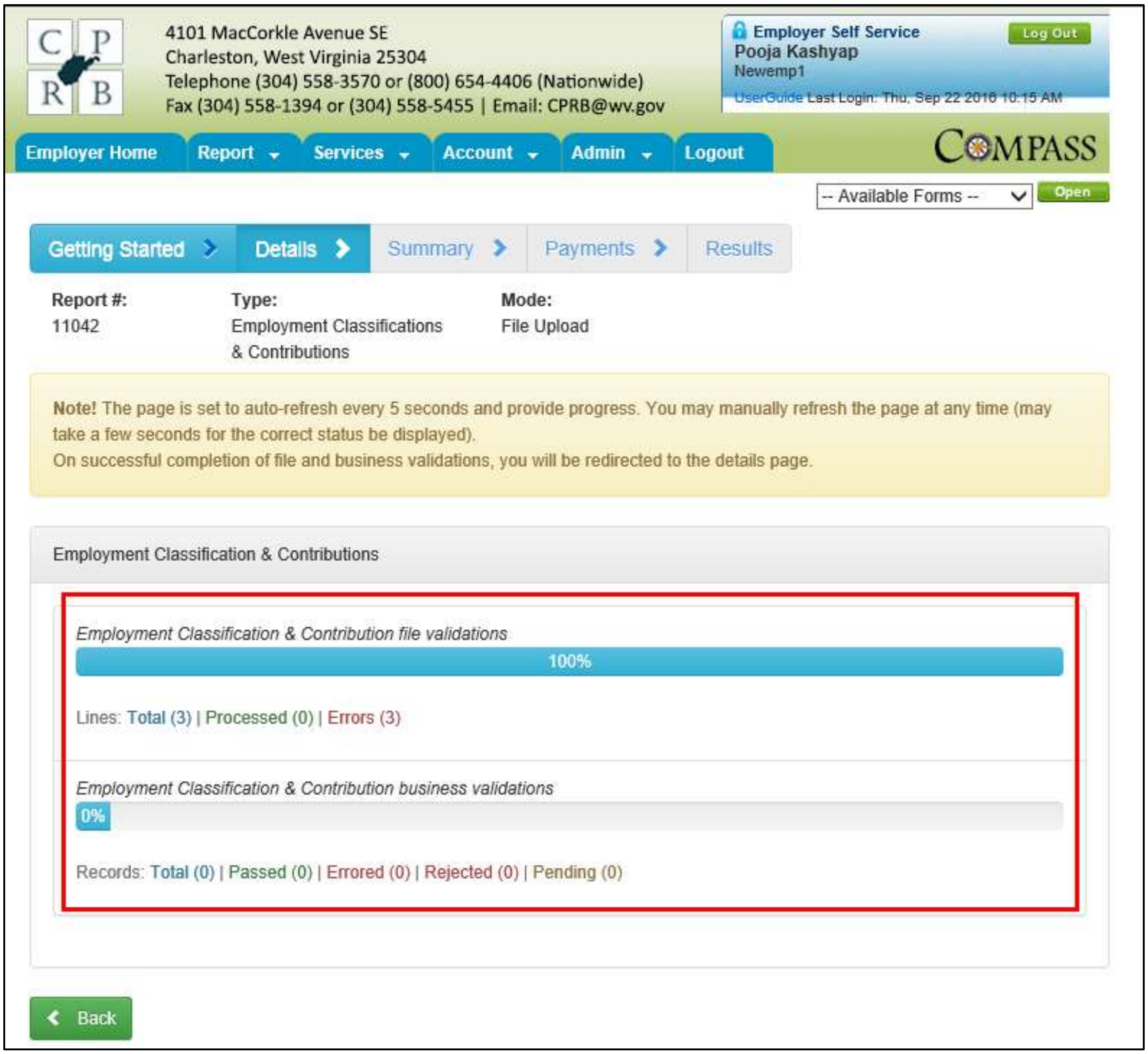
Employer	Report Type	Report Date	Error Report	Total Records	Total Rejected	Total Errors	Status	File Name
24121 - NEWEMP1	PERS	09/01/2016	Error Report	1	0		Rejected	2016092376324121
24121 - NEWEMP1	SPTA	03/01/2015	Error Report	1	0		Processed	2016092242924121
24121 - NEWEMP1	SPTA	02/01/2015	Error Report	1	0		Processed	2016092242924121
24121 - NEWEMP1	SPTA	01/01/2015	Error Report	1	0		Processed	2016092242924121
24121 - NEWEMP1	SPTA	03/01/2015	Error Report	1	0		Void	2016092242824121
24121 - NEWEMP1	SPTA	02/01/2015	Error Report	1	0		Void	2016092242824121

Step 5 -- Click the  button.

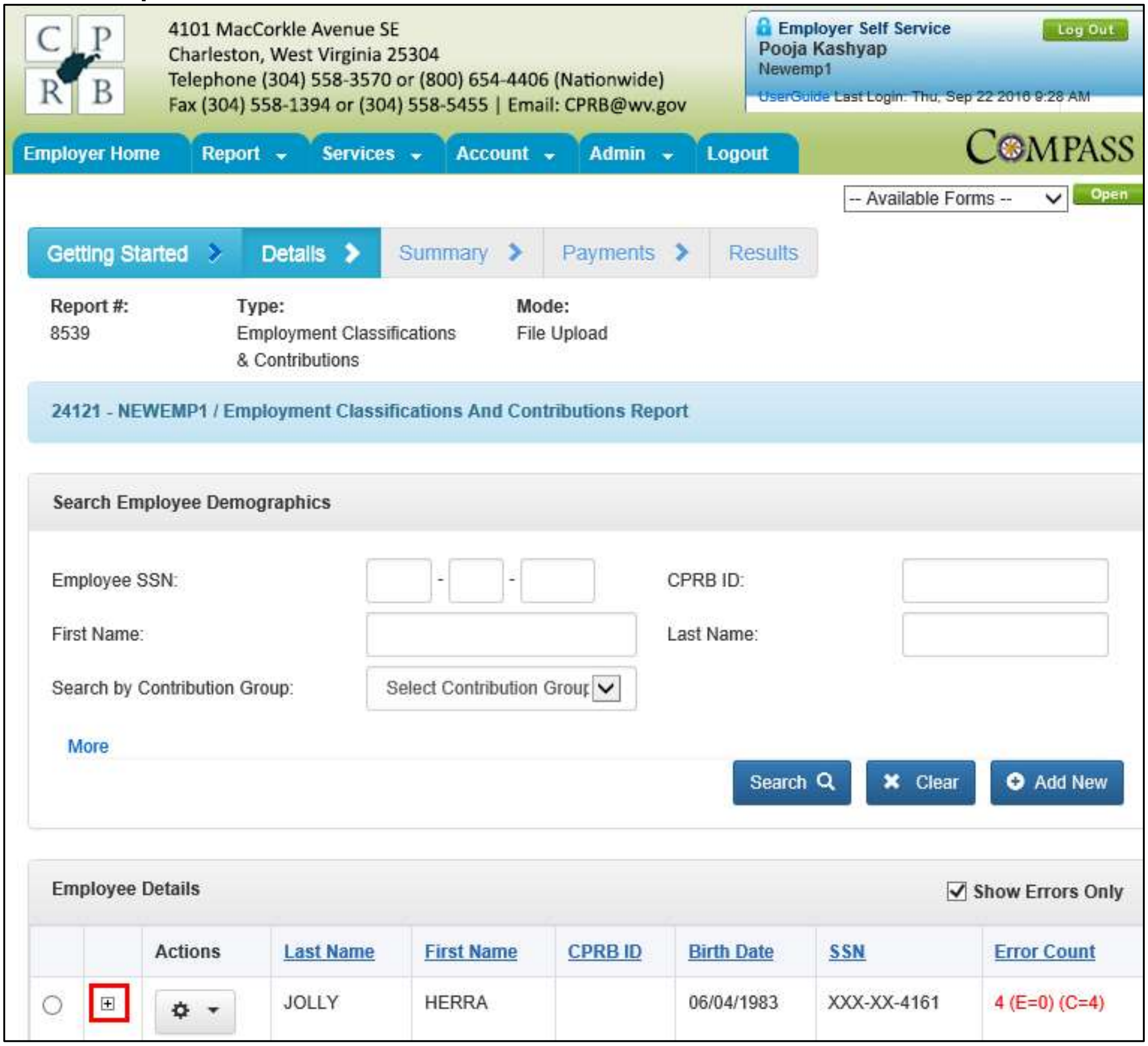


Step 6 -- The **Submit Employer Report – File Progress** screen will show the Employment Classification and Contributions file upload progress. The screen will also show any errors identified in the file and successful completion of uploading the Employment Classification and Contributions file.
Note: Once the Employment Classification and Contributions file processing is complete, the Primary Payroll Coordinator will receive an email with the results from the submission.

Note: If the **Submit Employer Report – File Progress** screen displays an error message, navigate to Section 7.3.1 to view the errors in the uploaded Employment Classification and Contribution file.

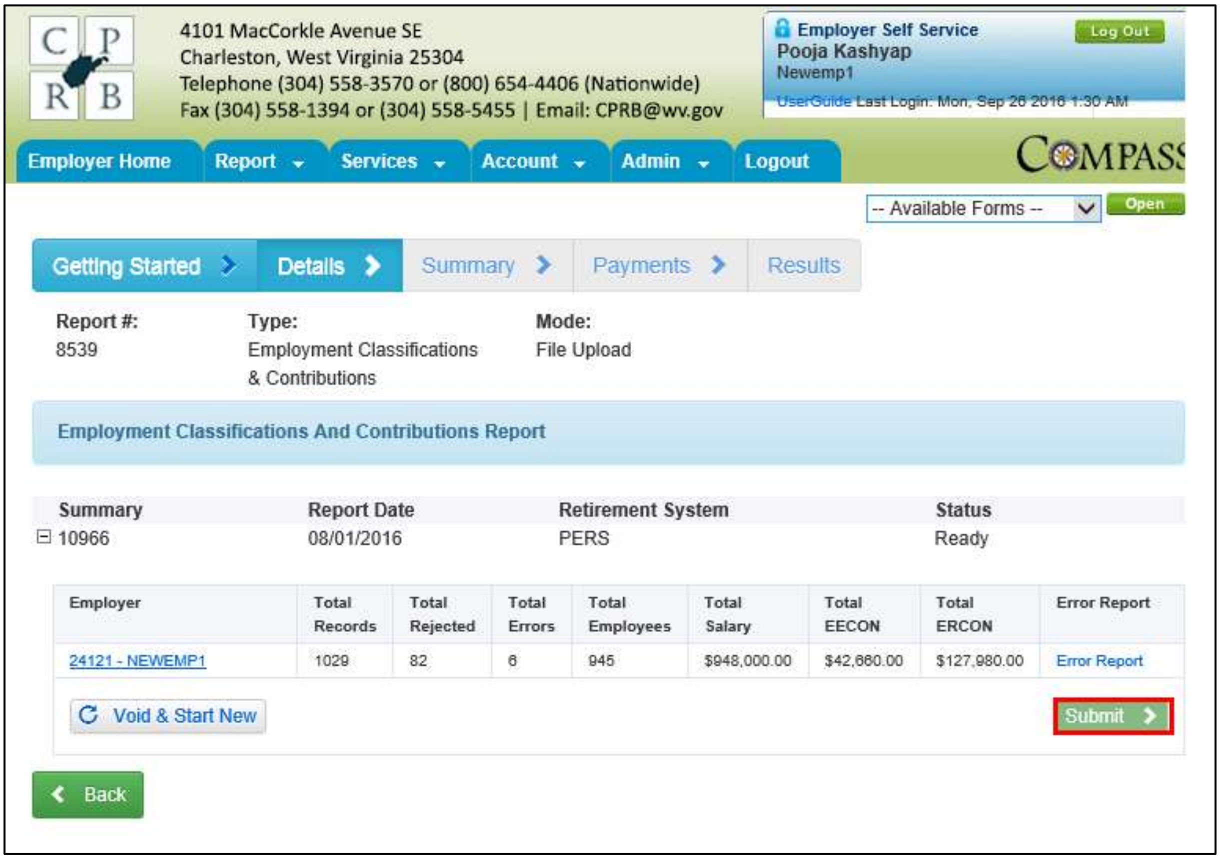


Step 7 -- The Employment Classification and Contributions files have been uploaded successfully, click the **expand** ⊞ icon to view the file details.



Step 8 -- Click the Submit button.

Note: The Submit button will be disabled if there are any **Errors** in the file. (Follow the steps in Section 7.3.2 Correct Employment Classification and Contributions Upload File Errors to correct remaining errors).


CPRB
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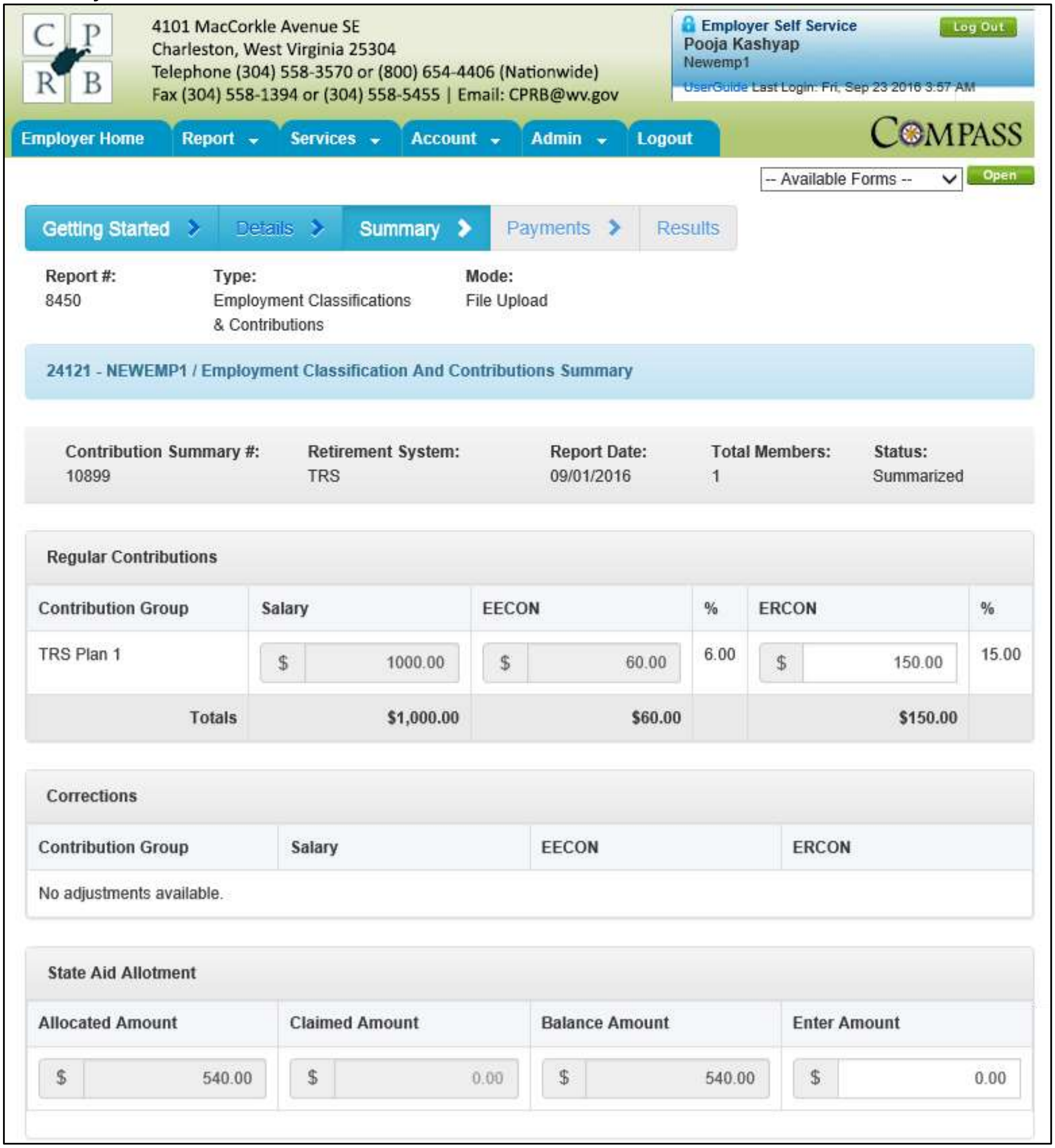
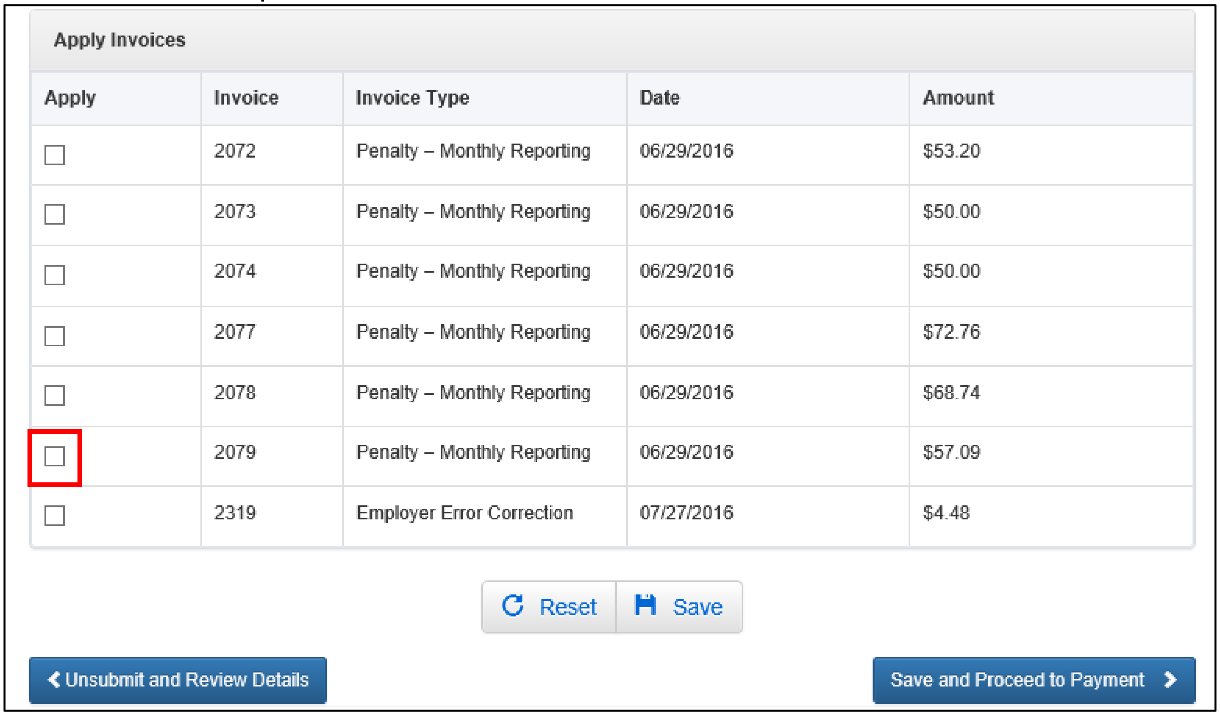
Charleston, West Virginia 25304
Telephone (304) 558-3570 or (800) 654-4406 (Nationwide)
Fax (304) 558-1394 or (304) 558-5455 | Email: CPRB@wv.gov
Employer Self Service
Log Out
Pooja Kashyap
Newemp1
UserGuide Last Login: Mon, Sep 26 2016 1:30 AM
Employer Home
Report
Services
Account
Admin
Logout
COMPASS
-- Available Forms --
Open
Getting Started
Details
Summary
Payments
Results
Report #:
8539
Type:
Employment Classifications & Contributions
Mode:
File Upload
Employment Classifications And Contributions Report
Summary
Report Date
Retirement System
Status
10966
08/01/2016
PERS
Ready
Employer
Total Records
Total Rejected
Total Errors
Total Employees
Total Salary
Total EECON
Total ERCON
Error Report
24121 - NEWEMP1
1029
82
6
945
$948,000.00
$42,660.00
$127,980.00
Error Report
Void & Start New
Submit
Back

Step 9 -- The **Summary** screen displays. Validate the employment classification and contributions summary information.



Step 10 -- Select the check box(es) adjacent to the **Invoice** to apply the employment classification and contributions report.



Apply Invoices

Apply	Invoice	Invoice Type	Date	Amount
☐	2072	Penalty – Monthly Reporting	06/29/2016	$53.20
☐	2073	Penalty – Monthly Reporting	06/29/2016	$50.00
☐	2074	Penalty – Monthly Reporting	06/29/2016	$50.00
☐	2077	Penalty – Monthly Reporting	06/29/2016	$72.76
☐	2078	Penalty – Monthly Reporting	06/29/2016	$68.74
☐	2079	Penalty – Monthly Reporting	06/29/2016	$57.09
☐	2319	Employer Error Correction	07/27/2016	$4.48

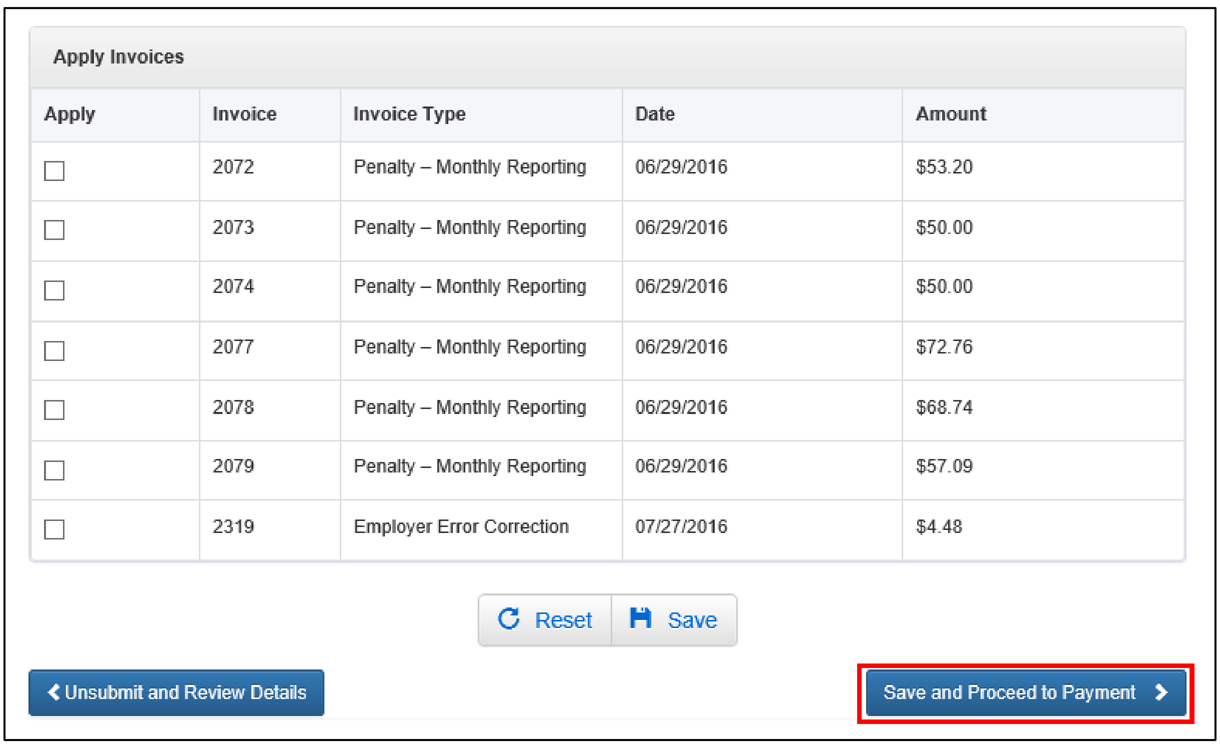
Reset Save

Unsubmit and Review Details

Save and Proceed to Payment

Step 11 -- Click the 

button.



Apply Invoices

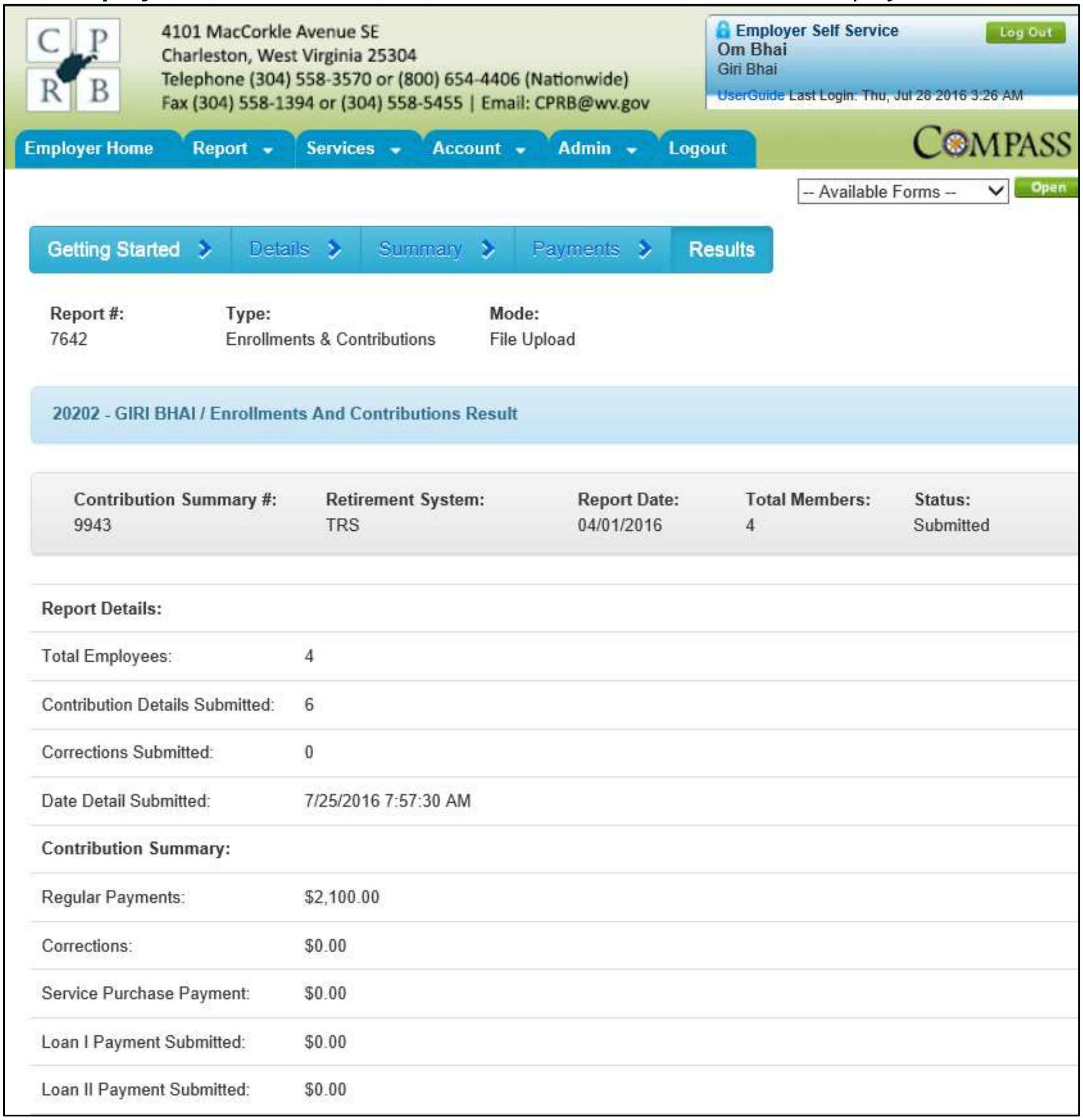
Apply	Invoice	Invoice Type	Date	Amount
☐	2072	Penalty – Monthly Reporting	06/29/2016	$53.20
☐	2073	Penalty – Monthly Reporting	06/29/2016	$50.00
☐	2074	Penalty – Monthly Reporting	06/29/2016	$50.00
☐	2077	Penalty – Monthly Reporting	06/29/2016	$72.76
☐	2078	Penalty – Monthly Reporting	06/29/2016	$68.74
☐	2079	Penalty – Monthly Reporting	06/29/2016	$57.09
☐	2319	Employer Error Correction	07/27/2016	$4.48

Reset Save

Unsubmit and Review Details

Save and Proceed to Payment

Step 12 -- The **Employment Classification and Contributions Results** screen displays.

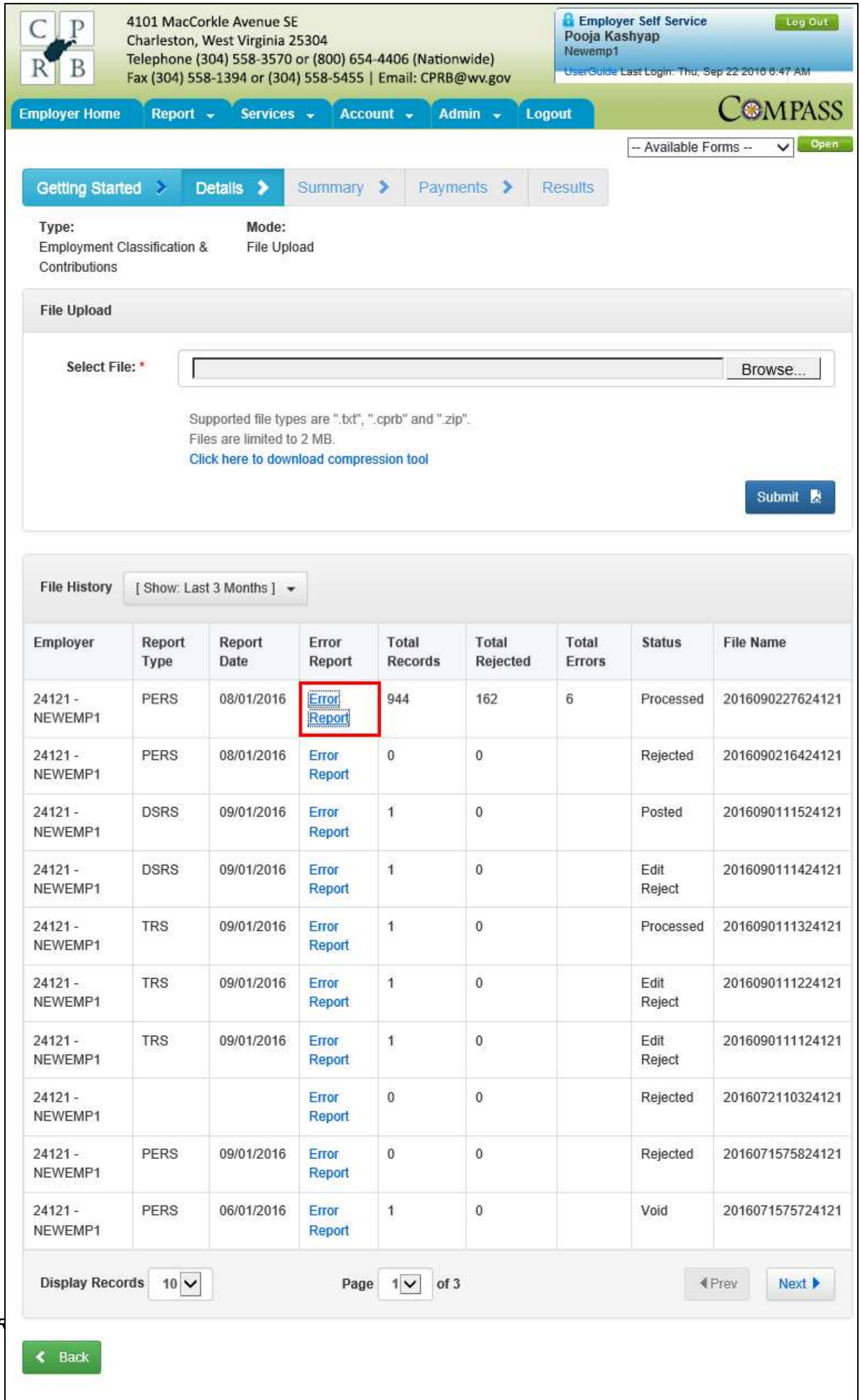


7.3.1 View Employment Classification and Contributions –Upload File Rejection Details

When submitting the combined Employment Classification and Contributions through the Upload File option, validations are run automatically to ensure the information in the file is formatted correctly and is accurate. If the file has too many errors or is not in the proper file format, the file will not be uploaded and will be rejected with an error status displayed in the Details screen.

Follow the steps below to view the **View Employment Classification and Contributions Report Upload File Rejection** details.

Step 1 -- Upon the completion of steps 1 - 4 (found in Section 7.3 Submit Employment Classification and Contributions – Upload File), if the file is rejected, the error message will be displayed in the **Details** screen.

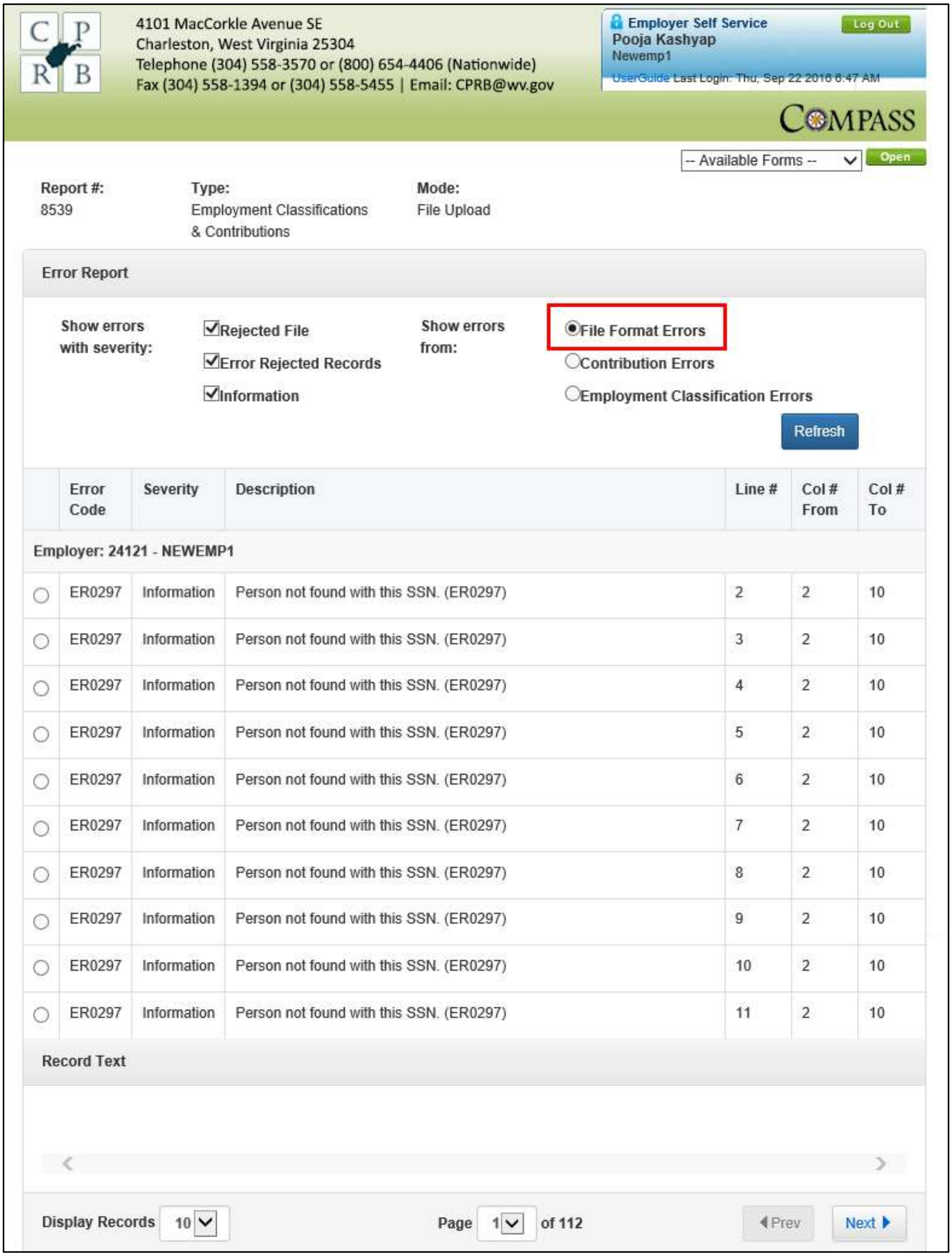


Employer	Report Type	Report Date	Error Report	Total Records	Total Rejected	Total Errors	Status	File Name
24121 - NEWEMP1	PERS	08/01/2016	Error Report	944	162	6	Processed	2016090227624121
24121 - NEWEMP1	PERS	08/01/2016	Error Report	0	0		Rejected	2016090216424121
24121 - NEWEMP1	DSRS	09/01/2016	Error Report	1	0		Posted	2016090111524121
24121 - NEWEMP1	DSRS	09/01/2016	Error Report	1	0		Edit Reject	2016090111424121
24121 - NEWEMP1	TRS	09/01/2016	Error Report	1	0		Processed	2016090111324121
24121 - NEWEMP1	TRS	09/01/2016	Error Report	1	0		Edit Reject	2016090111224121
24121 - NEWEMP1	TRS	09/01/2016	Error Report	1	0		Edit Reject	2016090111124121
24121 - NEWEMP1			Error Report	0	0		Rejected	2016072110324121
24121 - NEWEMP1	PERS	09/01/2016	Error Report	0	0		Rejected	2016071575824121
24121 - NEWEMP1	PERS	06/01/2016	Error Report	1	0		Void	2016071575724121

Step 2 -- The selected employer's Error Report details displays, by selecting the **File Format Errors** radio button allows the ability to filter by:

- Show errors with severity:
    - Error – must correct formatting errors to resubmit
    - Warning – may require action however can be overridden
    - Information – No correction required, informational only
- Show errors from:
    - File Format Error – these errors are a result of formatting issues in the file.

      For ex. if an SSN has the letter "O" rather than the number "0" (zero) the record will be flagged as having an error.



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COMPASS

-- Available Forms --
Open

Report #: 8539
Type: Employment Classifications & Contributions
Mode: File Upload

Error Report

Show errors with severity: Rejected File; Error Rejected Records; Information

Show errors from: File Format Errors; Contribution Errors; Employment Classification Errors

Refresh

Error Code	Severity	Description	Line #	Col # From	Col # To
Employer: 24121 - NEWEMP1					
ER0297	Information	Person not found with this SSN. (ER0297)	2	2	10
ER0297	Information	Person not found with this SSN. (ER0297)	3	2	10
ER0297	Information	Person not found with this SSN. (ER0297)	4	2	10
ER0297	Information	Person not found with this SSN. (ER0297)	5	2	10
ER0297	Information	Person not found with this SSN. (ER0297)	6	2	10
ER0297	Information	Person not found with this SSN. (ER0297)	7	2	10
ER0297	Information	Person not found with this SSN. (ER0297)	8	2	10
ER0297	Information	Person not found with this SSN. (ER0297)	9	2	10
ER0297	Information	Person not found with this SSN. (ER0297)	10	2	10
ER0297	Information	Person not found with this SSN. (ER0297)	11	2	10

Record Text

Display Records 10
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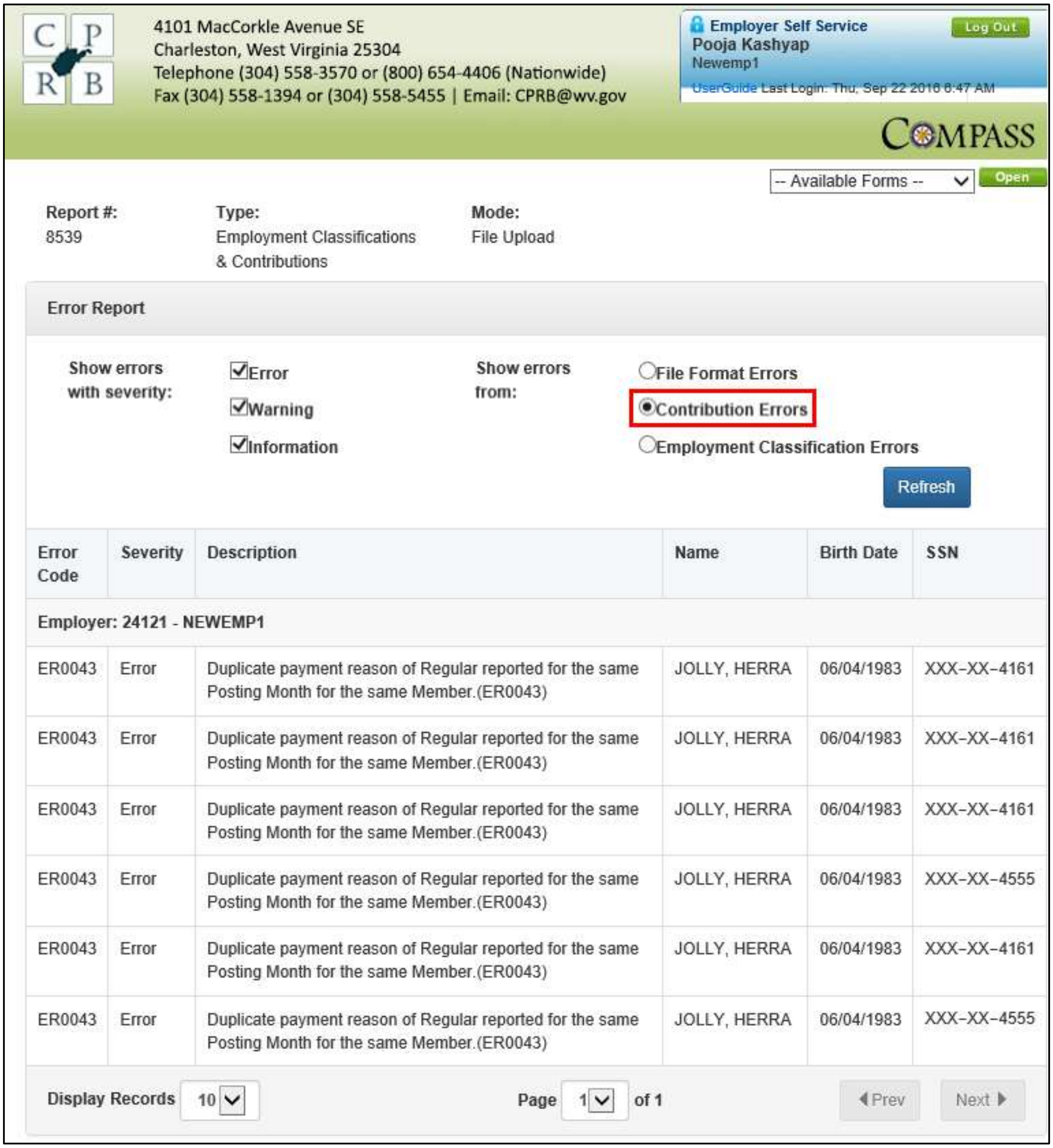
Next

Step 3 -- The selected employer's Error Report details displays, by selecting **Contributions Errors** radio button allows the ability to filter by:

- Show errors with severity:
  - Error – must correct formatting errors to resubmit
  - Warning – may require action however can be overridden
  - Information – No correction required, informational only
- Show errors from:
  - Contribution Errors – these errors are a result of information reported that does not adhere to CPRB regulations.
  - For example, if the date of birth entered means the employee would be 5 years old, the validations within ESS would flag this record as an error because the legal working age is 14 years old.



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COMPASS

-- Available Forms -- Open

Report #: 8539
Type: Employment Classifications & Contributions
Mode: File Upload

Error Report

Show errors with severity: Error, Warning, Information
Show errors from: File Format Errors, Contribution Errors, Employment Classification Errors

Refresh

Error Code	Severity	Description	Name	Birth Date	SSN
Employer: 24121 - NEWEMP1					
ER0043	Error	Duplicate payment reason of Regular reported for the same Posting Month for the same Member.(ER0043)	JOLLY, HERRA	06/04/1983	XXX-XX-4161
ER0043	Error	Duplicate payment reason of Regular reported for the same Posting Month for the same Member.(ER0043)	JOLLY, HERRA	06/04/1983	XXX-XX-4161
ER0043	Error	Duplicate payment reason of Regular reported for the same Posting Month for the same Member.(ER0043)	JOLLY, HERRA	06/04/1983	XXX-XX-4161
ER0043	Error	Duplicate payment reason of Regular reported for the same Posting Month for the same Member.(ER0043)	JOLLY, HERRA	06/04/1983	XXX-XX-4555
ER0043	Error	Duplicate payment reason of Regular reported for the same Posting Month for the same Member.(ER0043)	JOLLY, HERRA	06/04/1983	XXX-XX-4161
ER0043	Error	Duplicate payment reason of Regular reported for the same Posting Month for the same Member.(ER0043)	JOLLY, HERRA	06/04/1983	XXX-XX-4555

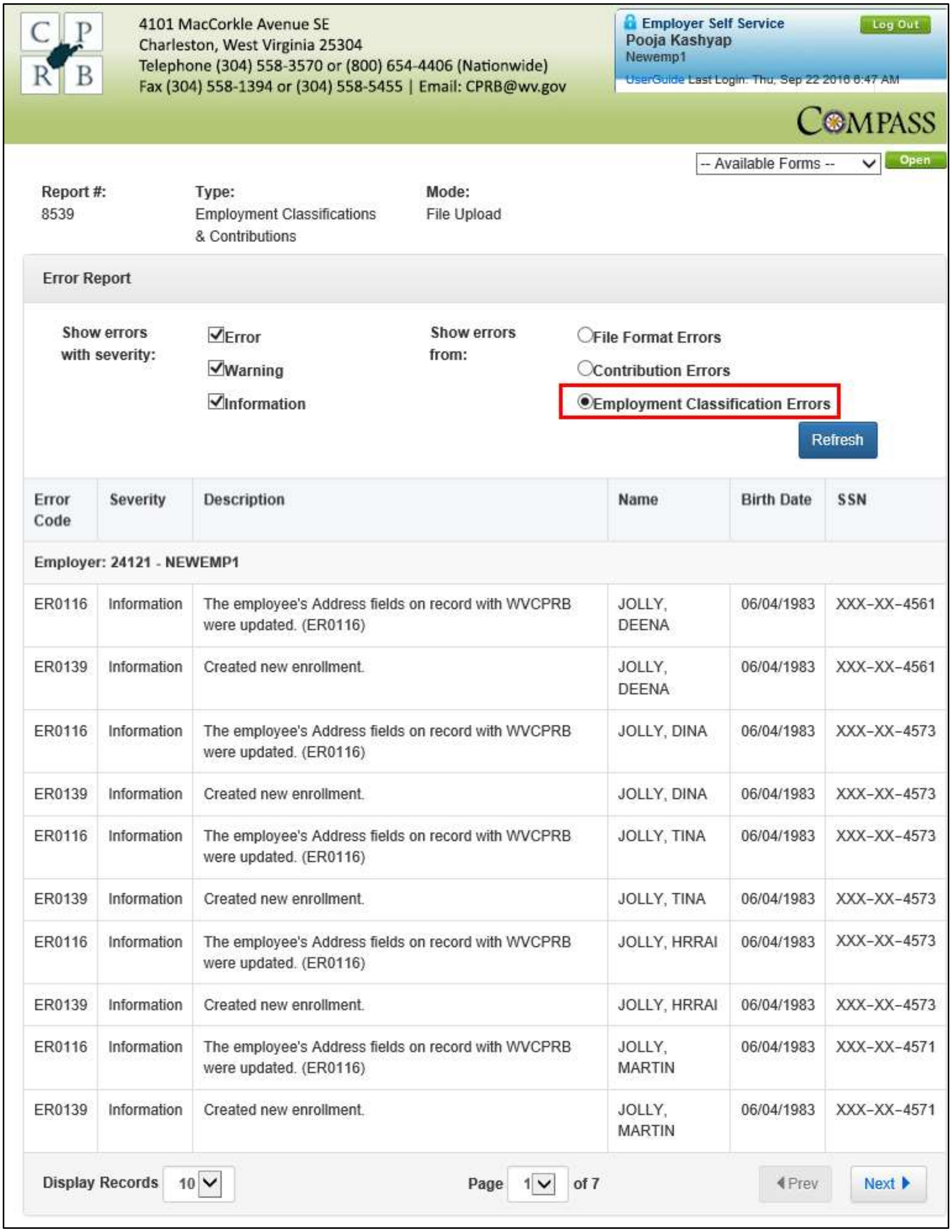
Display Records 10 Page 1 of 1 Prev Next

Step 4 -- The selected employer's Error Report details displays, by selecting **Enrollment Errors** radio button allows the ability to filter by:

- Show errors with severity:
  - Error – must correct formatting errors to resubmit
  - Warning – may require action however can be overridden
  - Information – No correction required, informational only
- Show errors from:
  - Enrollment Errors – these errors are a result of information reported that does not adhere to CPRB regulations.
  - For example, if the date of birth entered means the employee would be 5 years old, the validations within the ESS portal would flag this record as an error because the legal working age is 14 years old.

Step 5 -- If the file has been accepted, follow the steps in 7.3.2 Correct Employment Classification and Contributions Upload File Errors. If the file has been rejected, correct the rejected file and re-upload the file.

Note: Use the descriptions provided for the rejected files to make corrections and use the COMPASS Employer Reporting File Format document (which can be found here: http://www.wvretirement.com/Forms/COMPASS-Eer-ReportingFile.pdf) to ensure the file has the proper layout and/or verify the information in the file is correct to re-upload the file.



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-- Available Forms -- Open

Report #: 8539
Type: Employment Classifications & Contributions
Mode: File Upload

Error Report

Show errors with severity: ☑Error ☑Warning ☑Information

Show errors from: ○File Format Errors ○Contribution Errors ◉Employment Classification Errors

Refresh

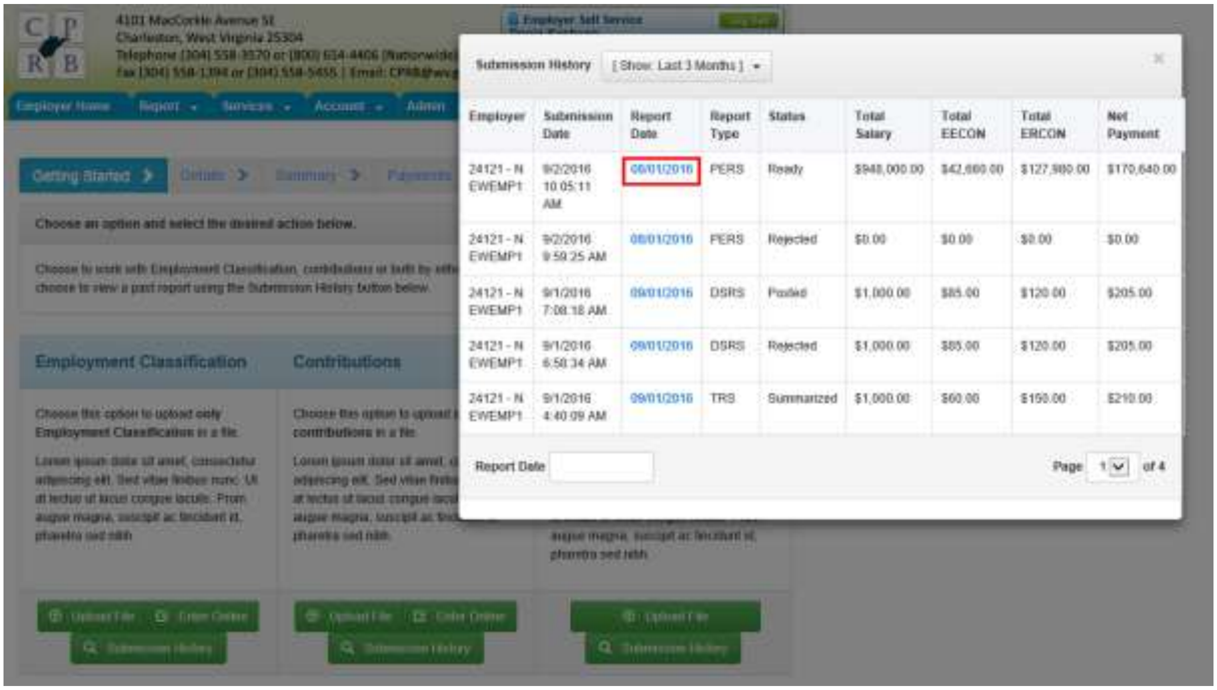
Error Code	Severity	Description	Name	Birth Date	SSN
Employer: 24121 - NEWEMP1					
ER0116	Information	The employee's Address fields on record with WVCPRB were updated. (ER0116)	JOLLY, DEENA	06/04/1983	XXX-XX-4561
ER0139	Information	Created new enrollment.	JOLLY, DEENA	06/04/1983	XXX-XX-4561
ER0116	Information	The employee's Address fields on record with WVCPRB were updated. (ER0116)	JOLLY, DINA	06/04/1983	XXX-XX-4573
ER0139	Information	Created new enrollment.	JOLLY, DINA	06/04/1983	XXX-XX-4573
ER0116	Information	The employee's Address fields on record with WVCPRB were updated. (ER0116)	JOLLY, TINA	06/04/1983	XXX-XX-4573
ER0139	Information	Created new enrollment.	JOLLY, TINA	06/04/1983	XXX-XX-4573
ER0116	Information	The employee's Address fields on record with WVCPRB were updated. (ER0116)	JOLLY, HRRAI	06/04/1983	XXX-XX-4573
ER0139	Information	Created new enrollment.	JOLLY, HRRAI	06/04/1983	XXX-XX-4573
ER0116	Information	The employee's Address fields on record with WVCPRB were updated. (ER0116)	JOLLY, MARTIN	06/04/1983	XXX-XX-4571
ER0139	Information	Created new enrollment.	JOLLY, MARTIN	06/04/1983	XXX-XX-4571

Display Records 10 | Page 1 of 7 | ◂Prev | Next ▸

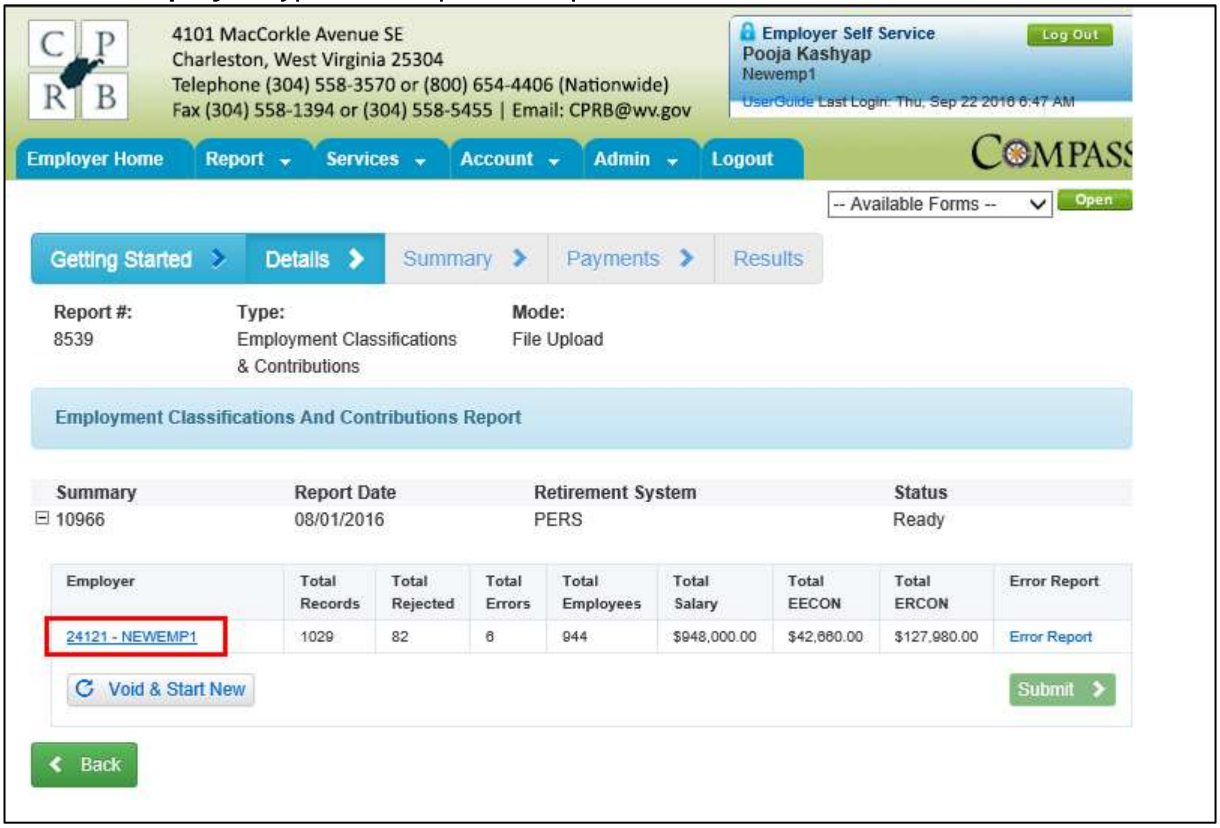
7.3.2 Correct Employment Classification and Contributions Upload File Errors

Follow the below steps to correct errors in a combined employment classification and contribution upload file:

Step 1 -- Click the **hyperlink** (report date) for the employer report which needs to be corrected or edited.

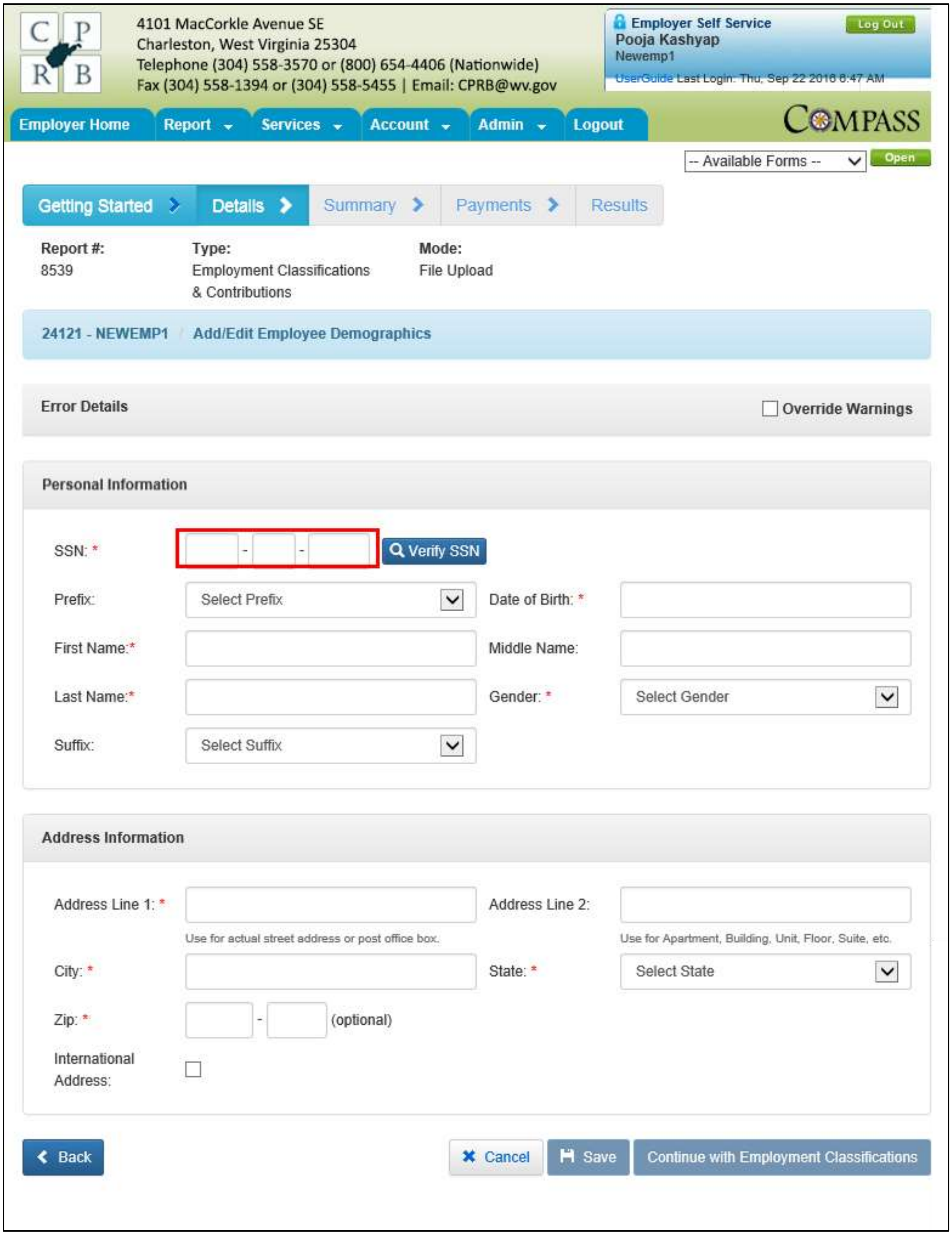


Step 2 -- Click the **Employer** hyperlink to open the report.



Step 3 -- In the **Personal Information** section, enter the SSN of the employee and click the Verify SSN button. If the employee already has a record with CPRB, the **Personal Information** section will automatically populate the employee's information.

Note: If the employee's personal information is pre-populated skip to step 14 of this Section.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Employer Home
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Services
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Admin
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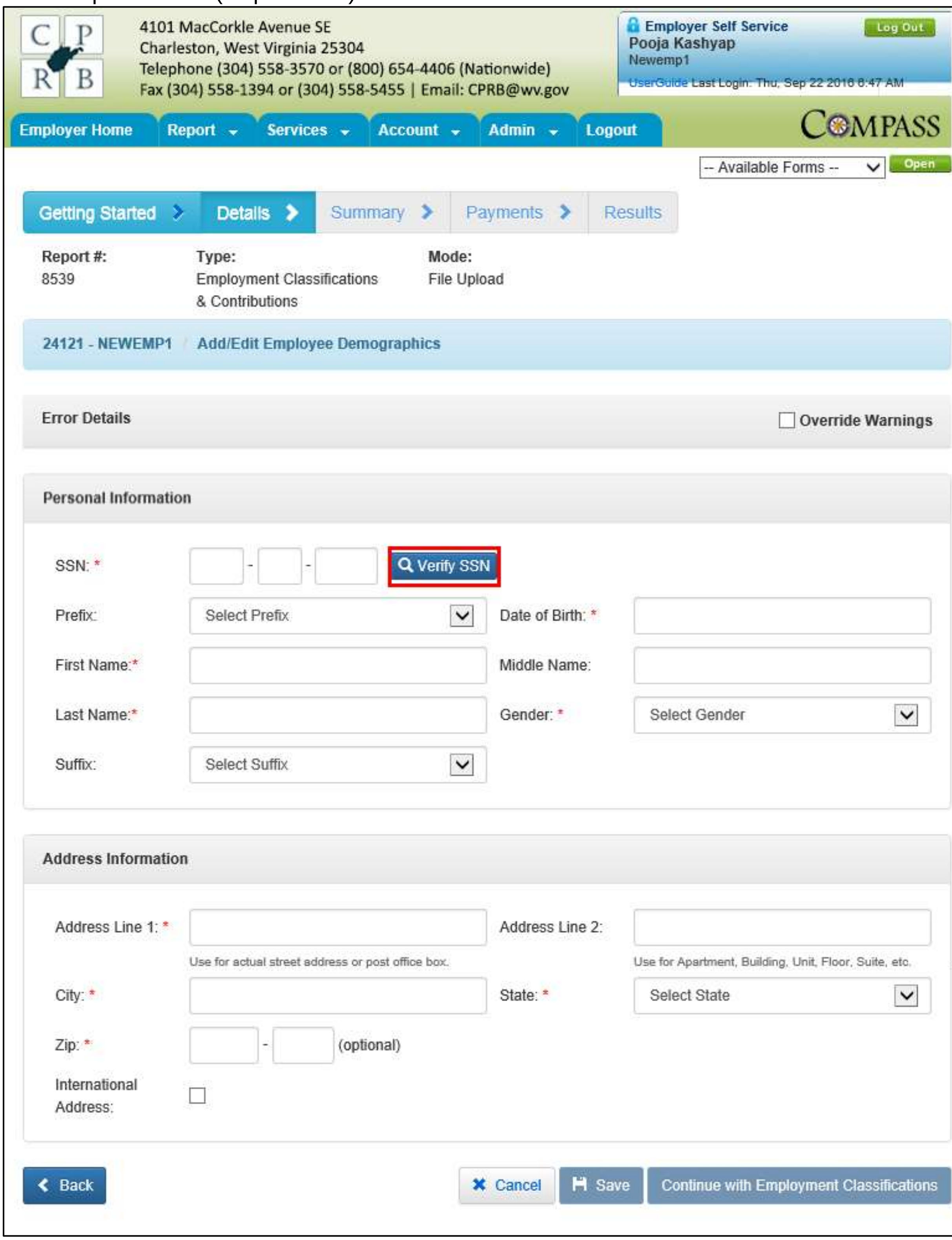
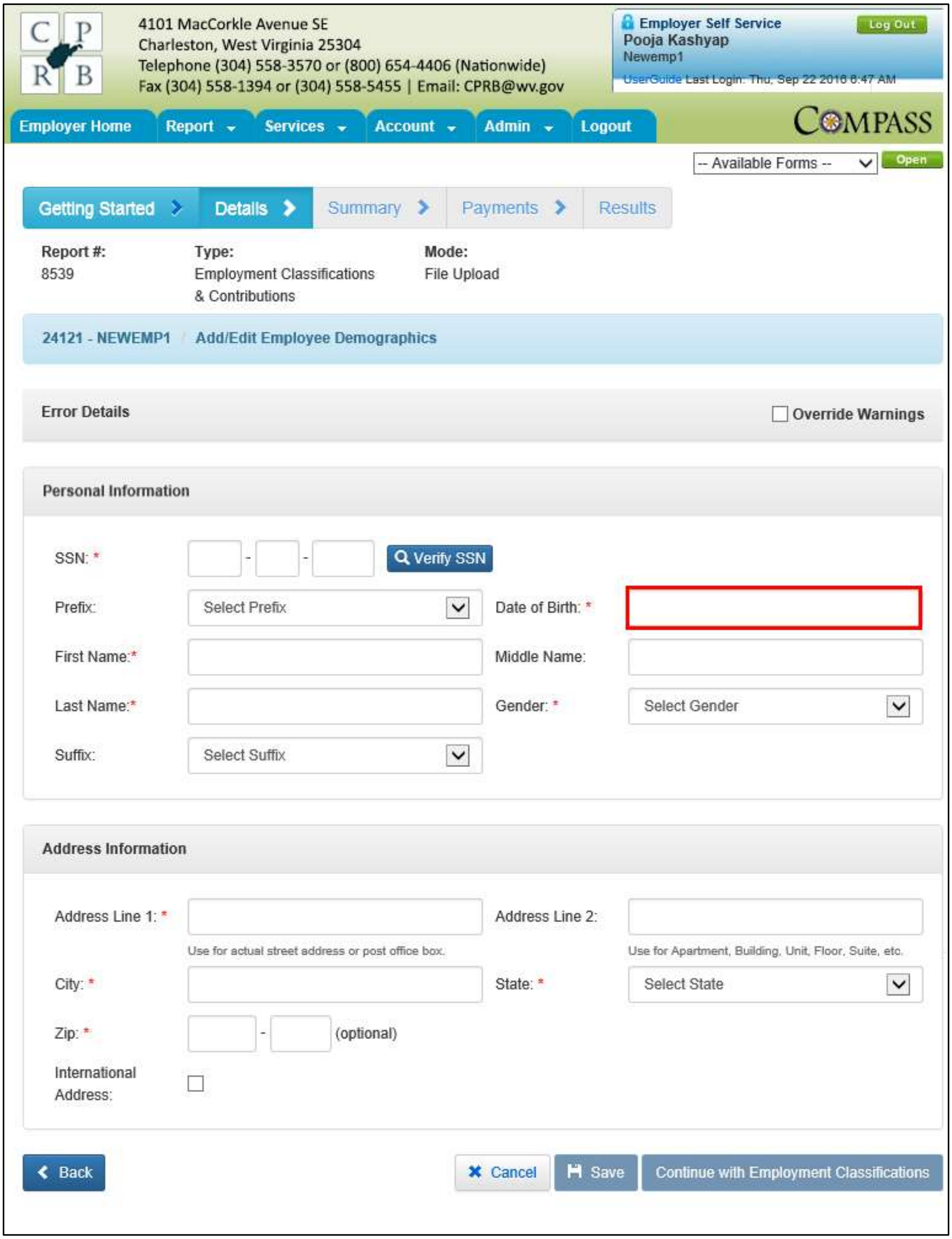
-- Available Forms --
Open
Getting Started
Details
Summary
Payments
Results
Report #:
8539
Type:
Employment Classifications & Contributions
Mode:
File Upload
24121 - NEWEMP1
Add/Edit Employee Demographics
Error Details
Override Warnings
Personal Information
SSN: *
Verify SSN
Prefix:
Select Prefix
Date of Birth: *
First Name:*
Middle Name:
Last Name:*
Gender: *
Select Gender
Suffix:
Select Suffix
Address Information
Address Line 1: *
Address Line 2:
Use for actual street address or post office box.
Use for Apartment, Building, Unit, Floor, Suite, etc.
City: *
State: *
Select State
Zip: *
(optional)
International Address:
Back
Cancel
Save
Continue with Employment Classifications

Step 4 -- If the employee **does not have an existing record with CPRB in COMPASS**, enter the **SSN**, click the Verify SSN button and enter the demographic information in the required fields (steps 5 – 13).



Step 5 -- Enter the **Date of Birth** (mm/dd/yyyy) in the field.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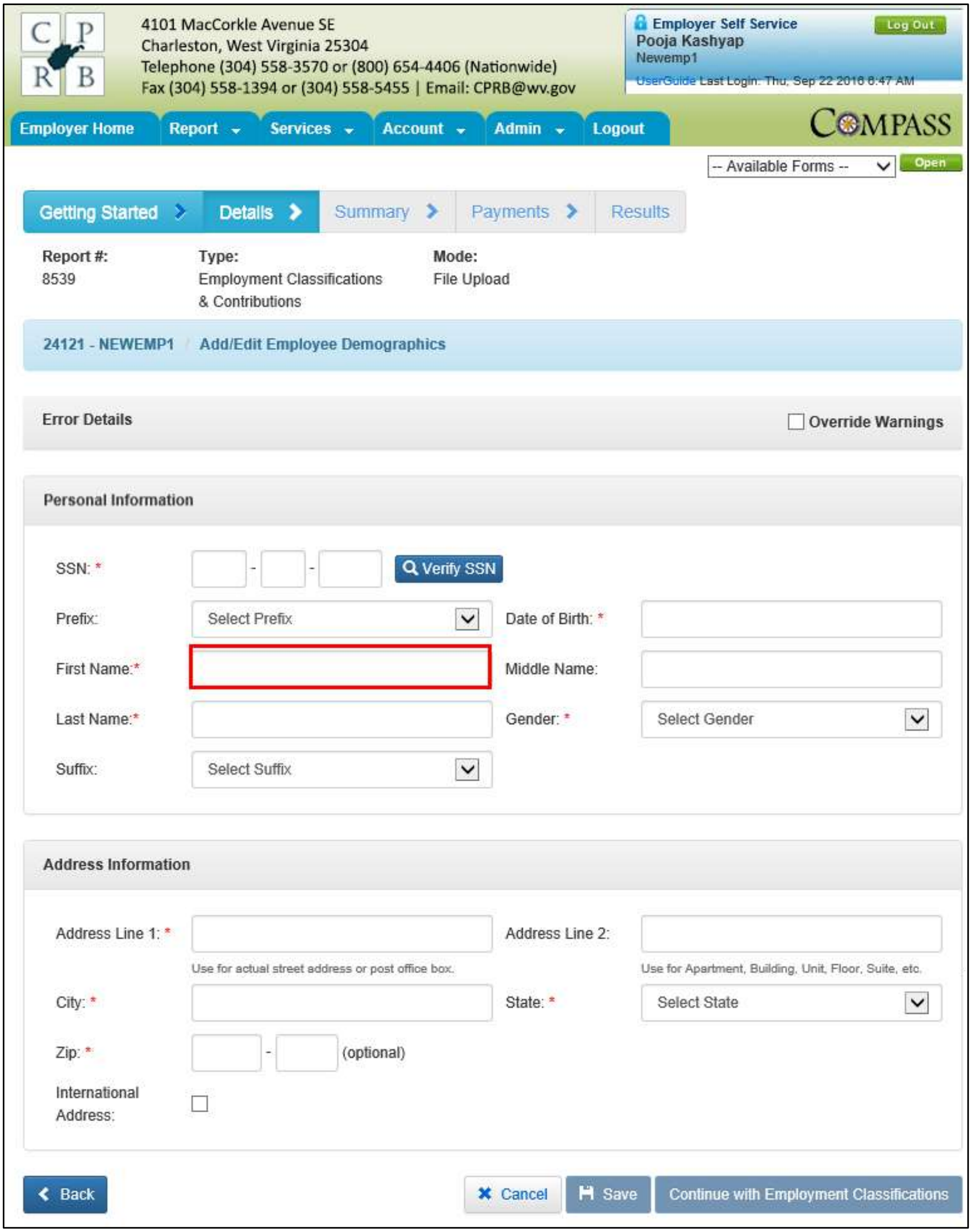
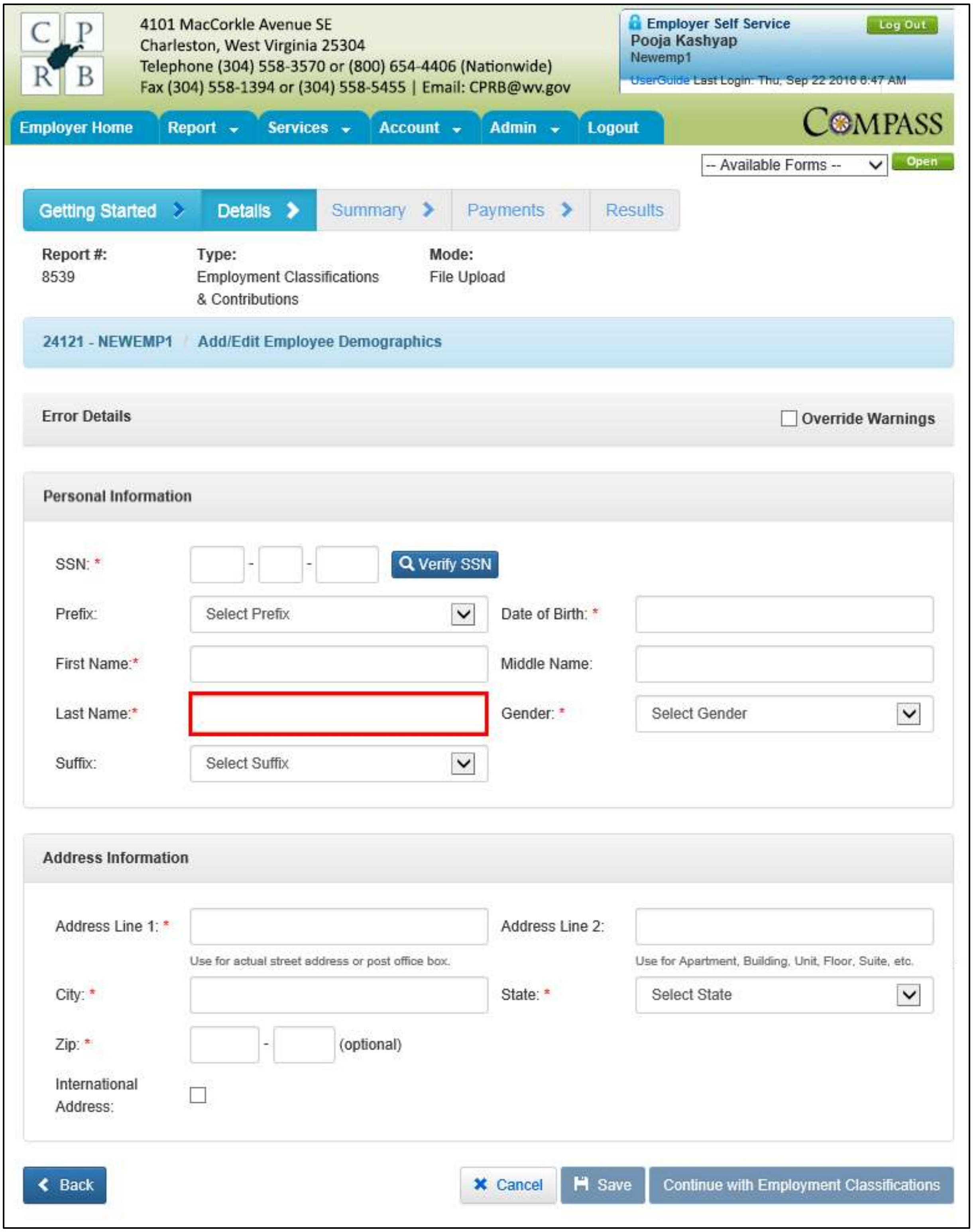
8539
Type:
Employment Classifications & Contributions
Mode:
File Upload
24121 - NEWEMP1 / Add/Edit Employee Demographics
Error Details
Override Warnings
Personal Information
SSN: *
Verify SSN
Prefix:
Select Prefix
Date of Birth: *
First Name:*
Middle Name:
Last Name:*
Gender: *
Select Gender
Suffix:
Select Suffix
Address Information
Address Line 1: *
Address Line 2:
Use for actual street address or post office box.
Use for Apartment, Building, Unit, Floor, Suite, etc.
City: *
State: *
Select State
Zip: *
(optional)
International Address:
Back
Cancel
Save
Continue with Employment Classifications

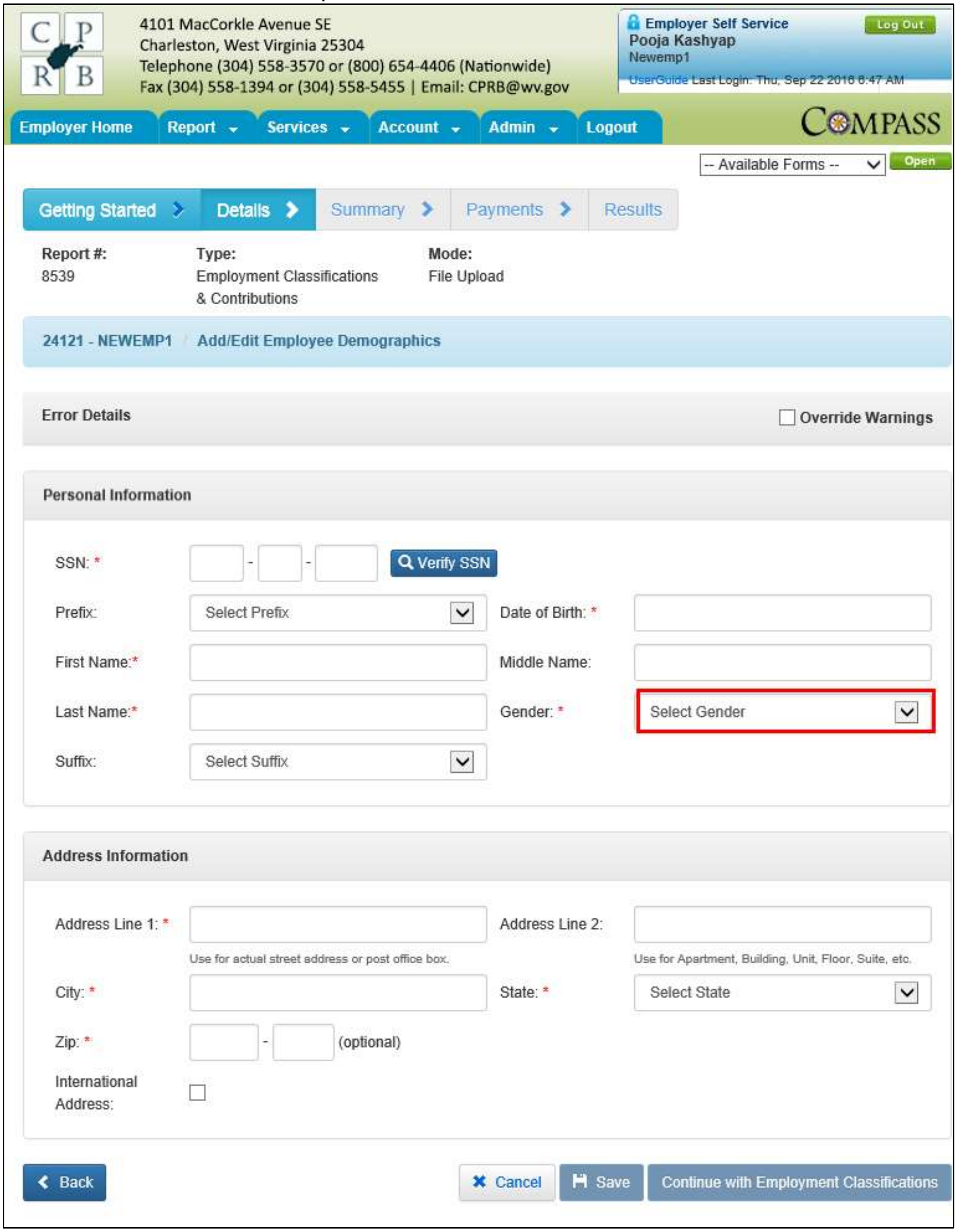
Step 6 -- Enter the **First Name** in the text field.



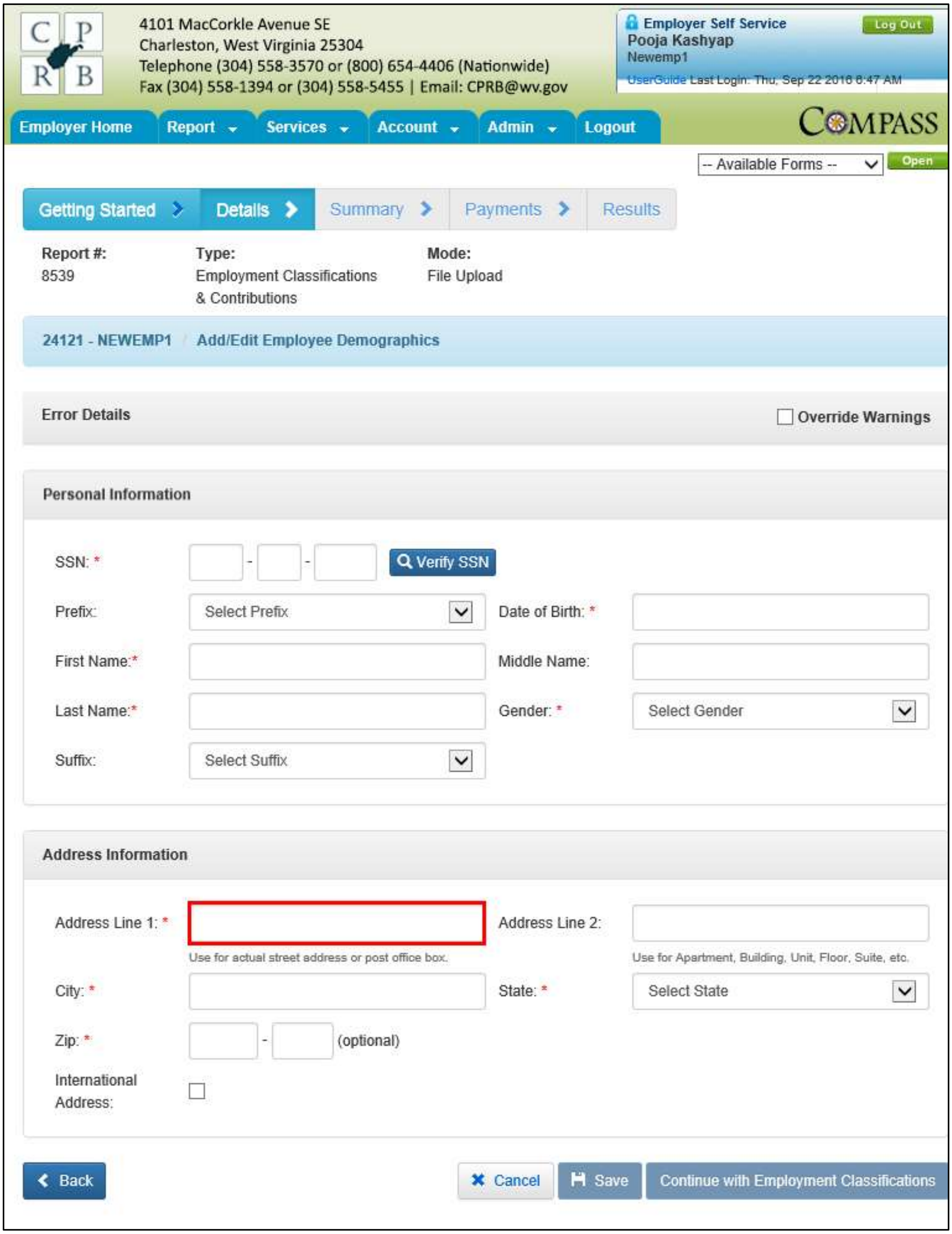
Step 7 -- Enter the **Last Name** in the text field.



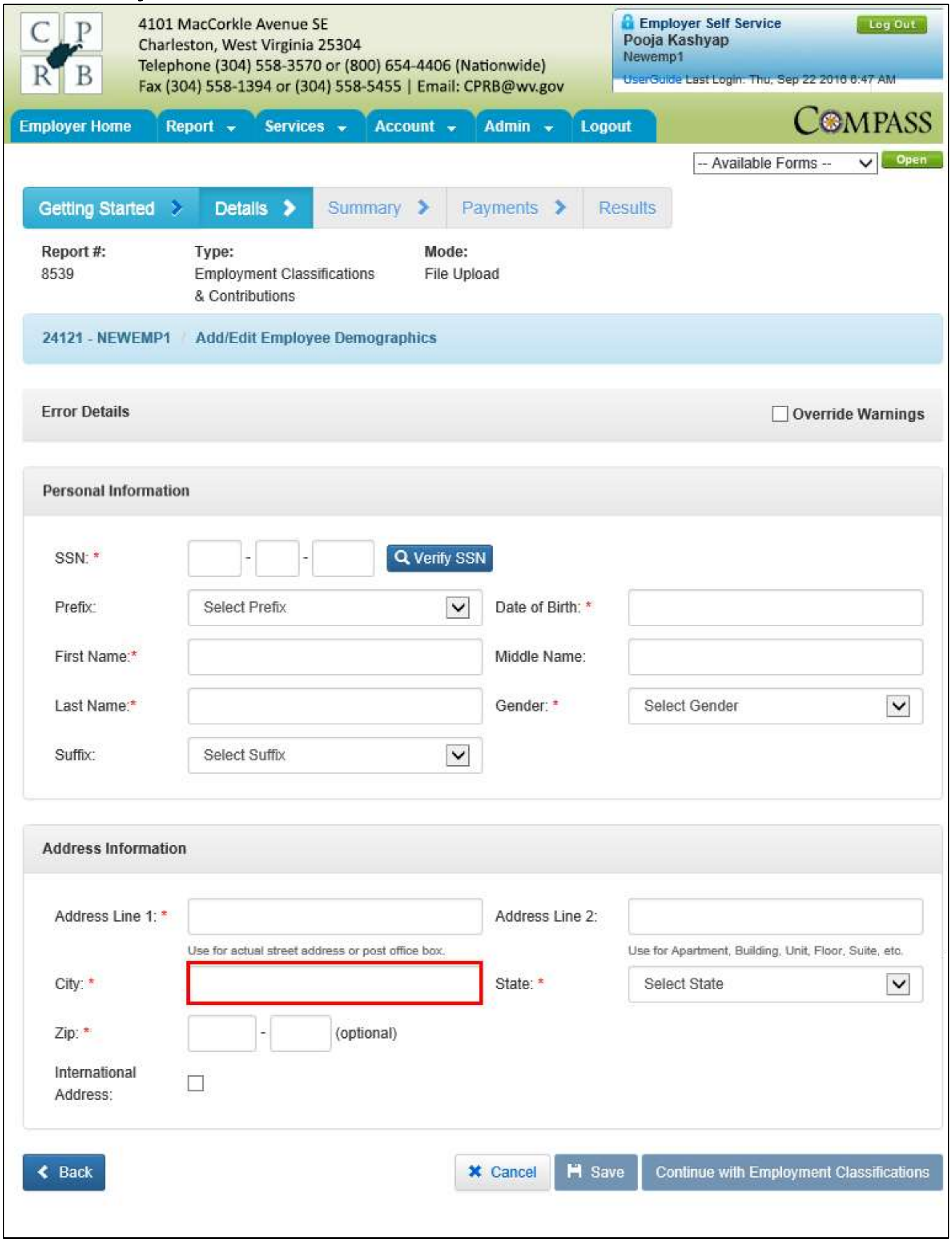
Step 8 -- Select the **Gender** from the drop down menu.



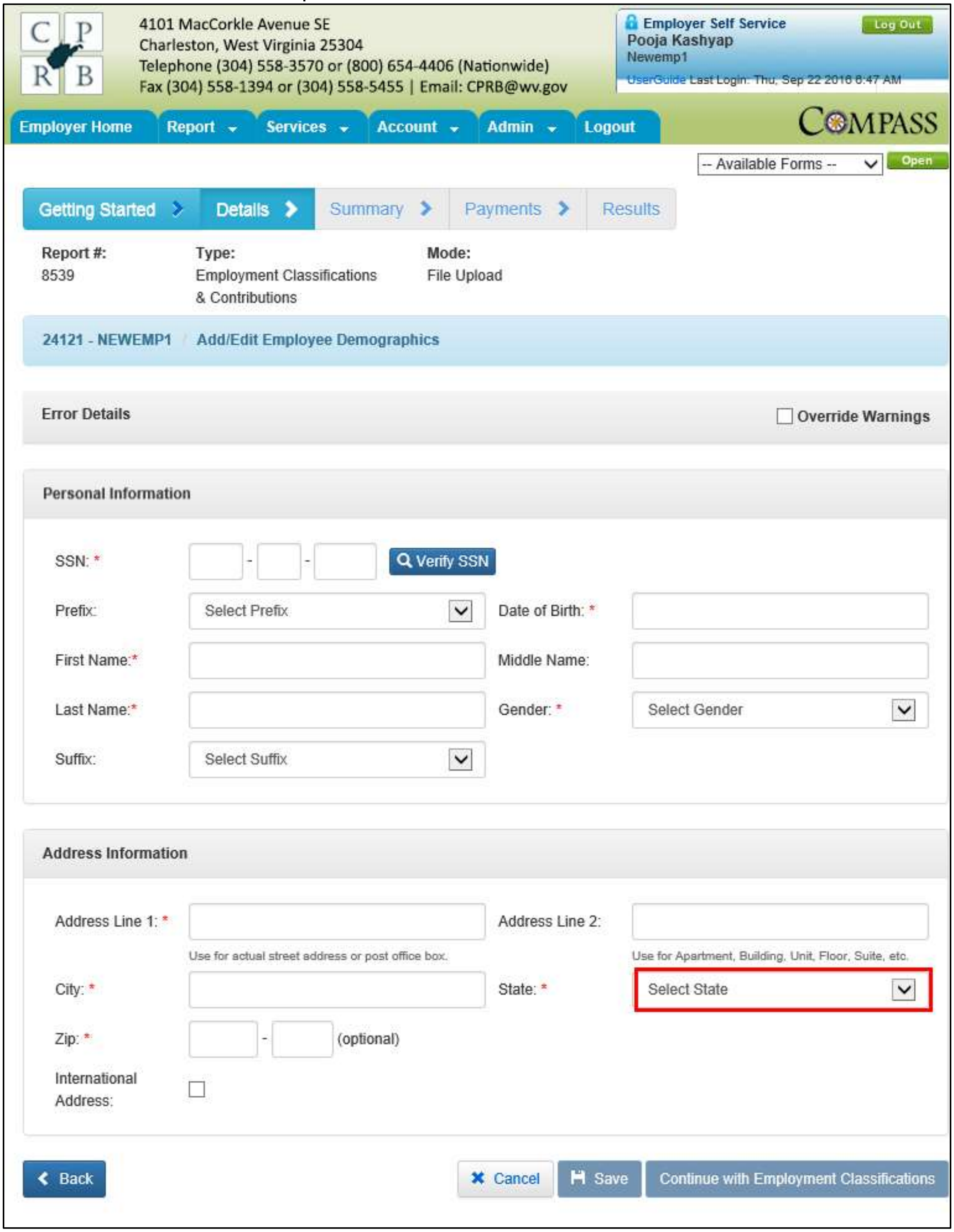
Step 9 -- In the Address Information section, enter the **Address Line 1** in the text field.



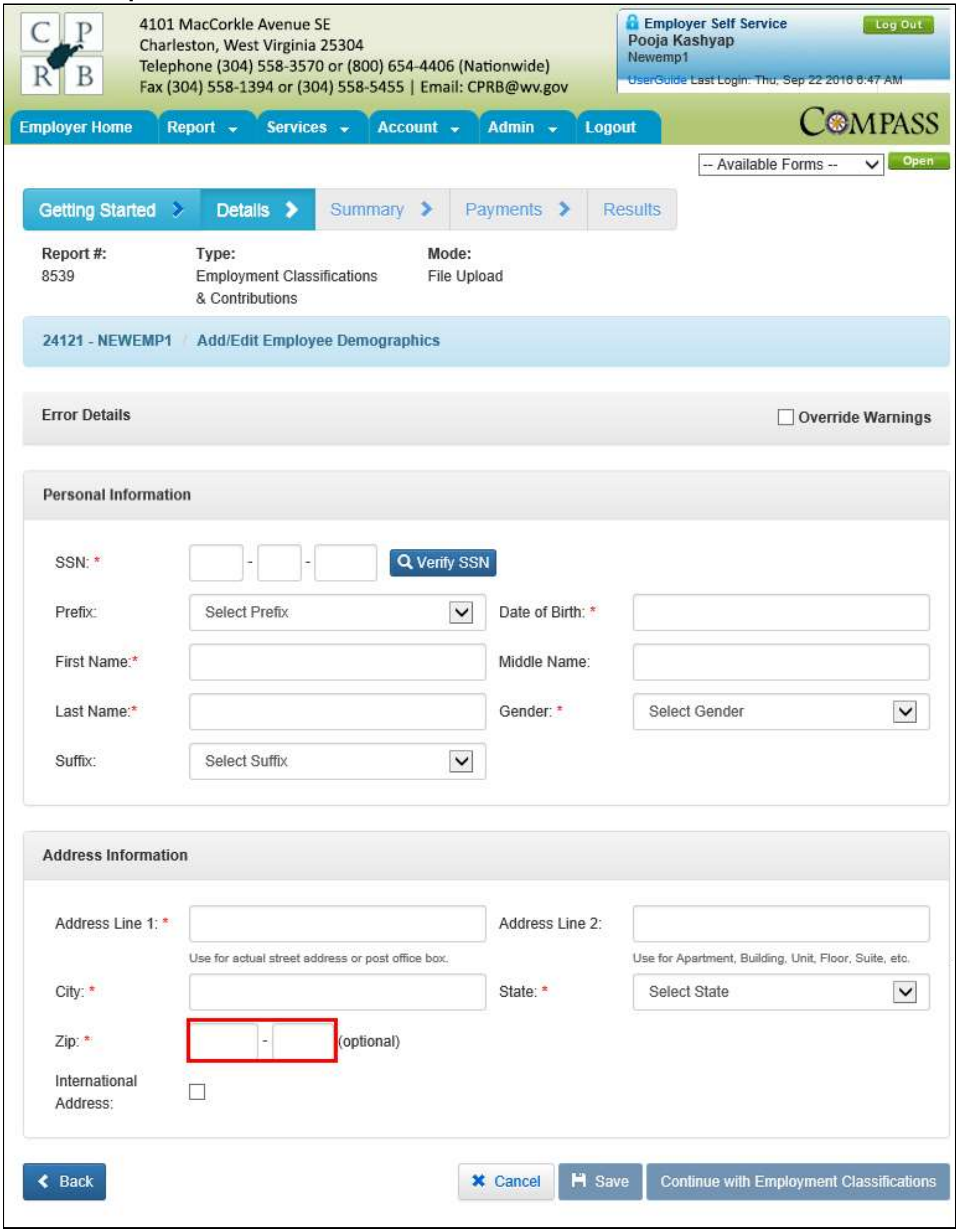
Step 10 -- Enter the **City** in the text field.



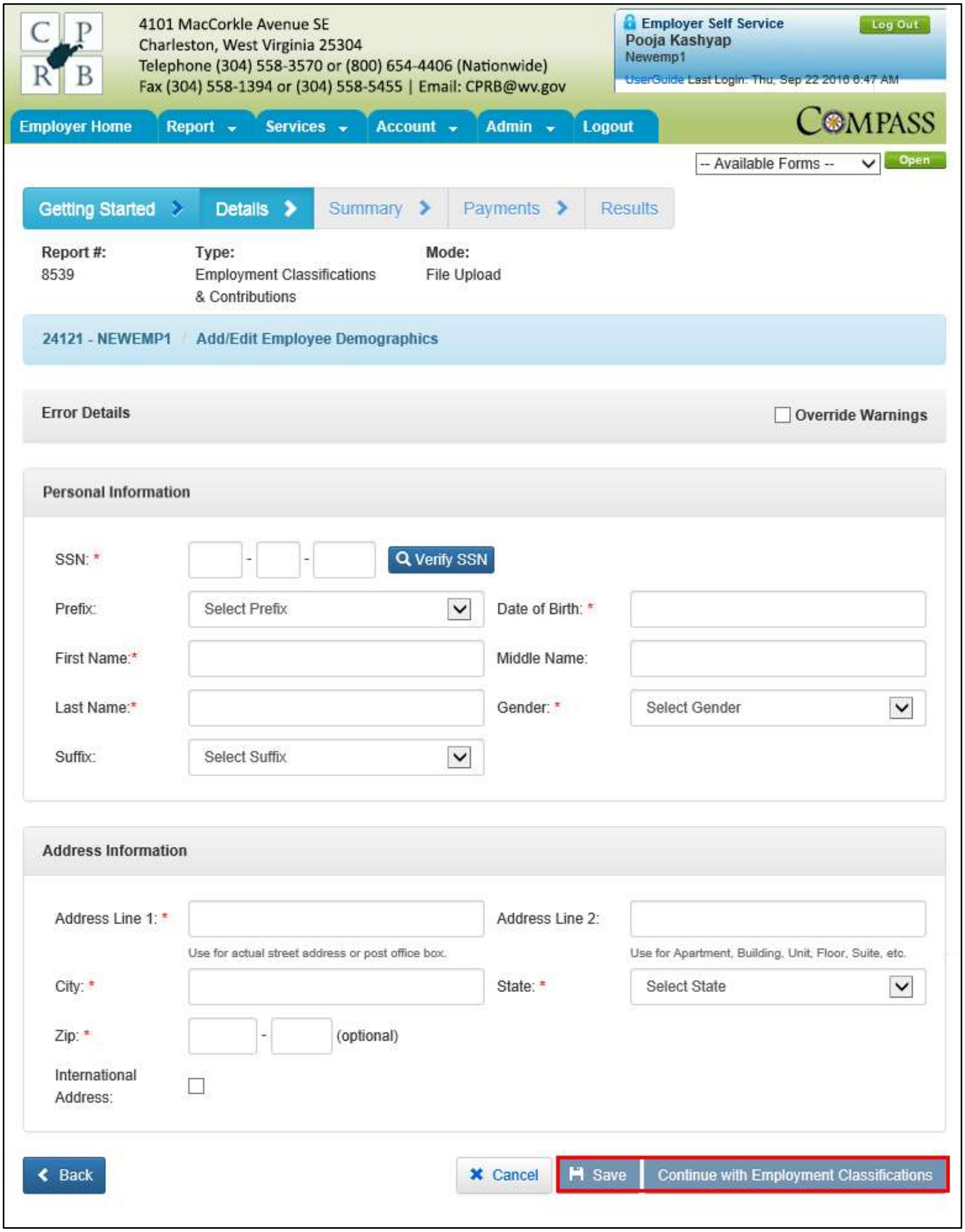
Step 11 -- Select the **State** from the drop down menu.



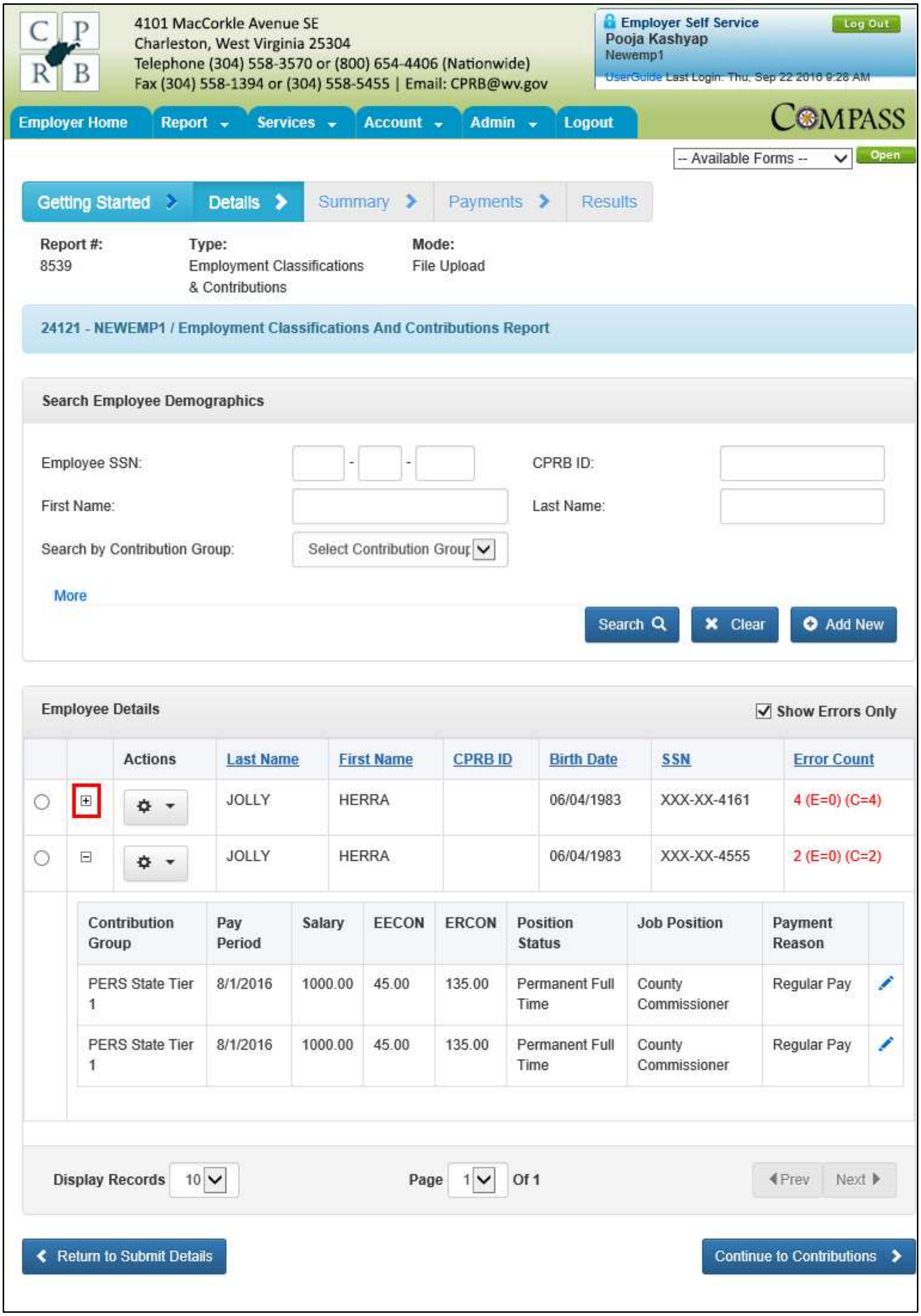
Step 12 -- Enter the **Zip** in the text field.



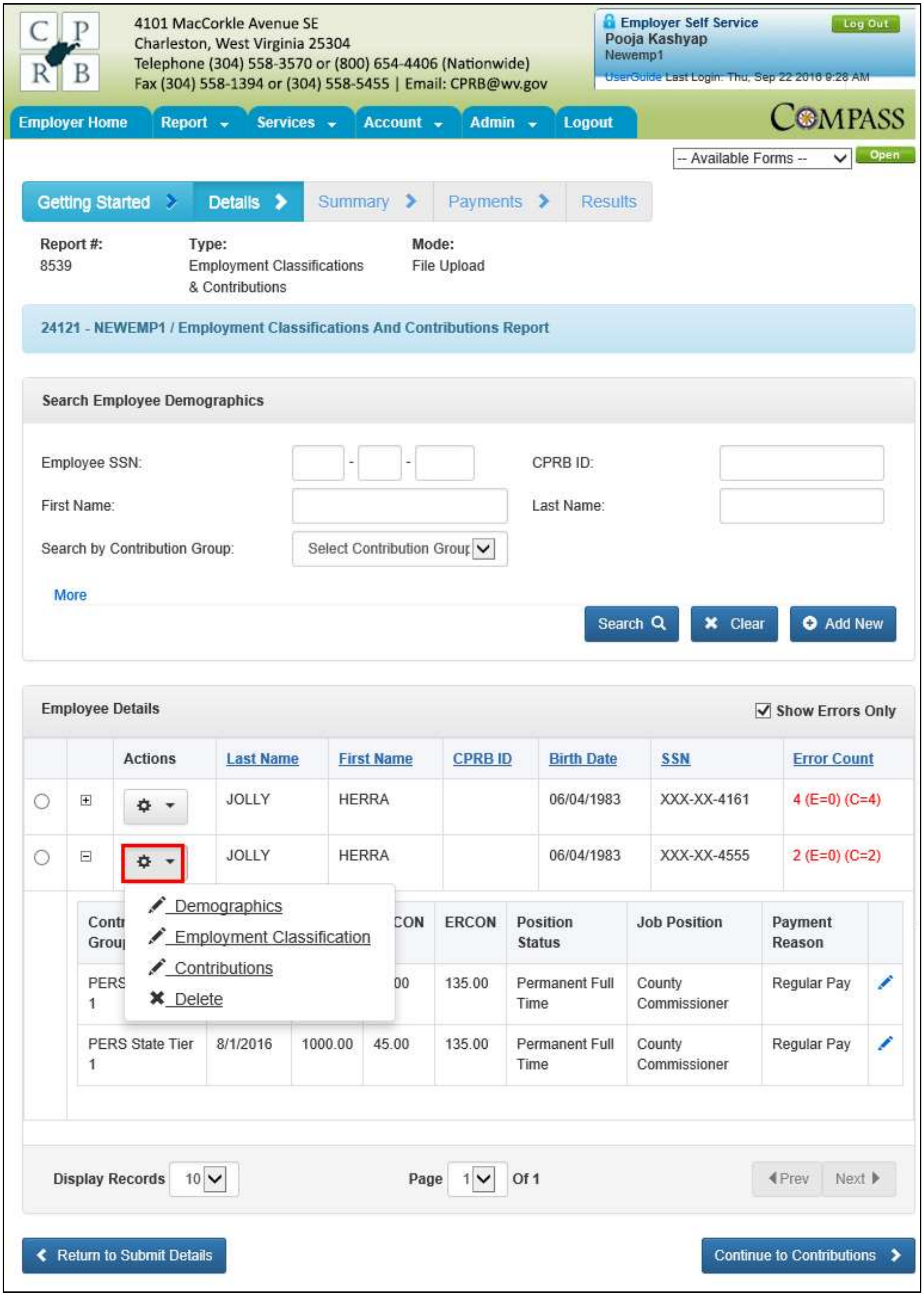
Step 13 -- Click the **Save** button to save the details and then click the **Continue with Enrollments** button to enter employment classification information.



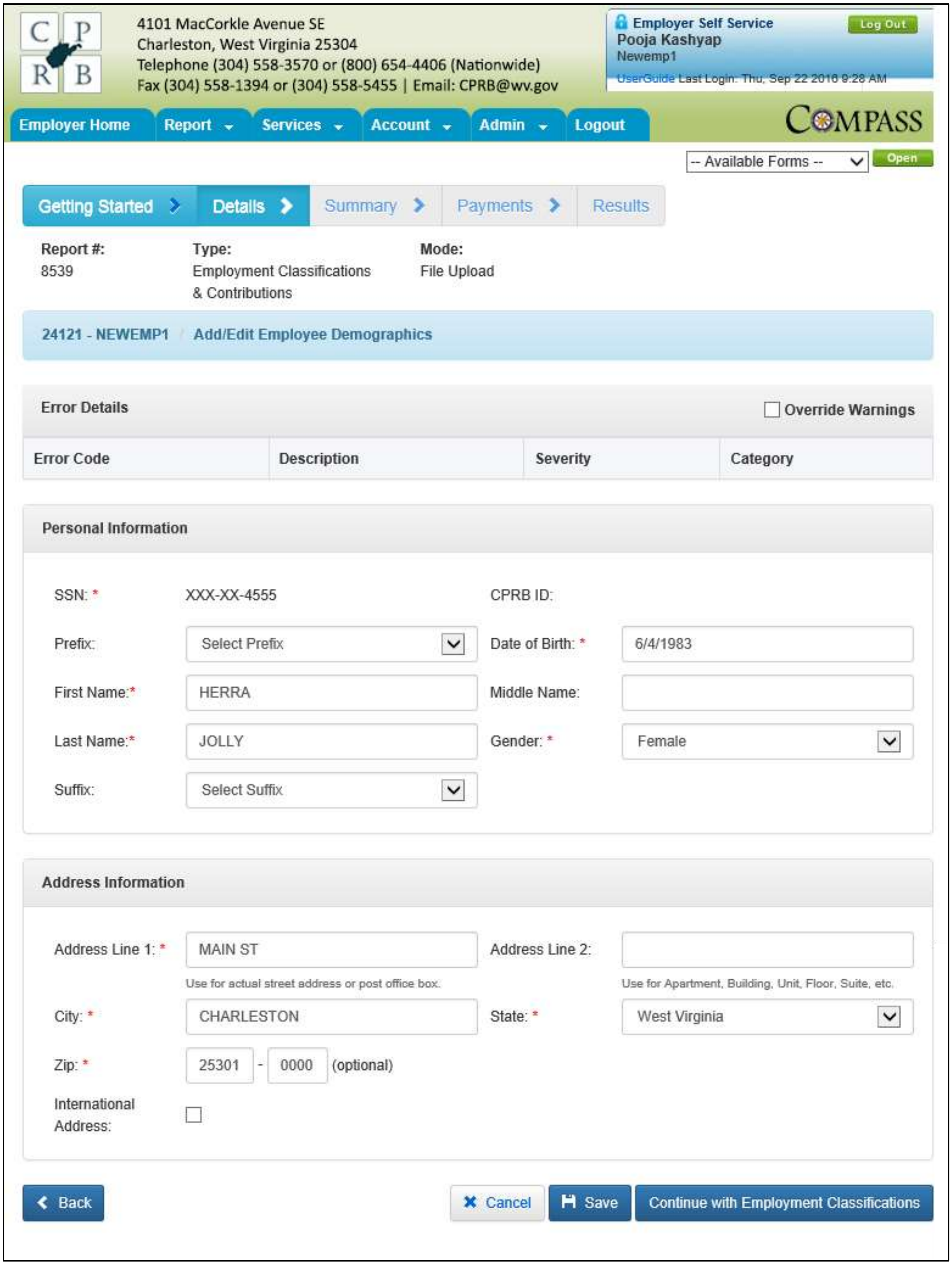
Step 14 -- Click the expand icon to view errors.



Step 15 -- In the **Employee Details** section, click the **Actions** drop down menu to add or edit the employment classification and/or contribution information to correct the error.

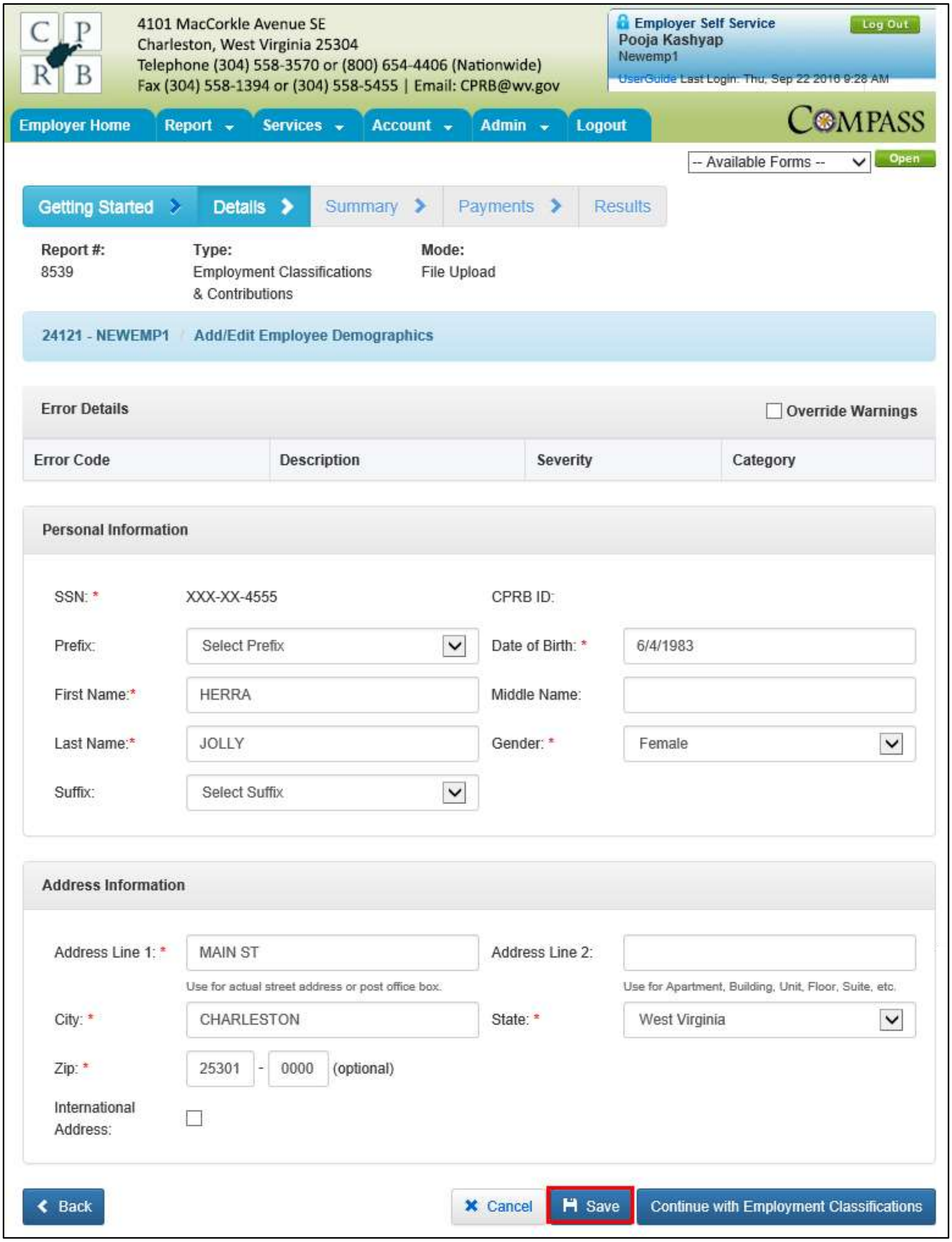


Step 16 -- Update the **Address Information** section if needed, click the Save button and Continue with Enrollments button.

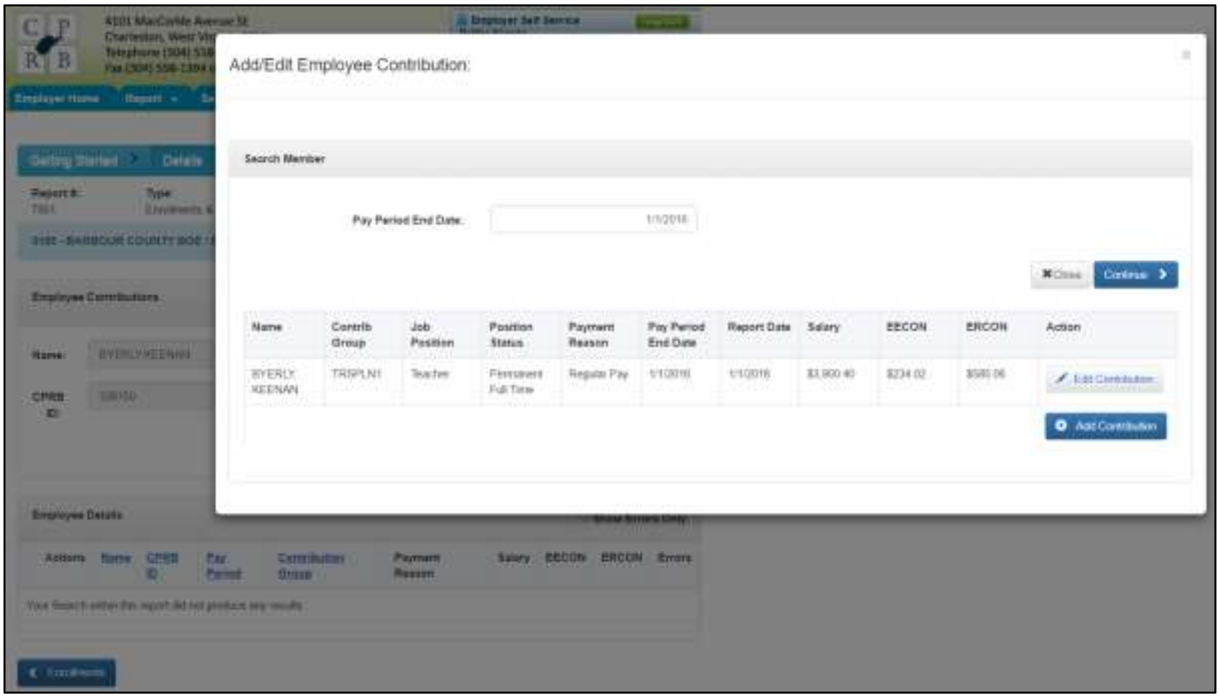


Step 17 -- The **Add/Edit Employment Information** pop-up window displays. Add or update the required fields, click the 

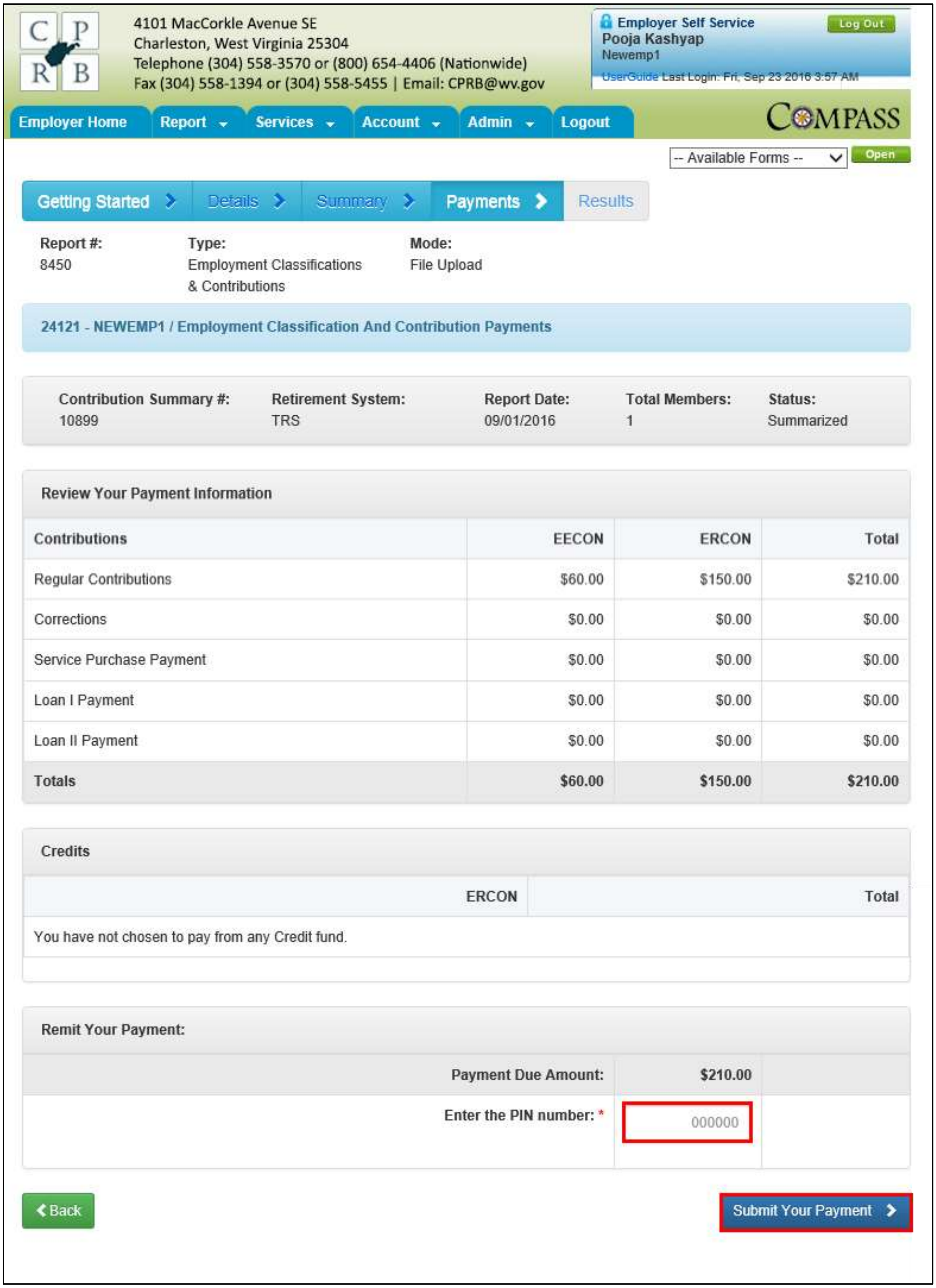
button.



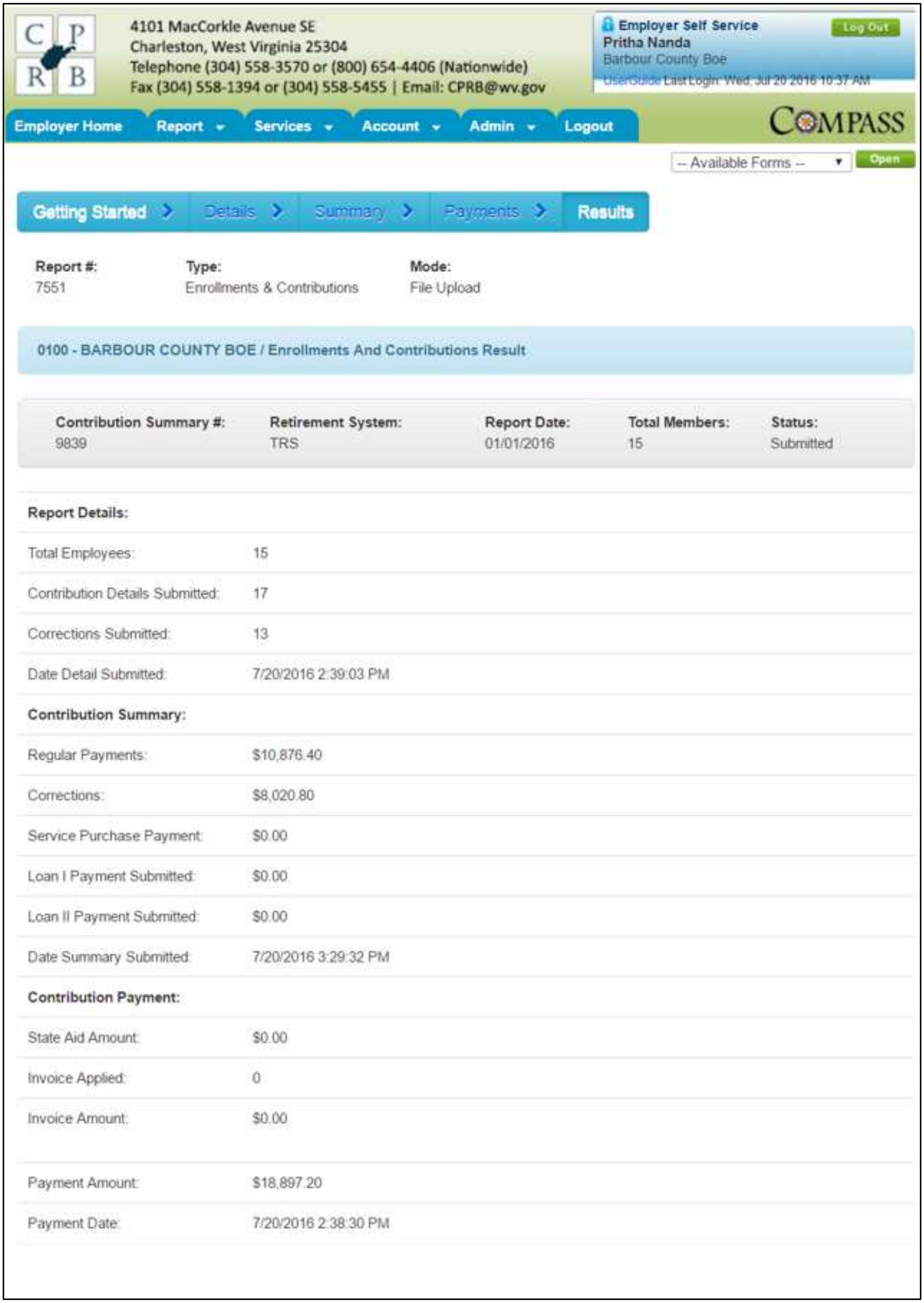
Step 18 -- The **Add/edit Contribution** pop-up window displays, click the **Edit Contribution** button to edit the contribution information or click **Add Contribution** button to add contribution information.



Step 19 -- Enter the **PIN number** and click the Submit Your Payment button.



Step 20 -- The **Employment Classification and Contributions Results** screen displays.



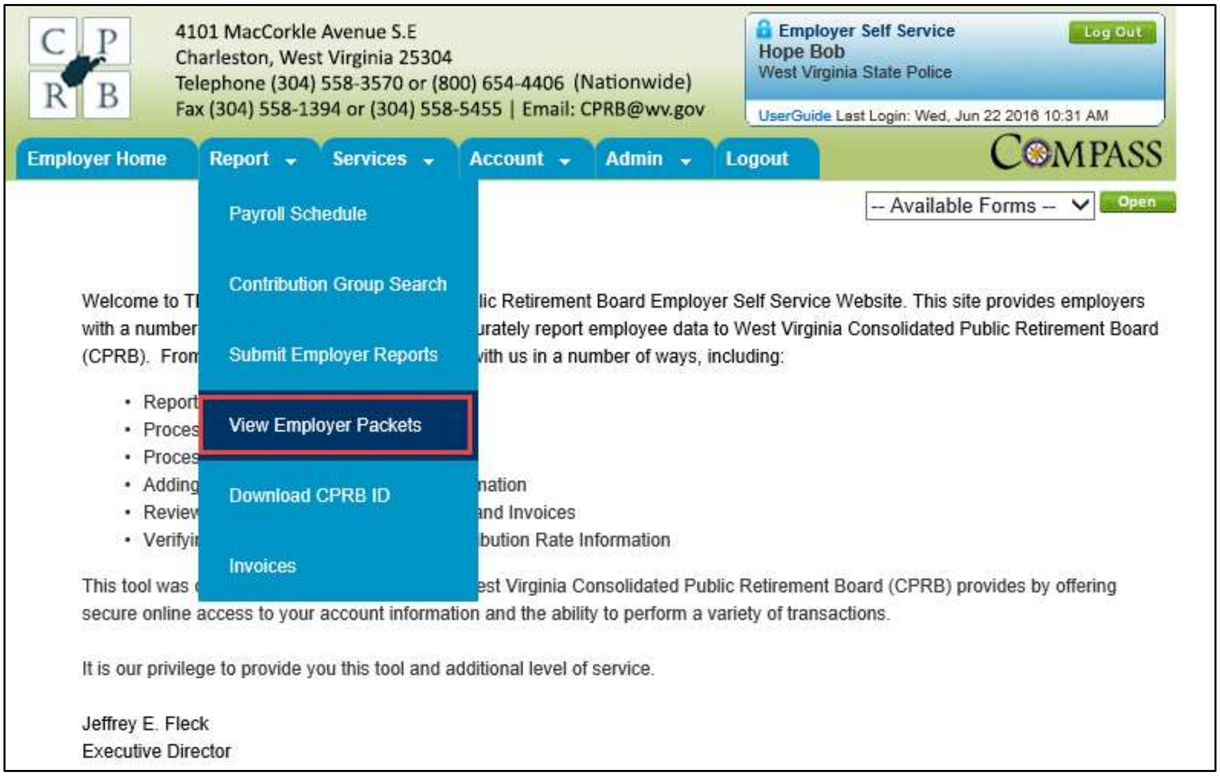
8. View Employer Packet

An **Employer Packet** contains information (such as a list of employees on leave without pay, employees with multiple plan participant and etc.) from the employer's last Contributions or Employment Classification and Contributions report submission. The employer packet displays as a link that opens up a report in the PDF format. Employer Packets are generated five business days after the employer's report is posted. Once the packets are generated, the primary Payroll Coordinator for the employer is alerted via an email that the packet is ready for viewing.

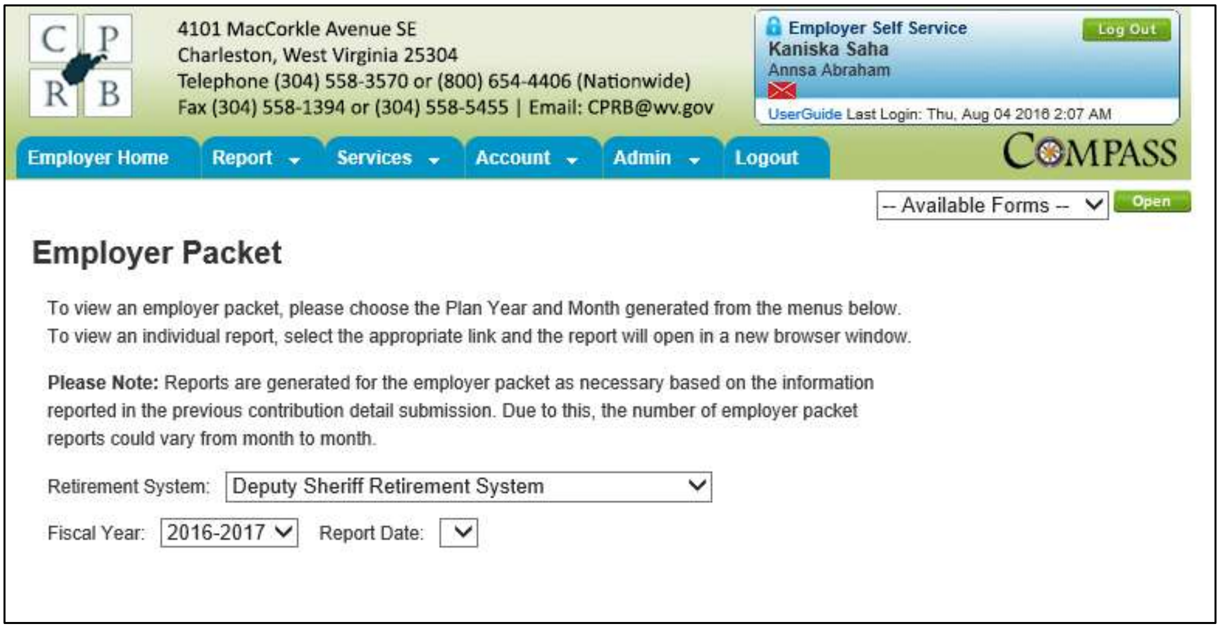
The following steps describe how to navigate to the **View Employer Packets** screen:

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

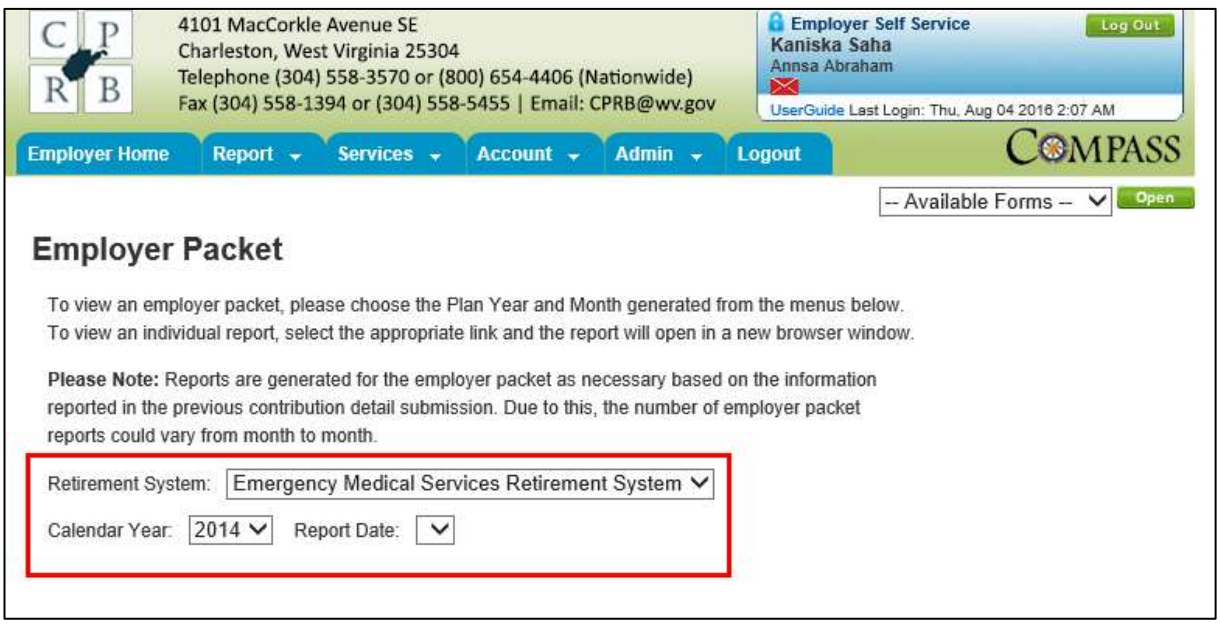
Report > **View Employer Packets**



Step 2 -- The **Employer Packet** screen displays.

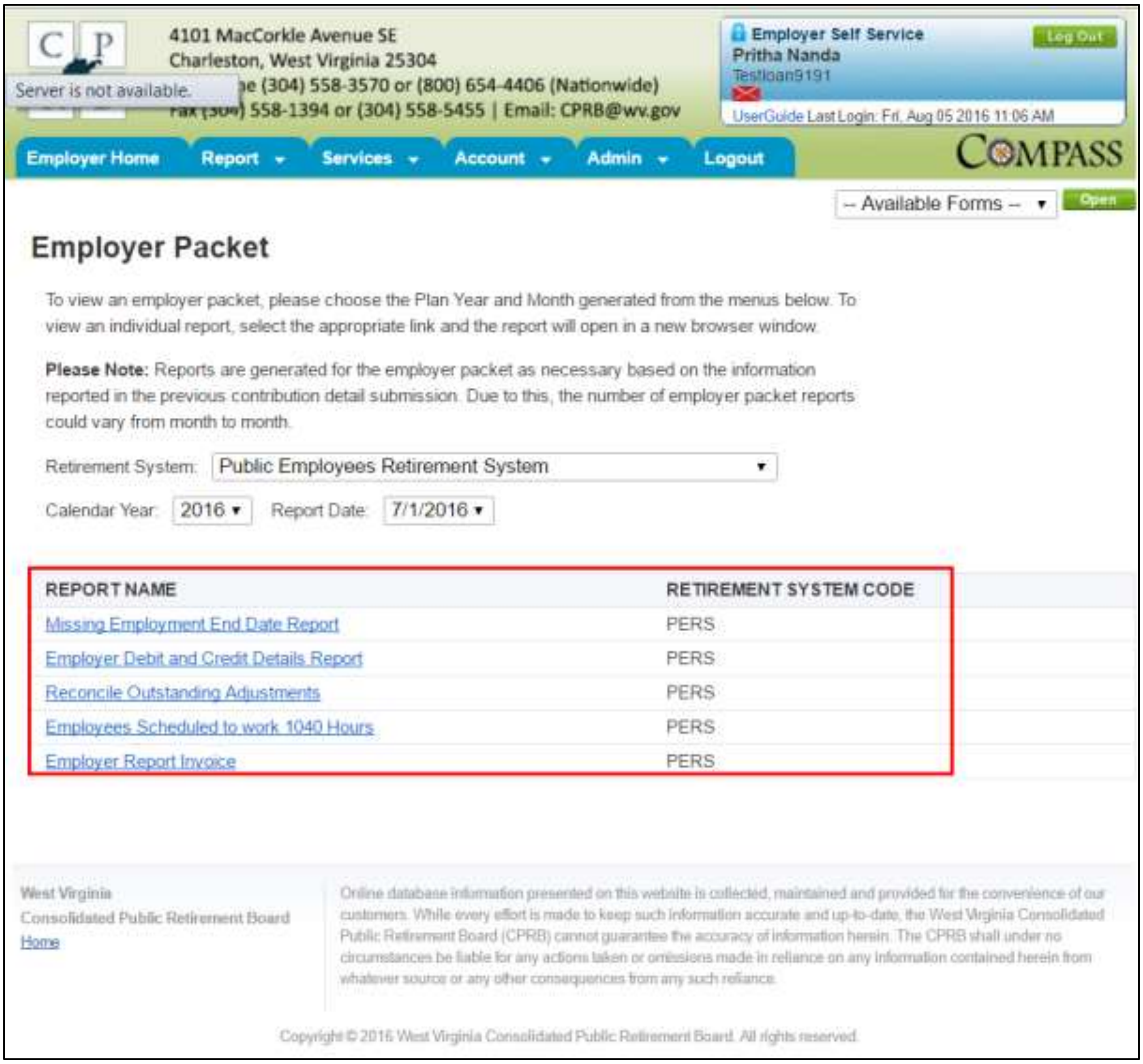


Step 3 -- Select the **Retirement System**, **Plan Year** (**Fiscal Year** or **Calendar Year** depending on the retirement system), and the **Report Date** from the drop down menu, respectively.

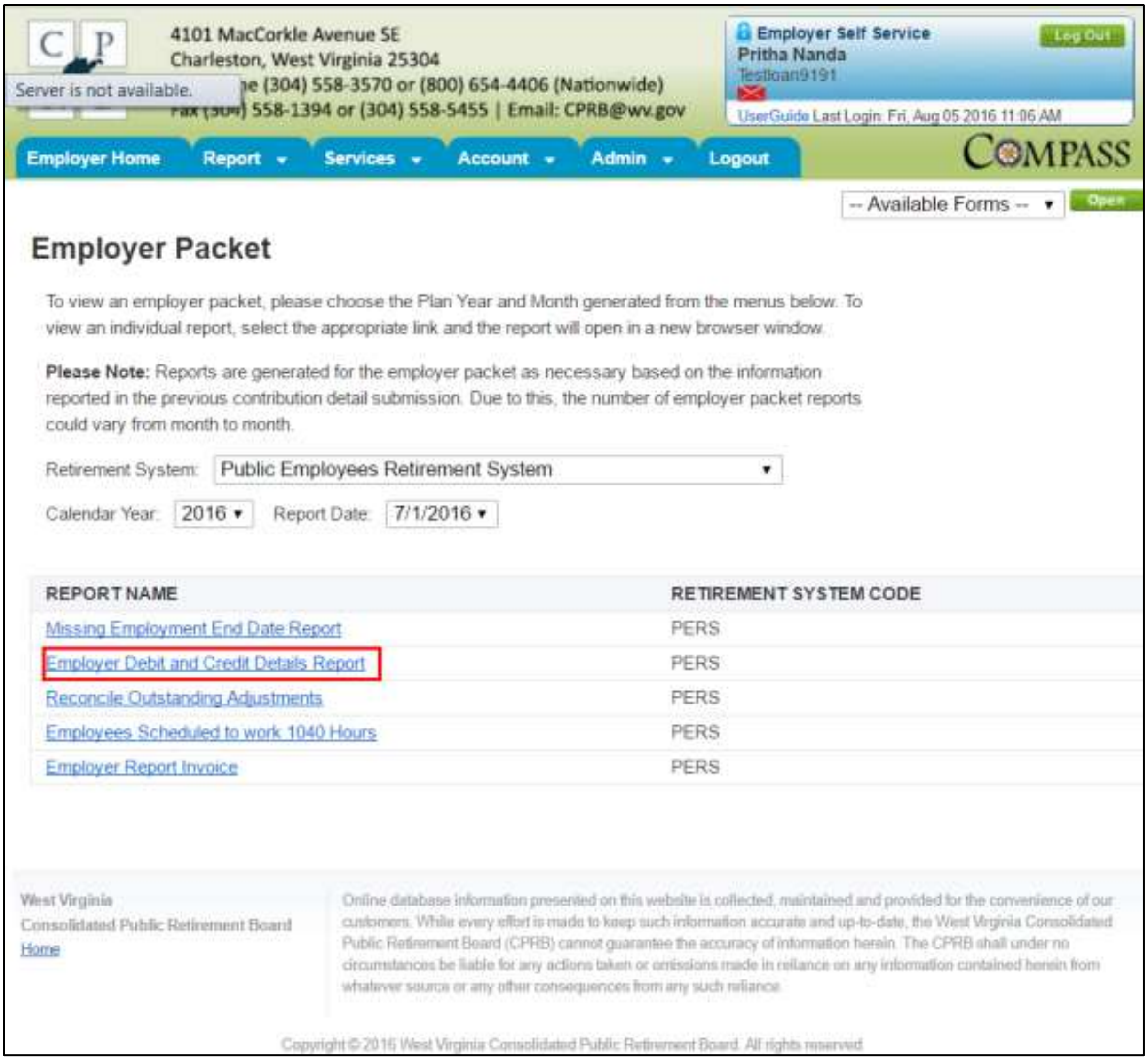


Note: If there is only one **Retirement System** for an employer, the **Retirement System** drop down menu will be display the retirement system by default.

Step 4 -- The **Report Name** and **Retirement System Code** sections will be displayed in the **Employer Packet** screen.



Step 5 -- Click the **Report Name** link to open the report in the .pdf format.



Step 6 -- The selected report is displayed.


Consolidated Public Retirement Board
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www.wvretirement.com

07/18/2016
05:45 PM

DPASBatchUser\(SOLUTIONS\DPASUser)

Employer Debit and Credit Details Report

Filter Conditions
Employer Code: 9191 **Employer Name:** 9191 - TESTLOAN9191 **From Date:** 07/01/2016 **To Date:** 07/01/2016

Reporting Date	Transaction Type	Salary	EECON	ERCON
7/1/2016 to 7/1/2016	Regular Transaction	$1,100.00	$49.50	$148.50

List of Reports

The table below describes the different reports listed in the **Report Name** field.

Report Name	Description
Employees Scheduled to Work 1040 Report	This report lists the employees who are scheduled to work 1040 hours for a calendar year in PERS.
Missing Employment End Date	This report displays employees whose employment end date is not recorded with CPRB and is missing from the current contribution file.
Leave Without Pay	This report displays a list of employees who are currently on leave without pay.
Lump Sum Payment of Unused Comp Holiday Time	This report displays all employees who have been reported with a lump sum payment due to holiday or comp time.
Reconcile Outstanding Adjustments	This report displays the details regarding outstanding adjustments for a specific employer.
Service Purchase Details	This report provides information to an employer of all the service purchase requests that members have requested and are approved and the employer is responsible to pay the portion of the total service purchase cost.
Dual Participation Report	This report lists the members who are dual participating between either PERS and TRS or PERS and TDC for a specific employer and for a selected time period.
Delinquency Invoice for Employer Reporting	This report displays the details for any delinquency invoices related to the Employer Contribution Reporting.

9. Download CPRB IDs

The **Download CPRB IDs** screen provides the contribution group, CPRB ID, employee's last name and last four digits of the employee's SSN for a particular employee or a set of employees. A CPRB ID is optional, but may at some point in the future be required (in an effort to move away from reporting PII such as SSNs). As an employer, any of the below defined search criteria can be used to search for an employee:

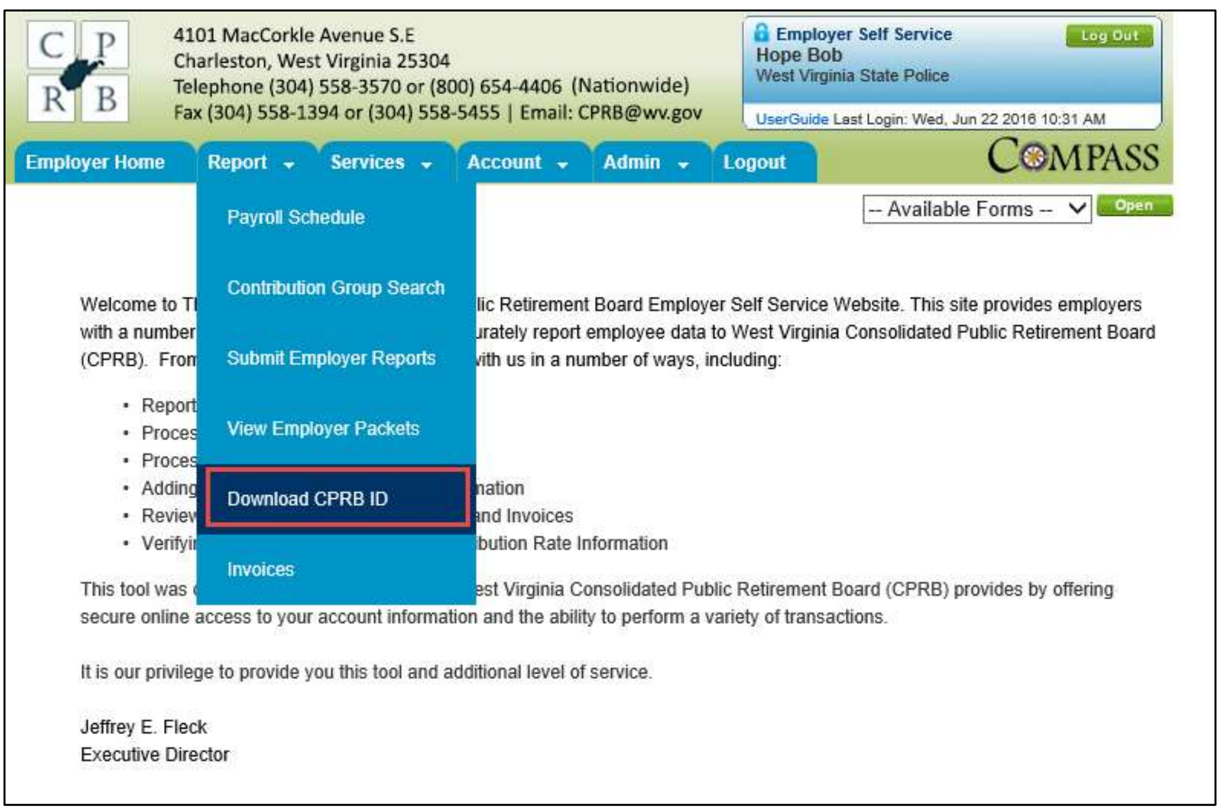
- **Newly Created Employees**: allows the employer to build a list of employees who have been reported since the Download CPRB ID file was last generated
- **Date of Employment**: allows the employer to pull a list of employee CPRB IDs corresponding to their Date of Employment
- **Report Date**: allows the employer to pull a list of employee CPRB IDs corresponding to the Report Date
- **SSN**: allows the employer to search for the employee using their SSN

The Download CPRB ID file can be saved to the employer's system and used to import the CPRB IDs into the employer's payroll system and maintained as a reference. A Download CPRB ID file format is available to employers and will be generated each time they choose to download the file using this functionality.

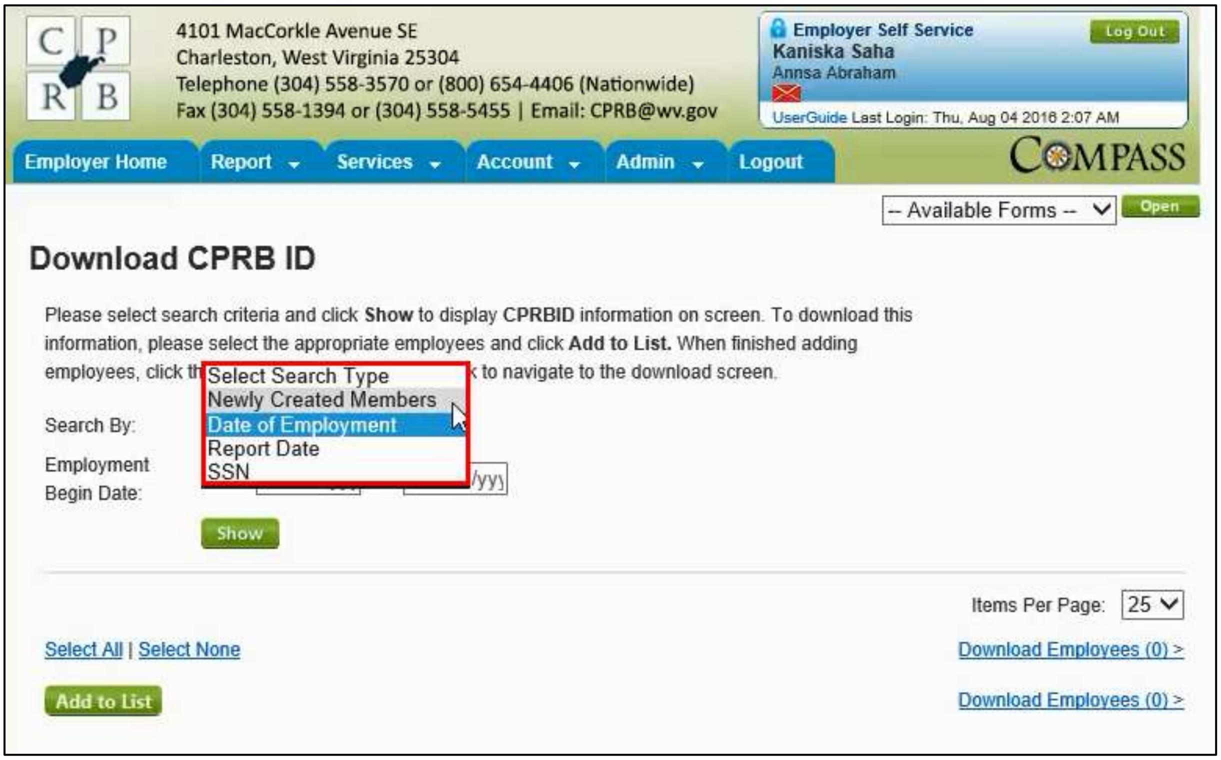
(Refer to the Download CPRB ID File Document, which can be found here: (Insert Link)

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

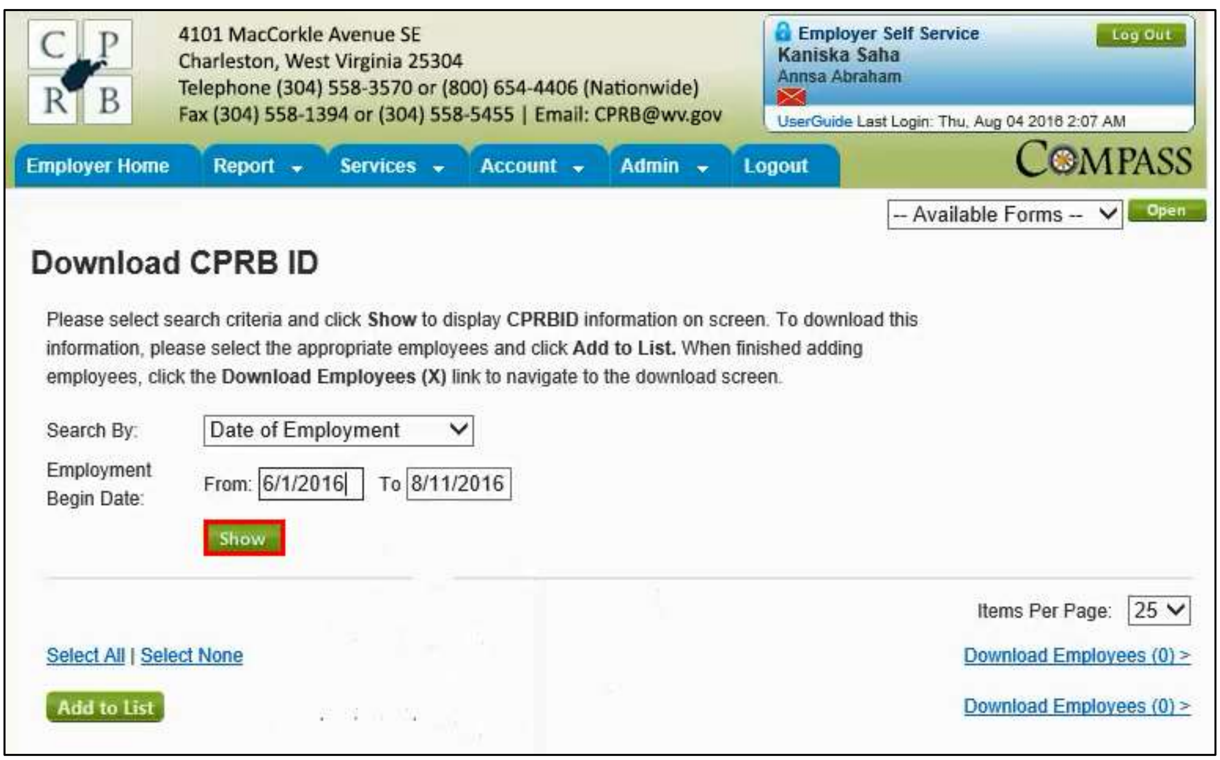
Report > **Download CPRB ID**



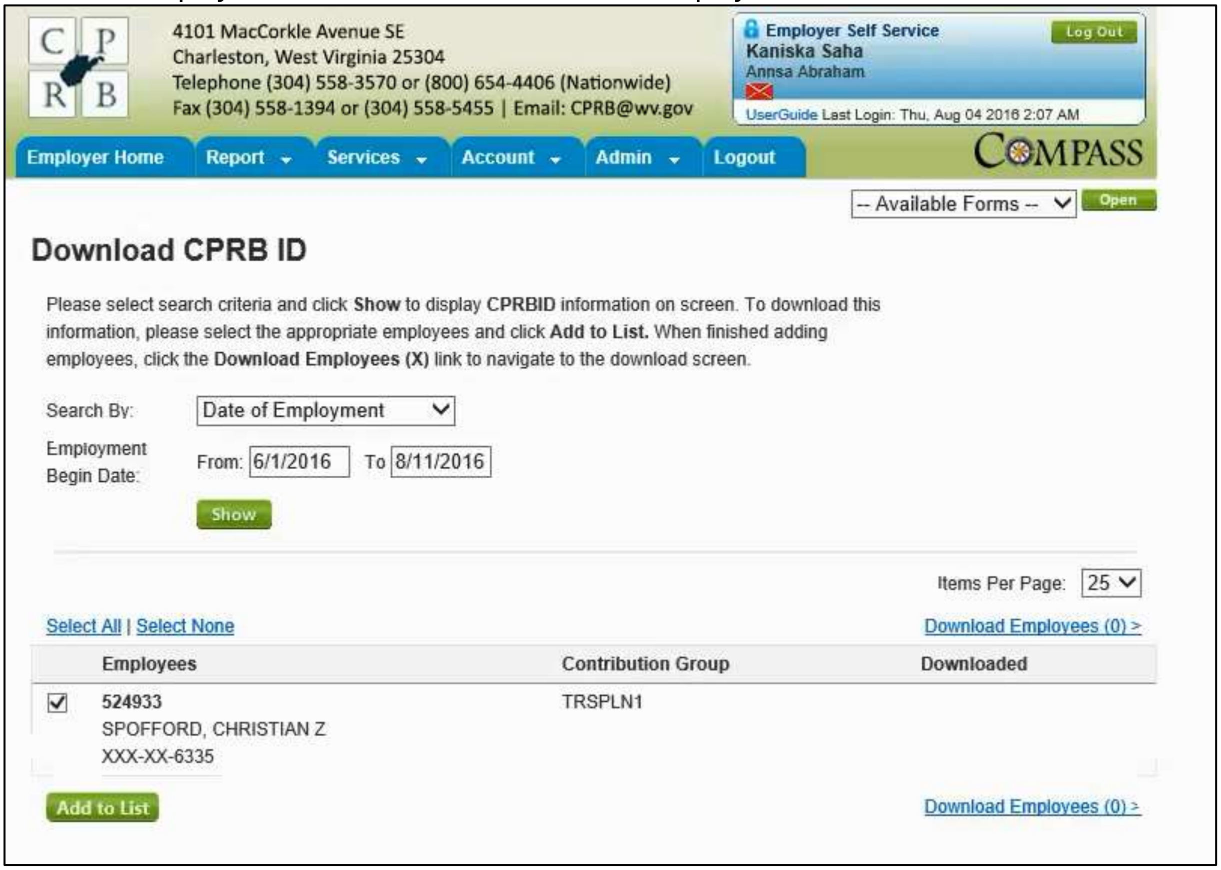
Step 2 -- Select the appropriate search criteria from the **Search By** drop down menu.
Note: Newly Created Employees, Date of Employment, Report Date, and SSN are the search criteria available to search for an employee's CPRB ID.



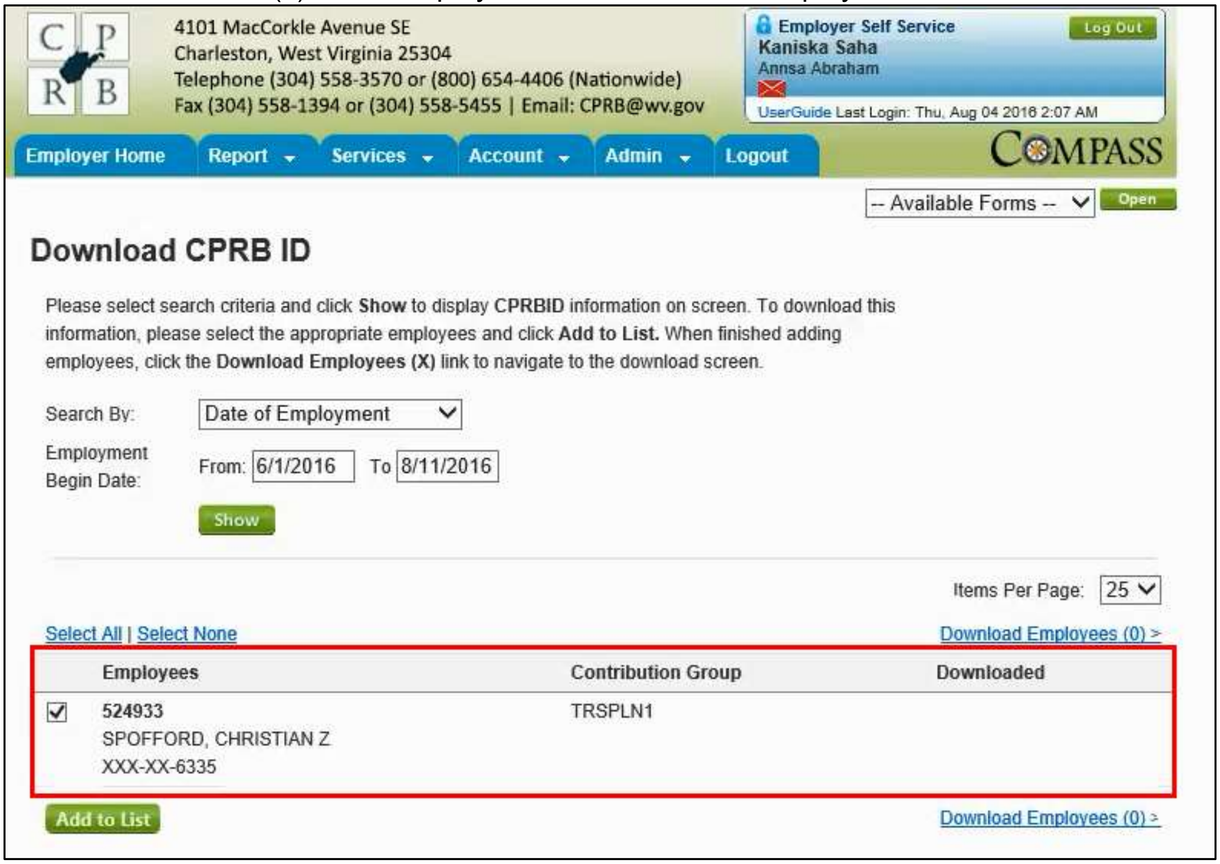
Step 3 -- Click the Show button.



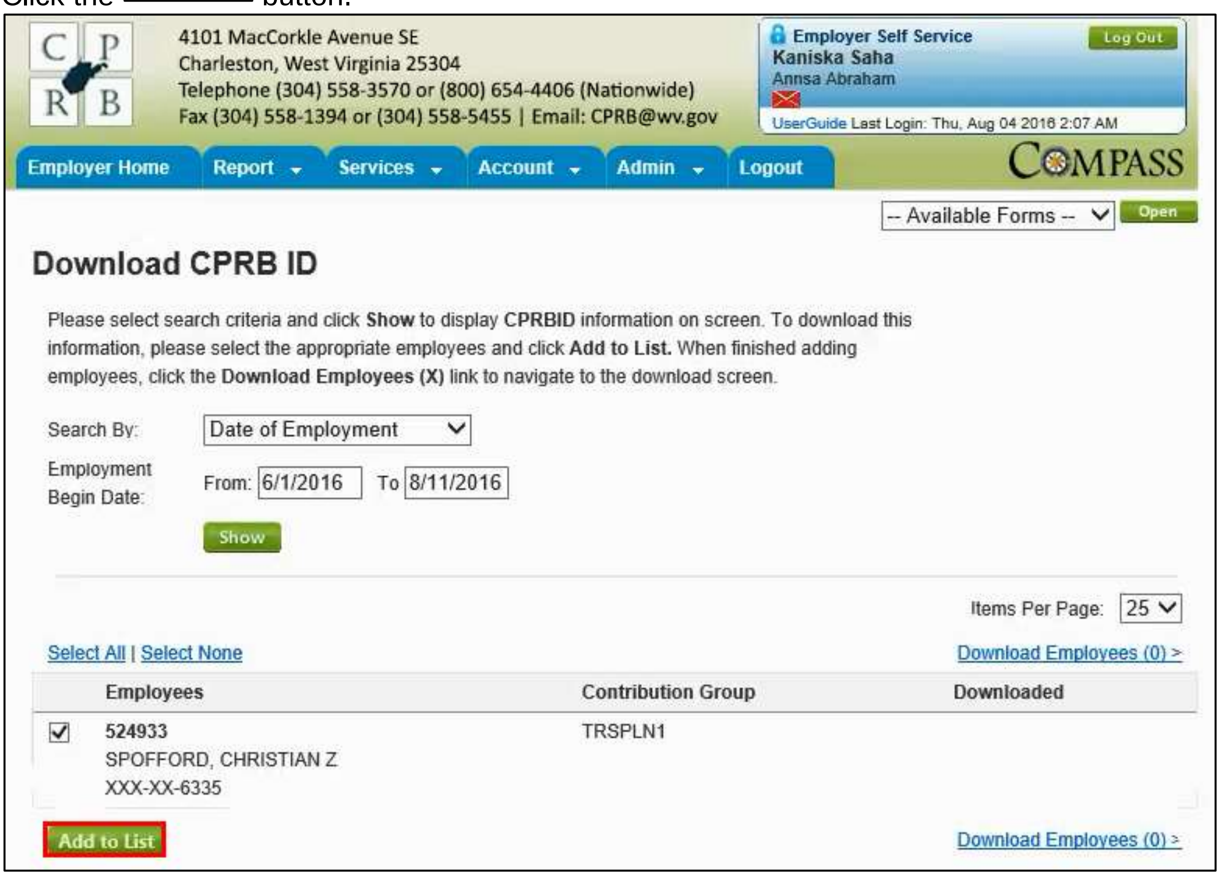
Step 4 -- The list of employees based on the search criteria displayed.



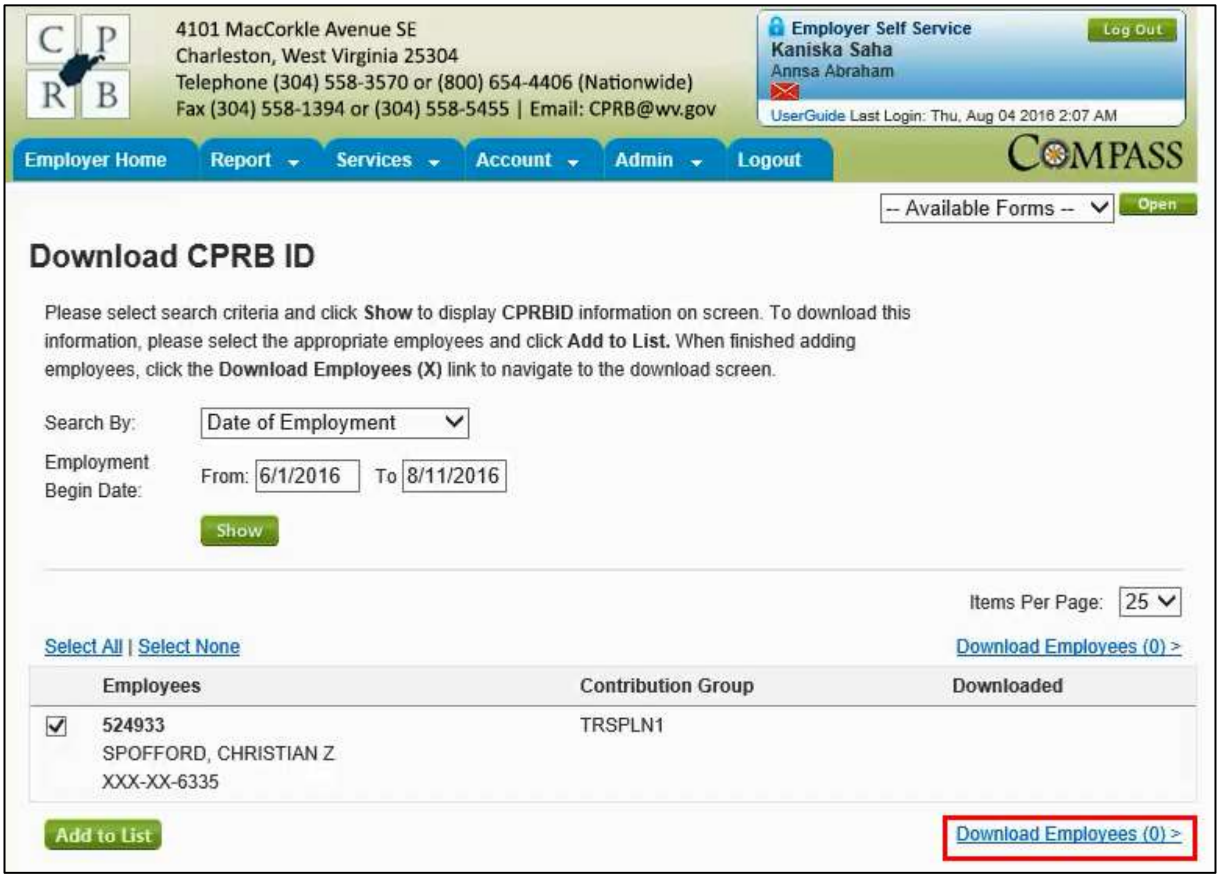
Step 5 -- Select the check box(s) of the employees to download the employees' details.



Step 6 -- Click the Add to List button.

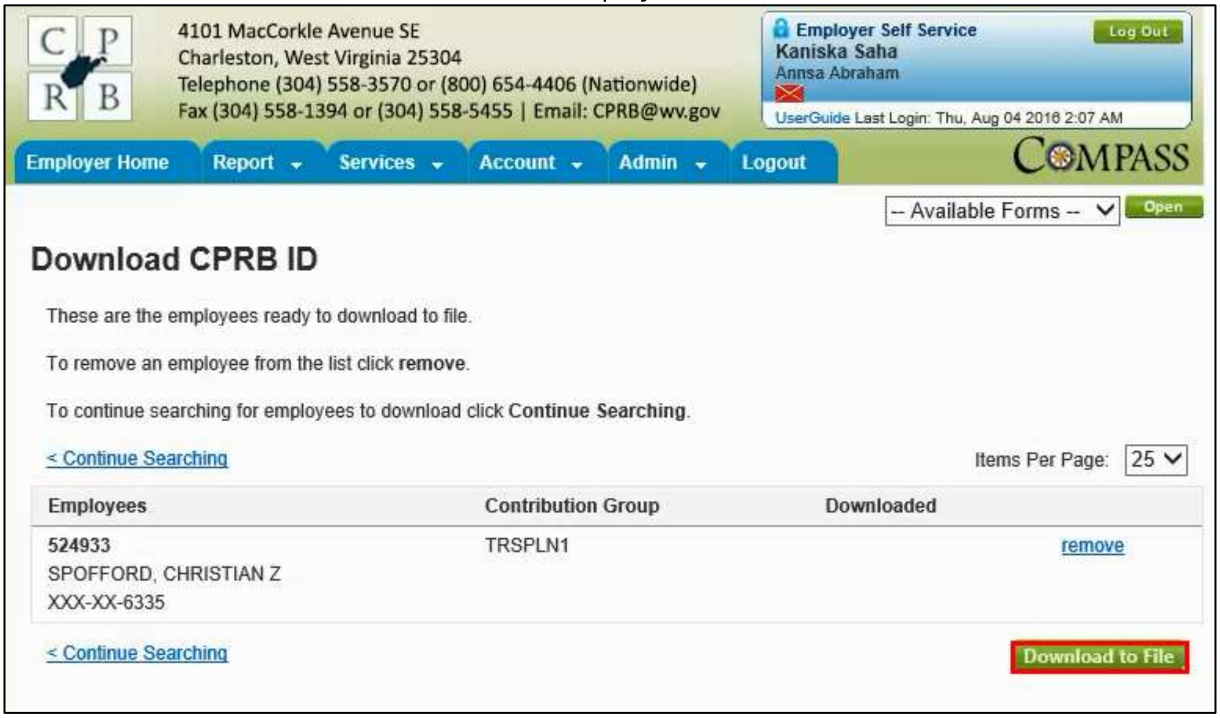


Step 7 -- Click the  link.

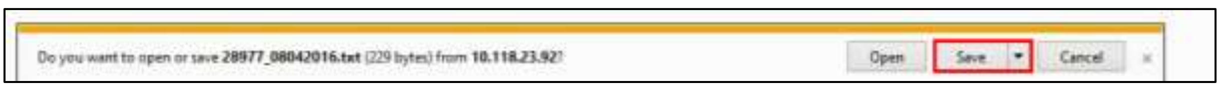


Step 8 -- The Download CPRB ID screen shows the employees added to the list. Click the **Download to File** button.

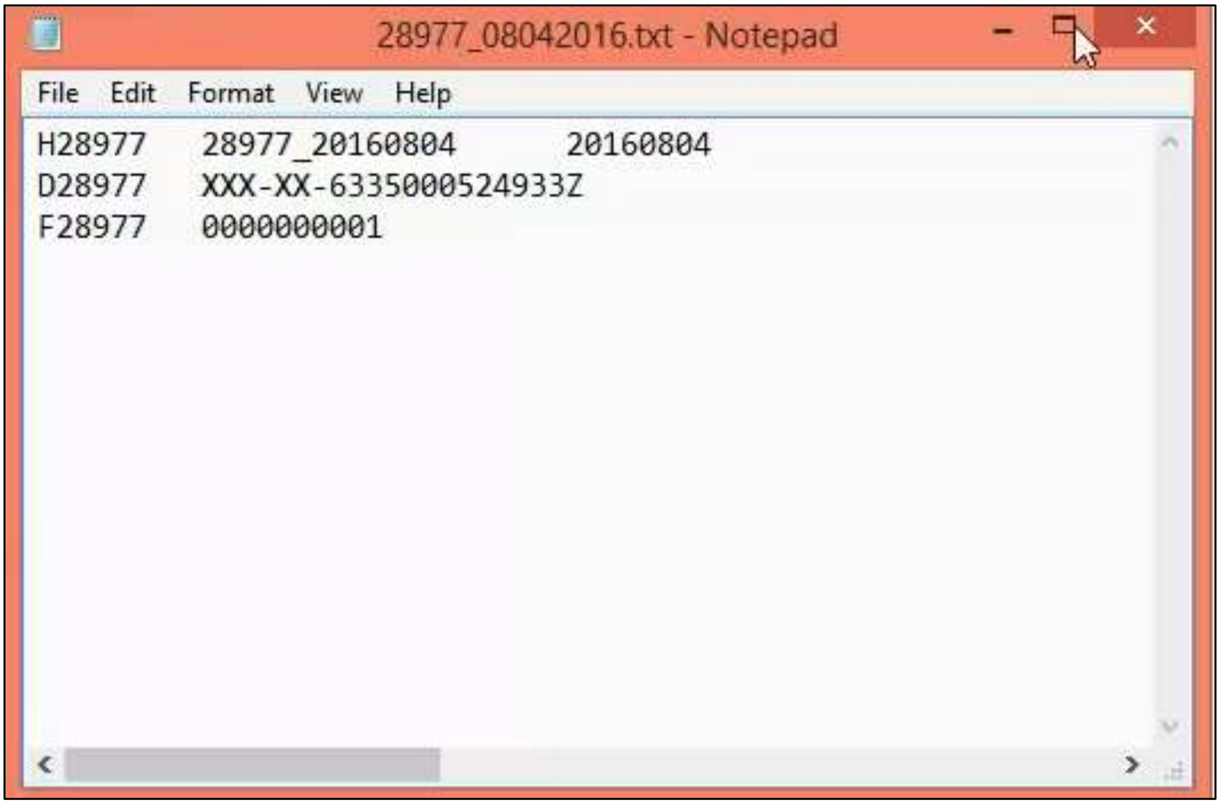
Note: Click the Remove link, to remove an employee from the Download CPRB ID file.



Step 9 -- The CPRB ID file is downloaded in .txt format.



Step 10 -- The file displays the employee details.



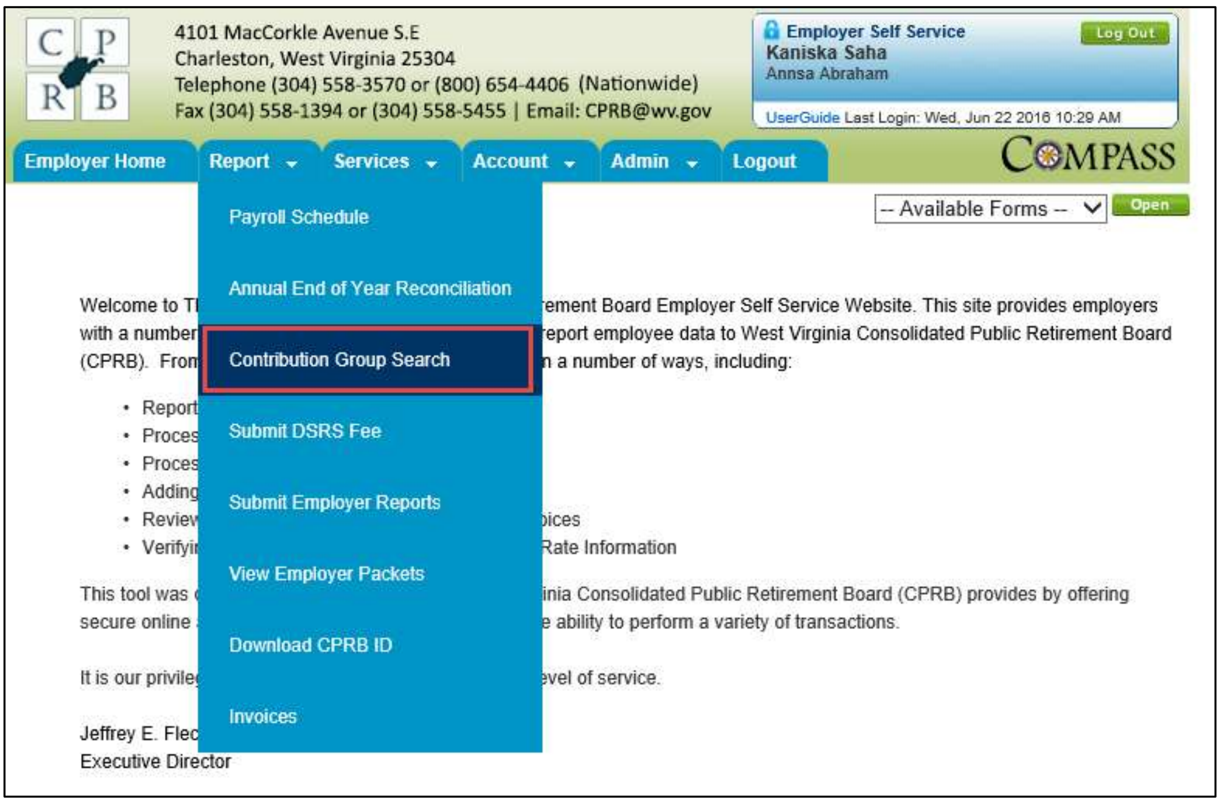
10. Contribution Group Search

Contribution Group is used to “organize” employees into different contribution rate categories and to validate their contribution amounts. The Contribution Group is determined by the employee’s eligibility to participate in a particular Retirement System and Plan. For example, ‘PERSST1’ will represent the contribution group for a PERS State, Tier I contributory member.
Note: Not all employees will be reported as part of a contributory Contribution Group. Those employees who are not eligible to participate will be reported under a Not-Eligible Contribution Group.

The **Contribution Group Search** screen is used by employers to determine the contribution group of a particular employee. The contribution group of an employee can be searched using specific criteria such as retirement system, employment begin date, position status, job position, and contract days.

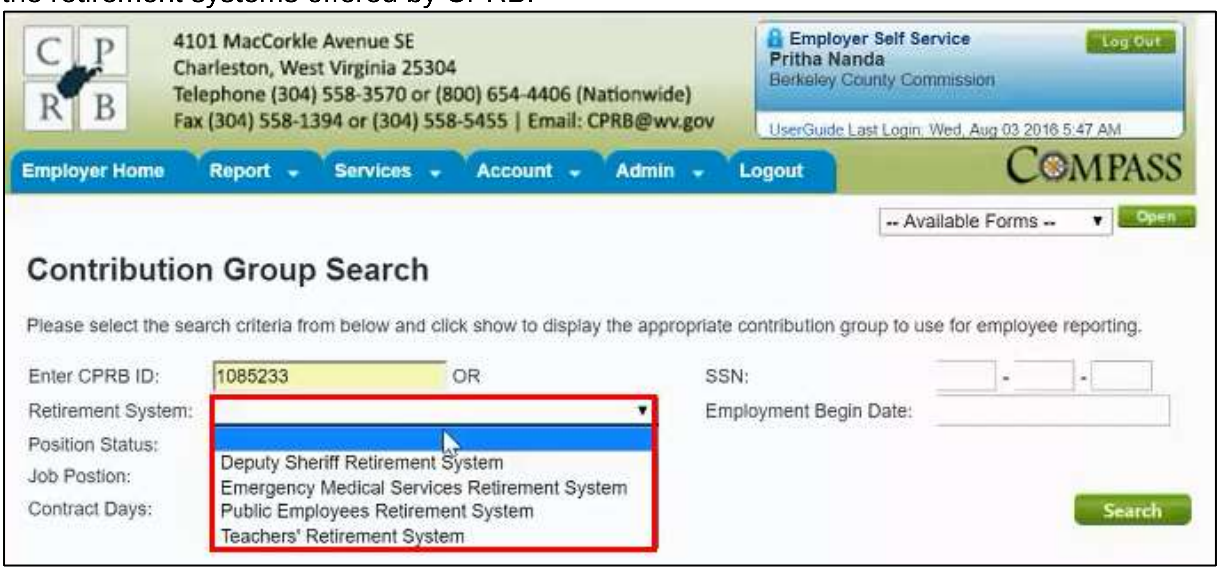
The following steps demonstrate how to determine the contribution group for an employee:

Step 1 -- To navigate to the **Contribution Group Search** screen, click the following menu options: **Report** > **Contribution Group Search**

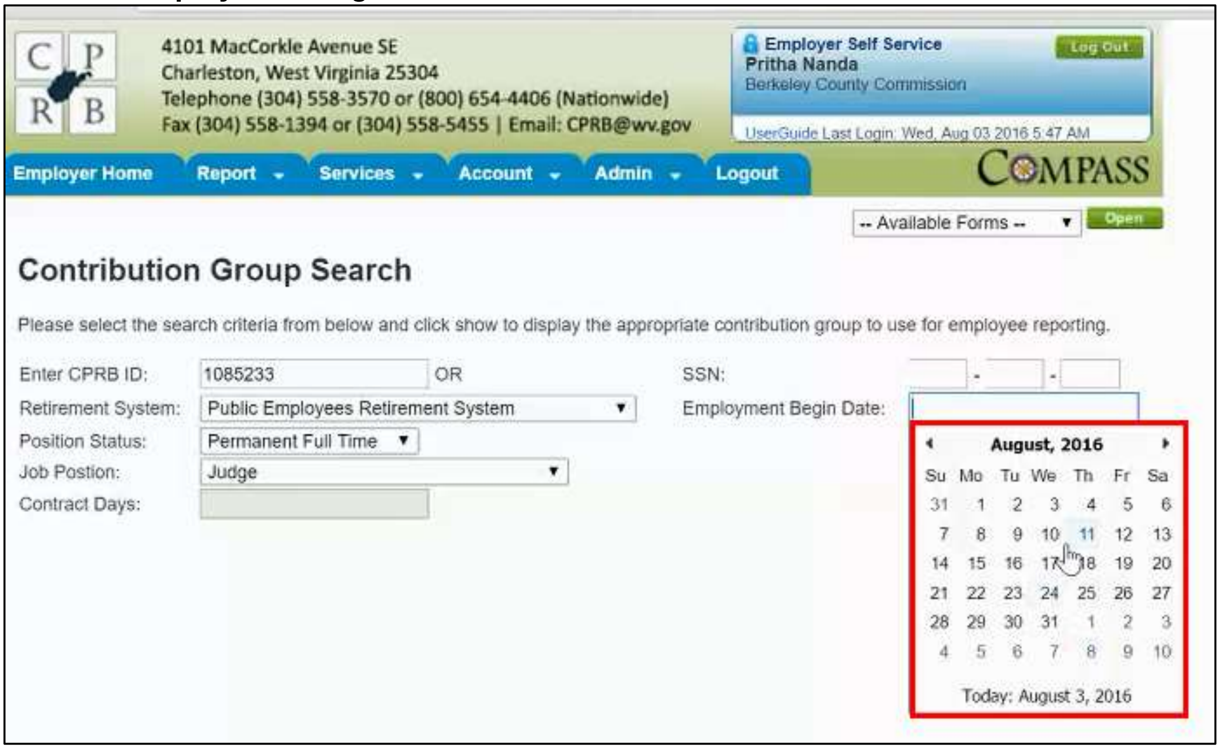


Step 2 -- Enter the employee's CPRB ID or SSN in the **Enter CPRB ID or SSN** field.

Step 3 -- Select the retirement system to which the employee will be reported from the **Retirement System** drop down menu.
Note: The retirement system options will display as per the Employer's participation in the retirement systems offered by CPRB.

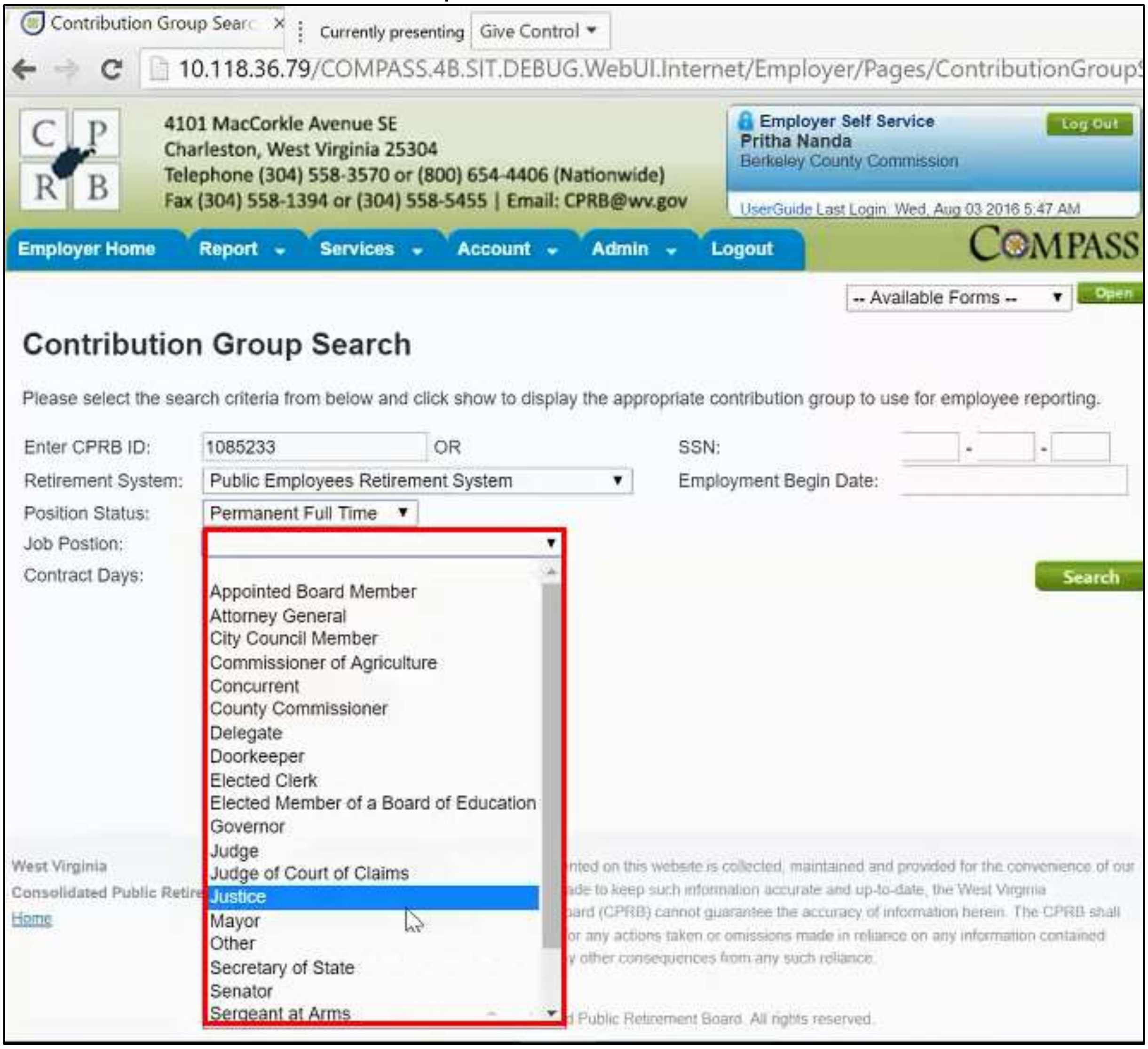


Step 4 -- Enter the **Employment Begin Date** from the calendar.

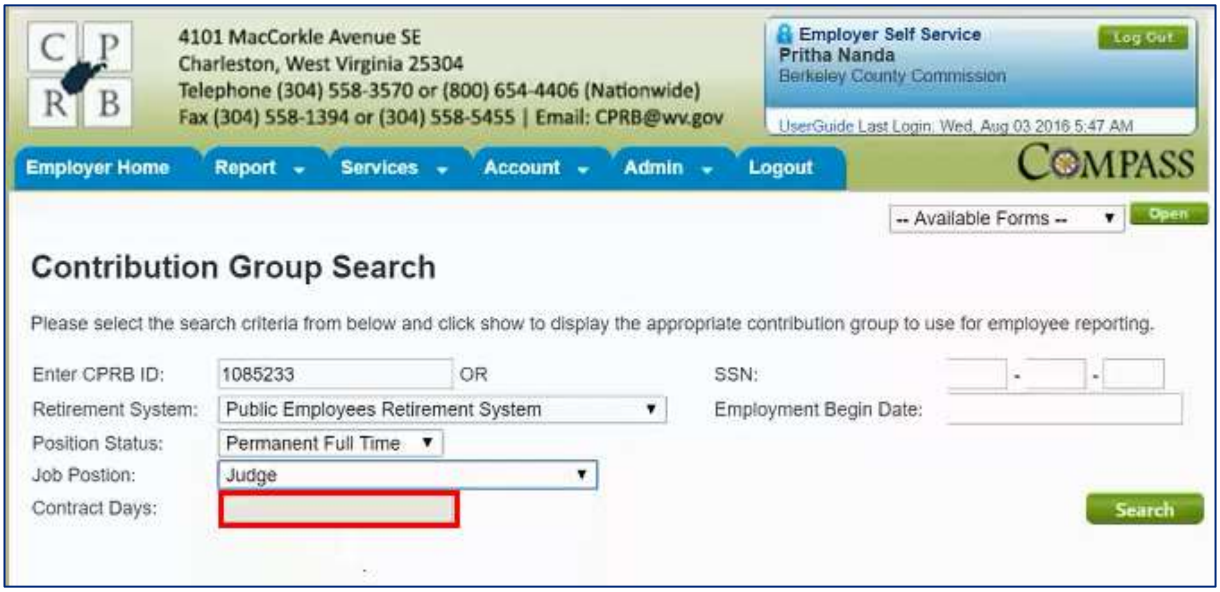


Step 5 -- Enter the **Position Status** from the drop down menu.

Step 6 -- Enter the **Job Position** from the drop down menu.

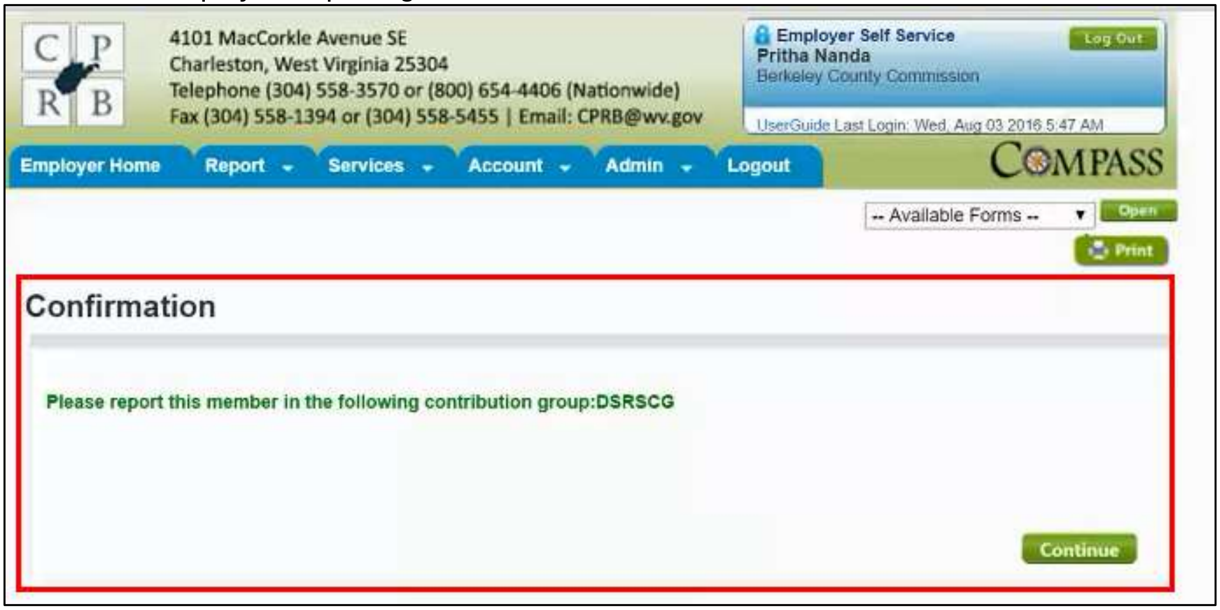


Step 7 -- Enter the number of days the employee is contracted to work in the **Contract Days** field. **Note:** This field will be relevant and fillable only for TRS and TDC participating employers.



Step 8 -- Click the  button.

Step 9 -- The Confirmation message "**Please report this member in the following contribution group: DSRSCG**" is displayed. The Code represents the contribution group and the complete list of contribution group codes can be found in the system appendix of the COMPASS Employer Reporting File Format.



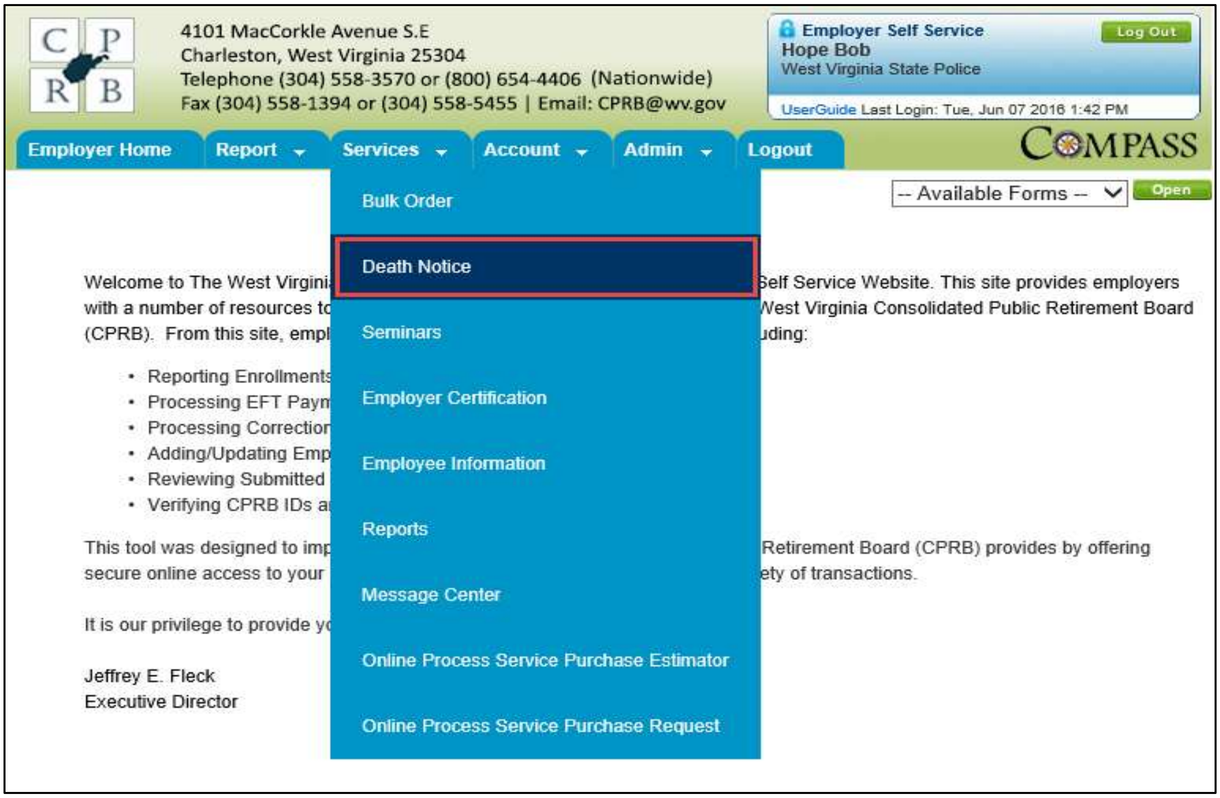
11. Employee Death Notice

The **Death Notice** screen allows employers to enter death information for an individual with an existing person record with CPRB and will automatically notify the appropriate CPRB staff member.

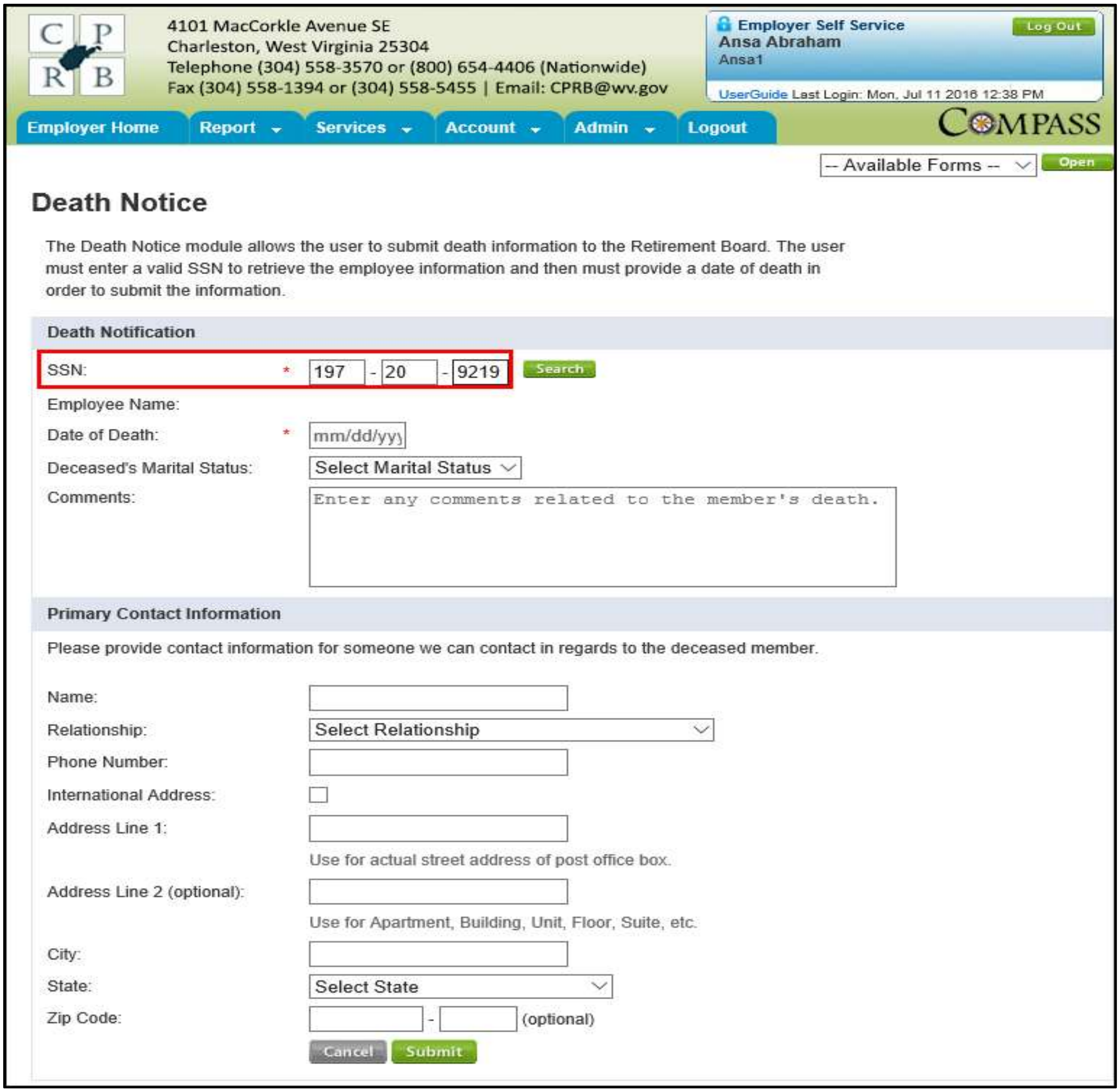
The following steps show how to report an employee's death in ESS:

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

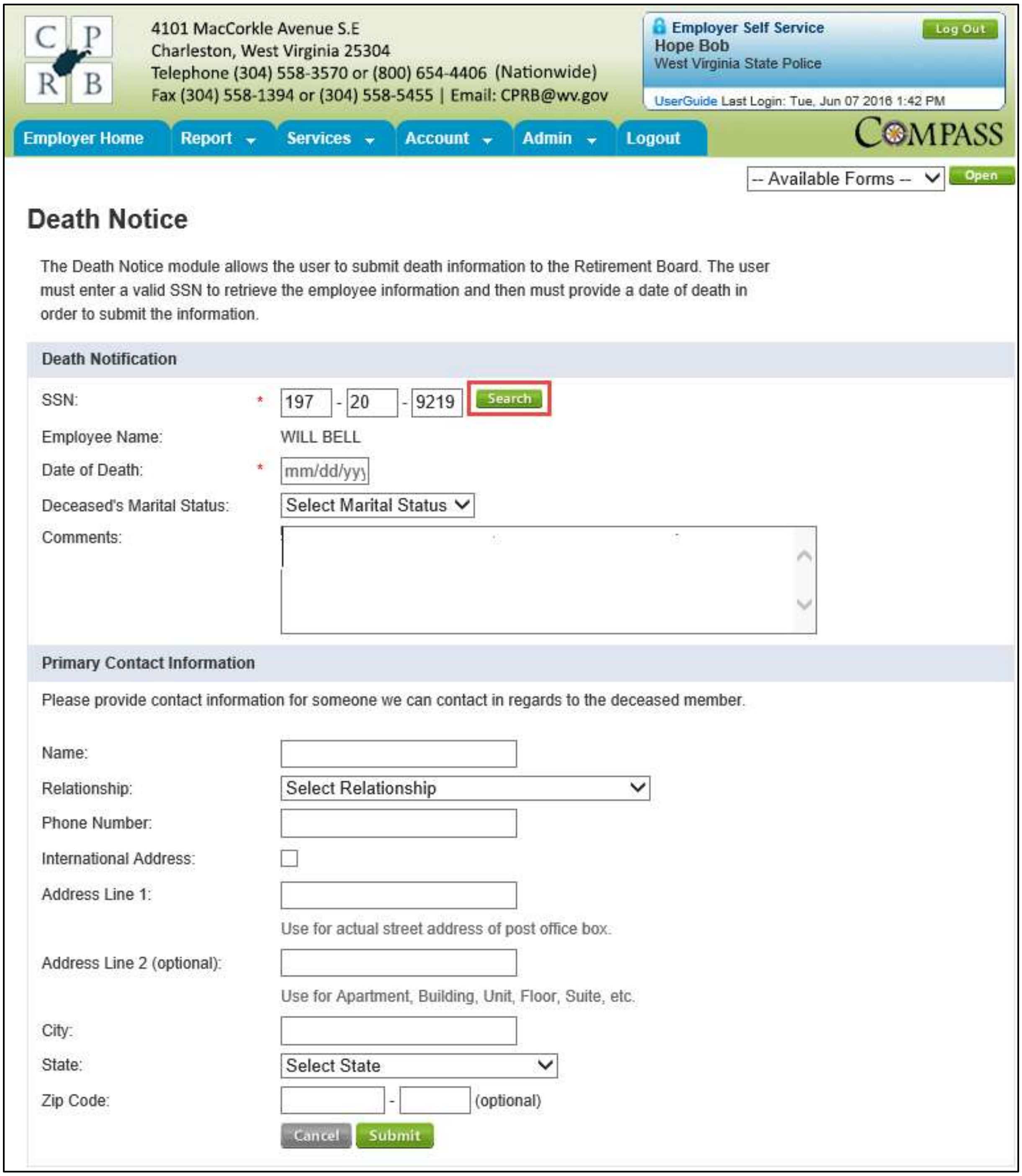
Services > **Death Notice**



Step 2 -- The **Death Notice** screen displays. Enter the SSN of the deceased employee into the **SSN** field.



Step 3 -- Click the Search button**.**



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Fax (304) 558-1394 or (304) 558-5455 | Email: CPRB@wv.gov

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

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-- Available Forms -- Open

Death Notice

The Death Notice module allows the user to submit death information to the Retirement Board. The user must enter a valid SSN to retrieve the employee information and then must provide a date of death in order to submit the information.

Death Notification

SSN: * 197 - 20 - 9219 Search
Employee Name: WILL BELL
Date of Death: * mm/dd/yyy
Deceased's Marital Status: Select Marital Status
Comments:

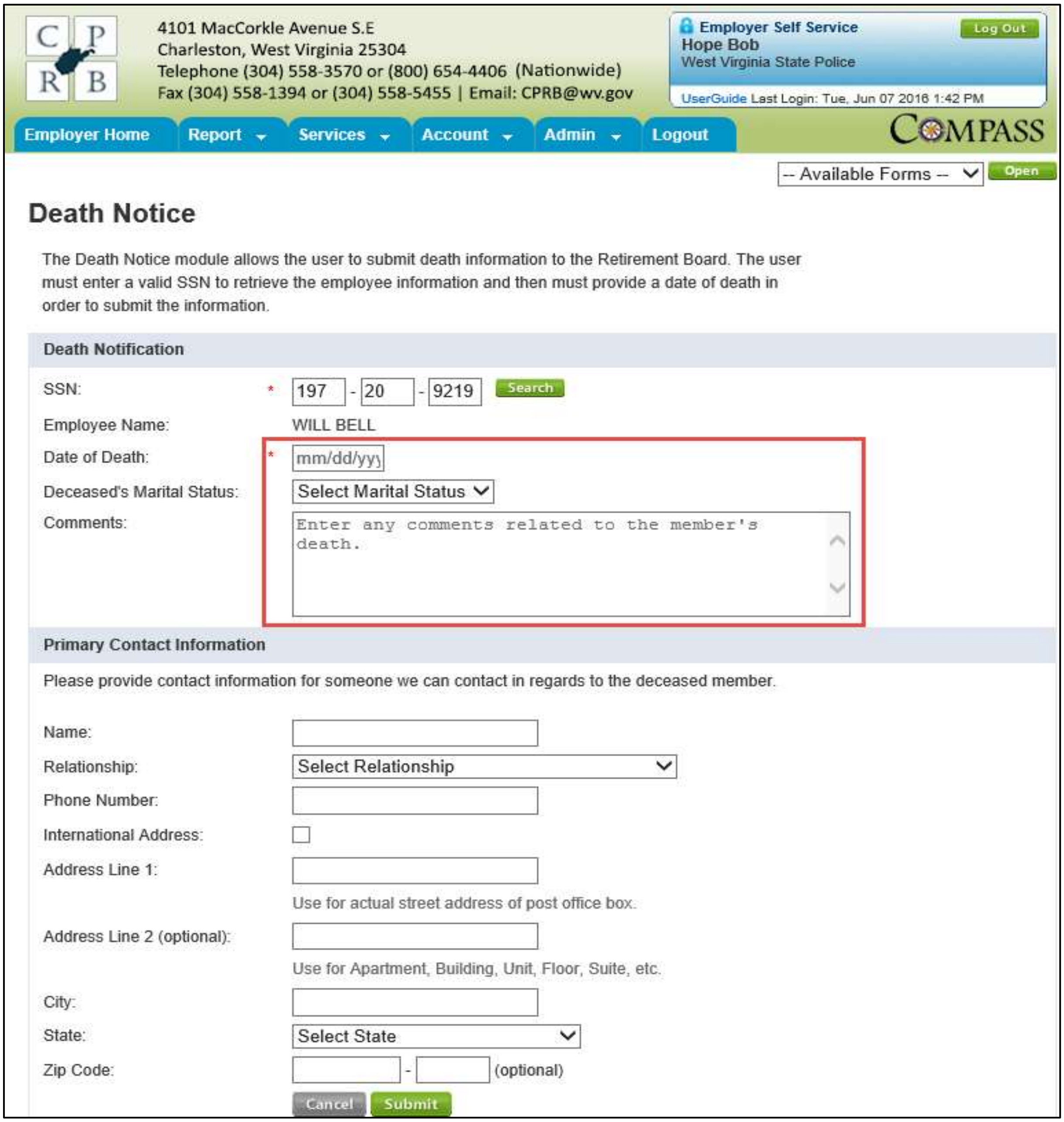
Primary Contact Information

Please provide contact information for someone we can contact in regards to the deceased member.

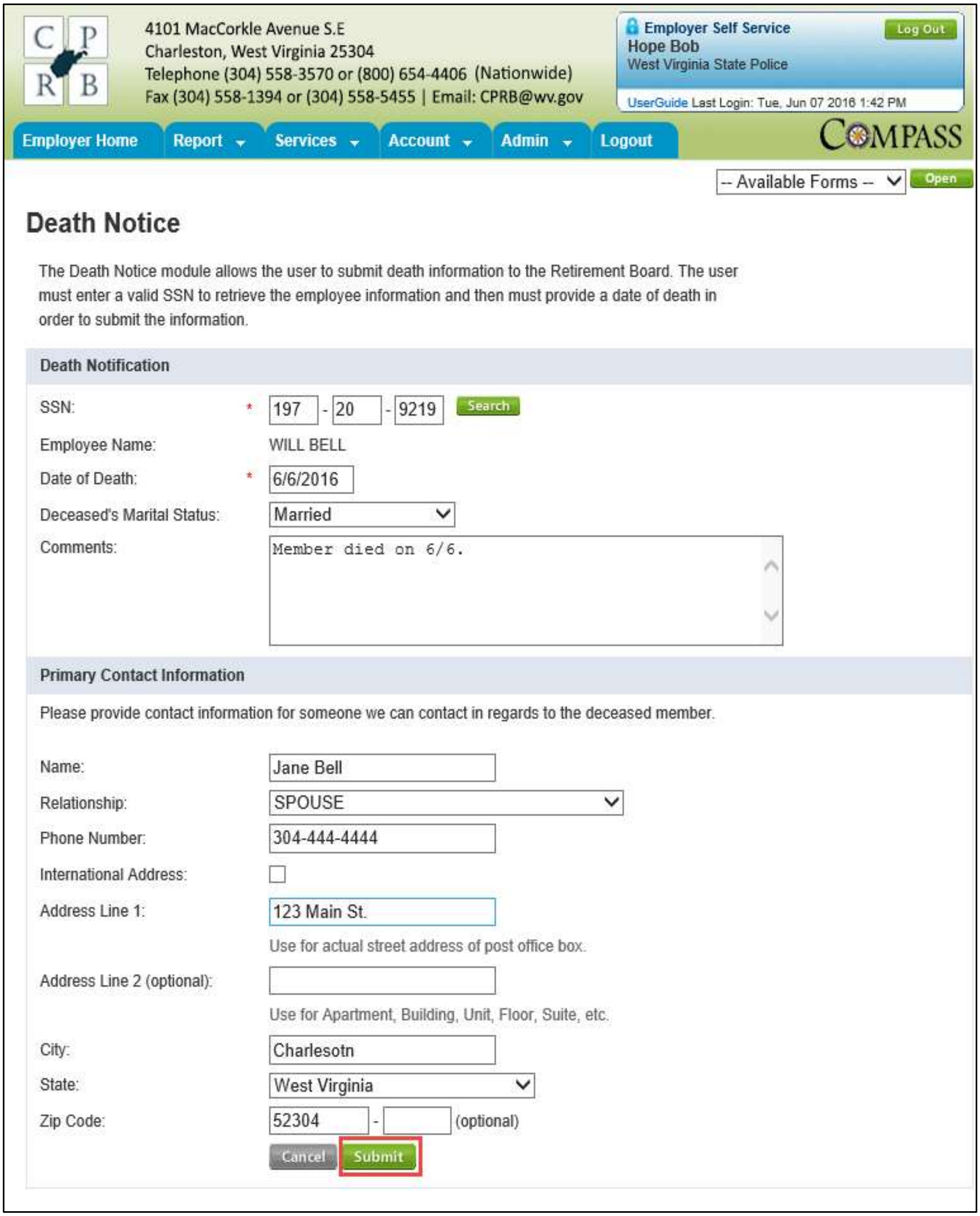
Name:
Relationship: Select Relationship
Phone Number:
International Address:
Address Line 1:
Use for actual street address of post office box.
Address Line 2 (optional):
Use for Apartment, Building, Unit, Floor, Suite, etc.
City:
State: Select State
Zip Code: - (optional)
Cancel Submit

Step 4 -- The employee information displays. Enter the required information.

Note: Use the **Primary Contact Information** Section to tell CPRB about the individual that CPRB should contact for verification of the employee's death.



Step 5 -- Click the Submit button.



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COMPASS

-- Available Forms -- Open

Death Notice

The Death Notice module allows the user to submit death information to the Retirement Board. The user must enter a valid SSN to retrieve the employee information and then must provide a date of death in order to submit the information.

Death Notification

SSN: *	197 - 20 - 9219 Search
Employee Name:	WILL BELL
Date of Death: *	6/6/2016
Deceased's Marital Status:	Married
Comments:	Member died on 6/6.

Primary Contact Information

Please provide contact information for someone we can contact in regards to the deceased member.

Name:	Jane Bell
Relationship:	SPOUSE
Phone Number:	304-444-4444
International Address:	☐
Address Line 1:	123 Main St. Use for actual street address of post office box.
Address Line 2 (optional):	 Use for Apartment, Building, Unit, Floor, Suite, etc.
City:	Charlesotn
State:	West Virginia
Zip Code:	52304 - (optional)

Cancel Submit

Step 6 -- The **Confirmation** screen displays indicating that CPRB will be notified of the employee's death.

12. Maintain Seminars

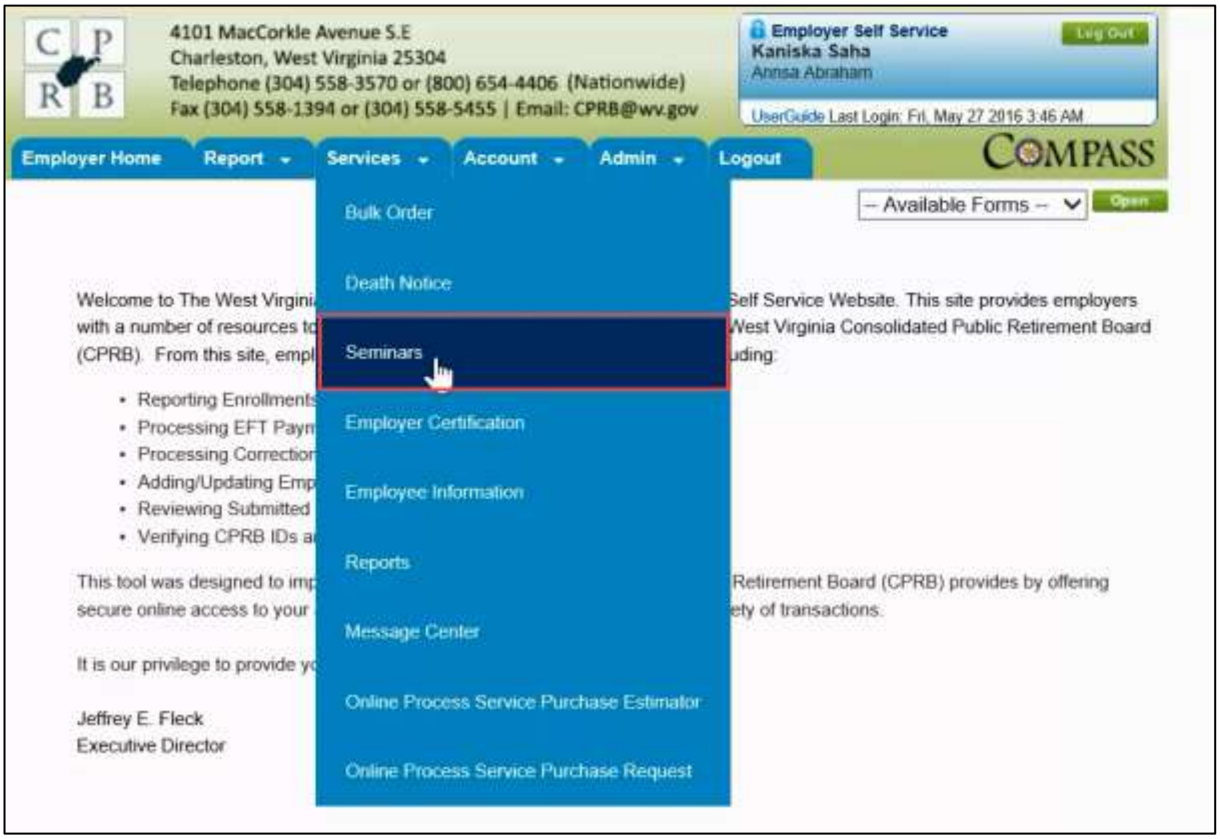
The **Seminars** screen provides the ability to register for CPRB offered seminars.

12.1 Register for a Seminar

Staff from a participating employer (even those without access to CPRB's ESS portal) can register for a CPRB offered seminar. The following steps demonstrate how to register for a seminar offered for employers through ESS:

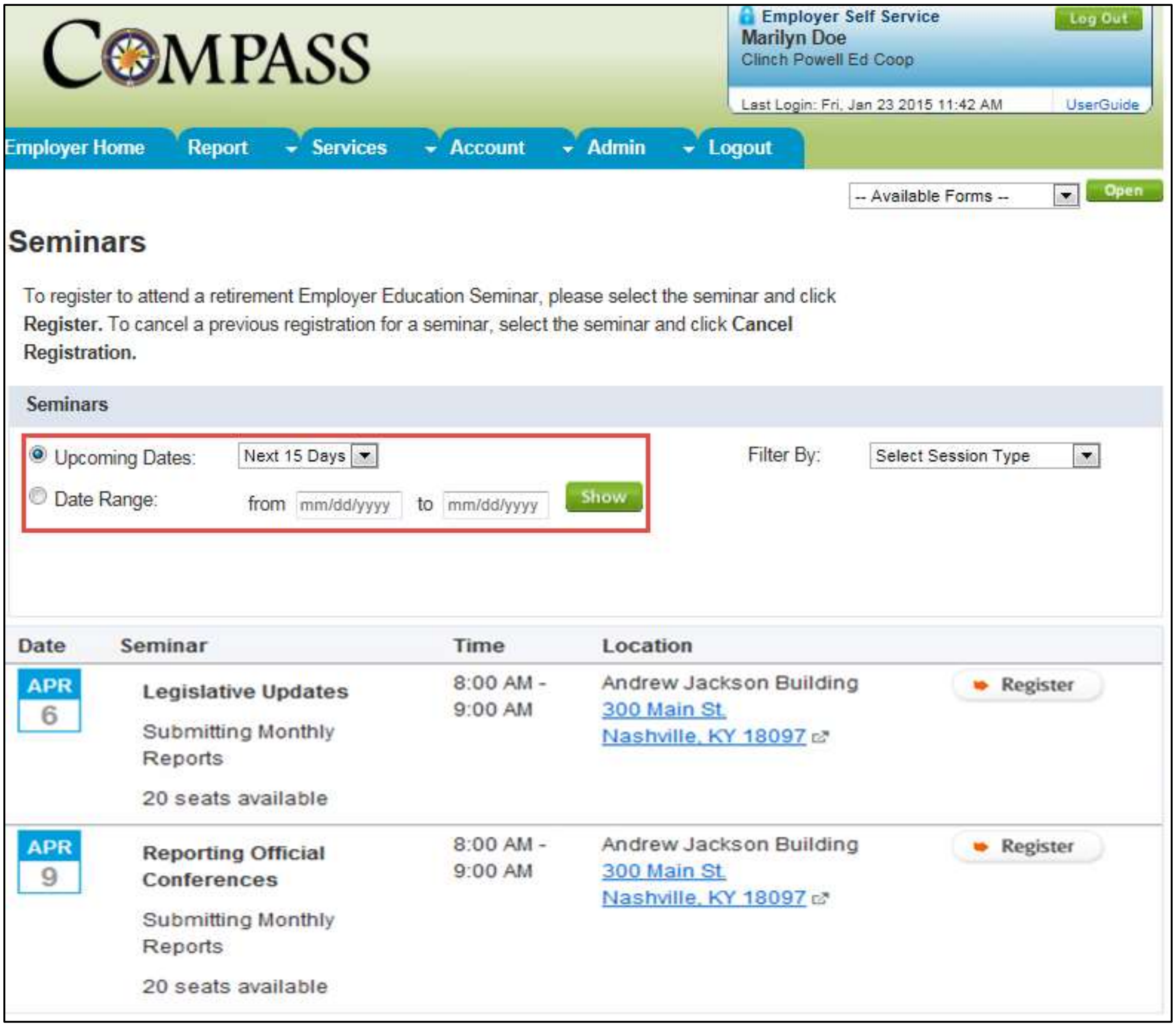
Step 1 -- To navigate to the **Seminars** screen, click the following menu options:

Services > **Seminars**



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

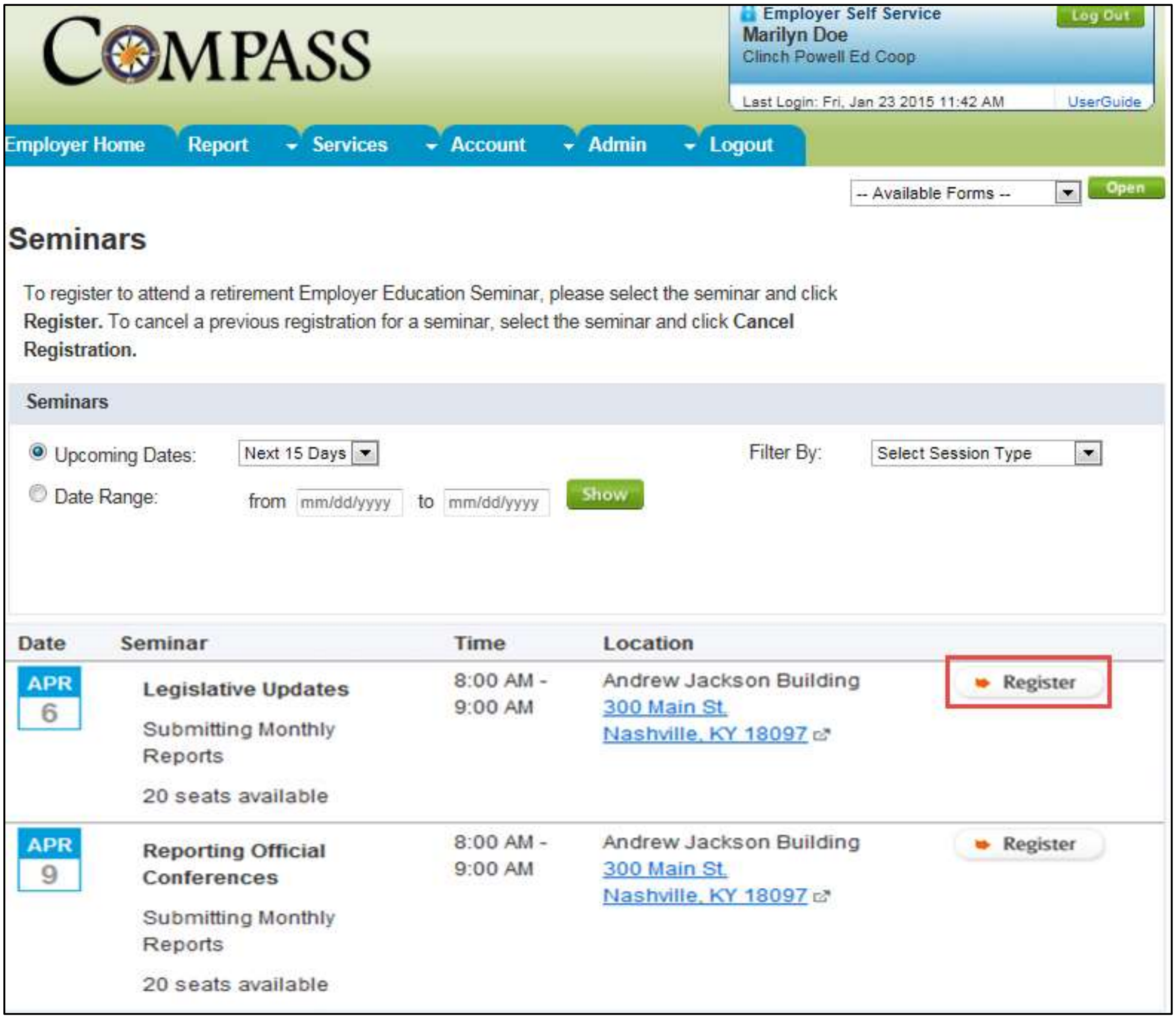
Note: The **Seminars** screen by default displays all upcoming seminars.



.

Step 3 -- All seminars with available seats that meet the search criteria are displayed. Click the 

button next to the desired seminar to register.



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

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

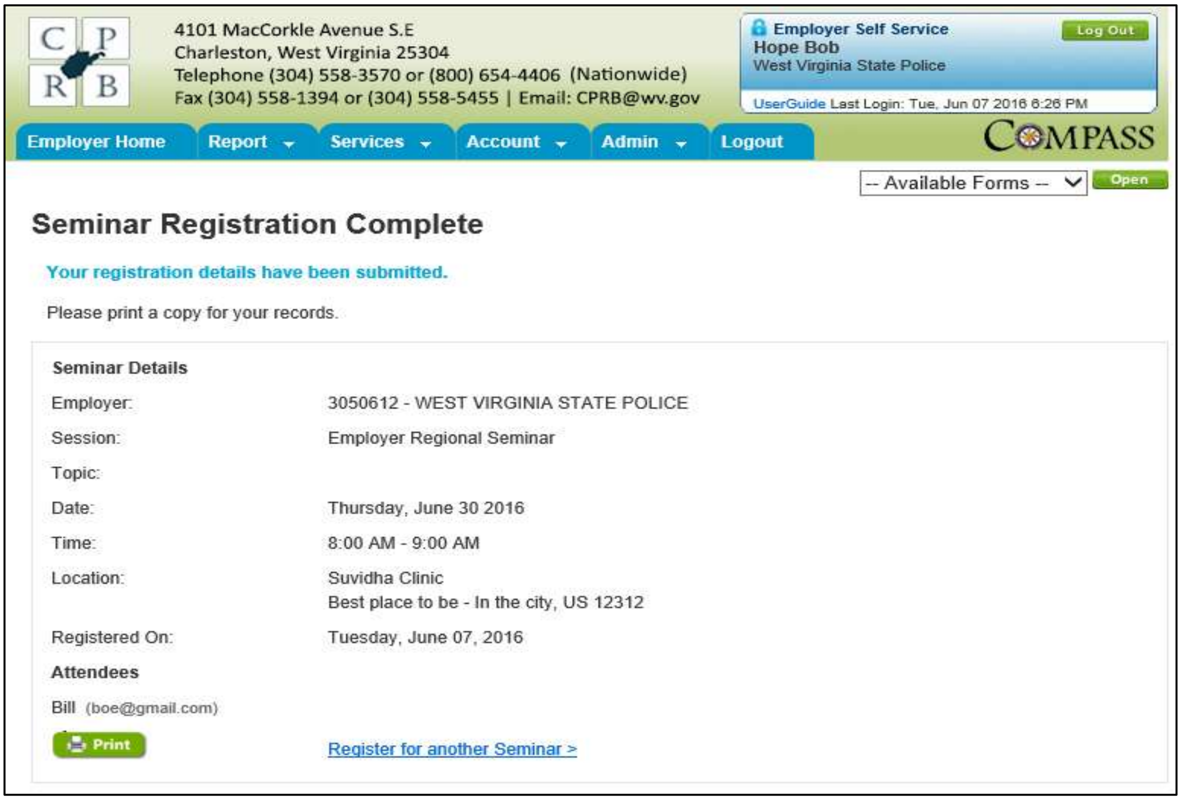
Step 6 -- Click the **Add Attendee** link to add additional attendees.

Step 7 -- Click the 

button.

Step 8 -- A confirmation message displays at the bottom of the screen to confirm success in registering for the seminar. The **Seminar Registration Complete** screen displays a message indicating the registration has been successfully submitted.

Note: The **Seminar Registration Complete** screen can be printed by clicking on the print button on the bottom of the screen.

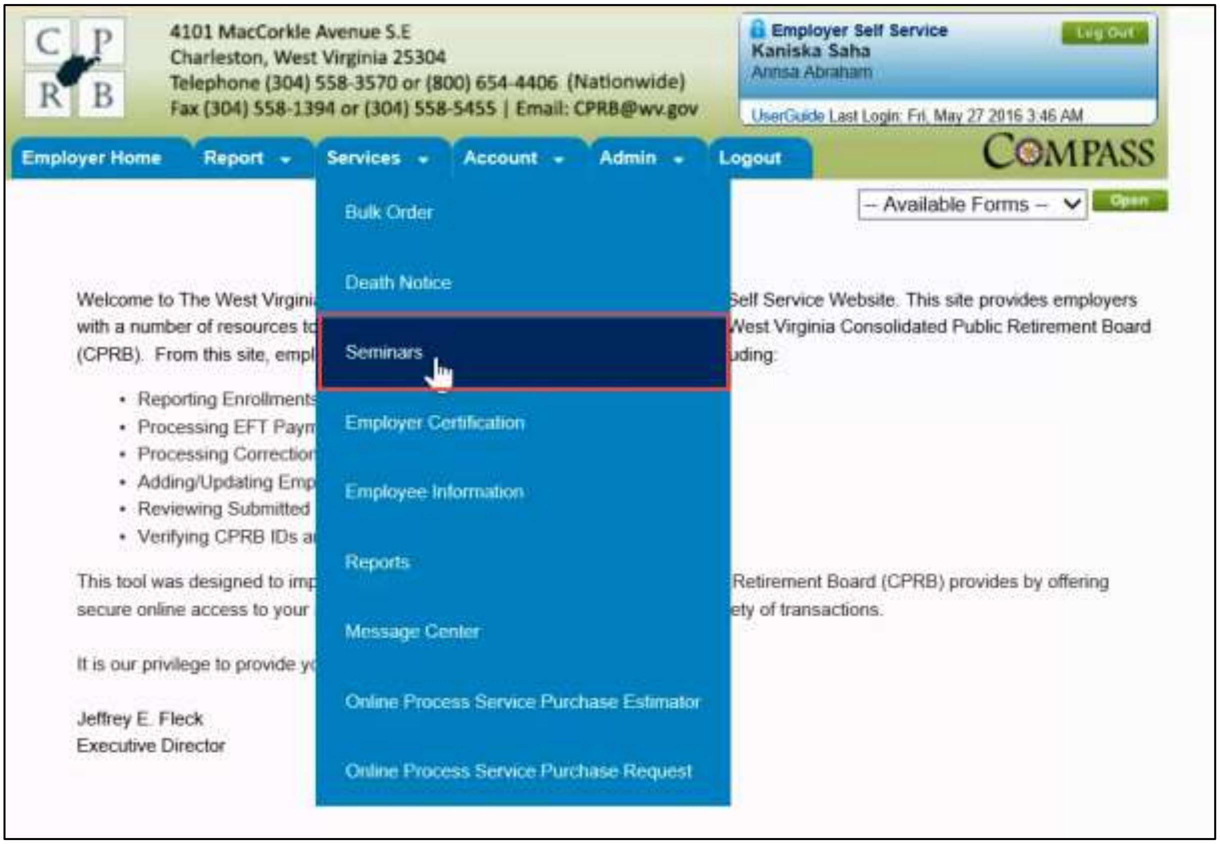


12.2 Cancel Attendee Registration for a Seminar

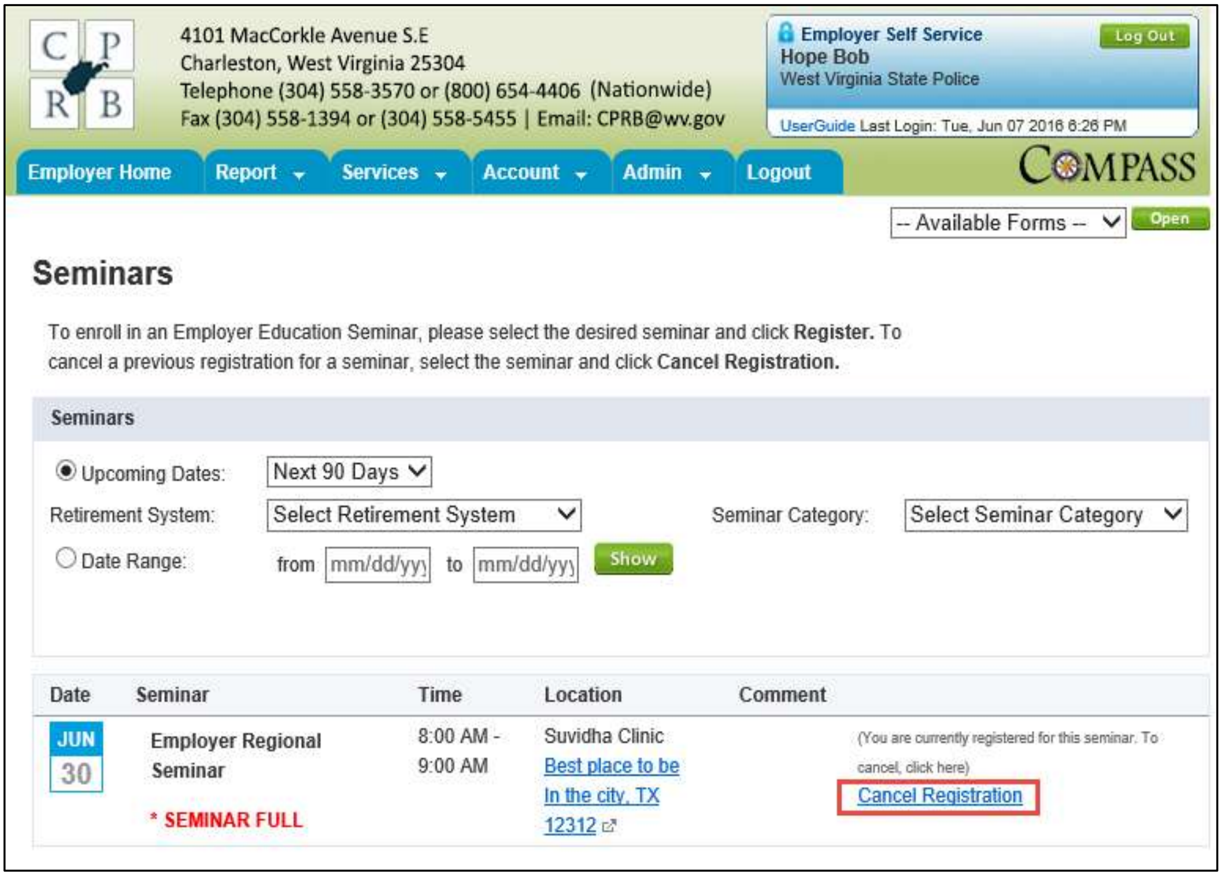
If a registered attendee can no longer attend the seminar, they can be removed as an attendee. The following steps demonstrate how to cancel attendee registration for a seminar through ESS:

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

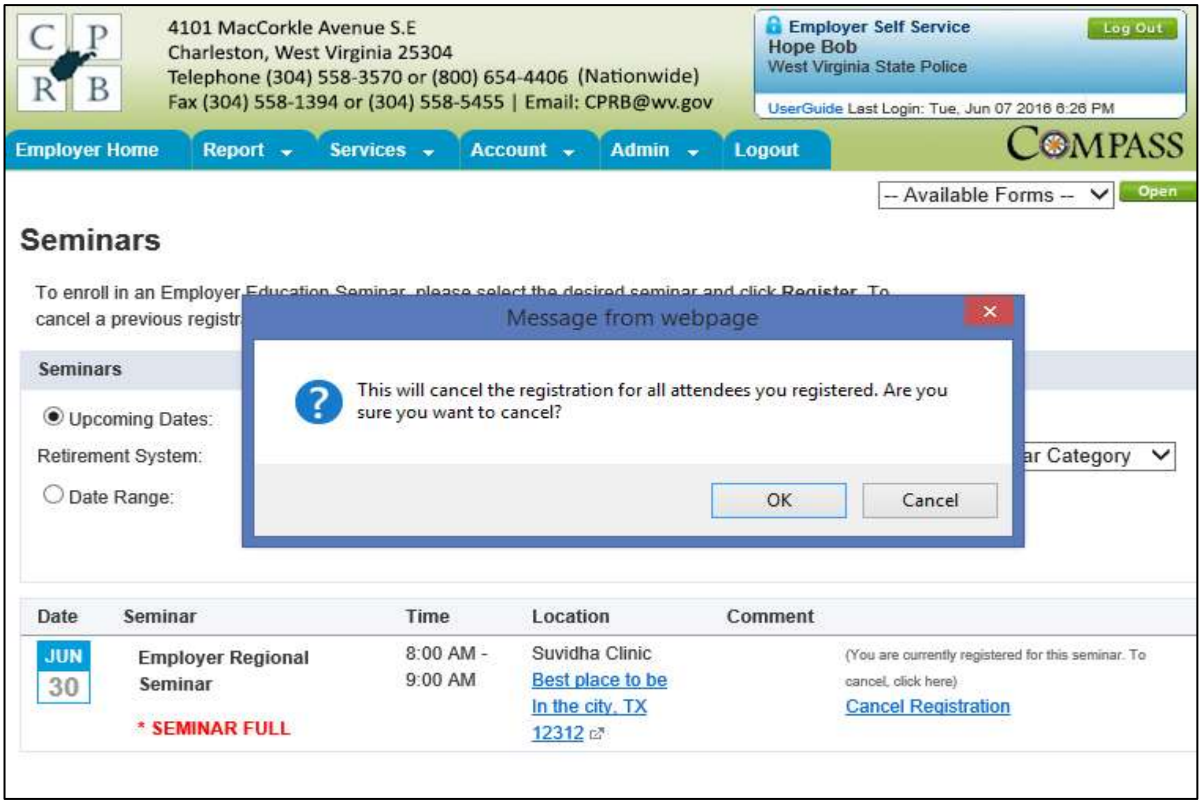
Services > **Seminars**



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



Step 3 -- A Cancel Registration pop-up displays confirming the cancellation request. Click the OK button.



13. Employer Certifications

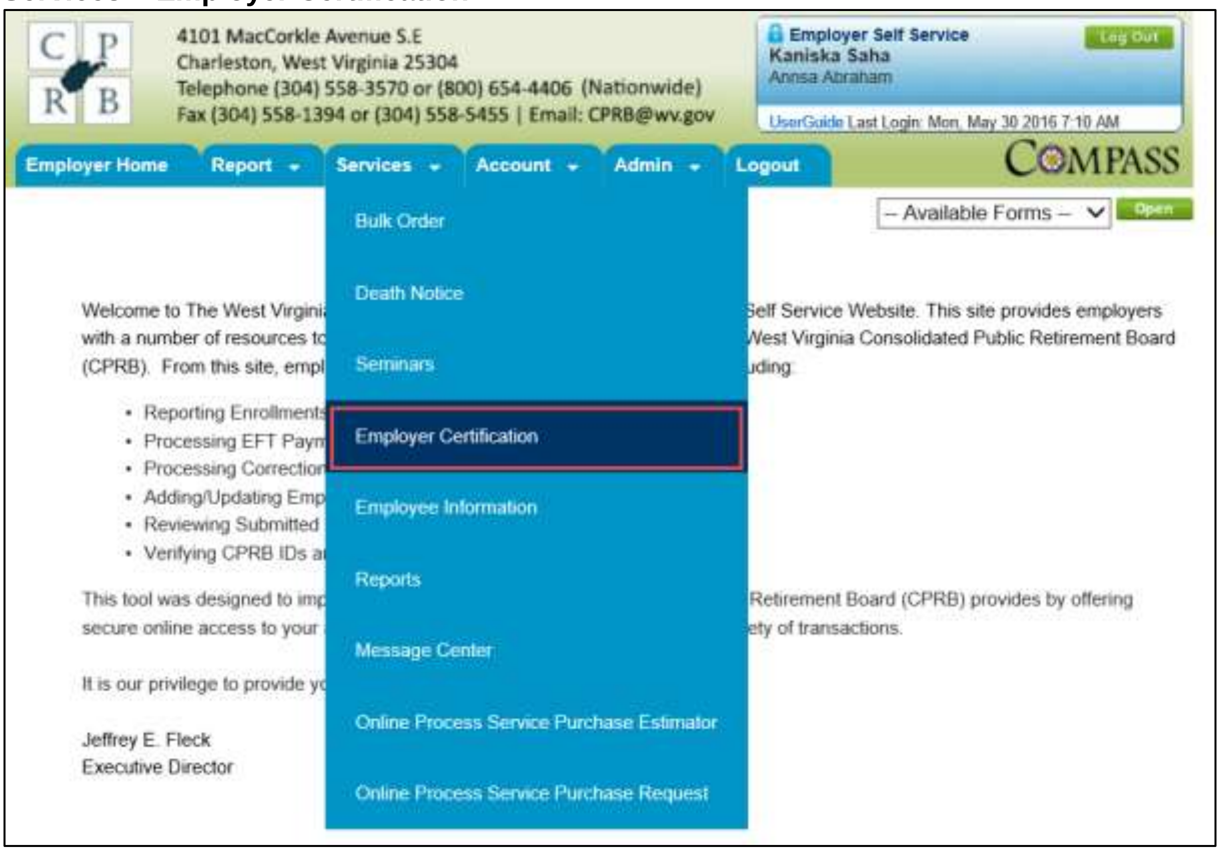
The **Employer Certifications** screens allows employers to certify information necessary for CPRB to process transactions. A certification will only appear when an employee or former employee has initiated a request with CPRB for a possible retirement, disability, refund, or service purchase. Certifications that have already been completed will not display on the **Employer Certification** screen.

13.1 Certify Service Purchase Information for a Member

Service Purchase requests are initiated by a member. When a service purchase request undergoes processing, CPRB service purchase specialists will send the service purchase request to the employer for certification.

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

Services > **Employer Certification**



Step 2 -- All pending disability, service purchase, retirement, and refund certification requests are displayed on the **Employer Certification** screen.

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Employer Certification

Retirement Requests:

CPRB ID:	Employee Name:	Job Position:	Position Status:	Contribution Group:	Retirement System:	Request Date:	Approved Date:	Employment End Date Verified:	Final Salary Verified:	Rejected Comments:
523768	TRS Cancellation	Teacher	Permanent Full Time	TRSPLN1	Teachers' Retirement System	5/31/2016		Yes	No	
523774	TRS Cancellation	Teacher	Permanent Full Time	TRSPLN1	Teachers' Retirement System	5/31/2016	05/31/2016	Yes	No	

Service Purchase Requests:

CPRB ID:	Employee Name:	Request Date:	Service Type:	Status:	Comments:
523701	Jon Snow	5/30/2016	Correction of Error Service	Progress	Test for demo material creation.

Member Refund Requests:

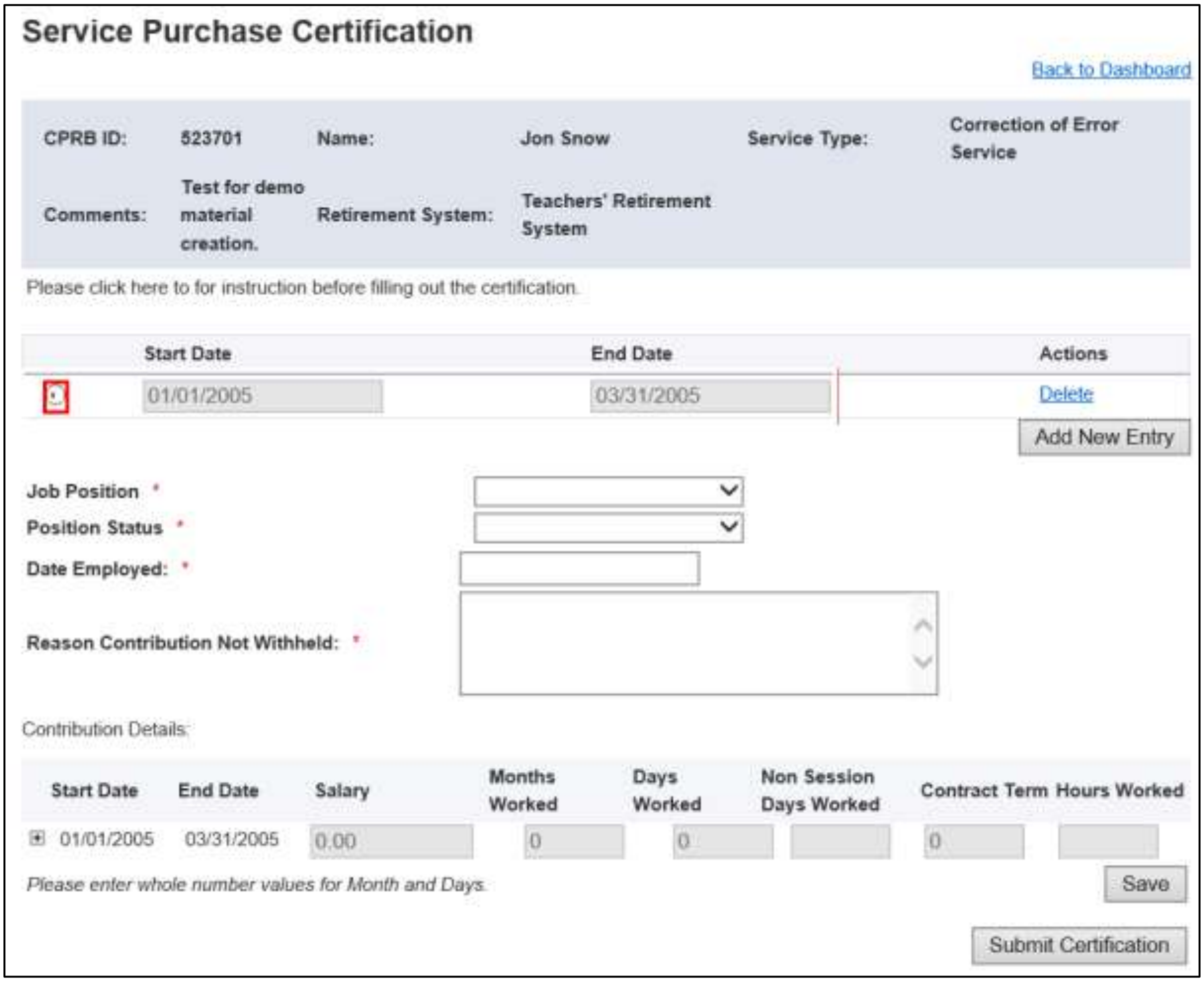
CPRB ID:	Employee Name:	Request Date:
523701	Jon Snow	05/30/2016

Disability Requests:

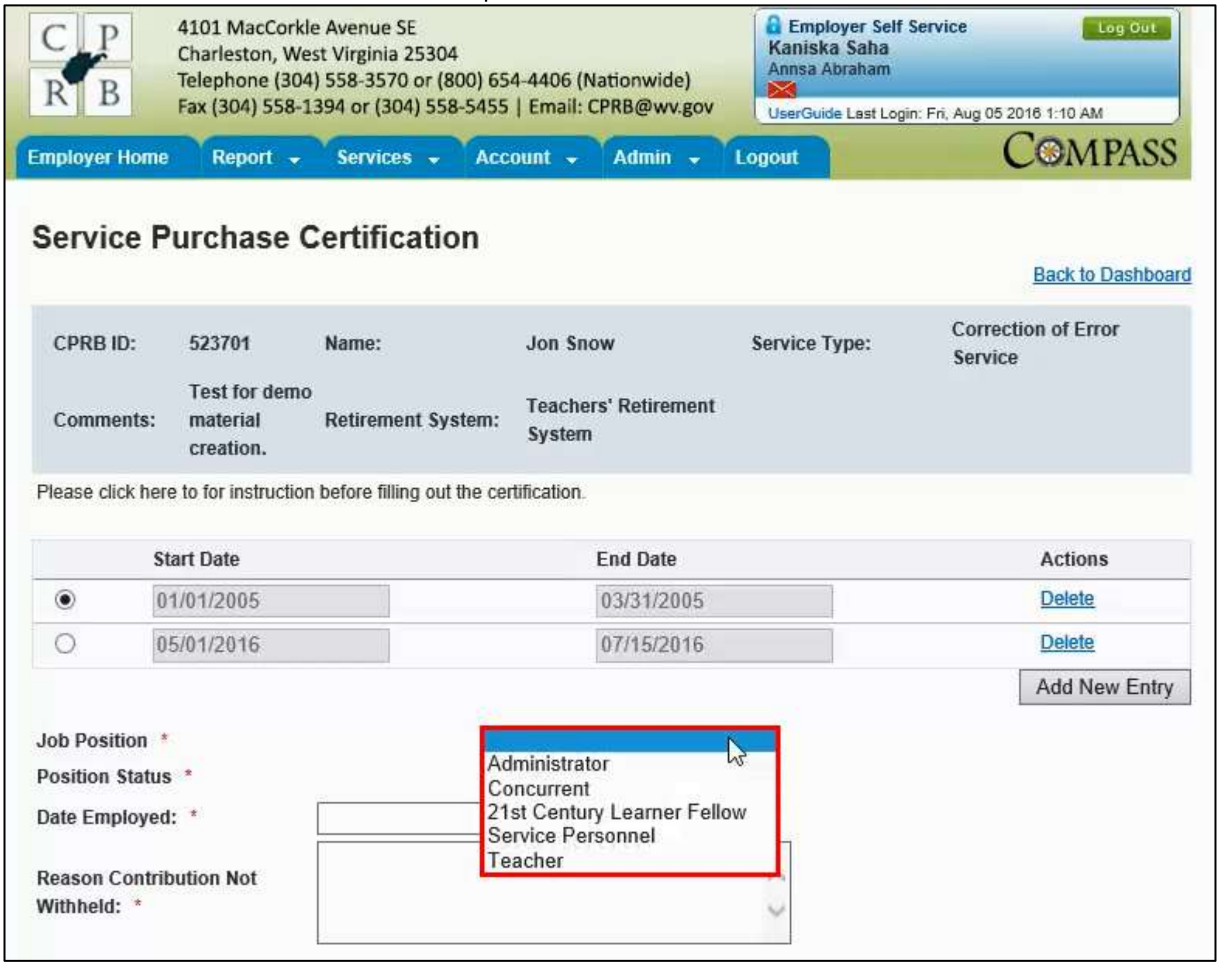
CPRB ID:	Employee Name:	Request Date:
523699	Ned Stark	05/30/2016

Step 3 -- Click the **CPRB ID** link to view the potential Service Purchase information for the member.

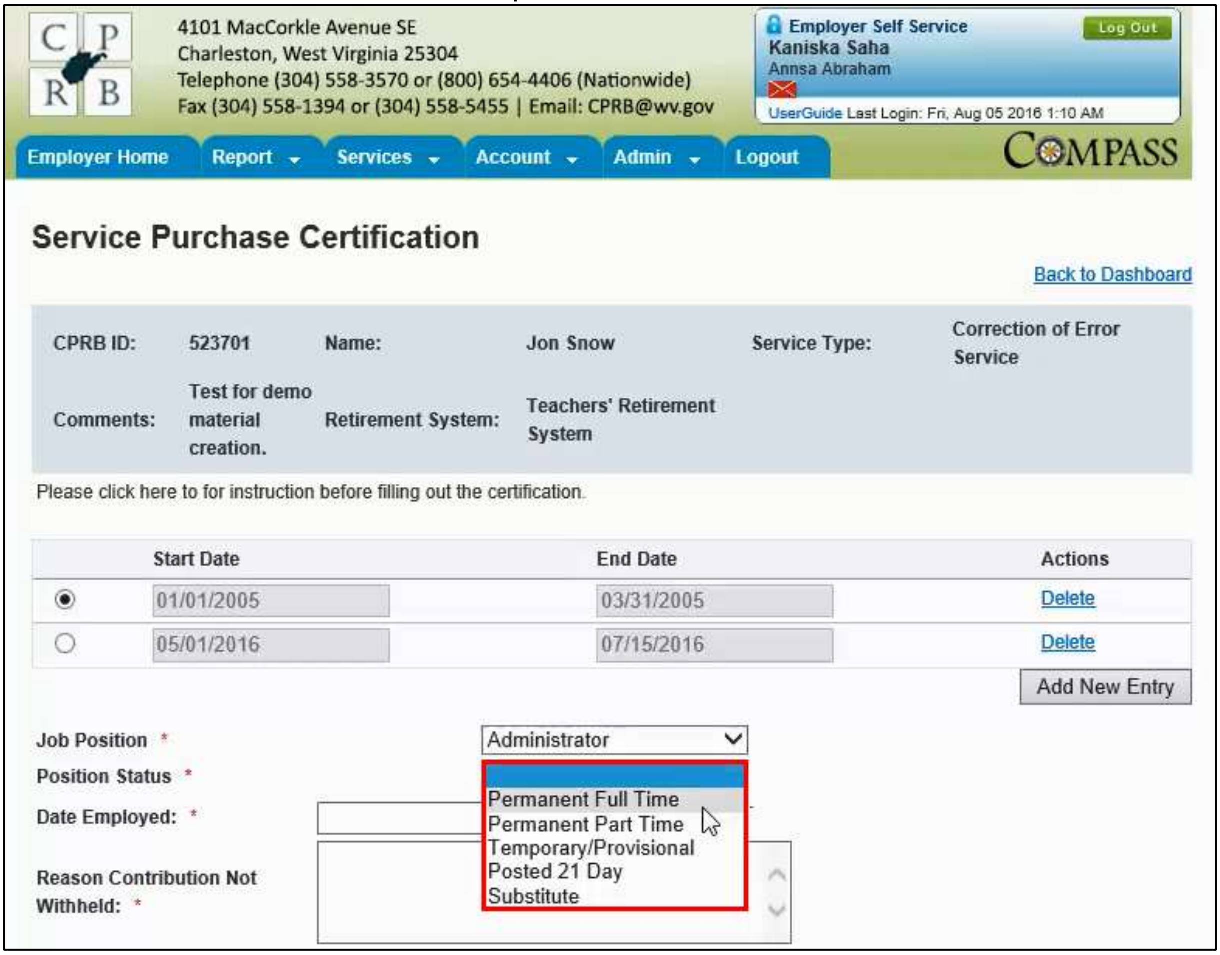
Step 4 -- The **Service Purchase Certification** screen is displayed. To certify the service purchase, select the radio button beside the **Start Date** and **End Date** fields.



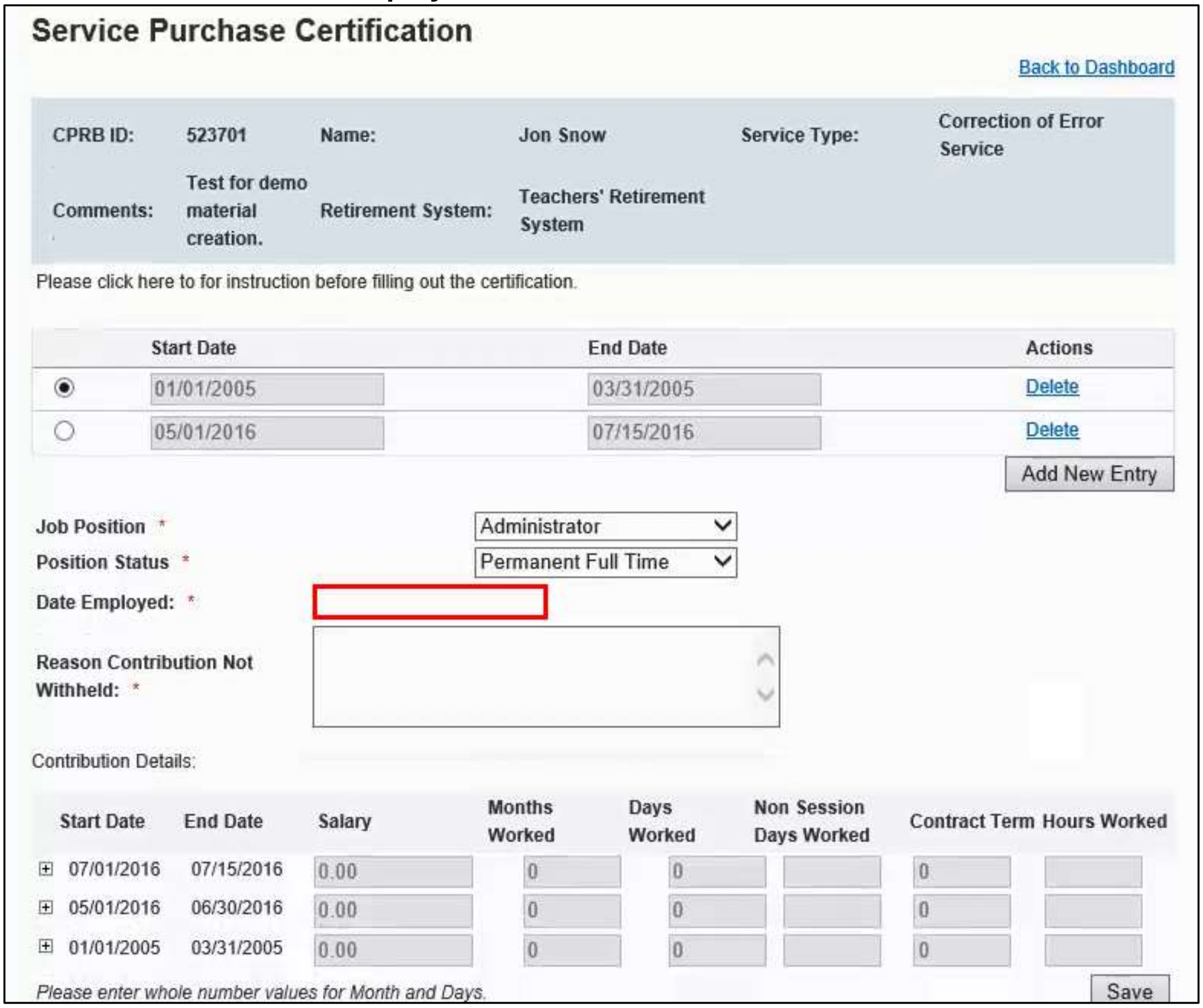
Step 5 -- Select the **Job Position** from the drop down menu.



Step 6 -- Select the **Positon Status** from the drop down menu.



Step 7 -- Enter the date in the **Date Employed** field.



Service Purchase Certification

Back to Dashboard

CPRB ID:	523701	Name:	Jon Snow	Service Type:	Correction of Error Service
Comments:	Test for demo material creation.	Retirement System:	Teachers' Retirement System		

Please click here to for instruction before filling out the certification.

	Start Date	End Date	Actions
◉	01/01/2005	03/31/2005	Delete
○	05/01/2016	07/15/2016	Delete

Add New Entry

Job Position * Administrator

Position Status * Permanent Full Time

Date Employed: *

Reason Contribution Not Withheld: *

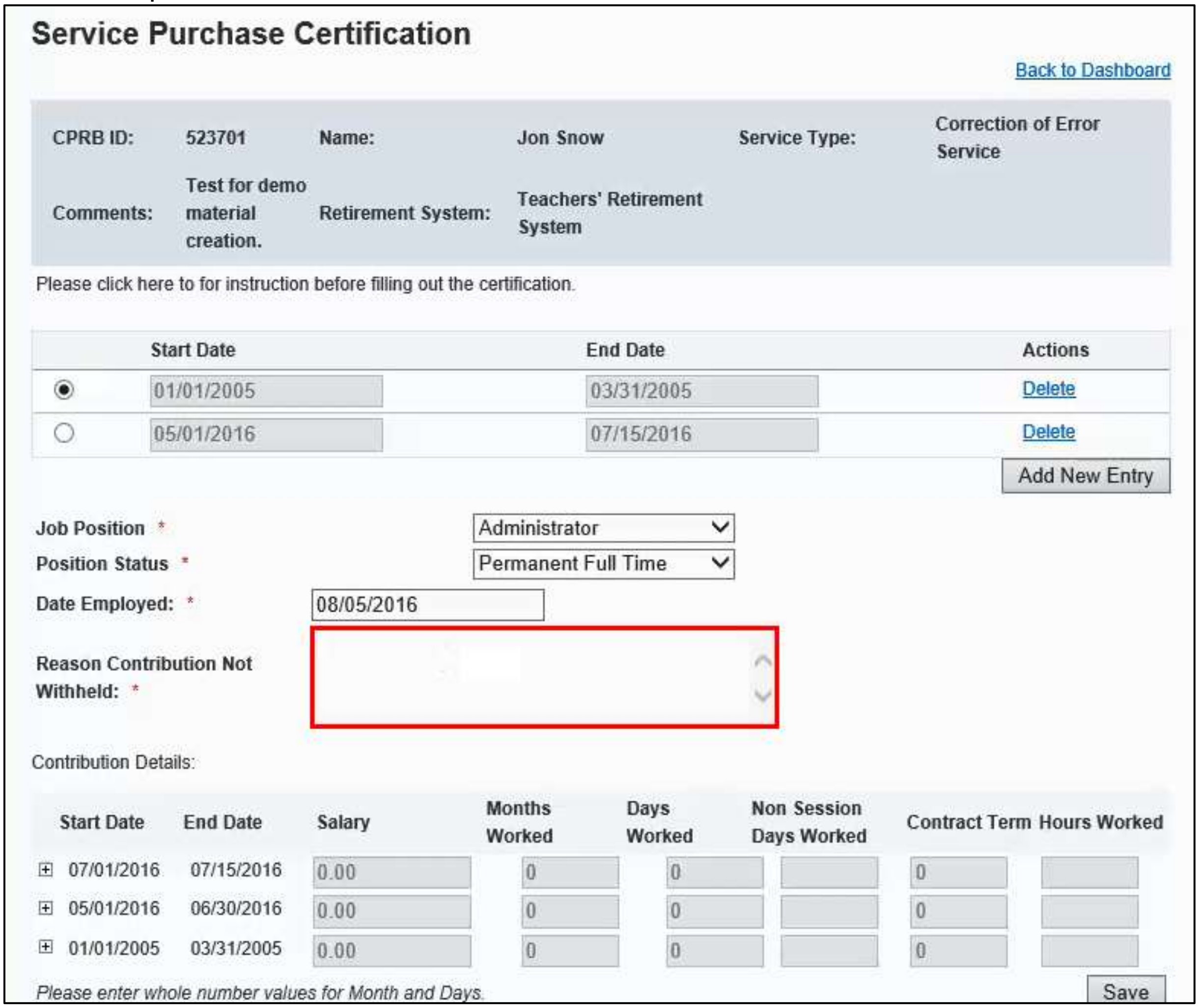
Contribution Details:

Start Date	End Date	Salary	Months Worked	Days Worked	Non Session Days Worked	Contract Term	Hours Worked
⊞ 07/01/2016	07/15/2016	0.00	0	0		0	
⊞ 05/01/2016	06/30/2016	0.00	0	0		0	
⊞ 01/01/2005	03/31/2005	0.00	0	0		0	

Please enter whole number values for Month and Days.

Save

Step 8 -- Enter an explanation in the **Reason Contribution Not Withheld** field.



Service Purchase Certification

Back to Dashboard

CPRB ID:	523701	Name:	Jon Snow	Service Type:	Correction of Error Service
Comments:	Test for demo material creation.	Retirement System:	Teachers' Retirement System		

Please click here to for instruction before filling out the certification.

	Start Date	End Date	Actions
◉	01/01/2005	03/31/2005	Delete
○	05/01/2016	07/15/2016	Delete

Add New Entry

Job Position * Administrator

Position Status * Permanent Full Time

Date Employed: * 08/05/2016

Reason Contribution Not Withheld: *

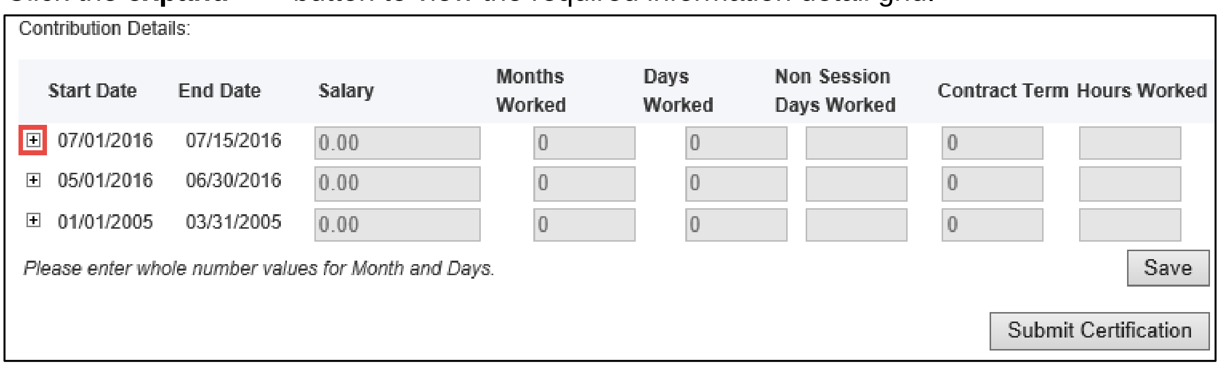
Contribution Details:

Start Date	End Date	Salary	Months Worked	Days Worked	Non Session Days Worked	Contract Term	Hours Worked
⊞ 07/01/2016	07/15/2016	0.00	0	0		0	
⊞ 05/01/2016	06/30/2016	0.00	0	0		0	
⊞ 01/01/2005	03/31/2005	0.00	0	0		0	

Please enter whole number values for Month and Days.

Save

Step 9 -- Click the **expand** ⊞ button to view the required information detail grid.



Contribution Details:

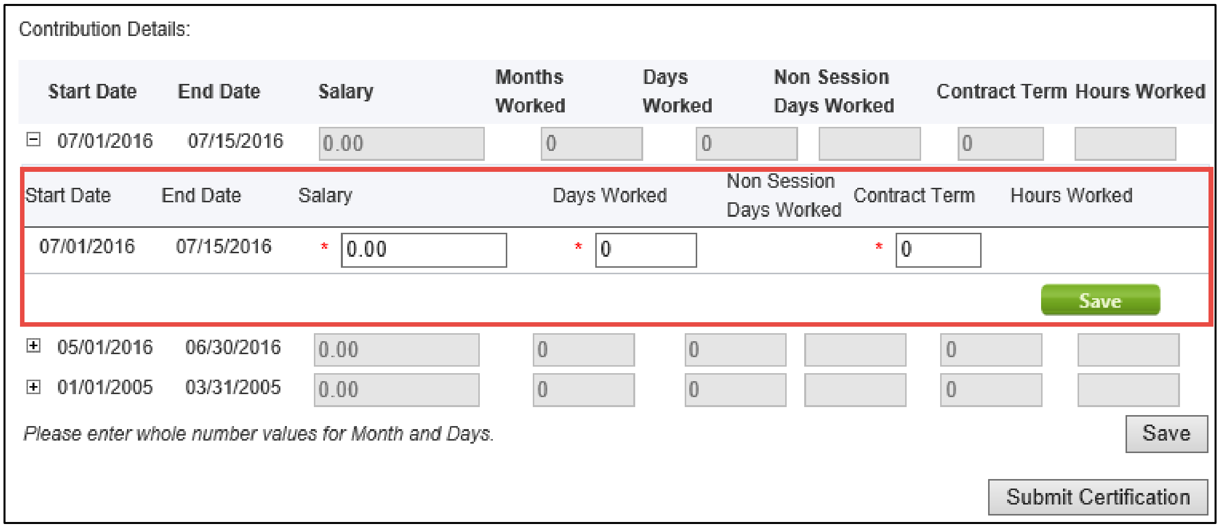
Start Date	End Date	Salary	Months Worked	Days Worked	Non Session Days Worked	Contract Term	Hours Worked
⊞ 07/01/2016	07/15/2016	0.00	0	0		0	
⊞ 05/01/2016	06/30/2016	0.00	0	0		0	
⊞ 01/01/2005	03/31/2005	0.00	0	0		0	

Please enter whole number values for Month and Days.

Save

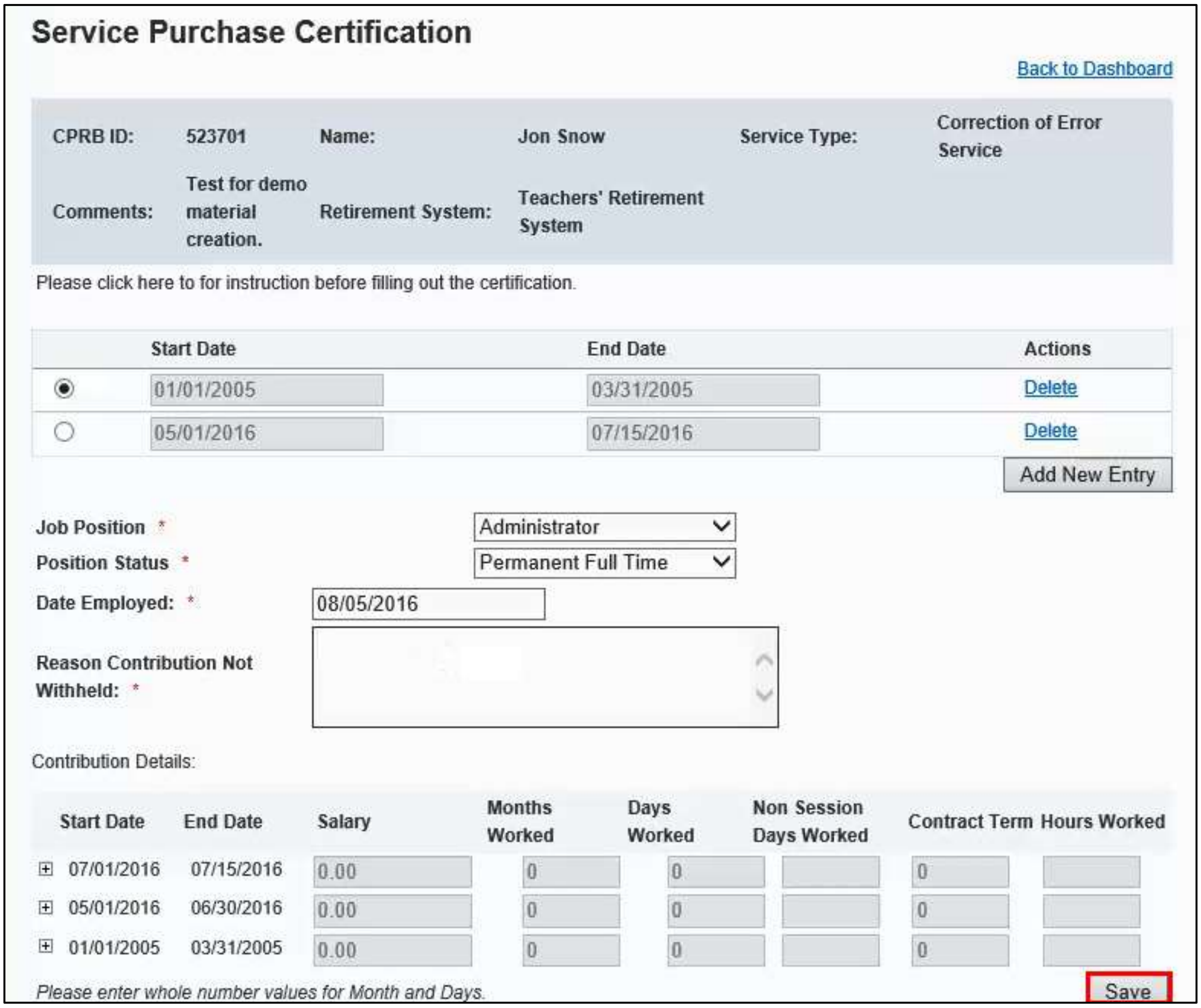
Submit Certification

Step 10 -- The additional contribution details are displayed.

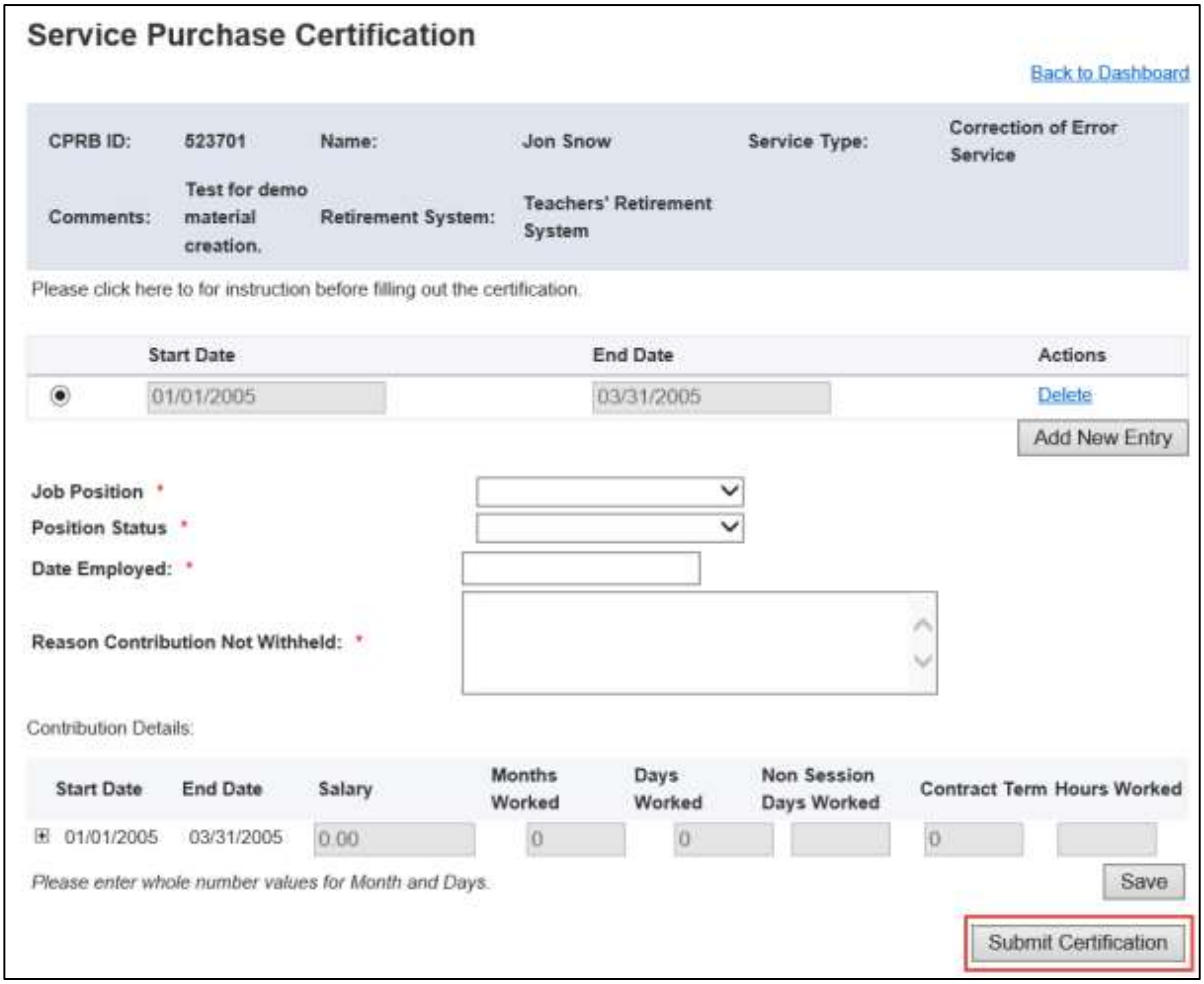


Step 11 -- Click the Save button.

Note: The **Days Worked** field should not be a record of cumulative days worked. Rather, it is for days worked over the number of months. Months worked column will be always disabled.



Step 12 -- Click the Submit Certification button to submit the information to CPRB for processing.

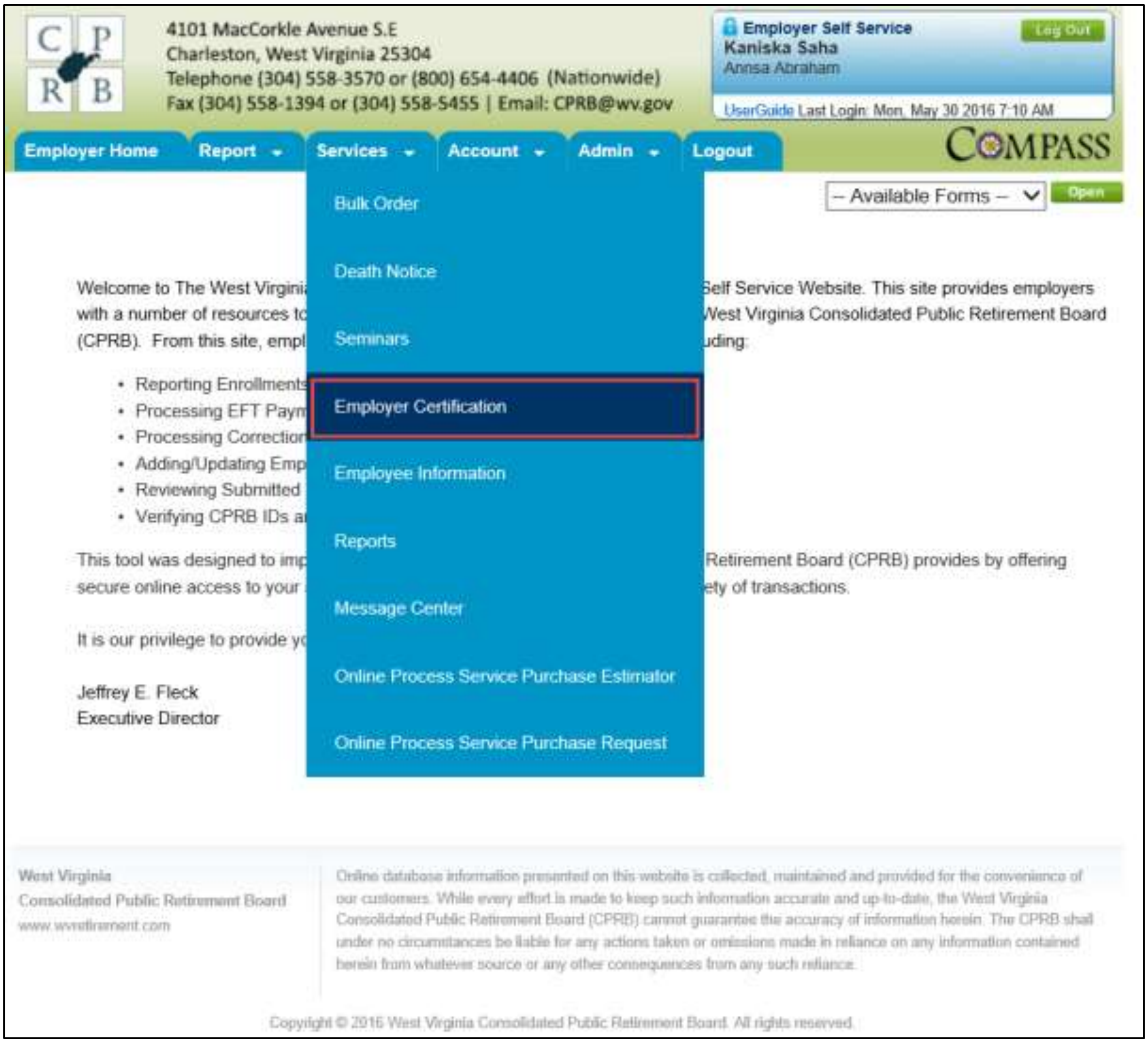


13.2 Certify Refund Information for a Member

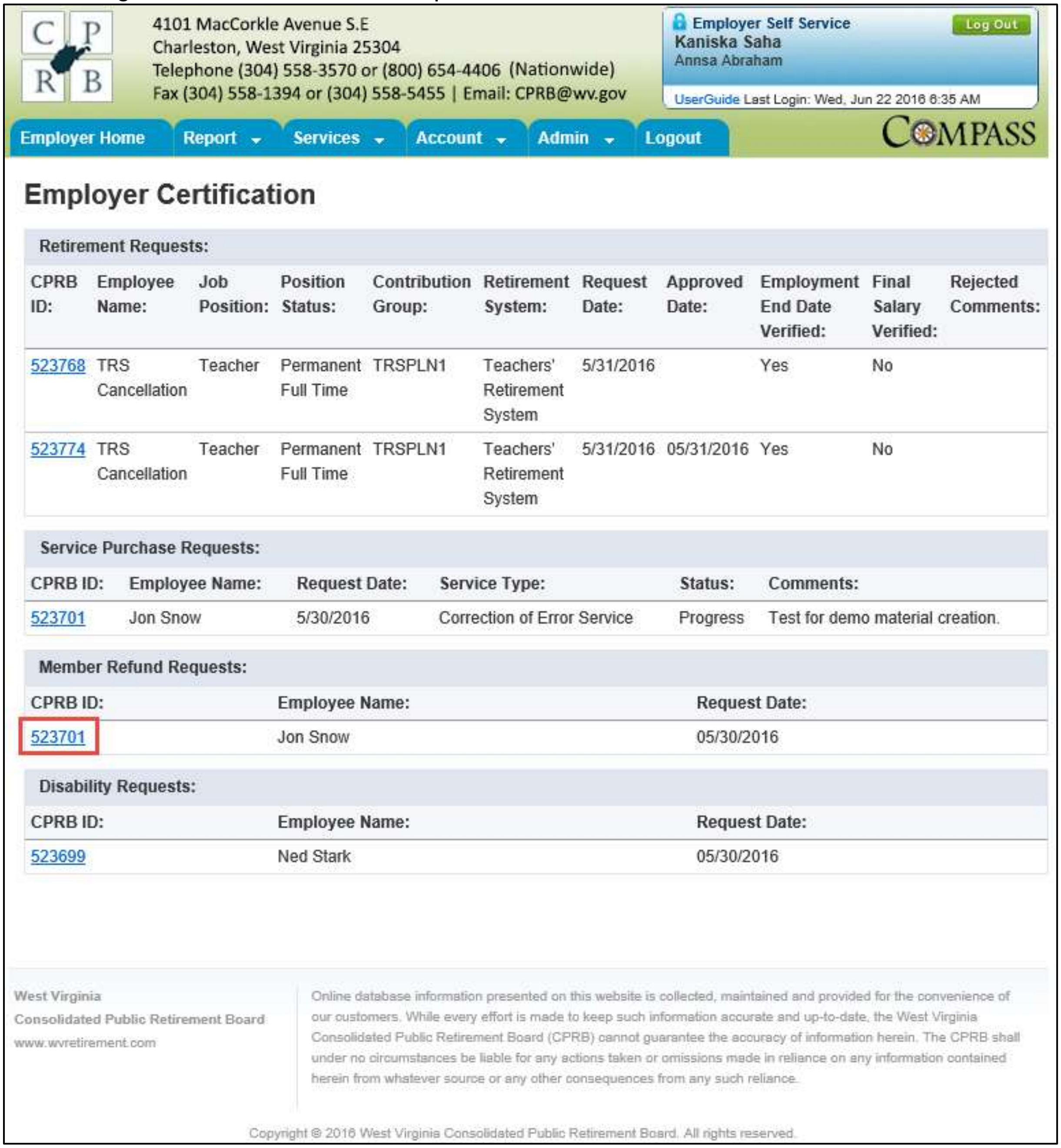
Member Refund Request is initiated by a member submitting a refund application through **Member Self-Service** or submitting a refund request form to CPRB. Once the employer certification is received for the member's refund application, then after approval of the application, CPRB staff completes the refund process.

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

Services > **Employer Certification**



Step 2 -- On the Employer Certification dashboard, click the **CPRB ID** next to a member's name under the grid for Member Refund Requests.


4101 MacCorkle Avenue S.E
Charleston, West Virginia 25304
Telephone (304) 558-3570 or (800) 654-4406 (Nationwide)
Fax (304) 558-1394 or (304) 558-5455 | Email: CPRB@wv.gov

Employer Self Service
Kaniska Saha
Annsa Abraham
Log Out
UserGuide Last Login: Wed, Jun 22 2016 6:35 AM

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

COMPASS

Employer Certification

Retirement Requests:

CPRB ID:	Employee Name:	Job Position:	Position Status:	Contribution Group:	Retirement System:	Request Date:	Approved Date:	Employment End Date Verified:	Final Salary Verified:	Rejected Comments:
523768	TRS Cancellation	Teacher	Permanent Full Time	TRSPLN1	Teachers' Retirement System	5/31/2016		Yes	No	
523774	TRS Cancellation	Teacher	Permanent Full Time	TRSPLN1	Teachers' Retirement System	5/31/2016	05/31/2016	Yes	No	

Service Purchase Requests:

CPRB ID:	Employee Name:	Request Date:	Service Type:	Status:	Comments:
523701	Jon Snow	5/30/2016	Correction of Error Service	Progress	Test for demo material creation.

Member Refund Requests:

CPRB ID:	Employee Name:	Request Date:
523701	Jon Snow	05/30/2016

Disability Requests:

CPRB ID:	Employee Name:	Request Date:
523699	Ned Stark	05/30/2016

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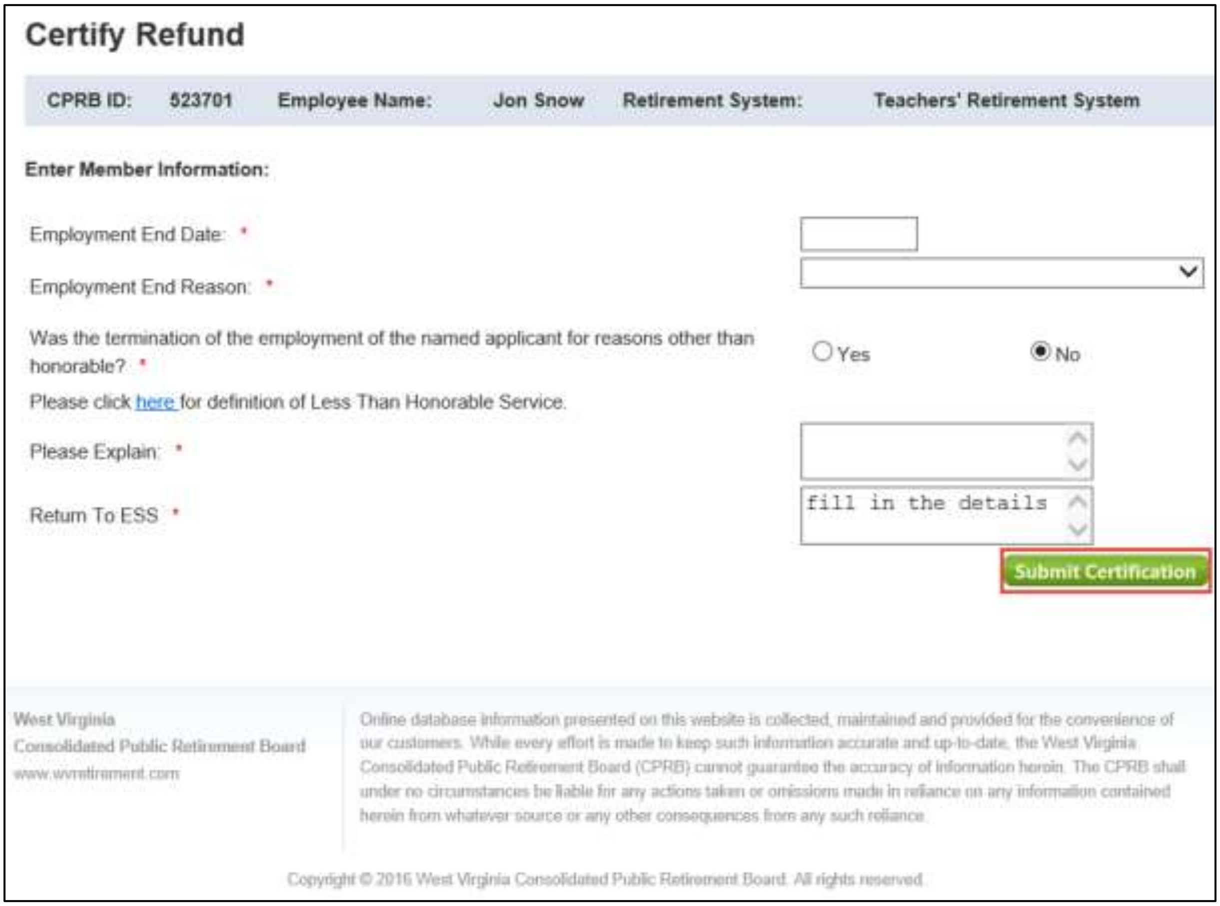
Step 3 -- The **Certify Refund** screen displays. Enter the required information, and click the 

button.

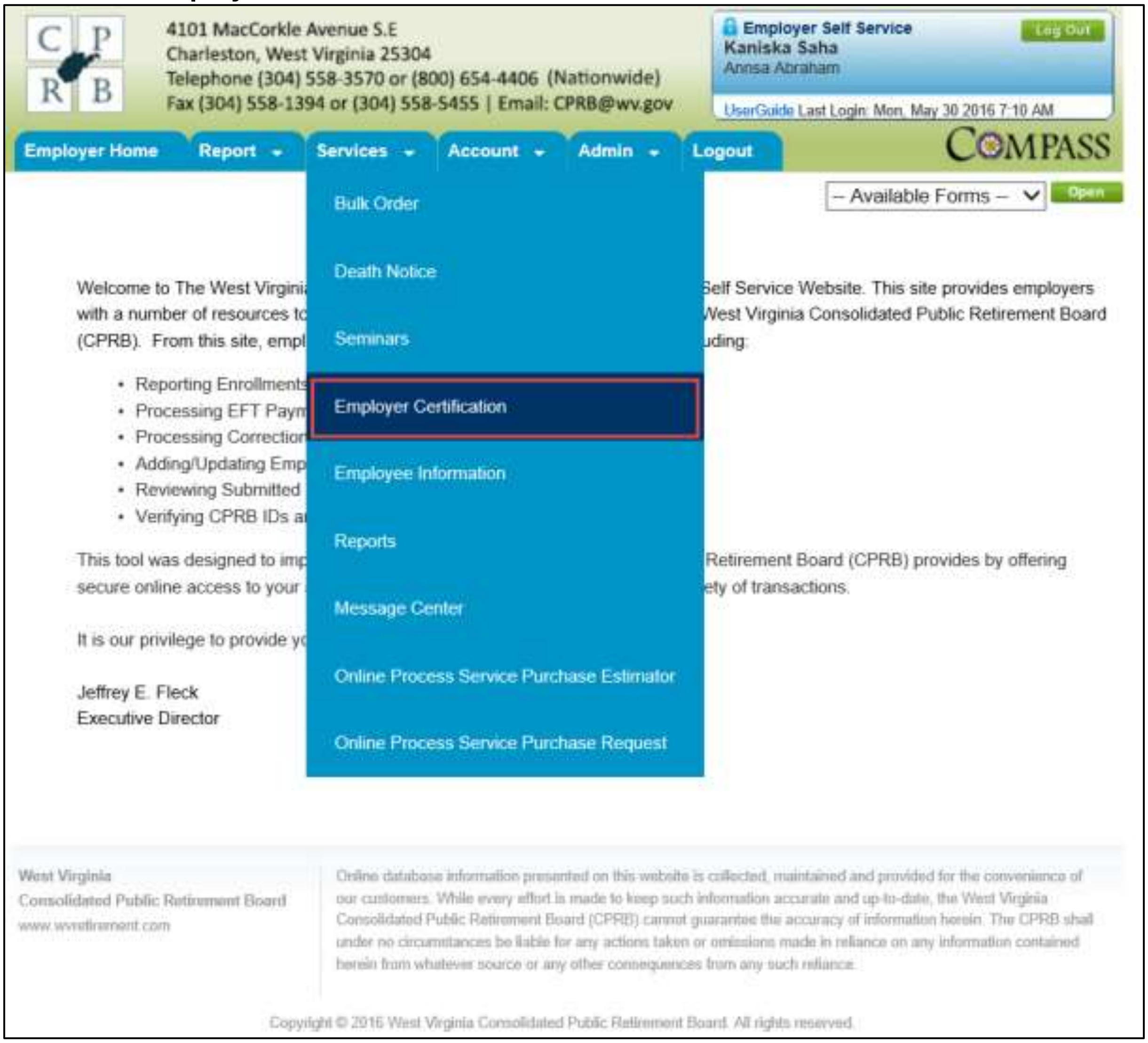


13.3 Certify Information for a Disability Applicant

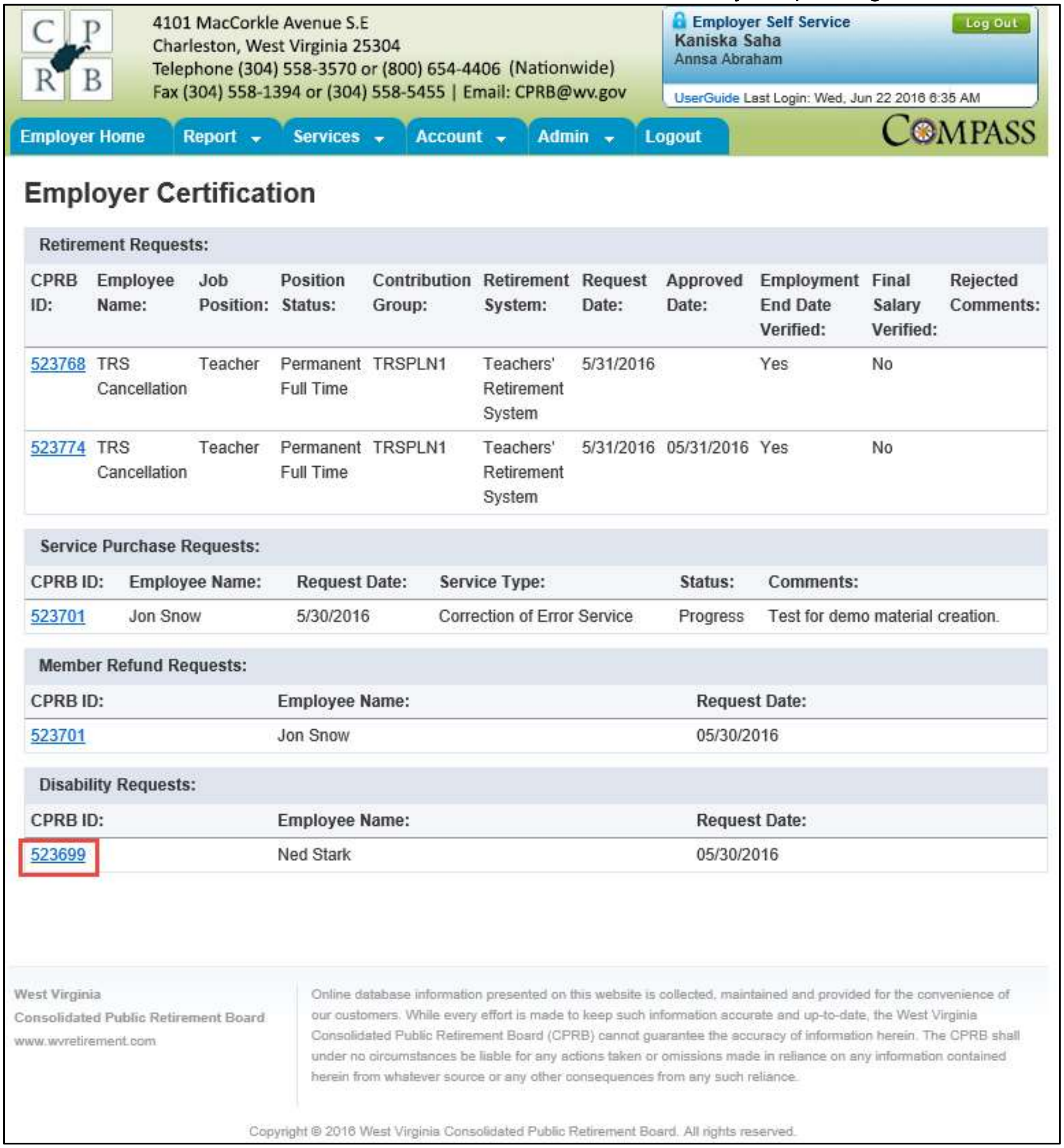
The following steps show how an employer can certify the information requested by CPRB as the result of a member's or former member's application for disability retirement benefits.

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

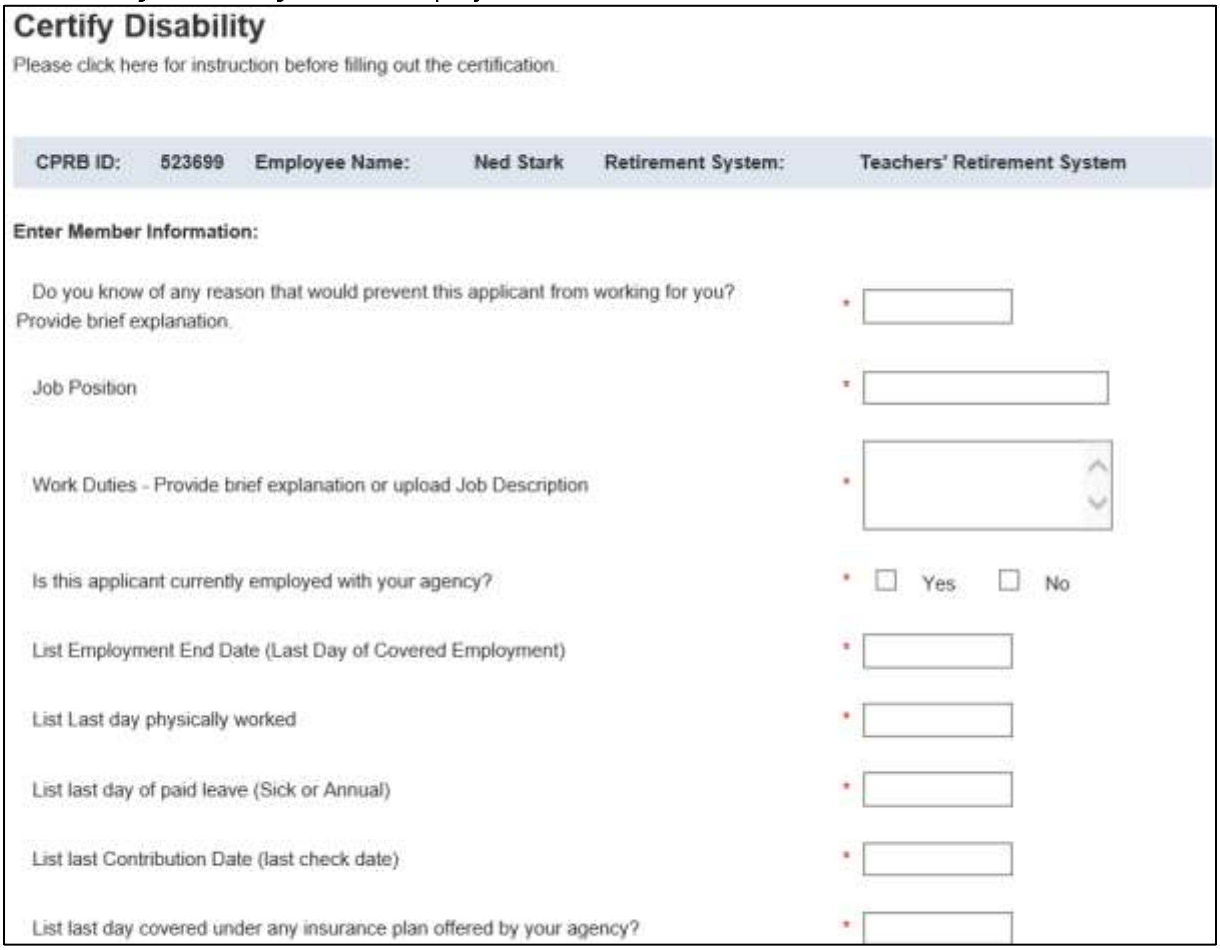
Services > **Employer Certification**



Step 2 -- Click the **CPRB ID** next to the member's name under the Disability Requests grid.



Step 3 -- The **Certify Disability** screen displays.



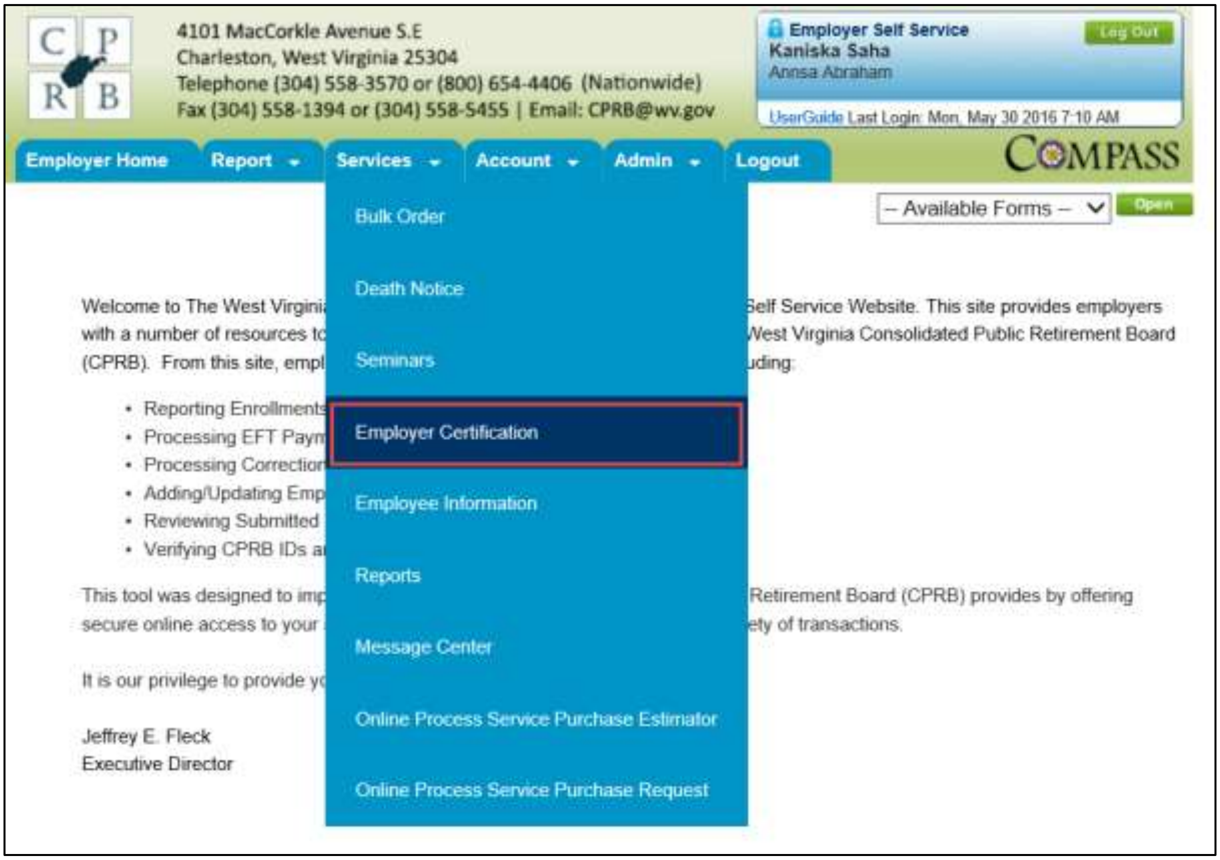
Step 4 -- Enter all relevant details in the fields, scroll down and click the **Approve** button.

13.4 Certify Retirement Information for a Member

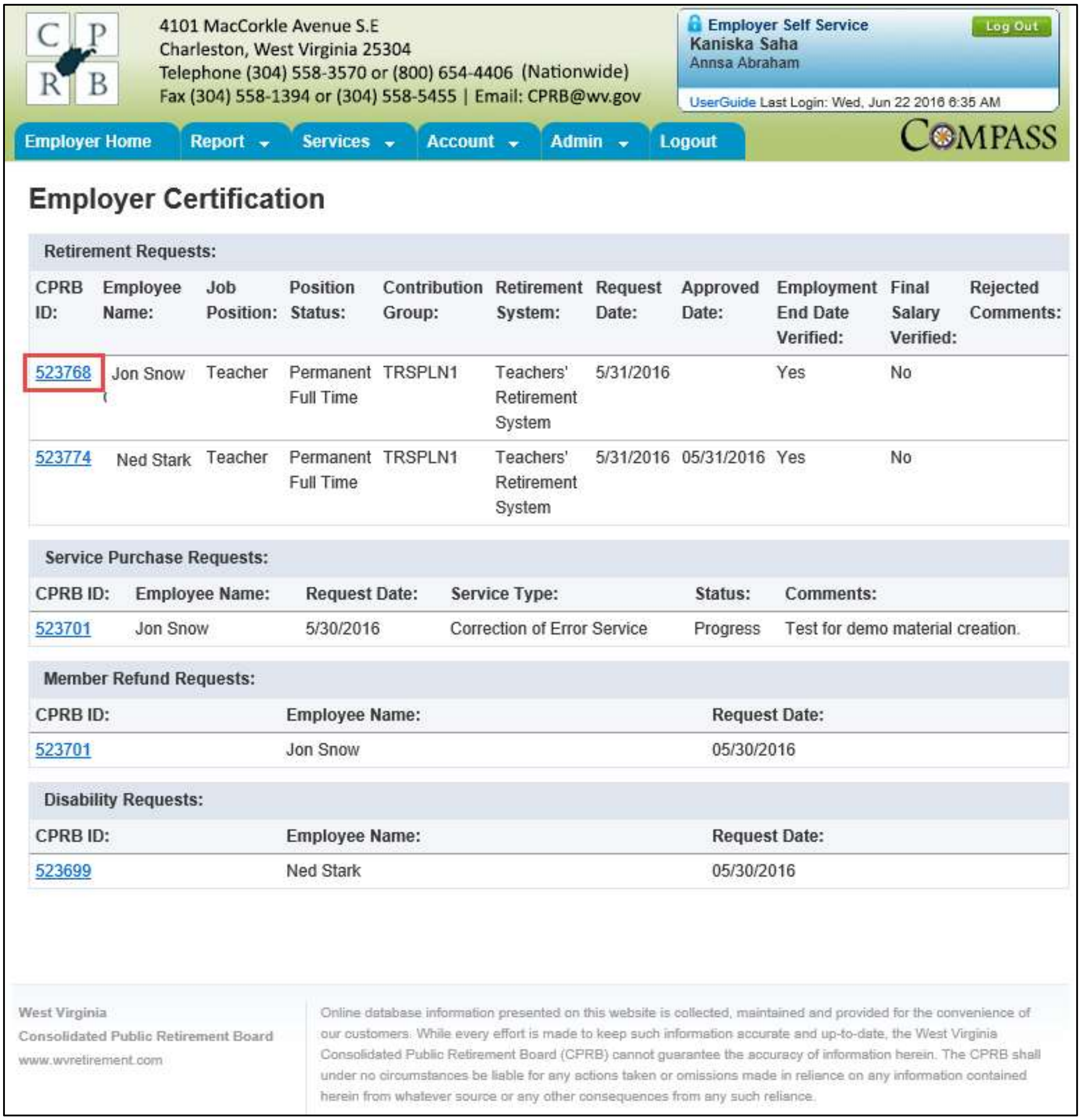
All retirement certification requests in CPRB's ESS portal are answered on the **Retirement Certification** screen. Retirement requests are initiated by a member using either Member Self-Service or submitting a retirement application to CPRB. Depending on the status of the application, it appears in the ESS portal for certification of key information. After the employer has completed the required certification, CPRB staff completes the retirement process for the member.

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

Services > Employer Certification.



Step 2 -- Click the **CPRB ID** next to the relevant retirement certification request.



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Employer Self Service — Log Out
Kaniska Saha
Annsa Abraham
UserGuide Last Login: Wed, Jun 22 2016 6:35 AM

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

Employer Certification

Retirement Requests:

CPRB ID:	Employee Name:	Job Position:	Position Status:	Contribution Group:	Retirement System:	Request Date:	Approved Date:	Employment End Date Verified:	Final Salary Verified:	Rejected Comments:
523768	Jon Snow	Teacher	Permanent Full Time	TRSPLN1	Teachers' Retirement System	5/31/2016		Yes	No	
523774	Ned Stark	Teacher	Permanent Full Time	TRSPLN1	Teachers' Retirement System	5/31/2016	05/31/2016	Yes	No	

Service Purchase Requests:

CPRB ID:	Employee Name:	Request Date:	Service Type:	Status:	Comments:
523701	Jon Snow	5/30/2016	Correction of Error Service	Progress	Test for demo material creation.

Member Refund Requests:

CPRB ID:	Employee Name:	Request Date:
523701	Jon Snow	05/30/2016

Disability Requests:

CPRB ID:	Employee Name:	Request Date:
523699	Ned Stark	05/30/2016

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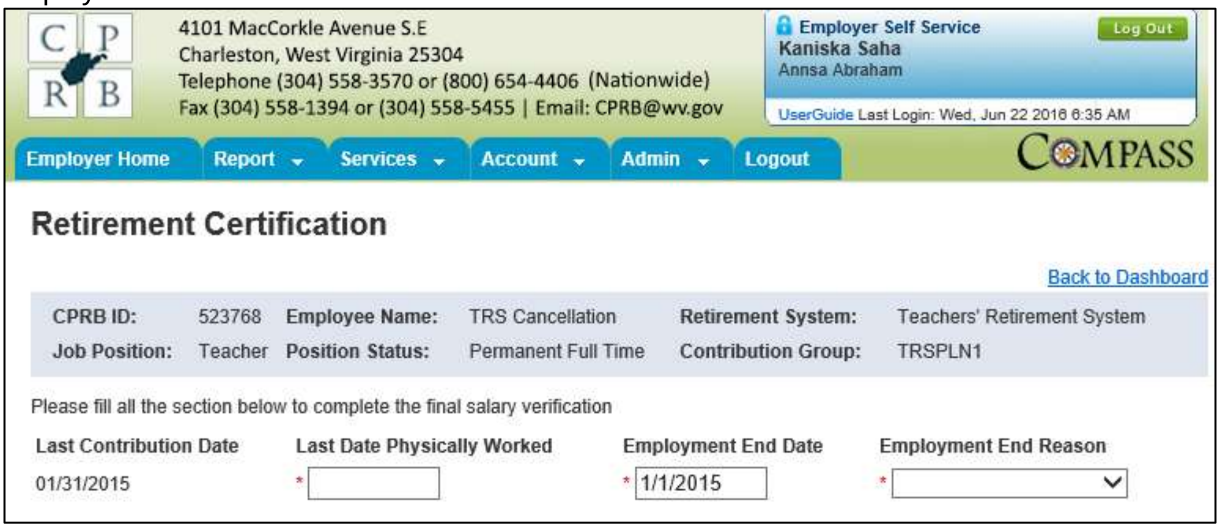
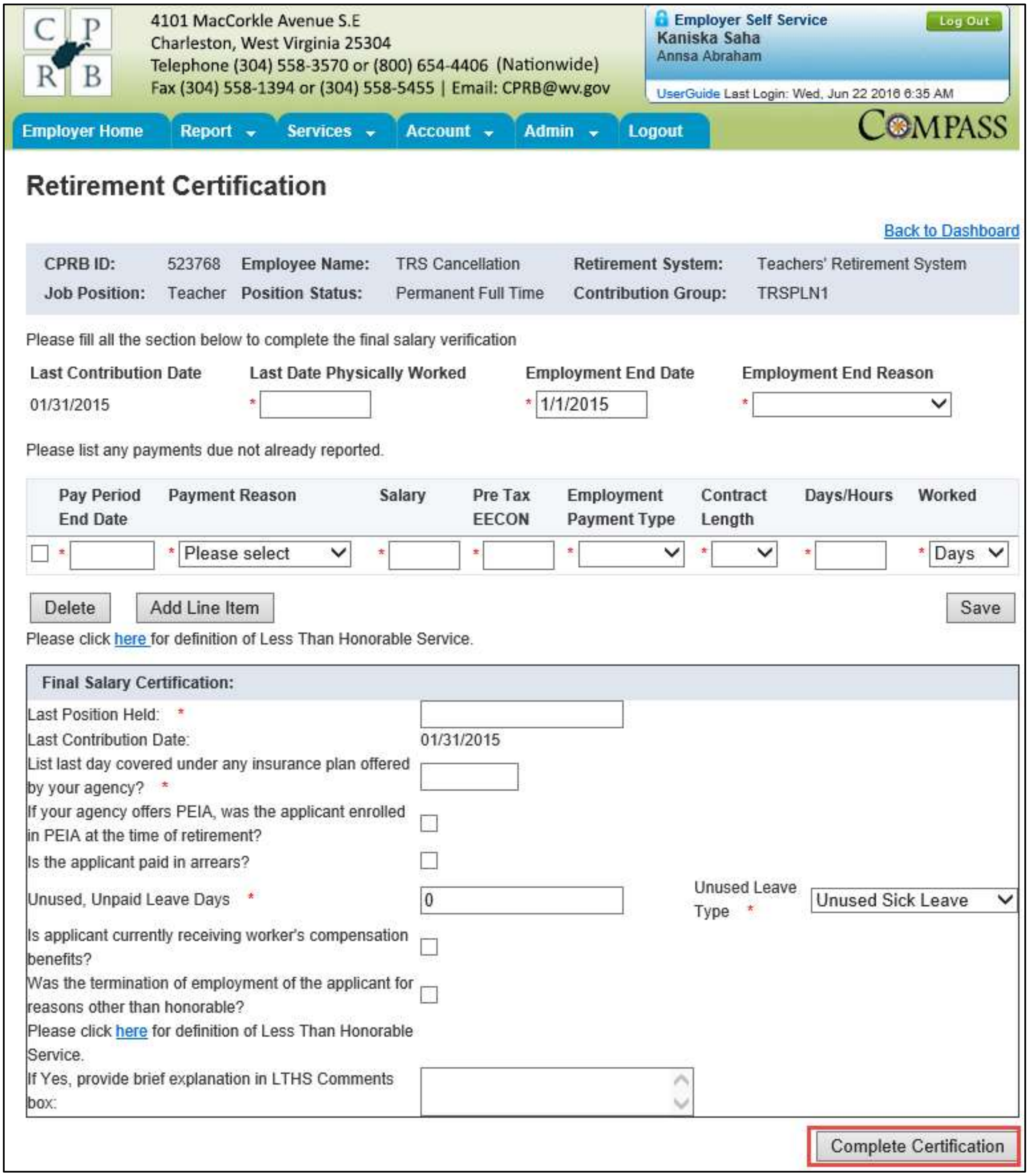
Step 3 -- The **Retirement Certification** screen displays. Enter the **Last Date Physically Worked, Employment End Date** and **Employment End Reason**.

Note: The completion of the **Last Date Physically Worked, Employment End Date** and **Employment End Reason** fields will allow CPRB to add the retiree to payroll. The remaining fields can be completed as the required information is made available to the employer.



Step 4 -- The remaining Retirement Certification fields are populated based on the completion of the **Last Date Physically Worked, Employment End Date** and **Employment End Reason**.

Note: The completion of the **Last Date Physically Worked, Employment End Date** and **Employment End Reason** fields will allow CPRB to add the retiree to payroll. The remaining fields can be completed as the required information is made available to the employer.



14. Message Center

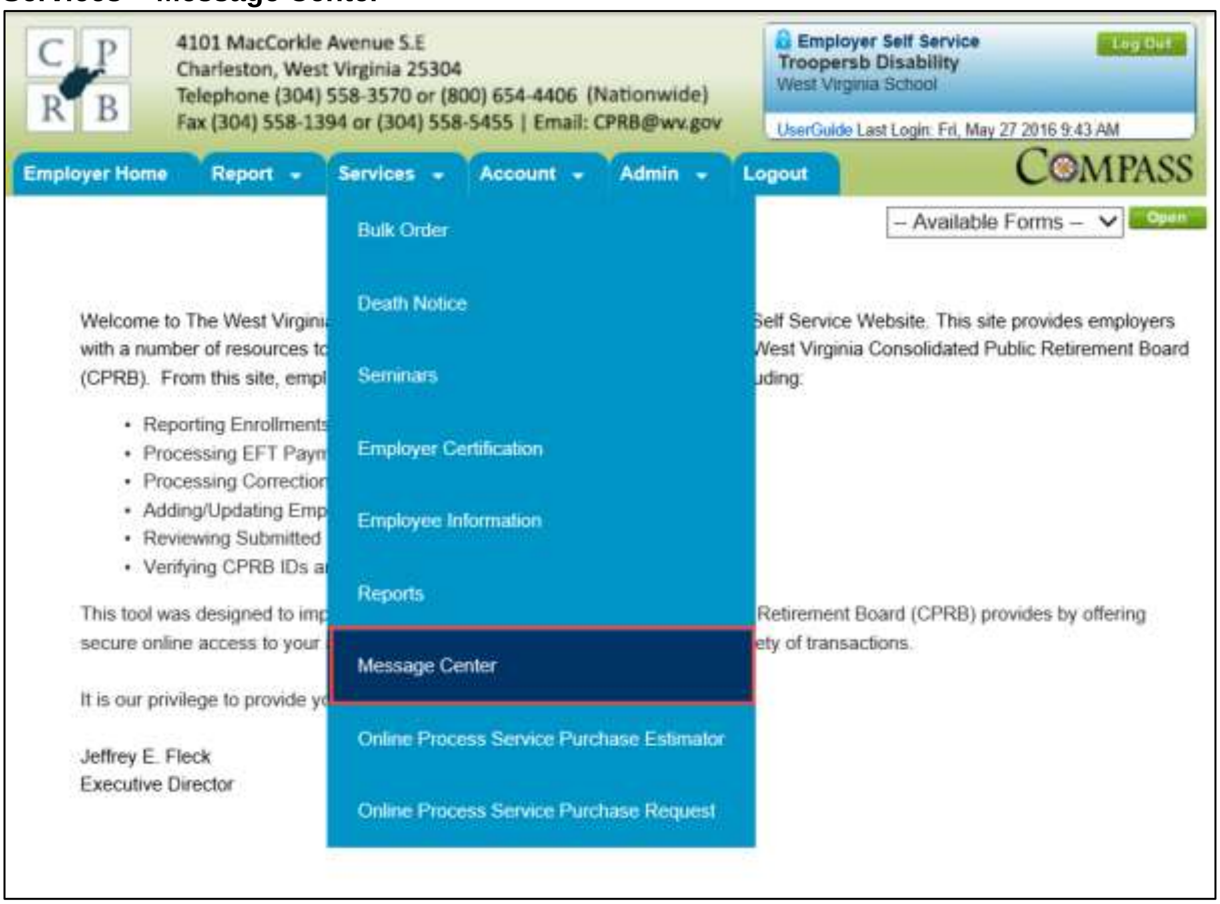
The **Message Center** screen allows employers to view, compose, reply, delete and flag important messages sent between an employer and CPRB. The messages are available on CPRB's ESS portal for 90 days and will automatically be deleted after 90 days except messages flagged as important.

14.1 View Messages

The following steps demonstrate how to view messages sent from CPRB using the **Message Center** screen:

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

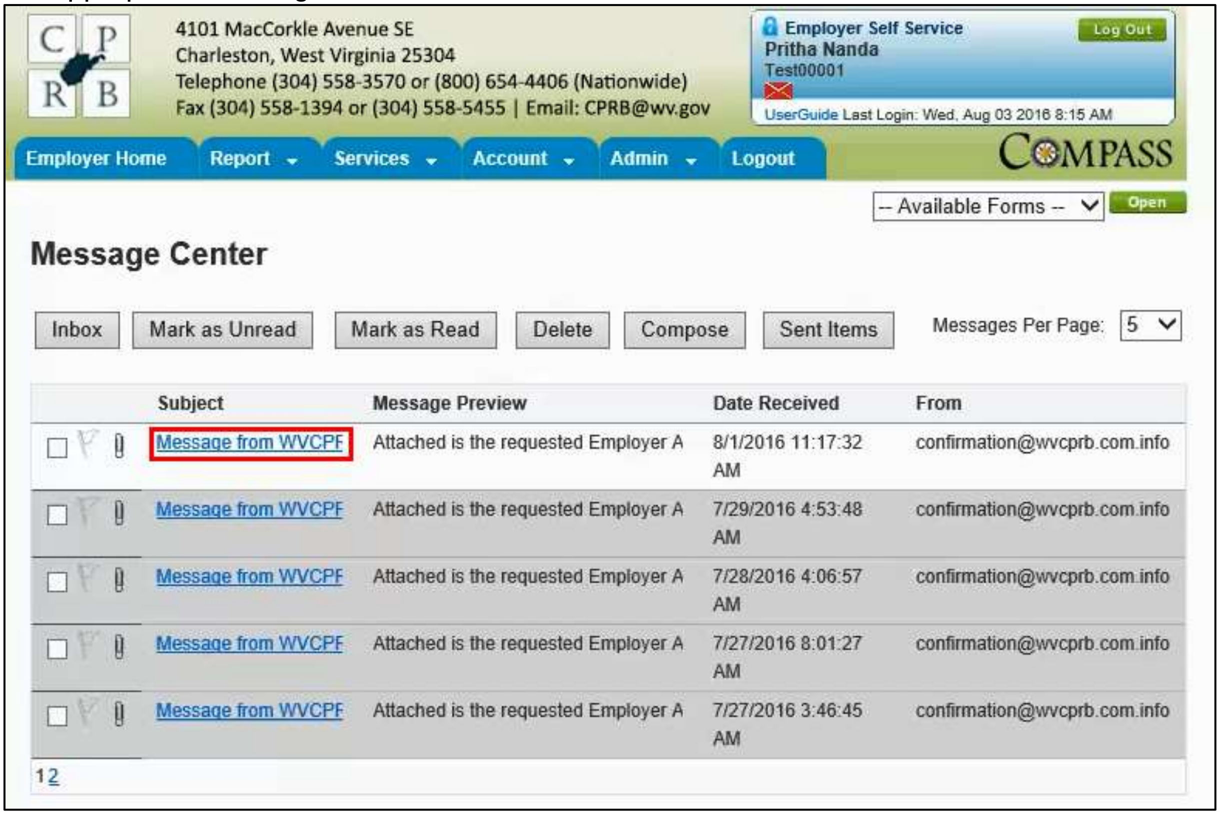
Services > **Message Center**



Step 2 -- The **Message Center** screen displays all the messages or correspondence sent by CPRB staff members. Click the **Subject** link to view the message.

Note: A message status can be updated by selecting the check box next to the appropriate message and clicking the **Mark as Read** button or **Mark as Unread** button.

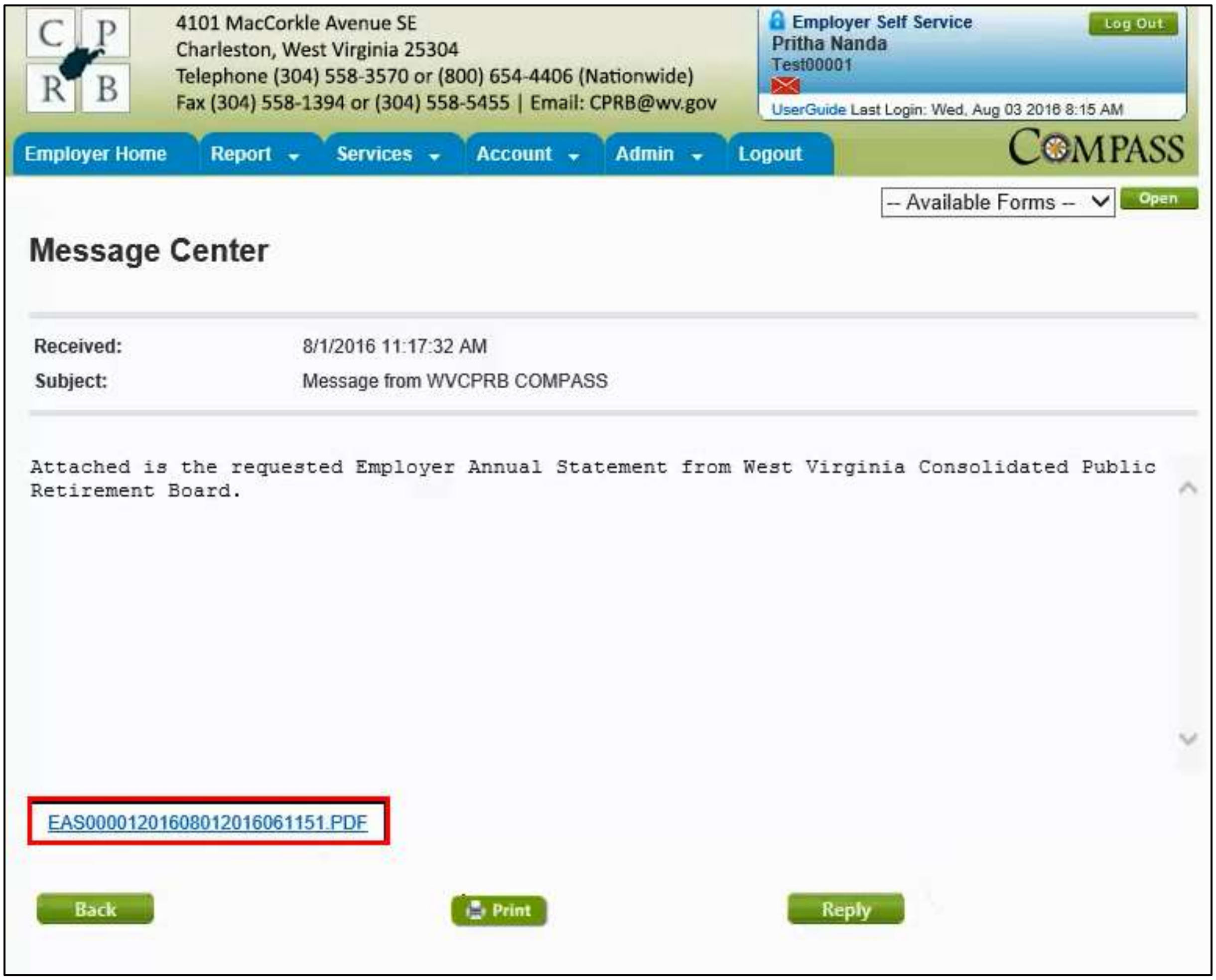
Note: A message status can be updated to **Important**, by selecting the flag icon next to the appropriate message.



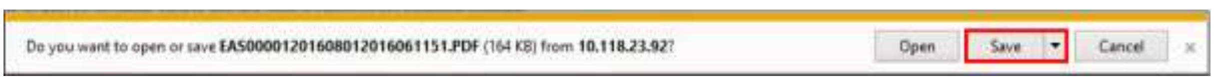
Note: To view messages sent to CPRB, click the 

button on the right side of the **Message Center** screen.

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



Step 4 -- The attachment opens as a separate document, which can be saved to the desktop.

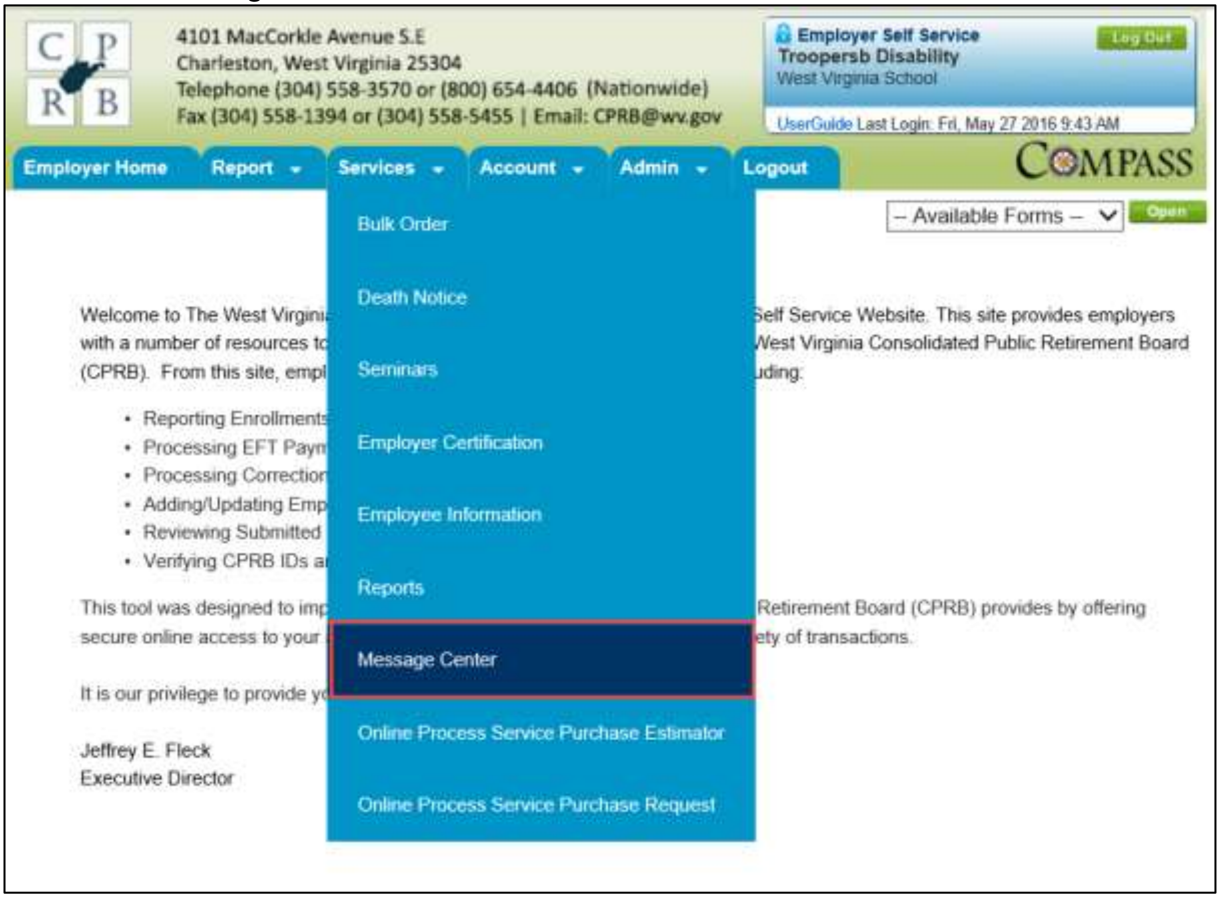


14.2 Delete Messages

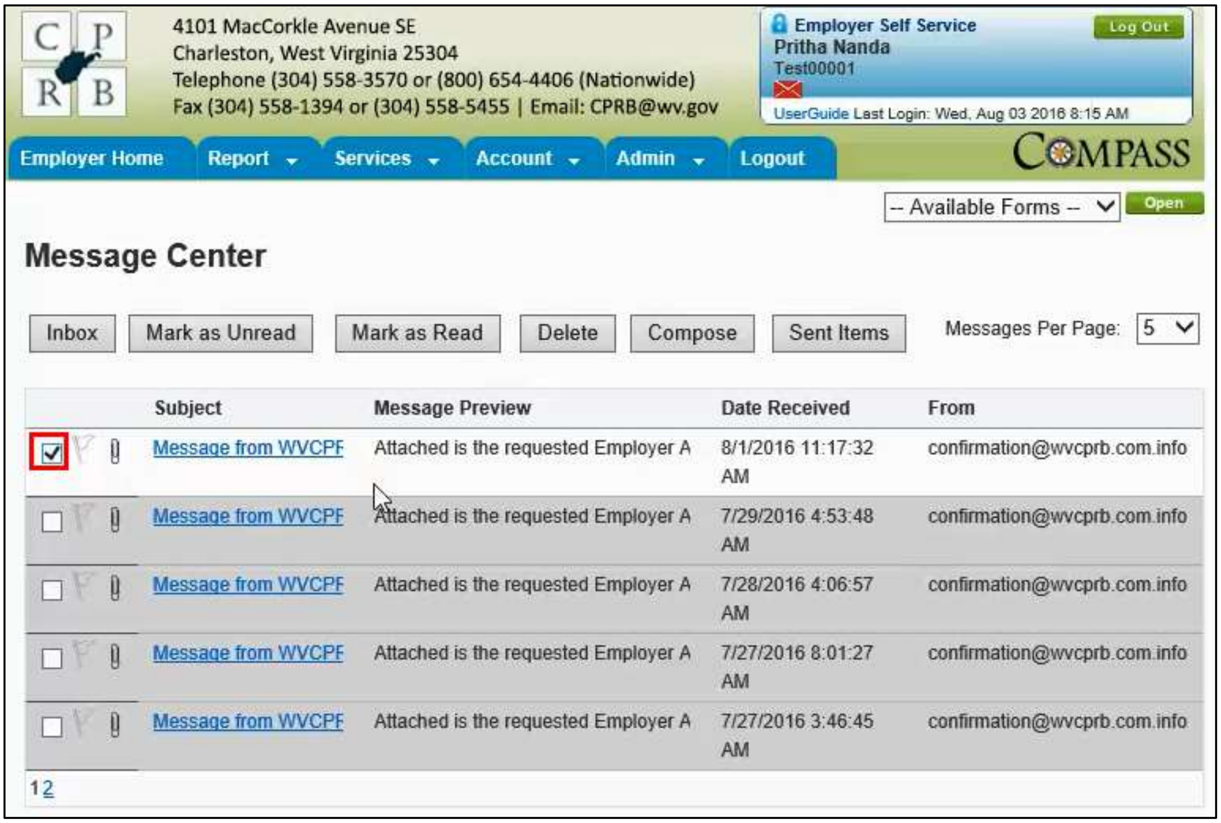
The following steps demonstrate how to delete a message from the inbox using the **Message Center** screen:

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

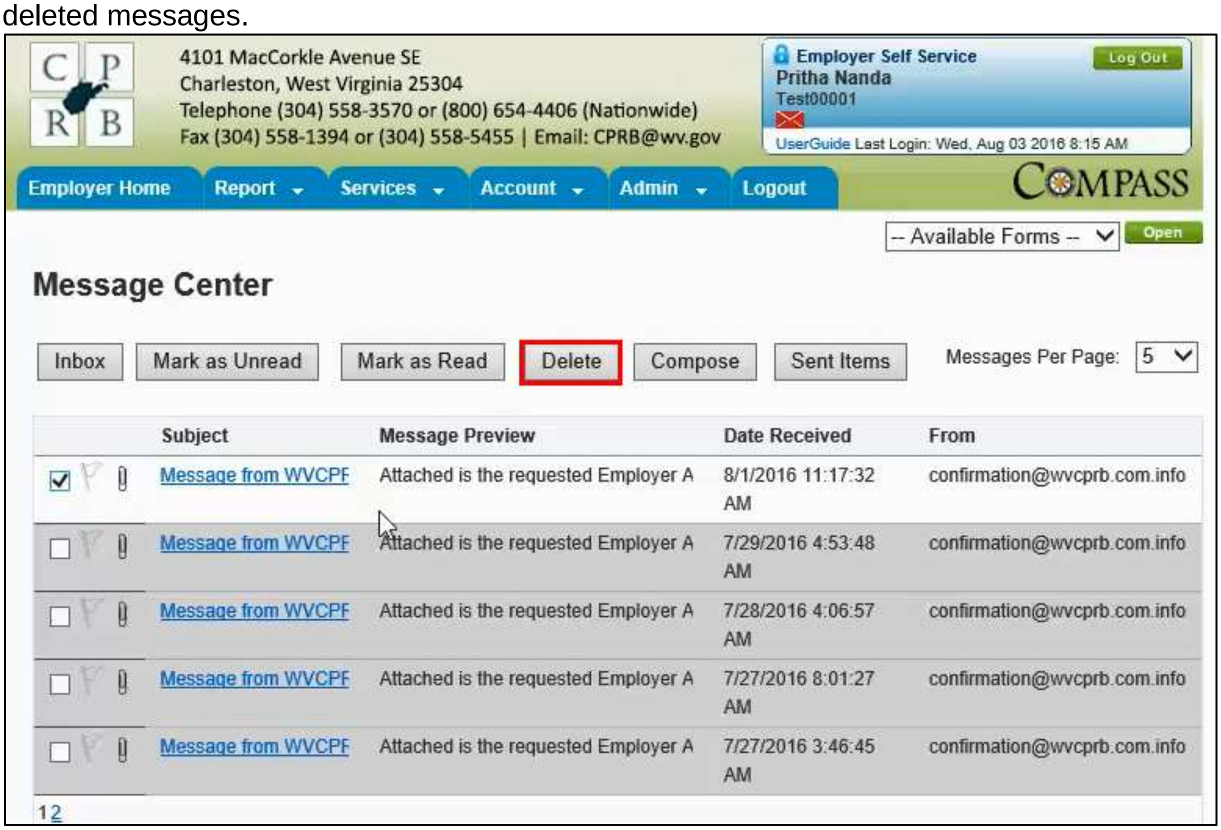
Services > **Message Center**



Step 2 -- To delete a message in the inbox, select the message check box (es).



Step 3 -- Click the Delete button.
Note: Once a message has been deleted, click the **View Deleted Message** link to view deleted messages.

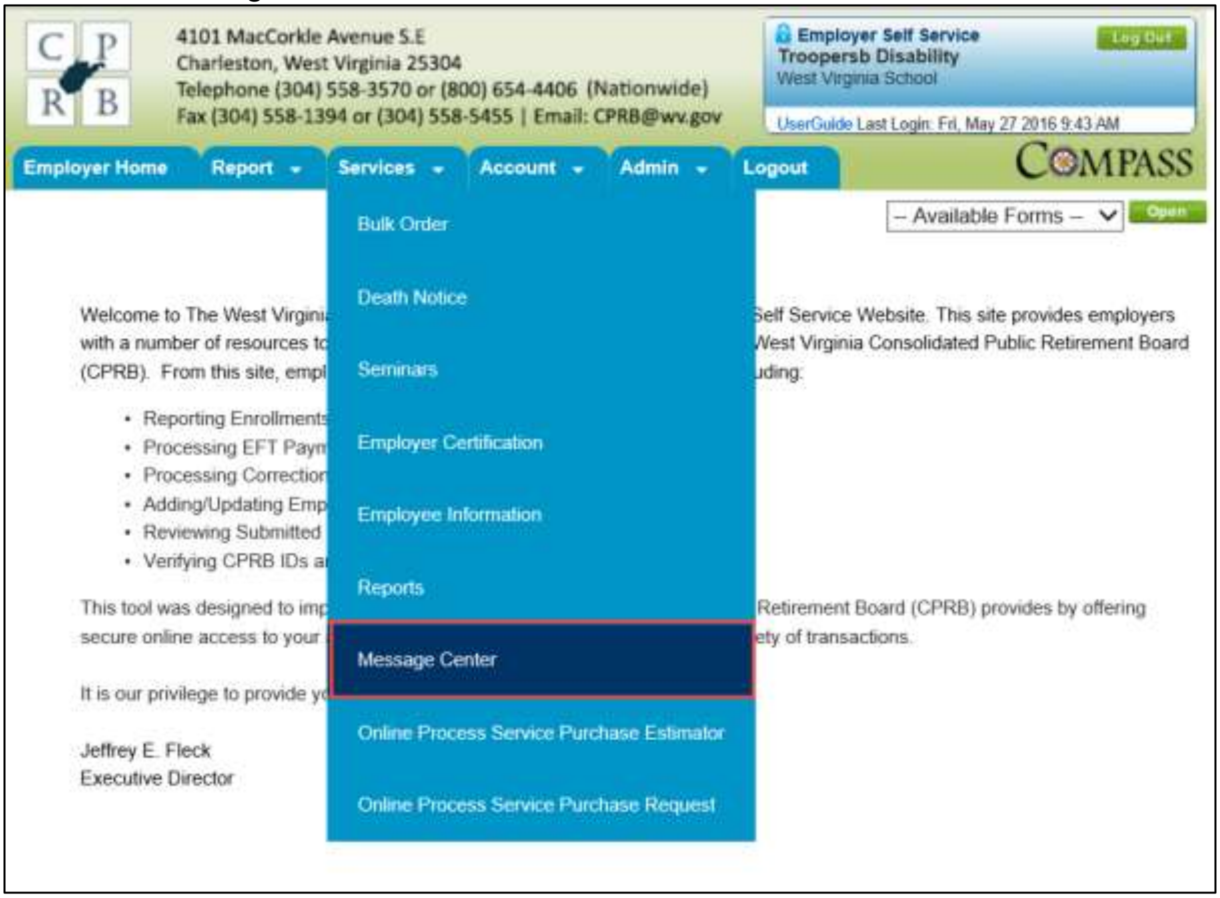


14.3 Compose a New Message

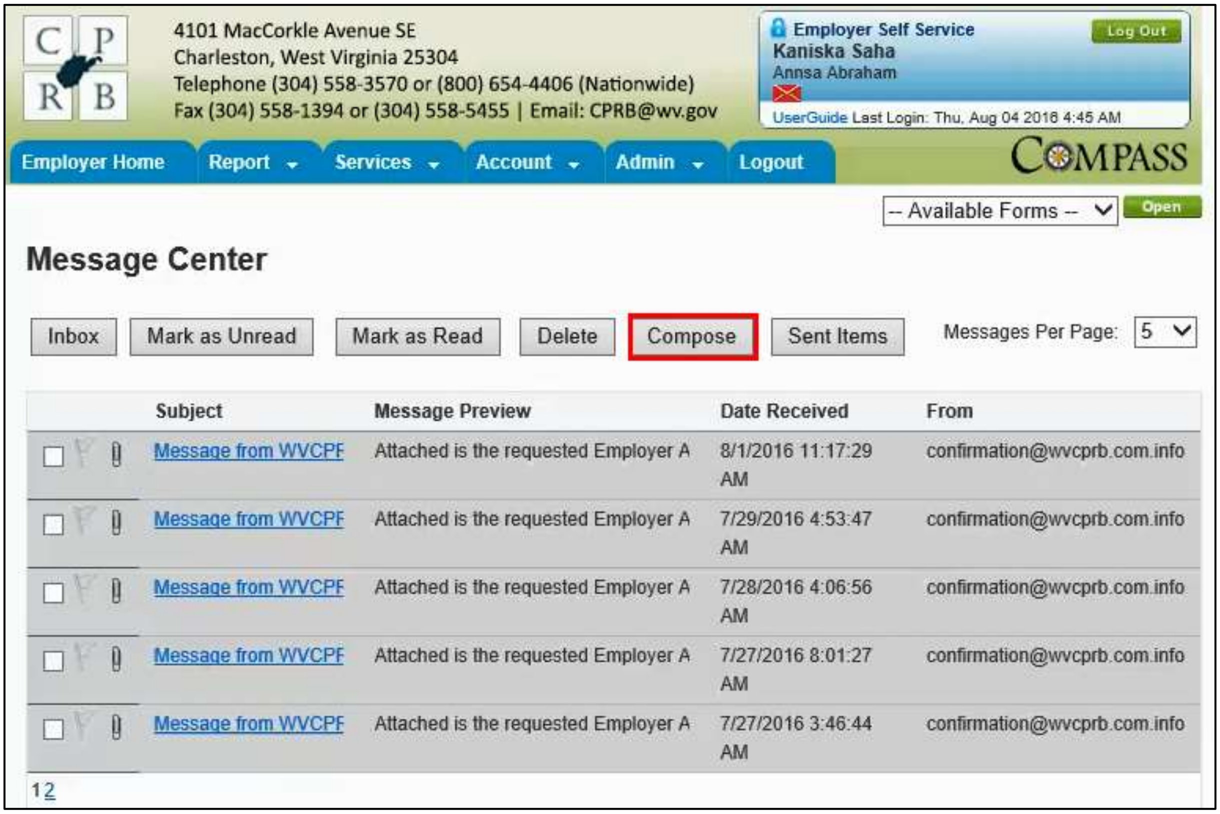
The following steps demonstrate how to compose a new message using the **Message Center** screen:

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

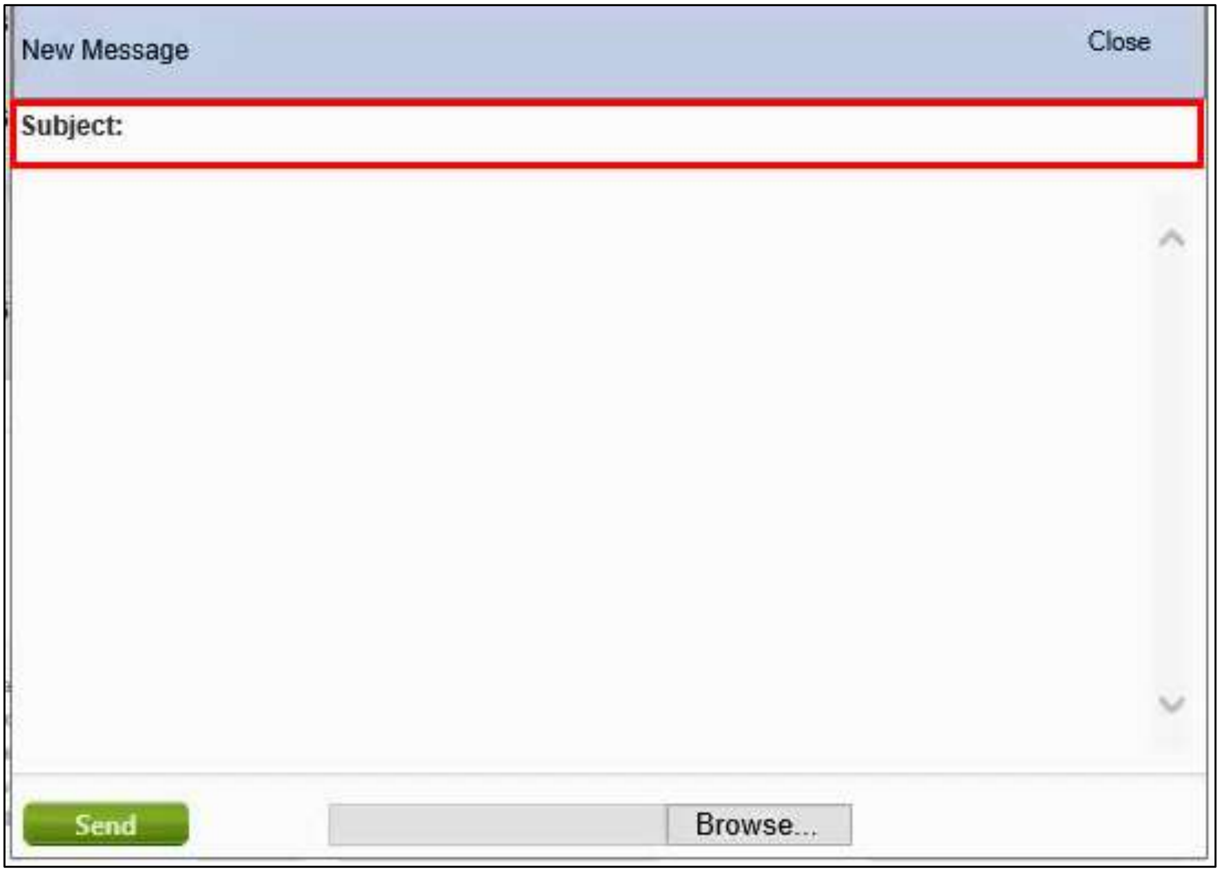
Services > **Message Center**



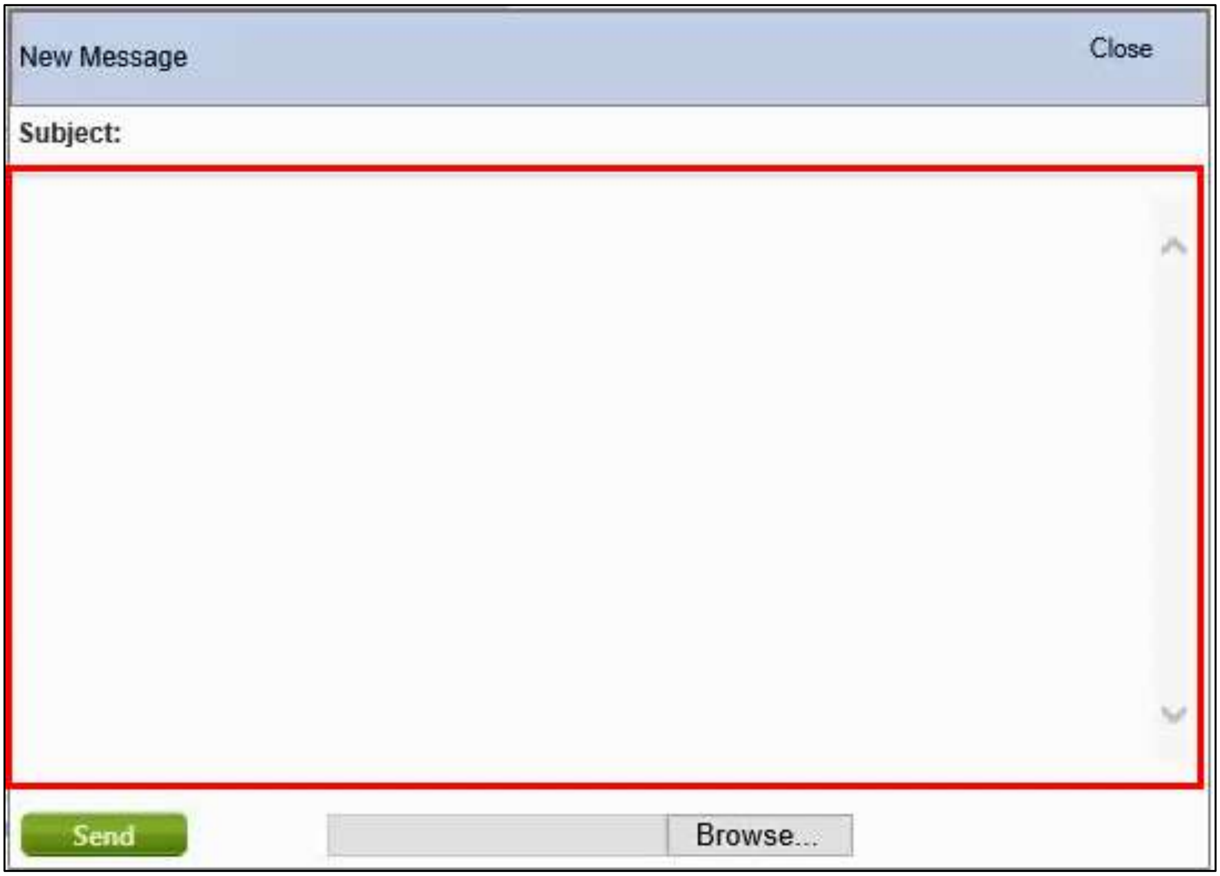
Step 2 -- Click the Compose button.



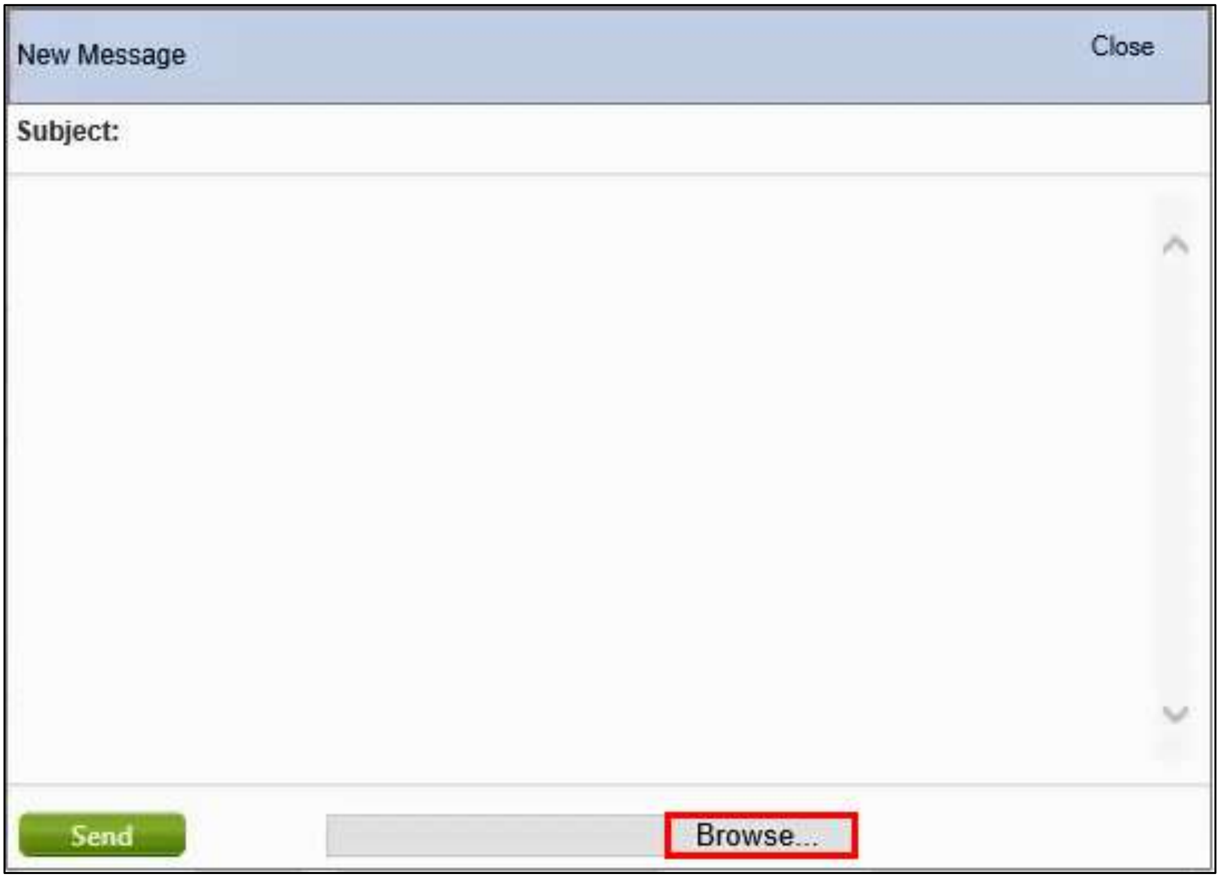
Step 3 -- The **New Message** pop up window is displayed. Enter the message subject in the **Subject** text field.


New Message
Close
Subject:
Send
Browse...

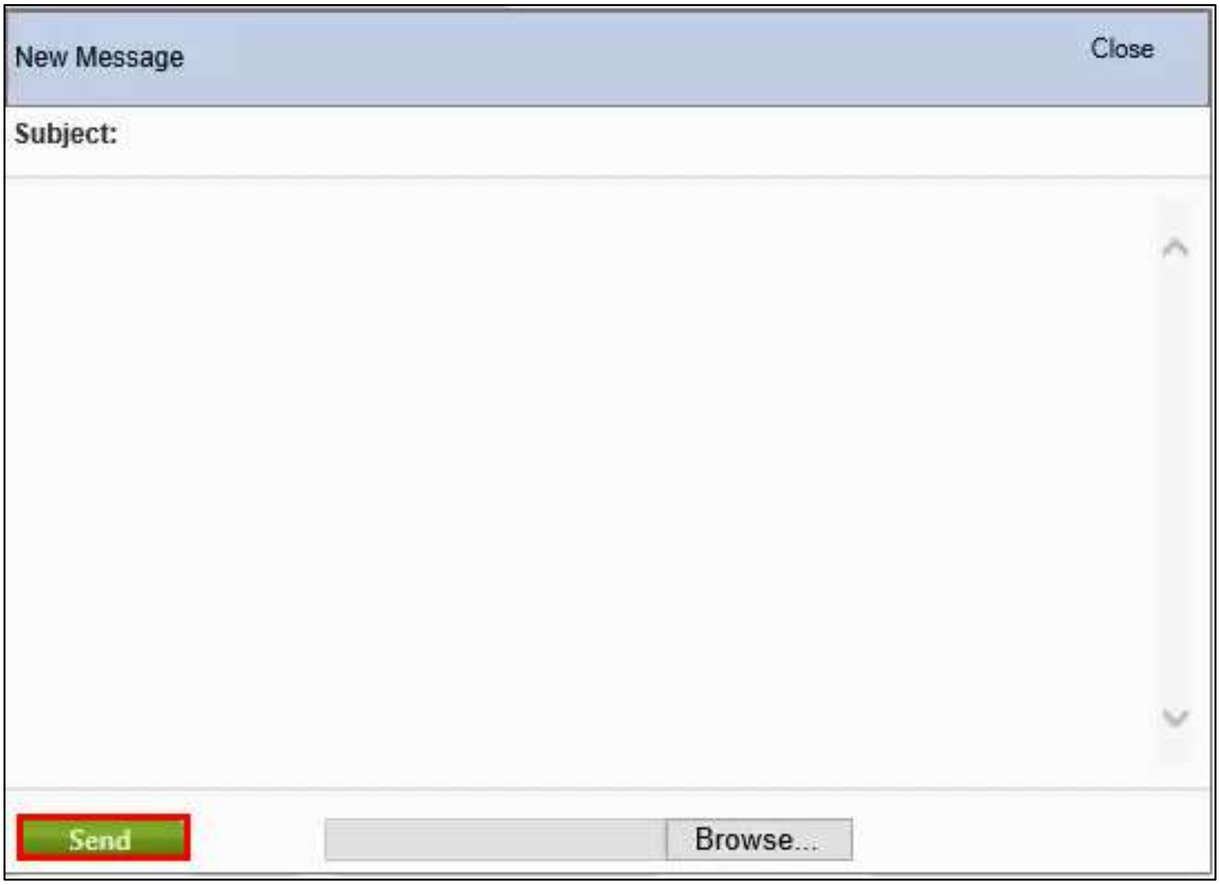
Step 4 -- Enter the **message** in the message body.



Step 5 -- Click the Browse... button to attach a supporting file if necessary.



Step 6 -- Click the  button.

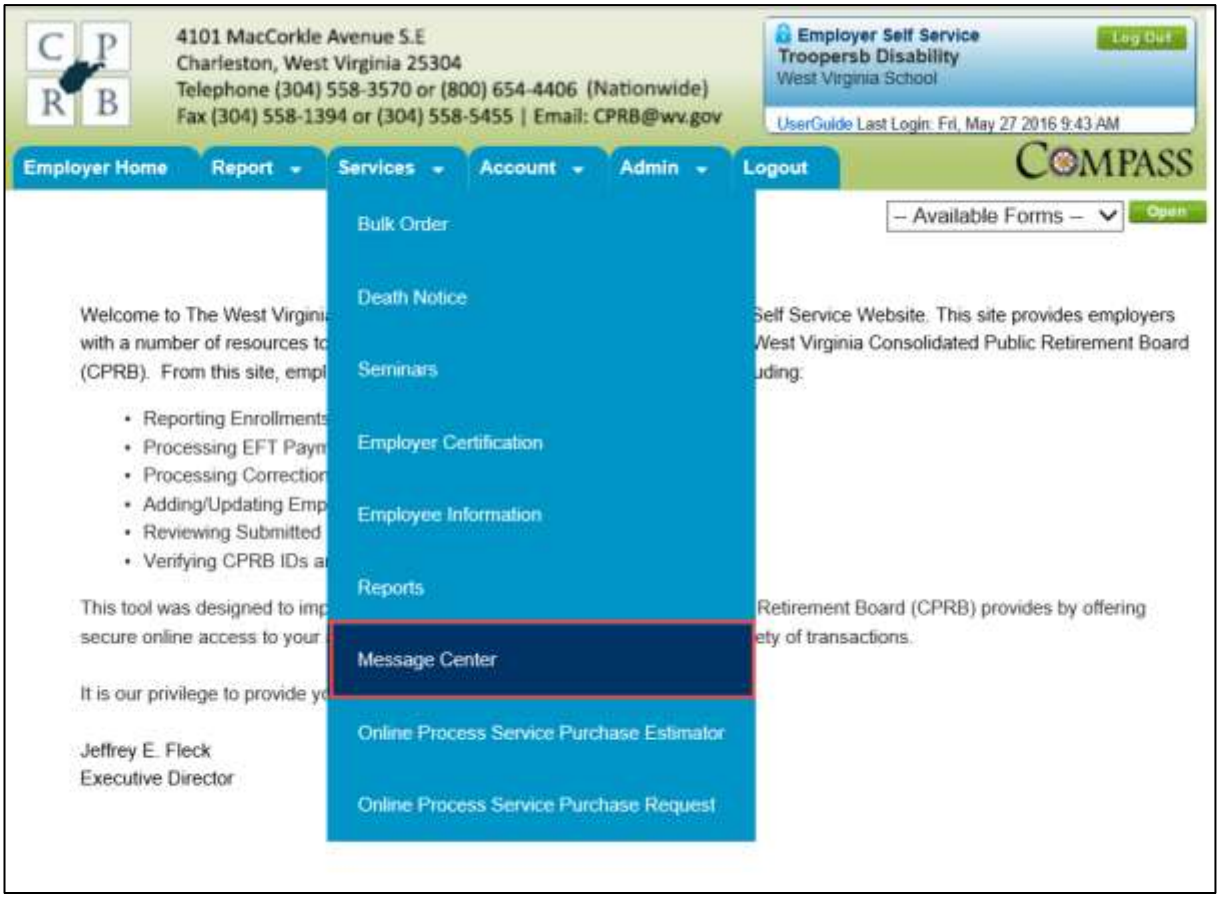


14.4 Reply to a Message

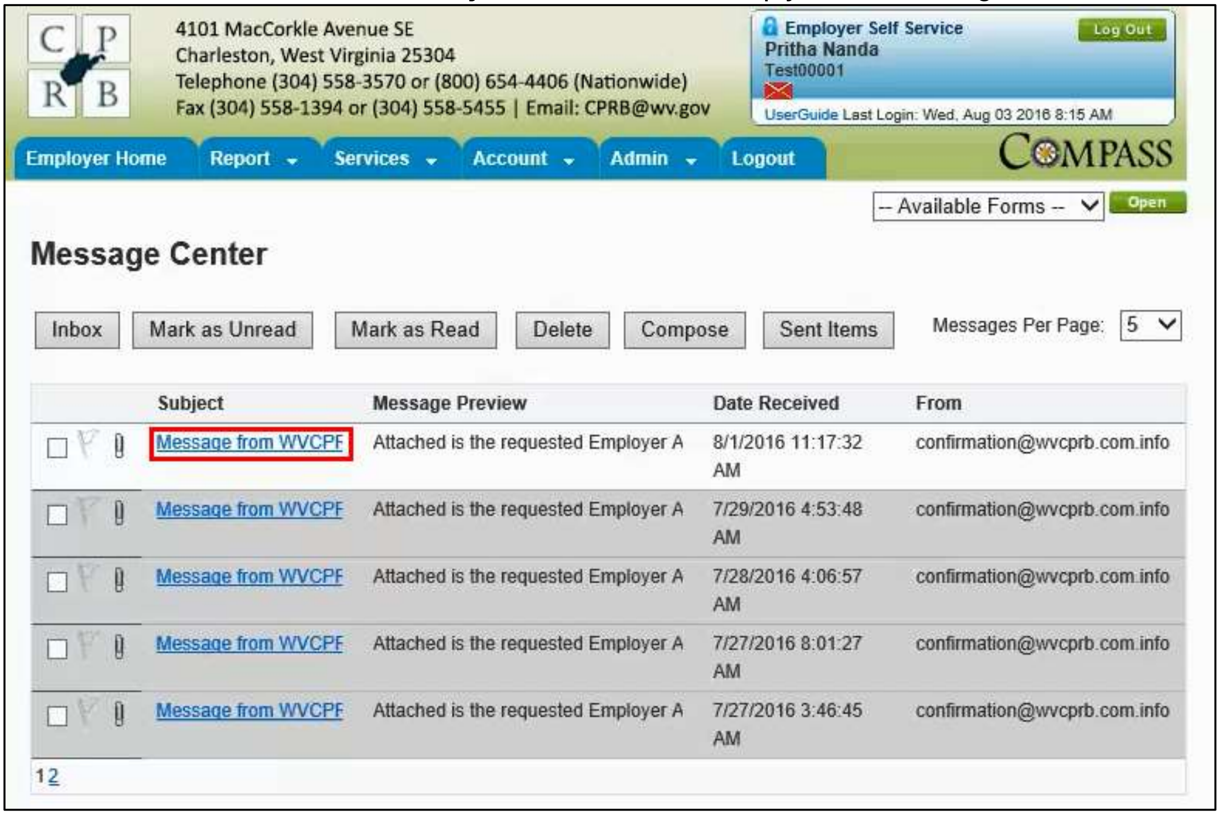
The following steps demonstrate how to reply to a message using the **Message Center** screen:

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

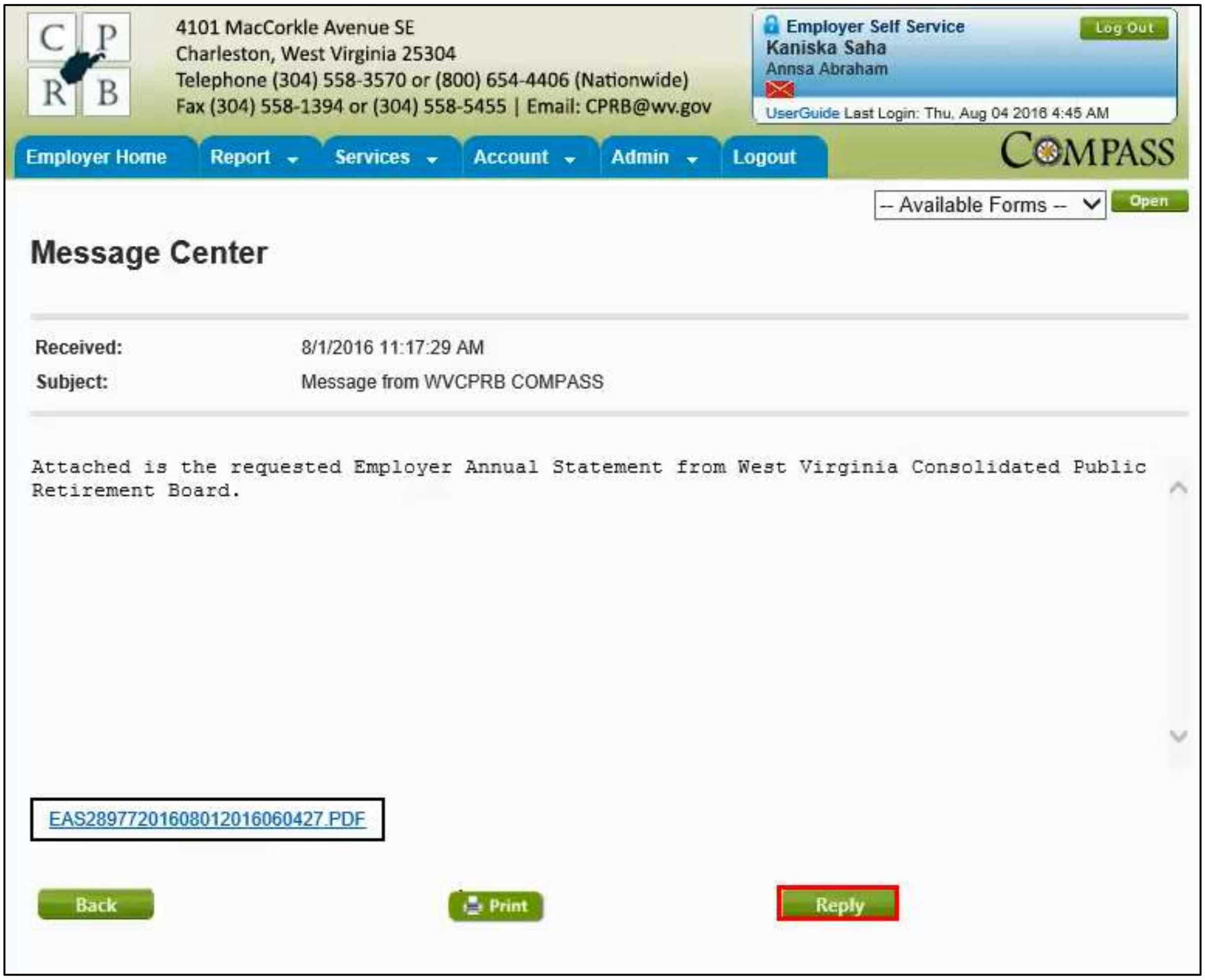
Services > **Message Center**



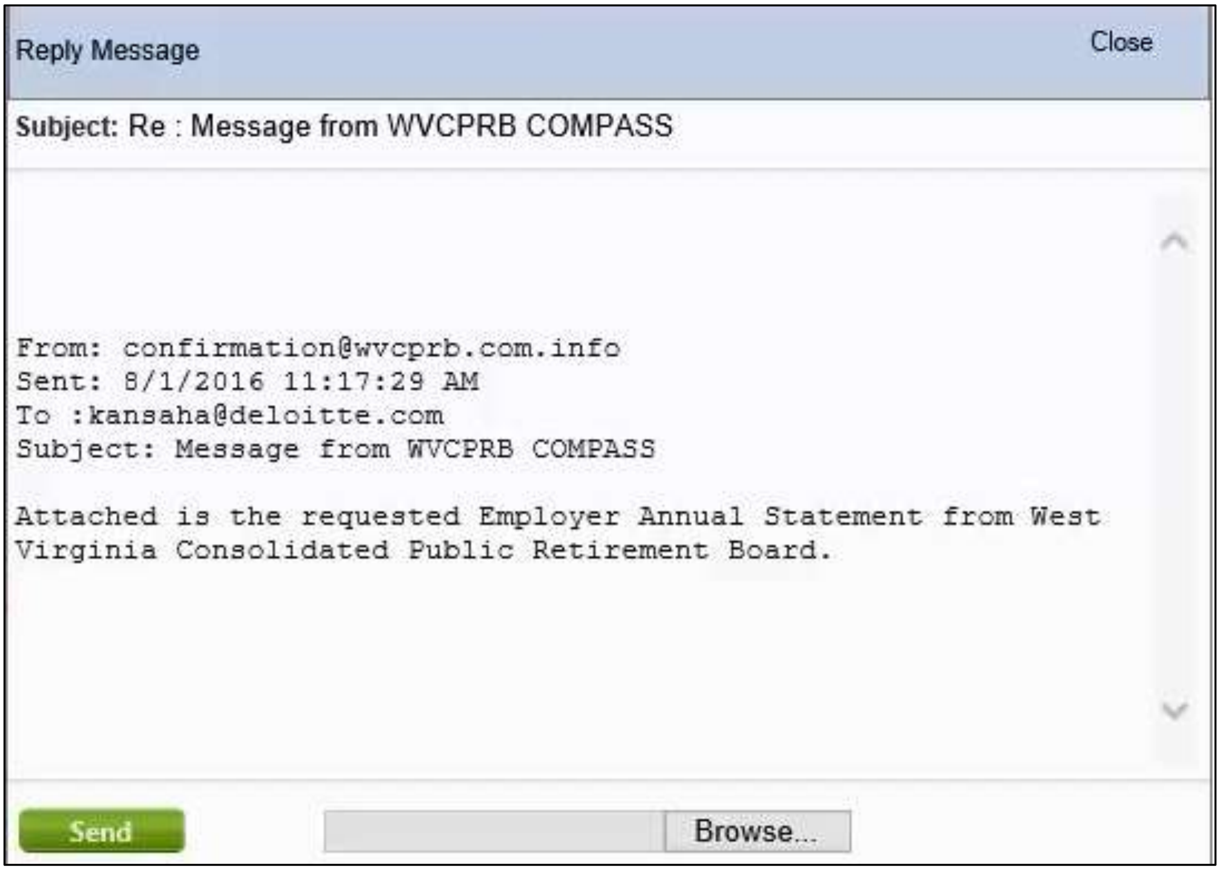
Step 2 -- The **Message Center** screen displays all the messages or correspondence sent by CPRB staff members. Click the **Subject** link to view and reply to the message.



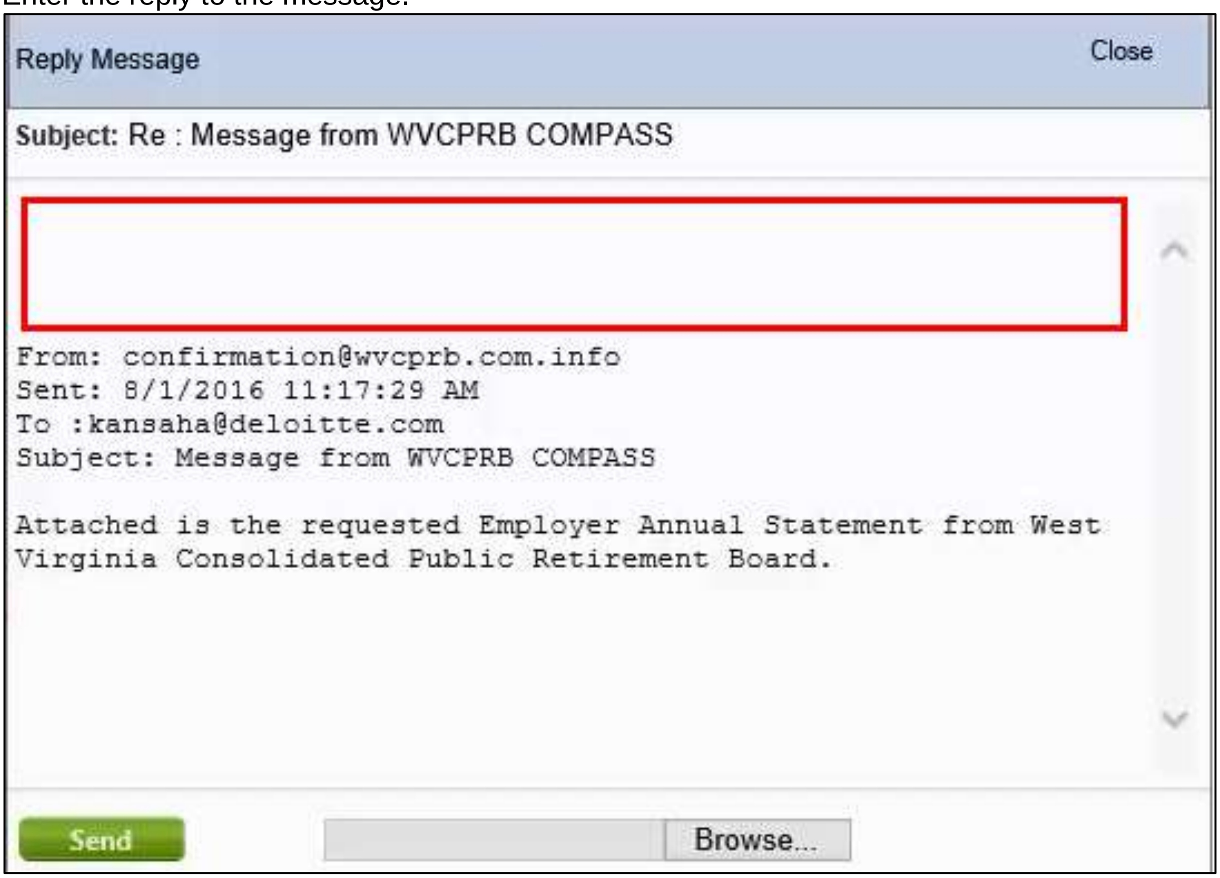
Step 3 -- The message is displayed. Click the Reply button.



Step 4 -- The **Reply Message** pop up window is displayed.

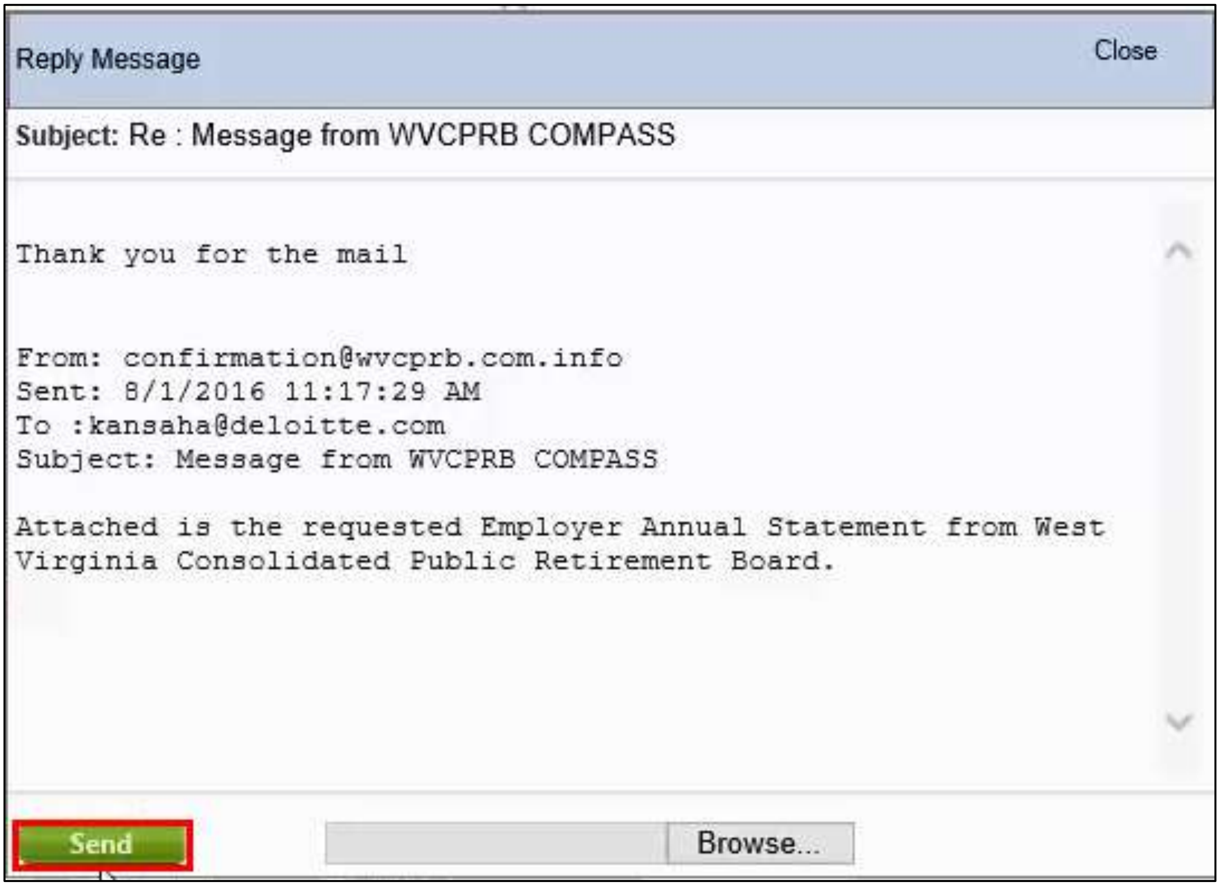


Step 5 -- Enter the reply to the message.



Step 6 -- Click the 

button.



15. View Reports

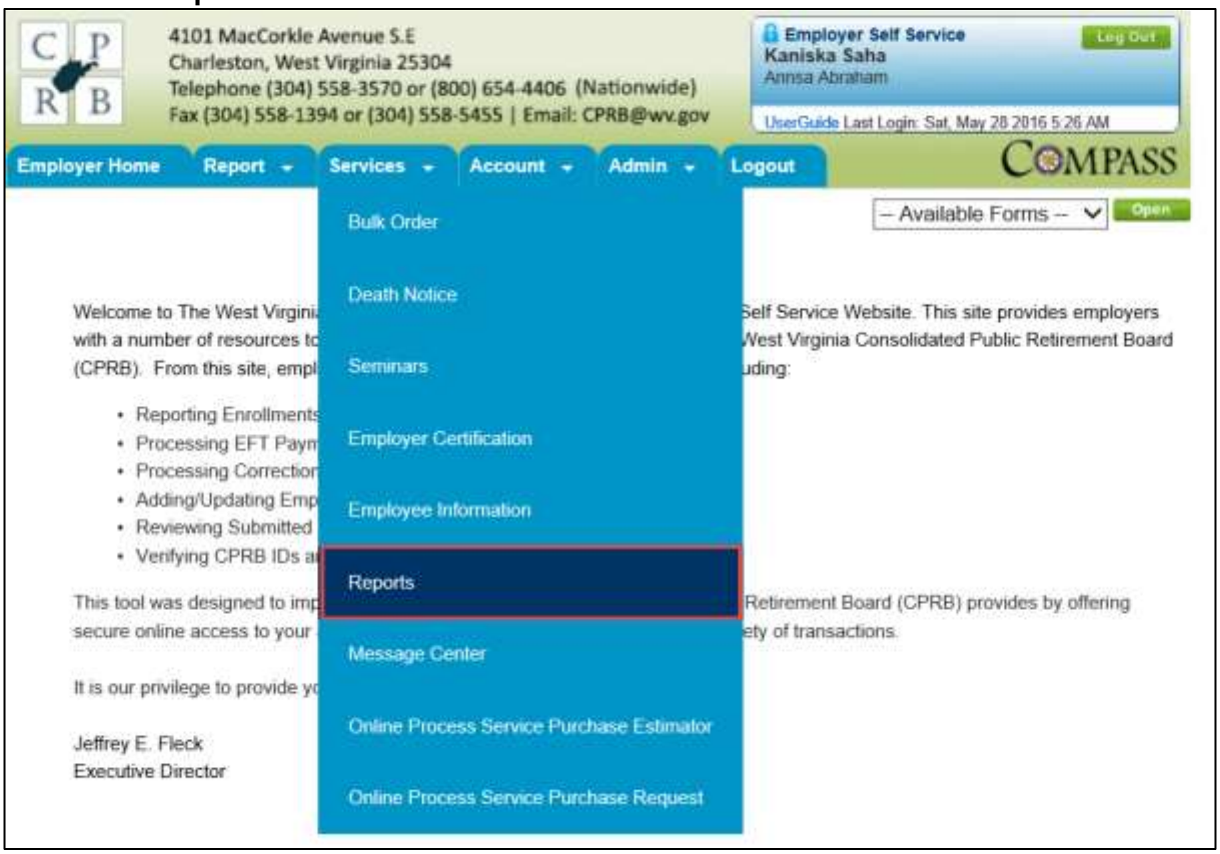
The **Reports** screen allows employers to generate specific reports on an ad-hoc basis, outside the Employer Packet. This enables employers to gain a real-time view of the data currently present in COMPASS.

Note: If an organization is a reporting employer (meaning they submit contributions reports on behalf of child agencies), they have the ability to retrieve the reports for a child agency (for which a reporting employer submits contribution reports).

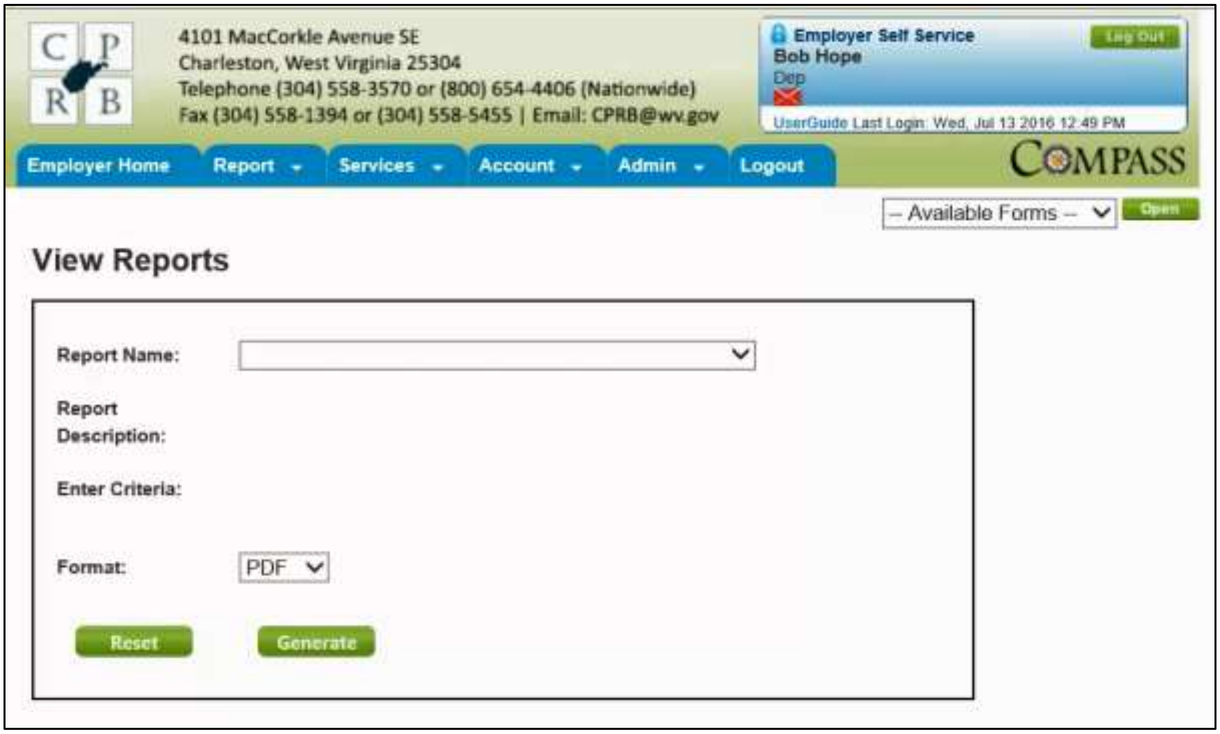
Follow the steps below to view a report in ESS:

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

Services > **Reports**



Step 2 -- The **View Reports** page displays.



Step 3 -- Select the report to be viewed from the **Report Name** drop down menu.

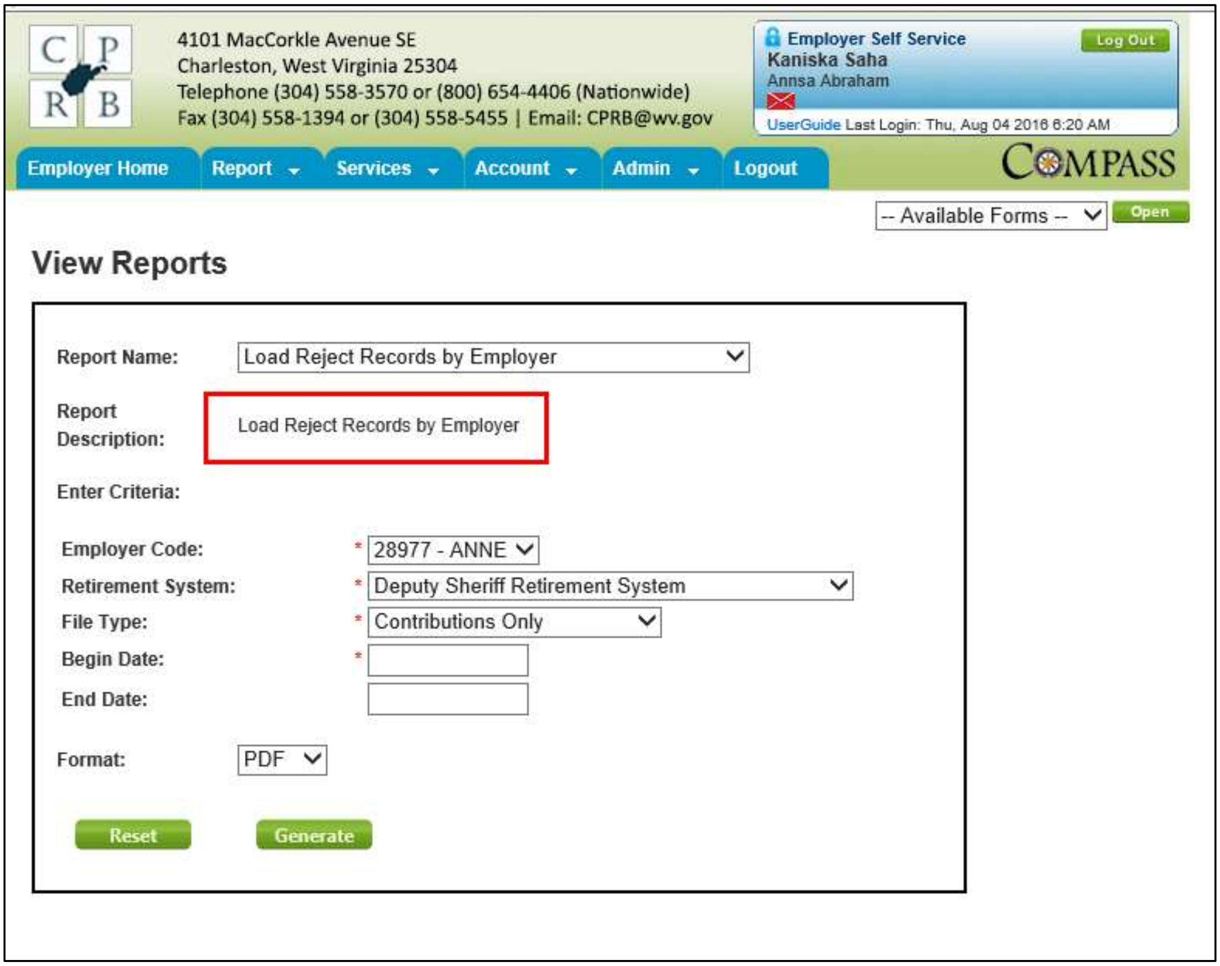
List of Reports

The table below describes the different reports listed in the **Report Name** field.

Report Name	Description
Posting Exceptions Report By Employer Code	This report displays a list of the validation errors, for a given employer for a specific report date by retirement system when the submitted report is being analyzed after successfully being uploaded.
Demographic Errors	This report lists all demographic errors for a given employer for a specific report date by retirement system for an employer.
Employer Debit and Credit Details Report	This report shows employer debit and credit details information for a selected time period.
Not - Eligible Status	This report displays the members for an employer who have been reported with a payment reason of 'Non-Participating Status'.
Missing Employment End Date	This report displays employees whose employment end date is not recorded with CPRB and missing from the current contribution file.
Leave Without Pay	This report displays a list of employees who are currently on leave without pay.
Load Errors	This report displays a summary of all errors, warnings, and informational messages that are identified as part of the load validation process when a file is uploaded.
TDC Employer Forfeiture Fund Report	This report shows forfeiture fund details for TDC employers (allotted amount, withdrawn till date and balance amount) for a selected time period. This report is only relevant to TDC employers.
Outstanding Edit Errors by Employee or Employer	This report displays the details regarding outstanding adjustments for a specific employer.
Lump Sum Payment of Unused Comp Holiday Time	This report displays all employees who have been reported with a lump sum payment due to holiday or comp time.
Downloaded CPRB IDs	This report displays a list of employees and their CPRB IDs.
PERS TLEs	This report lists the members who are working as temporary legislative employees in PERS for a specific employer and for a selected time period.
Reconcile Outstanding Adjustments	This report displays the details regarding outstanding adjustments for a specific employer.
Service Purchase Details	This report displays all retirement services purchased by your employees.
Deputy Sheriff Statewide Uniform Fees	This report displays the DSRS fees for the Report Date provided.

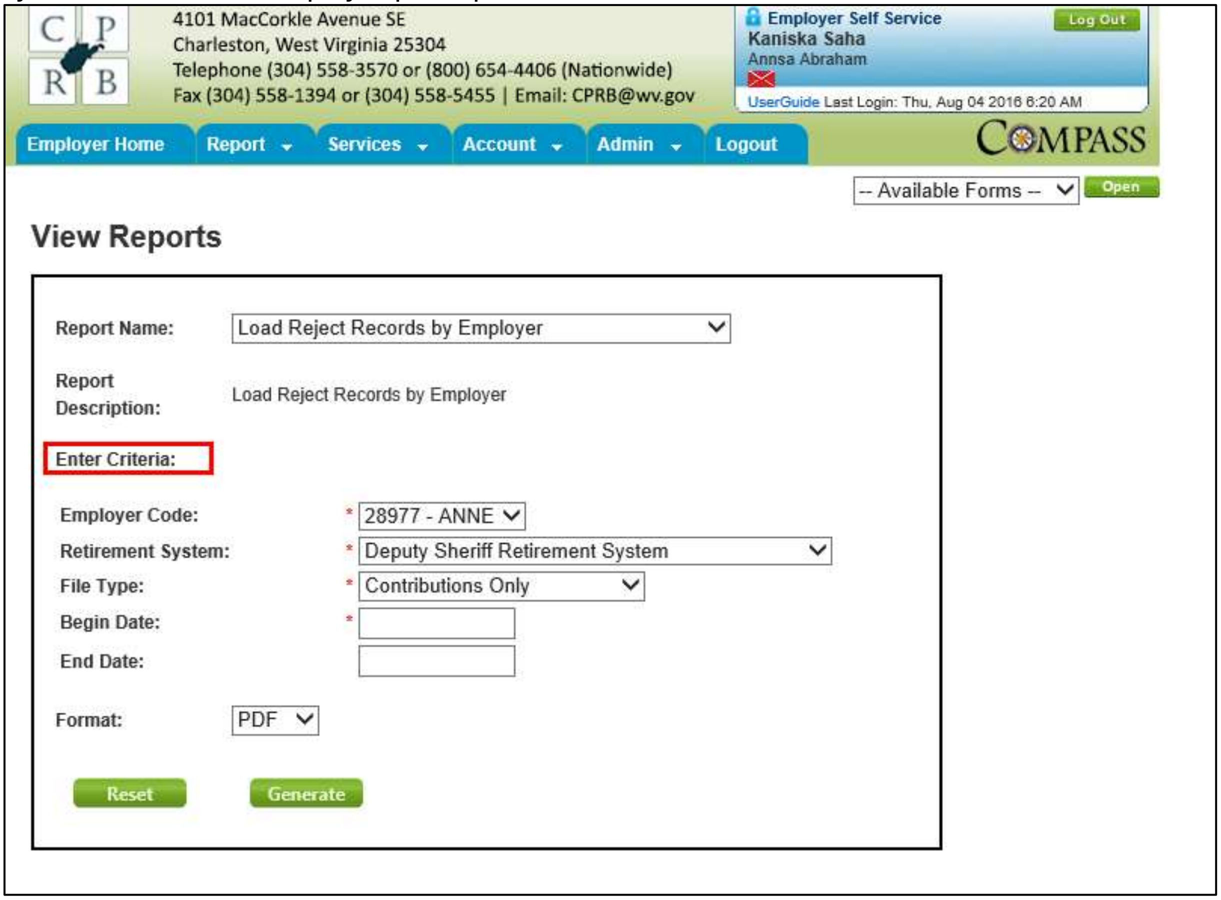
Report Name	Description
Employer State Aid	This report shows state aid fund details for TRS and TDC employers (allocated amount, withdrawn till date and balance amount) for a selected time period. This report is only relevant for TRS and TDC.
Load Reject Records by Employer	This report shows the load reject records for the selected employers.
Dual Participation Report	This report lists the members who are dual participating between either PERS and TRS or PERS and TDC for a specific employer and for a selected time period.

Step 4 -- The **Report Description** for the selected report is displayed.

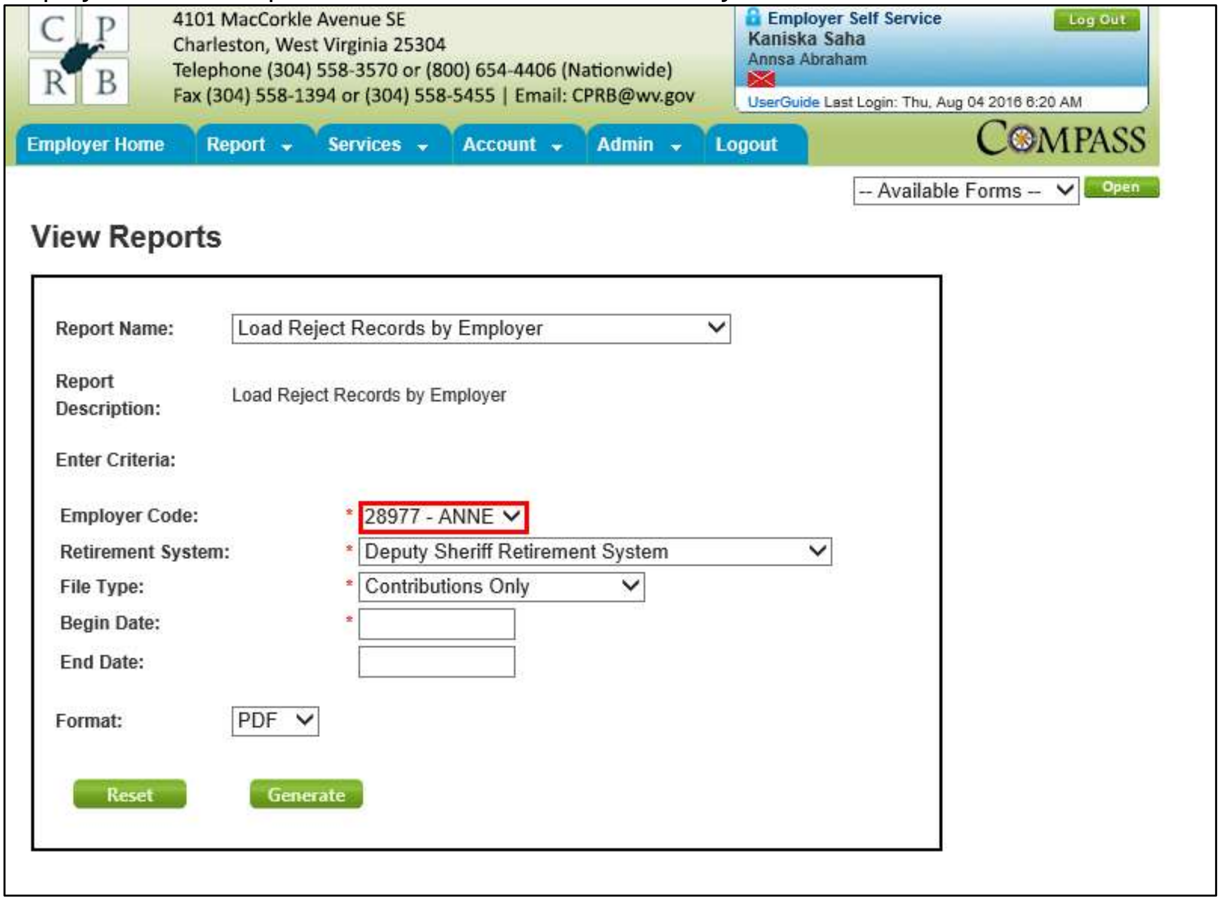


Step 5 -- In the **Enter Criteria** section, enter the parameters required to generate the report.

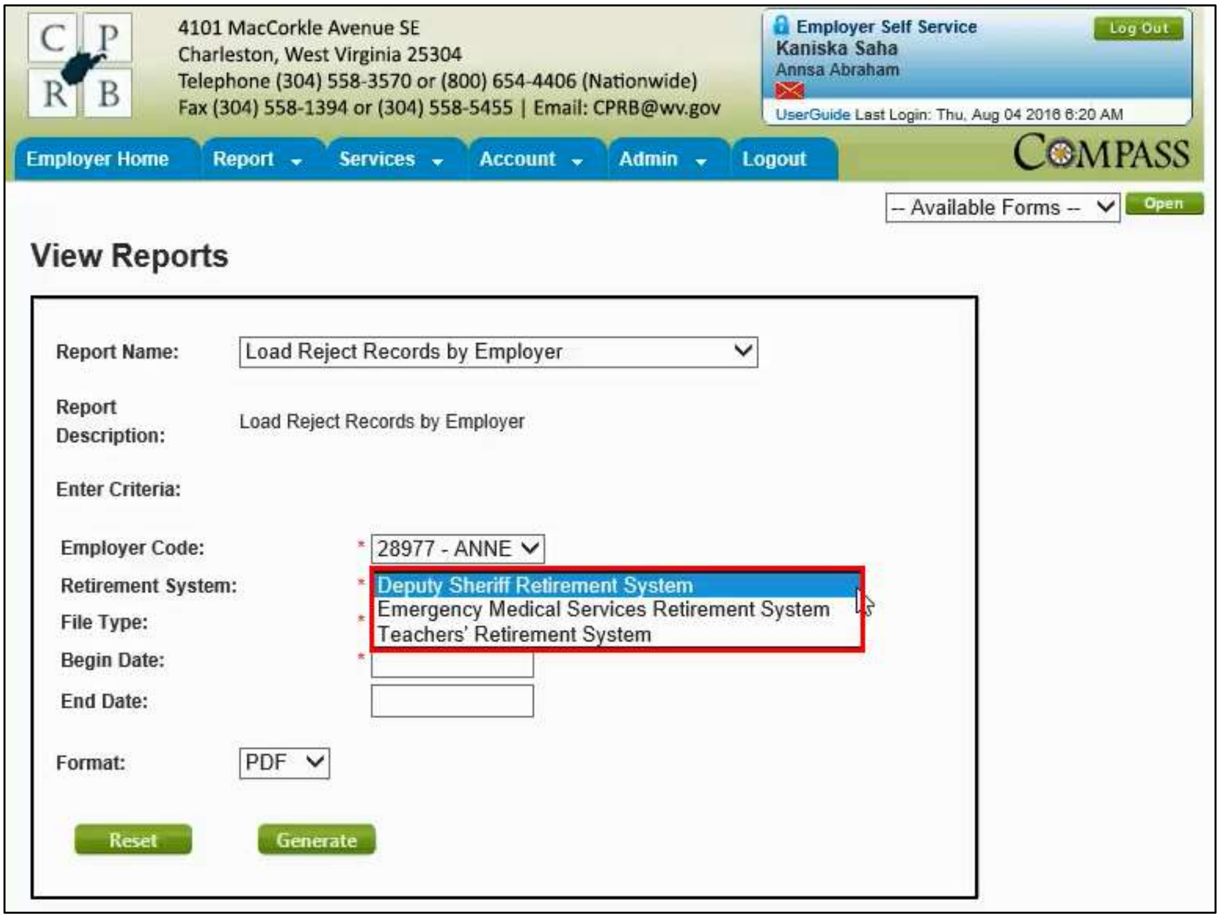
Note: Each report requires different parameters. If the employer logged in is not a reporting agency, the **Employer Code** drop down menu will be pre-populated with the logged in Employer's Code. Also, if the employer participates in only one retirement system then the **Retirement System** drop down will be pre-populated with the retirement system in which the employer participates.



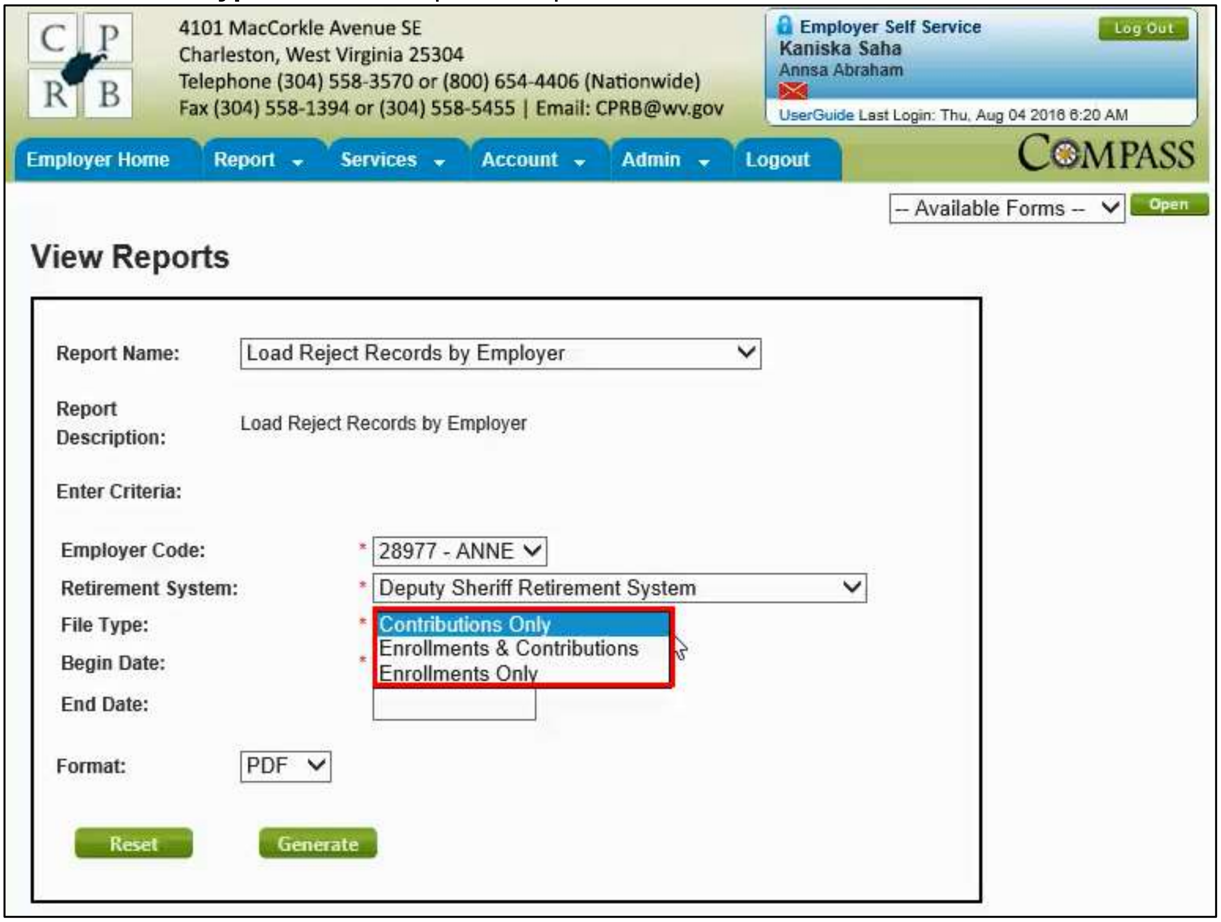
Step 6 -- Select the **Employer Code** from the drop down options.
Note: This field is prepopulated. There will be drop down options only when multiple employer codes are present. In this case, there was only one.



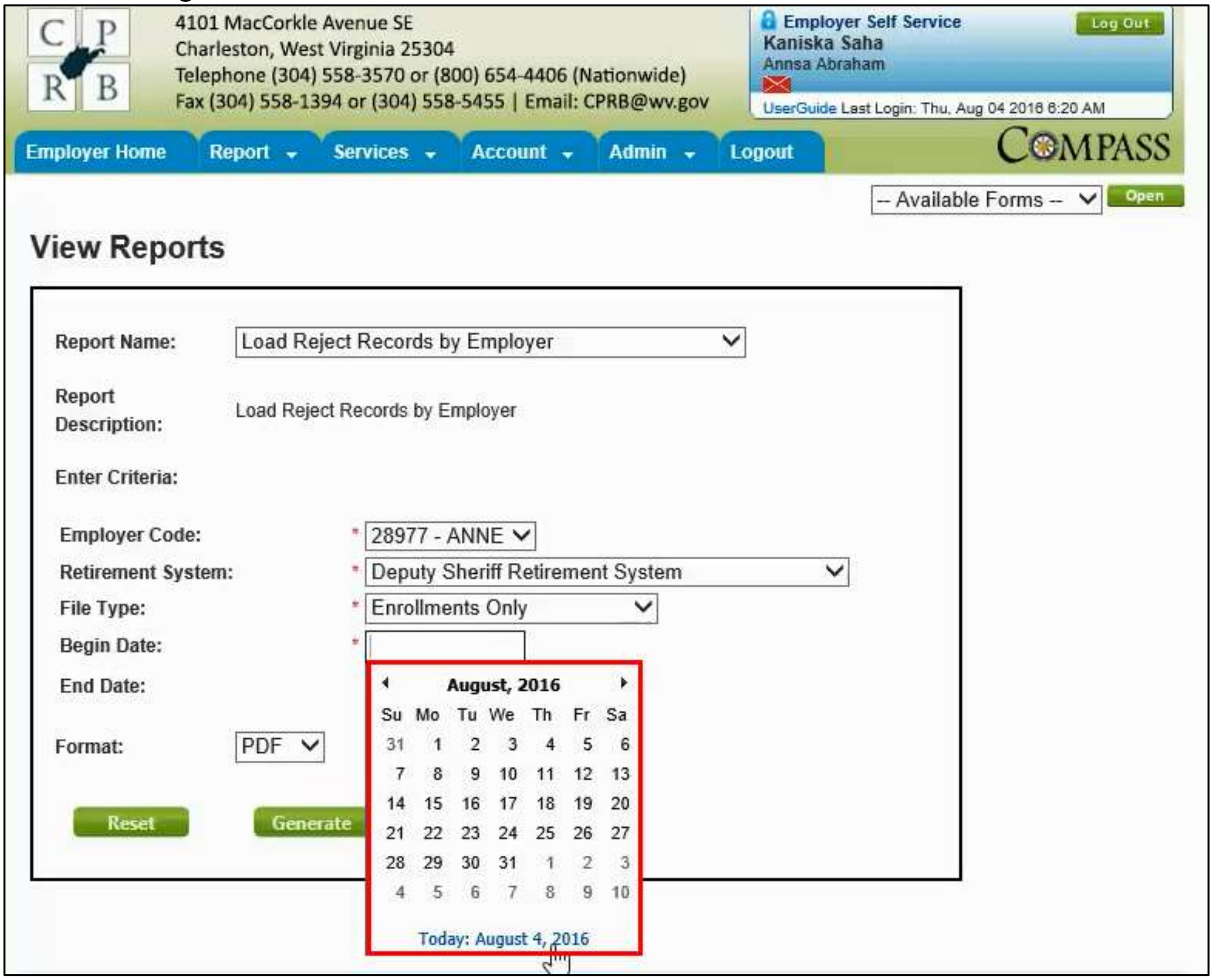
Step 7 -- Select the relevant retirement system from the **Retirement System** drop down menu.



Step 8 -- Select the **File Type** from the drop down option.

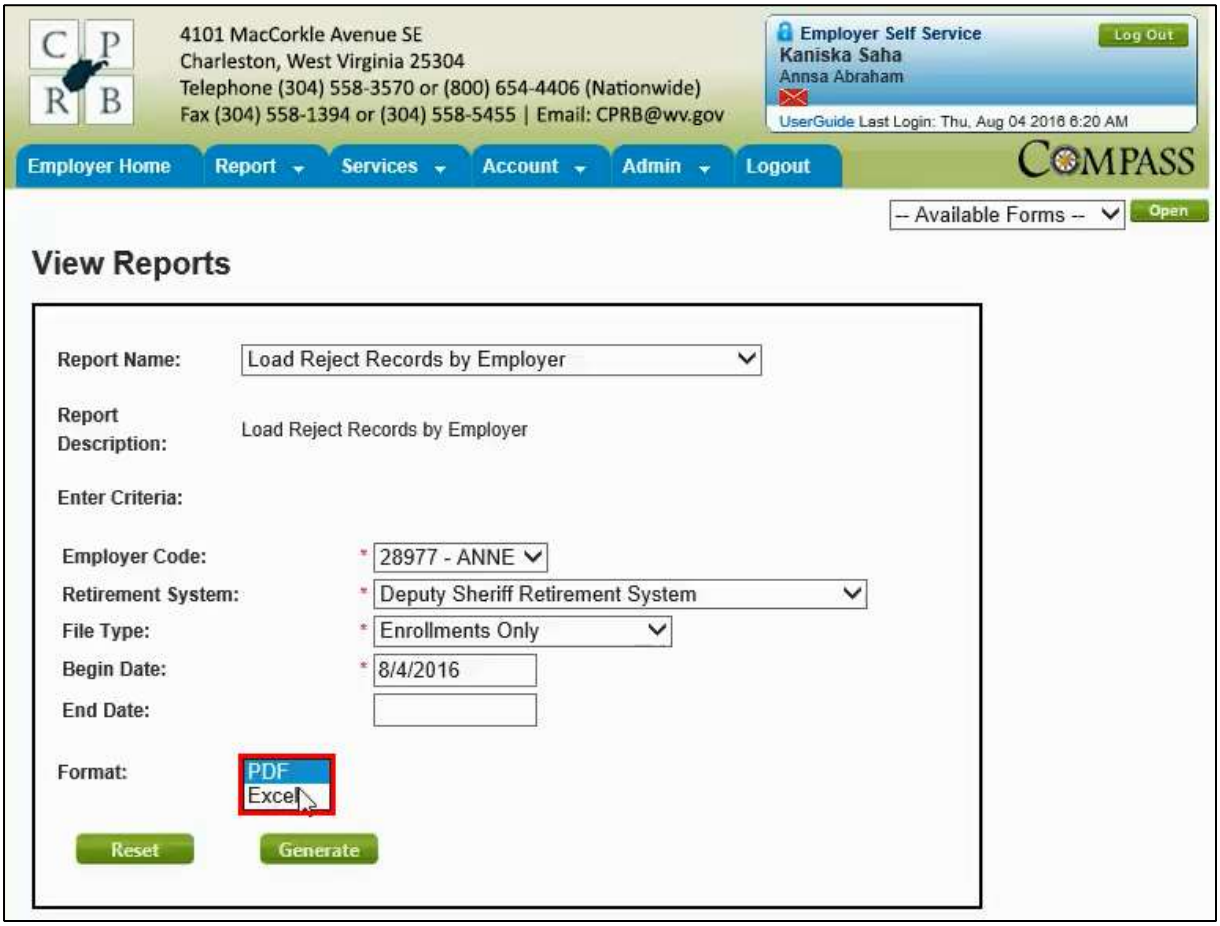


Step 9 -- Select the **Begin Date** from the calendar.



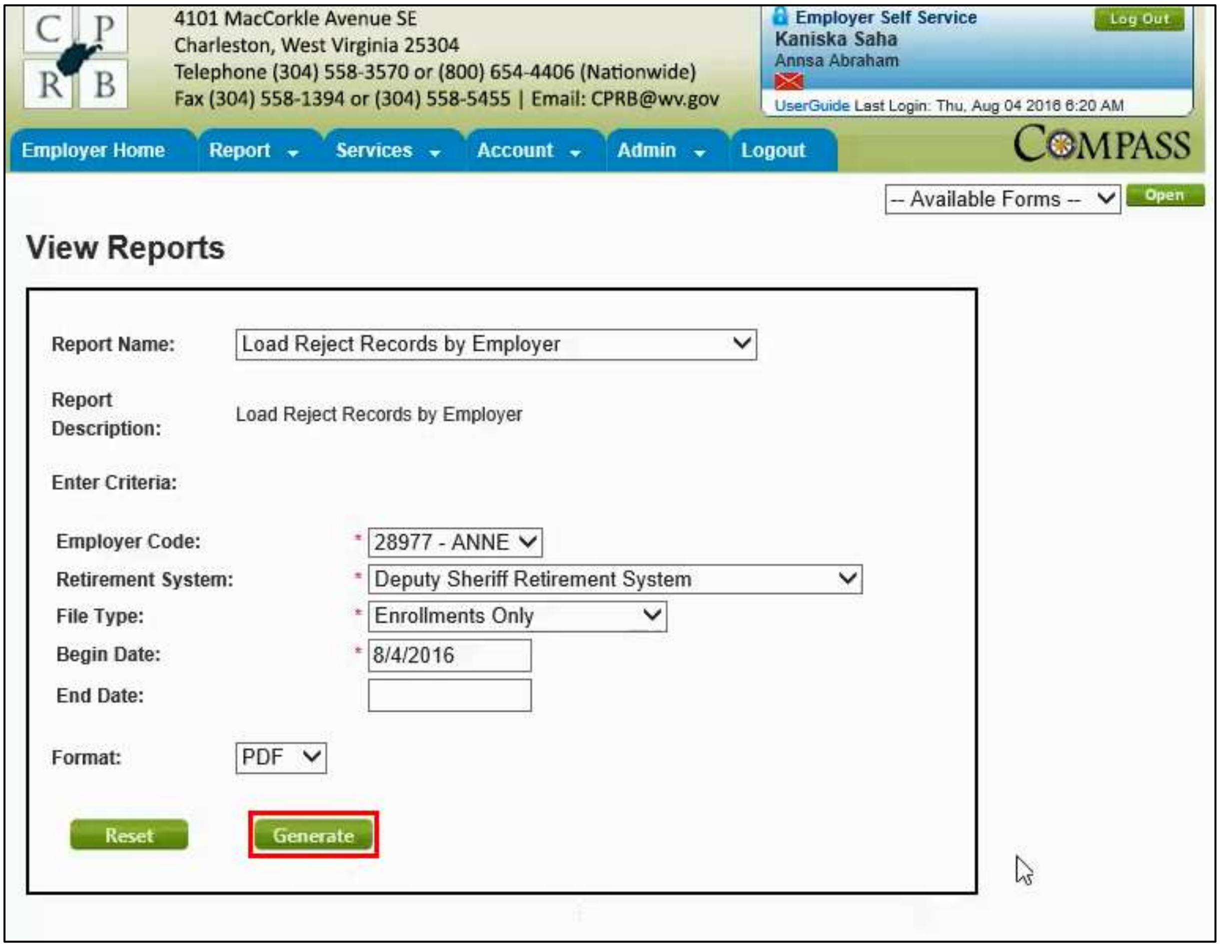
Step 10 -- Select the report format from the **Format** drop down menu.

Note: PDF is the default selection.

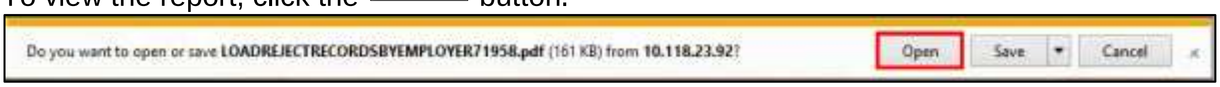


Step 11 -- Click the Generate button.

Note: The Reset button clears all the details in the fields and allows the information to be re-entered.



Step 12 -- To view the report, click the Open button.



Step 13 -- The report opens in the format selected in Step 6.

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www.wvretirement.com

08/04/2016
07:19 AM

KANSAHA123(SOLUTIONS\DPASUser)

Load Reject Records by Employer Report

Filter Conditions
Employer Code: 28977 **Retirement System:** DSRS
File Type: ENRL **Begin Date:** 8/4/2016 **End Date:**

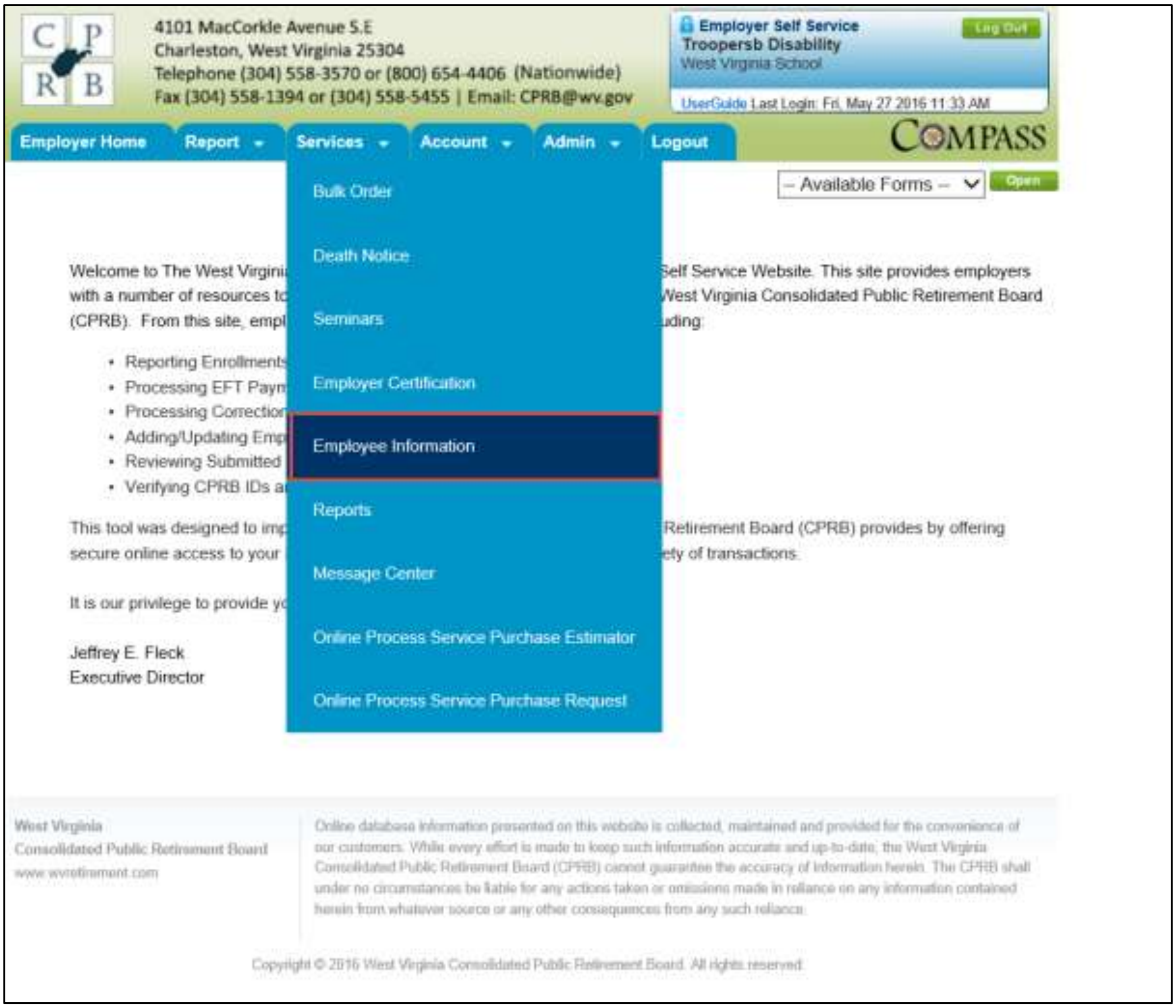
16. View Employee Information

The **Employee Information** screen in CPRB's ESS portal allows the employers to view the salary and contribution history for a selected employee who currently works or has worked for the employer previously.

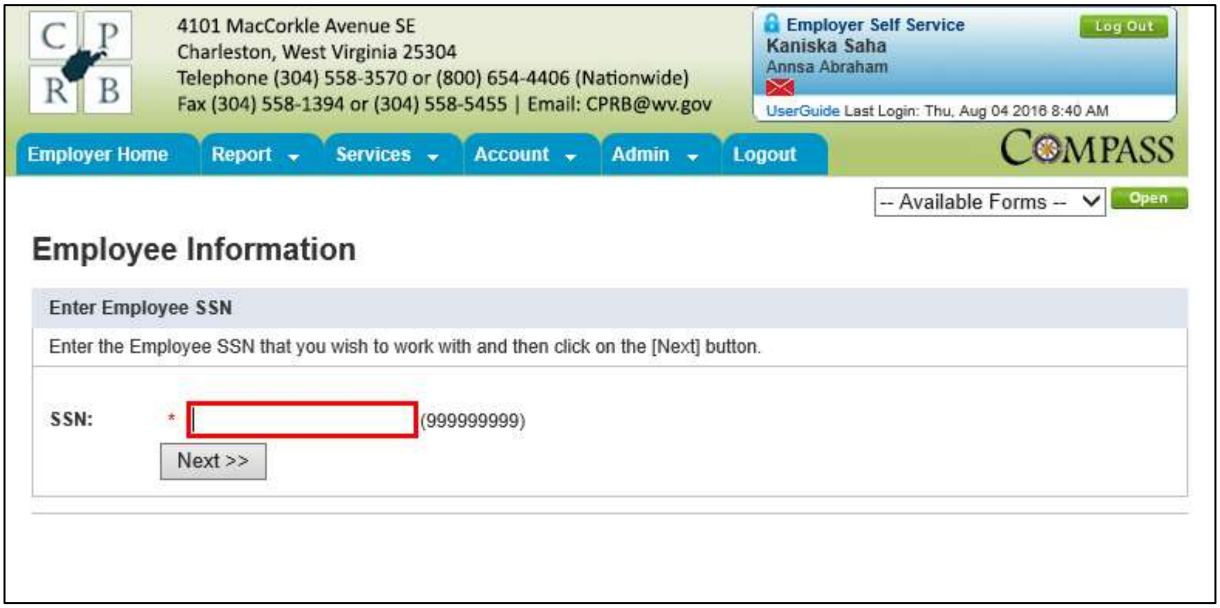
The following steps demonstrate how to access an employee's information using their SSN:

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

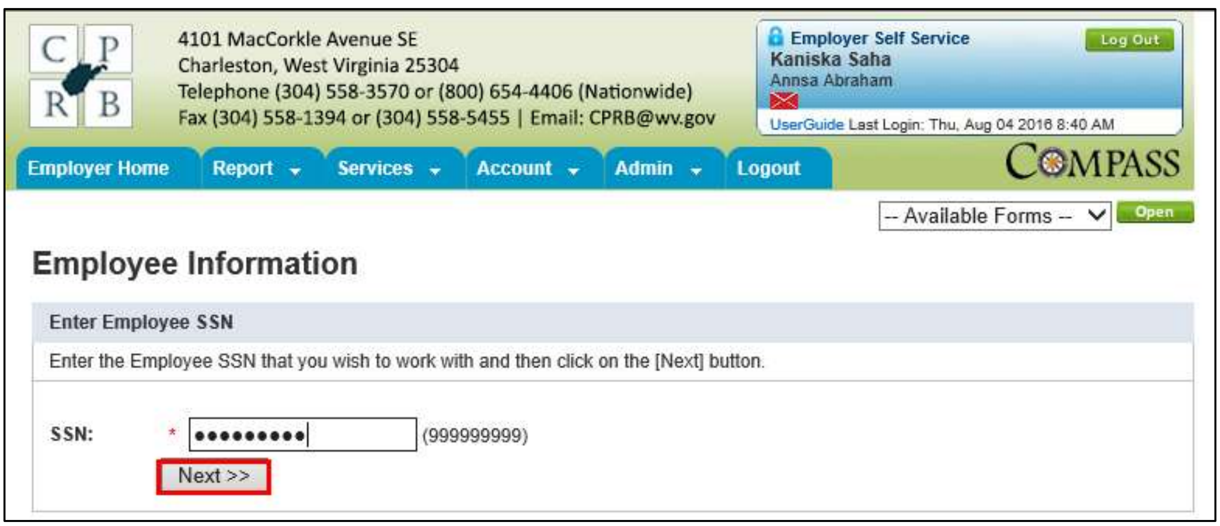
Services > **Employee Information**



Step 2 -- The **Employee Information** screen is displayed. Enter the employee's SSN in the **SSN** field.



Step 3 -- Click the Next >> button.



Step 4 -- The employee's **Account History, Account Information,** and **Contribution History** are displayed.

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Employer Self Service
Pritha Nanda
Test00001
Log Out
UserGuide Last Login: Wed, Aug 03 2016 11:29 AM

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

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-- Available Forms -- | Open

Employee Information

Enter Employee SSN

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

SSN: * (999999999)

Next >>

View Account History

Employee Name : ROMEO BROUWER **Employee SSN :** XXX-XX-2465 **Date Of Birth :** 6/1/1964

Account Information

CPRB ID :	524934
Retirement System :	Teachers' Retirement System
Most Recent Contribution Group :	TRSPLN1 - TRS Plan 1
Most Recent Employer :	TEST00001
Employment Begin Date :	7/1/2009
Employment End Date :	PRESENT

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

Year	Service Type	Employer	Contribution Group	Total Salary	Total Contributions
2016	MEMBERSHIP	TEST00001	TRSPLN1 - TRS Plan 1	12491.70	2623.26
2016	MEMBERSHIP	TEST00001	TRSPLN3 - TRS Plan 3	4163.90	874.42
2015	MEMBERSHIP	TEST00001	TRSPLN3 - TRS Plan 3	2081.95	437.21
			Total		3934.89

1

17. Submit DSRS Fees

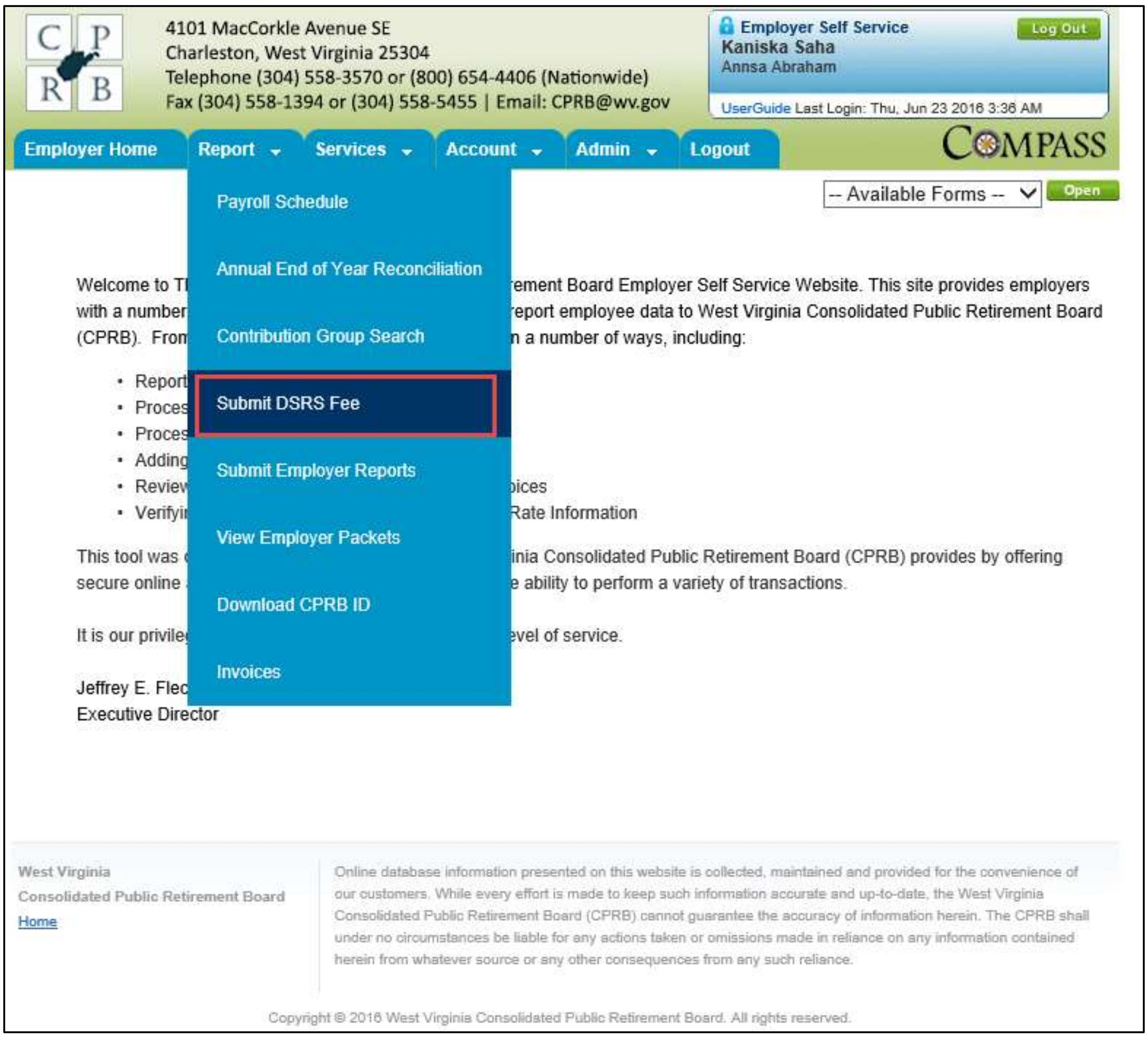
The **Submit DSRS (Deputy Sheriff's Retirement System) Fee** allows employers participating in the DSRS to manage the reporting of the Deputy Sheriff Statewide Uniform fees. Using this screen, employers can also view the previously submitted DSRS Fees report.

Note: The ESS portal user with the role of "DSRS Fee Reporting" will be able to access the DSRS Fee module and submit the DSRS Fee for the employer's corresponding report date. When this user logs into the ESS portal, they will not be able to view any other menu option except for **Submit DSRS Fee**. Also, the menu of **Submit DSRS Fee** will be visible as read-only to other ESS users with roles of "ESS Admin" and "ESS Employer Reporting". When the invoice for DSRS fee is generated, a physical copy of the invoice will be mailed to the ESS portal user with the role of "DSRS Fee administrator".

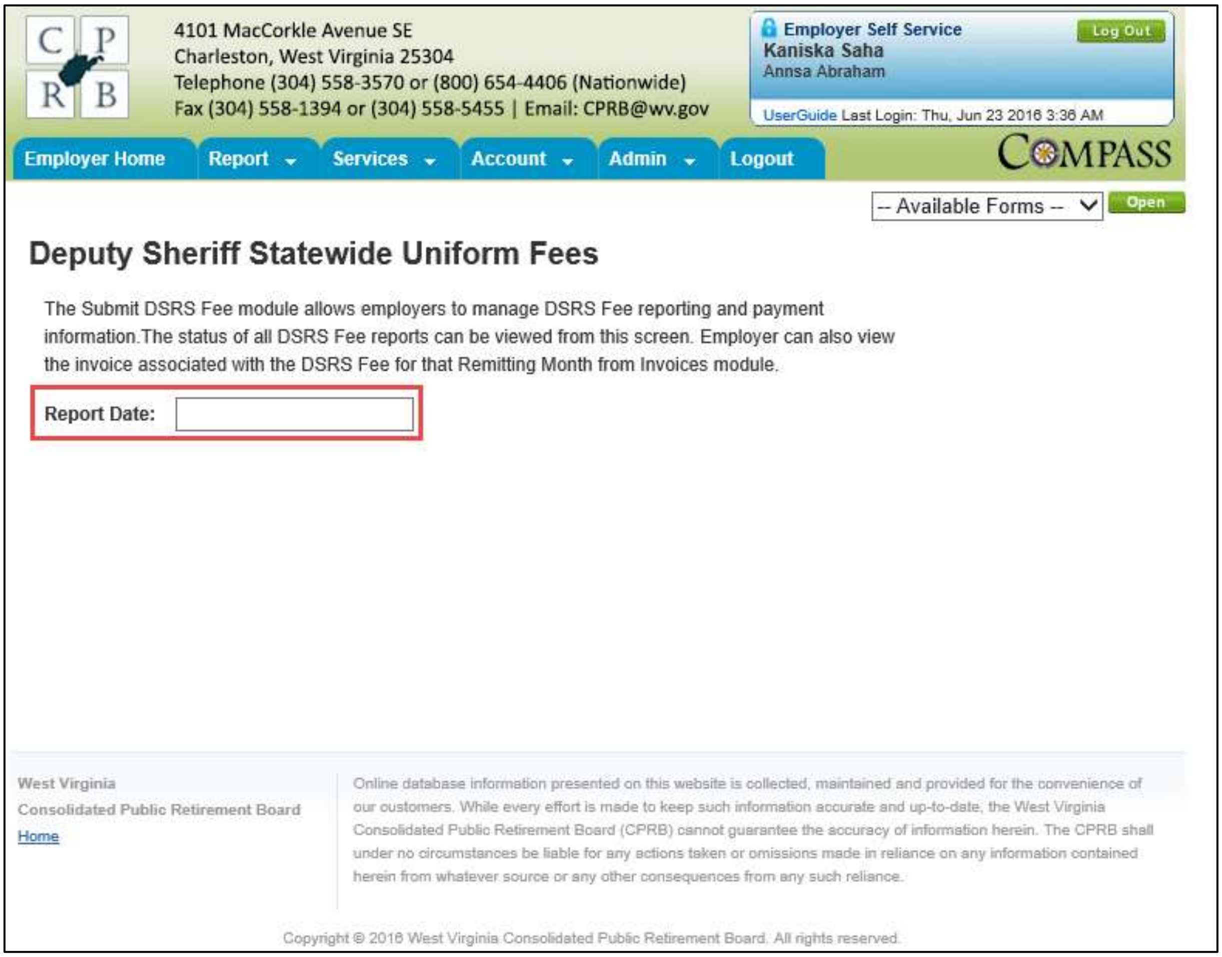
Perform the steps below to submit the DSRS Fees report:

Step 1 -- To navigate to the **Submit DSRS Fee** screen, click the following menu options:

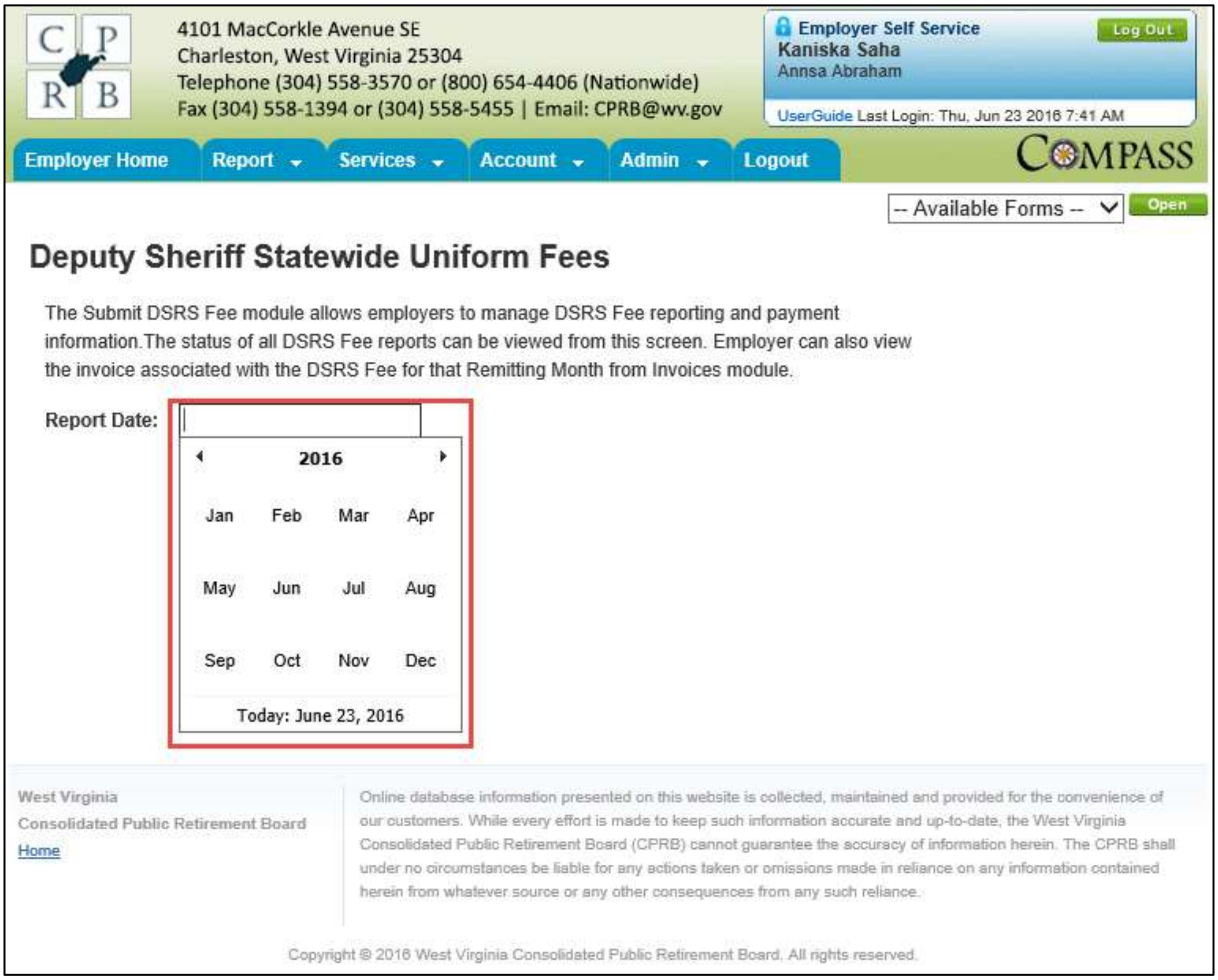
Report > **Submit DSRS Fee**



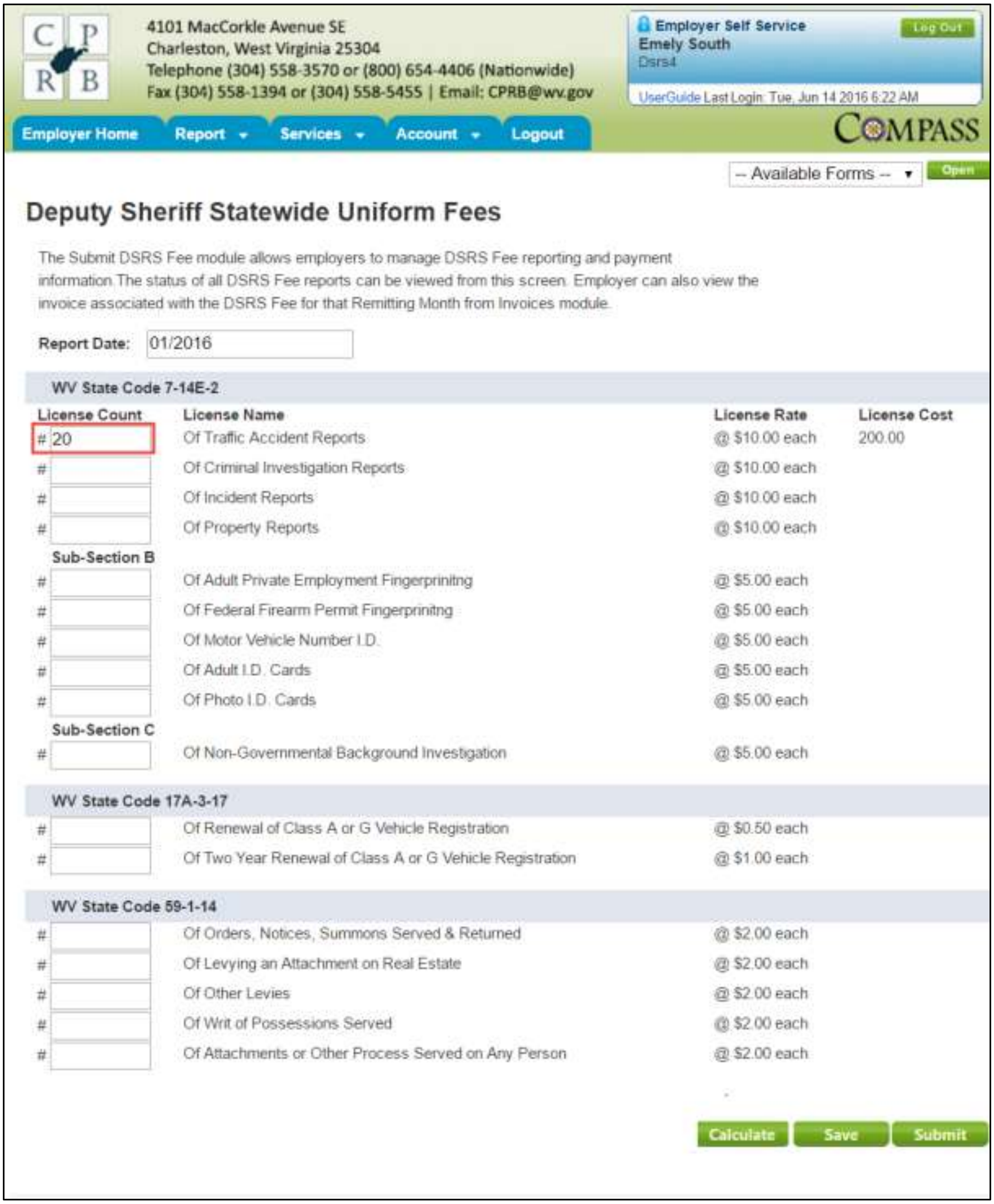
Step 2 -- Click the **Report Date** field to open the calendar.



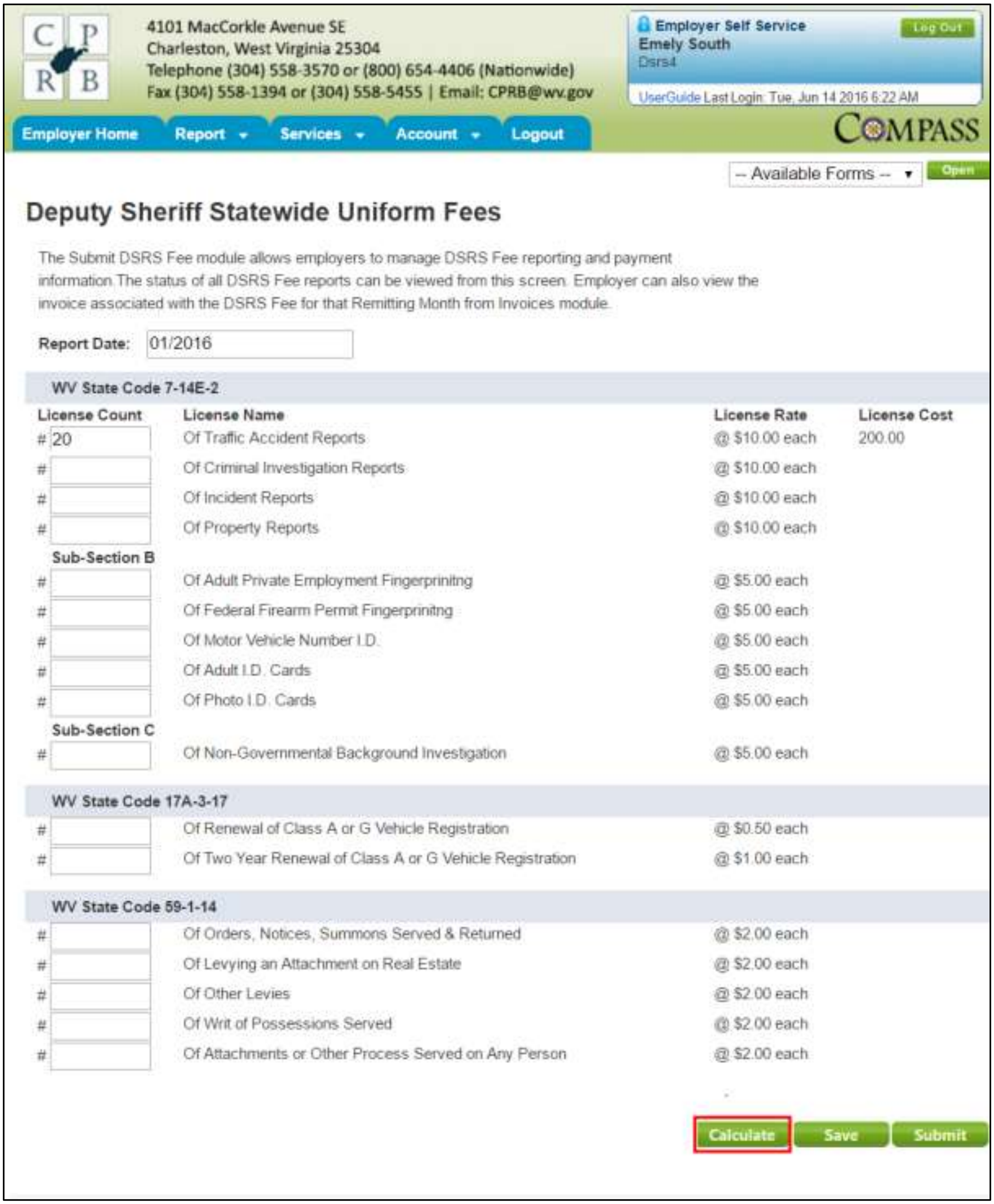
Step 3 -- The **Report Date** calendar displays. Select an appropriate date.



Step 4 -- Enter the license count in the **License Count** field.



Step 5 -- Click the **Calculate** button.



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Emely South
Dsrs4
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Employer Home | Report | Services | Account | Logout

-- Available Forms -- | Open

Deputy Sheriff Statewide Uniform Fees

The Submit DSRS Fee module allows employers to manage DSRS Fee reporting and payment information. The status of all DSRS Fee reports can be viewed from this screen. Employer can also view the invoice associated with the DSRS Fee for that Remitting Month from Invoices module.

Report Date: 01/2016

WV State Code 7-14E-2

License Count	License Name	License Rate	License Cost
# 20	Of Traffic Accident Reports	@ $10.00 each	200.00
#	Of Criminal Investigation Reports	@ $10.00 each	
#	Of Incident Reports	@ $10.00 each	
#	Of Property Reports	@ $10.00 each	
Sub-Section B			
#	Of Adult Private Employment Fingerprinitng	@ $5.00 each	
#	Of Federal Firearm Permit Fingerprinitng	@ $5.00 each	
#	Of Motor Vehicle Number I.D.	@ $5.00 each	
#	Of Adult I.D. Cards	@ $5.00 each	
#	Of Photo I.D. Cards	@ $5.00 each	
Sub-Section C			
#	Of Non-Governmental Background Investigation	@ $5.00 each	

WV State Code 17A-3-17

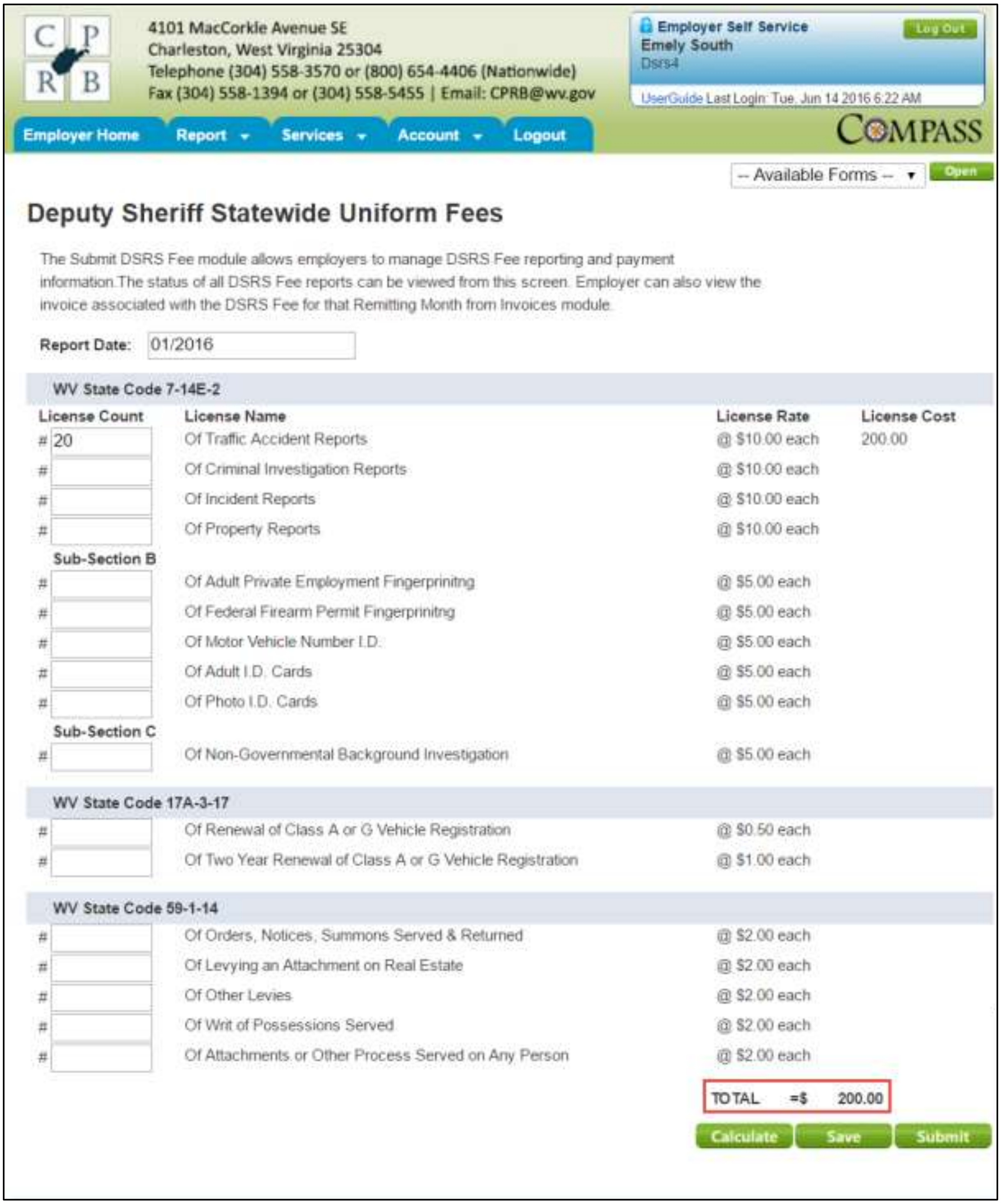
#	Of Renewal of Class A or G Vehicle Registration	@ $0.50 each	
#	Of Two Year Renewal of Class A or G Vehicle Registration	@ $1.00 each	

WV State Code 59-1-14

#	Of Orders, Notices, Summons Served & Returned	@ $2.00 each	
#	Of Levying an Attachment on Real Estate	@ $2.00 each	
#	Of Other Levies	@ $2.00 each	
#	Of Writ of Possessions Served	@ $2.00 each	
#	Of Attachments or Other Process Served on Any Person	@ $2.00 each	

Calculate | Save | Submit

Step 6 -- The ESS portal calculates the total cost.



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-- Available Forms -- | Open

Deputy Sheriff Statewide Uniform Fees

The Submit DSRS Fee module allows employers to manage DSRS Fee reporting and payment information.The status of all DSRS Fee reports can be viewed from this screen. Employer can also view the invoice associated with the DSRS Fee for that Remitting Month from Invoices module.

Report Date: 01/2016

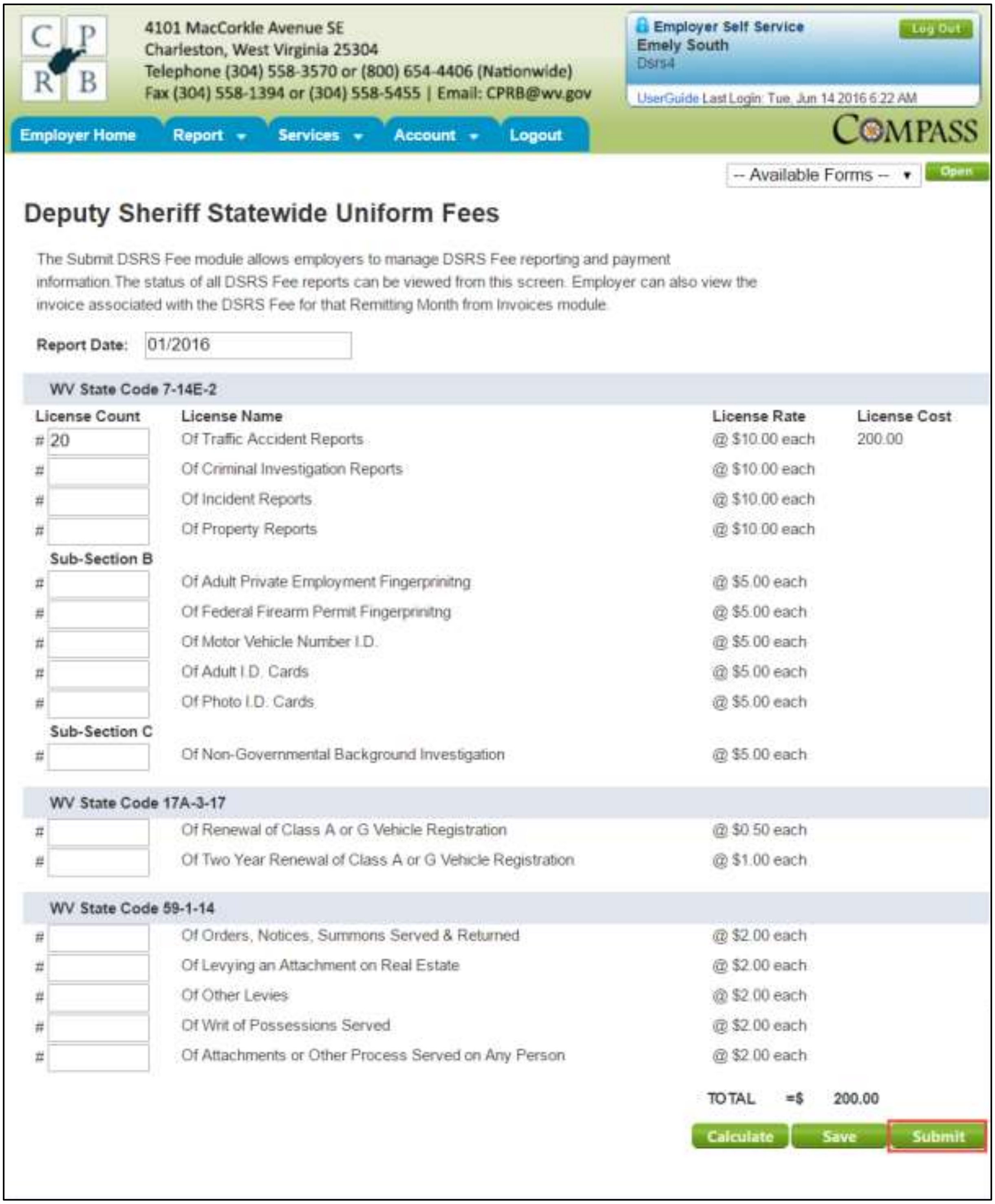
License Count	License Name	License Rate	License Cost
WV State Code 7-14E-2			
# 20	Of Traffic Accident Reports	@ $10.00 each	200.00
#	Of Criminal Investigation Reports	@ $10.00 each	
#	Of Incident Reports	@ $10.00 each	
#	Of Property Reports	@ $10.00 each	
Sub-Section B			
#	Of Adult Private Employment Fingerprinitng	@ $5.00 each	
#	Of Federal Firearm Permit Fingerprinitng	@ $5.00 each	
#	Of Motor Vehicle Number I.D.	@ $5.00 each	
#	Of Adult I.D. Cards	@ $5.00 each	
#	Of Photo I.D. Cards	@ $5.00 each	
Sub-Section C			
#	Of Non-Governmental Background Investigation	@ $5.00 each	
WV State Code 17A-3-17			
#	Of Renewal of Class A or G Vehicle Registration	@ $0.50 each	
#	Of Two Year Renewal of Class A or G Vehicle Registration	@ $1.00 each	
WV State Code 59-1-14			
#	Of Orders, Notices, Summons Served & Returned	@ $2.00 each	
#	Of Levying an Attachment on Real Estate	@ $2.00 each	
#	Of Other Levies	@ $2.00 each	
#	Of Writ of Possessions Served	@ $2.00 each	
#	Of Attachments or Other Process Served on Any Person	@ $2.00 each	

TOTAL =$ 200.00

Calculate | Save | Submit

Step 7 -- Click the Submit button to submit the DSRS fees.

Note: Also the DSRS Fees report can be saved by clicking on the Save button without submitting the report. The Save reports can be retrieved for later submission.



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Deputy Sheriff Statewide Uniform Fees

The Submit DSRS Fee module allows employers to manage DSRS Fee reporting and payment information. The status of all DSRS Fee reports can be viewed from this screen. Employer can also view the invoice associated with the DSRS Fee for that Remitting Month from Invoices module.

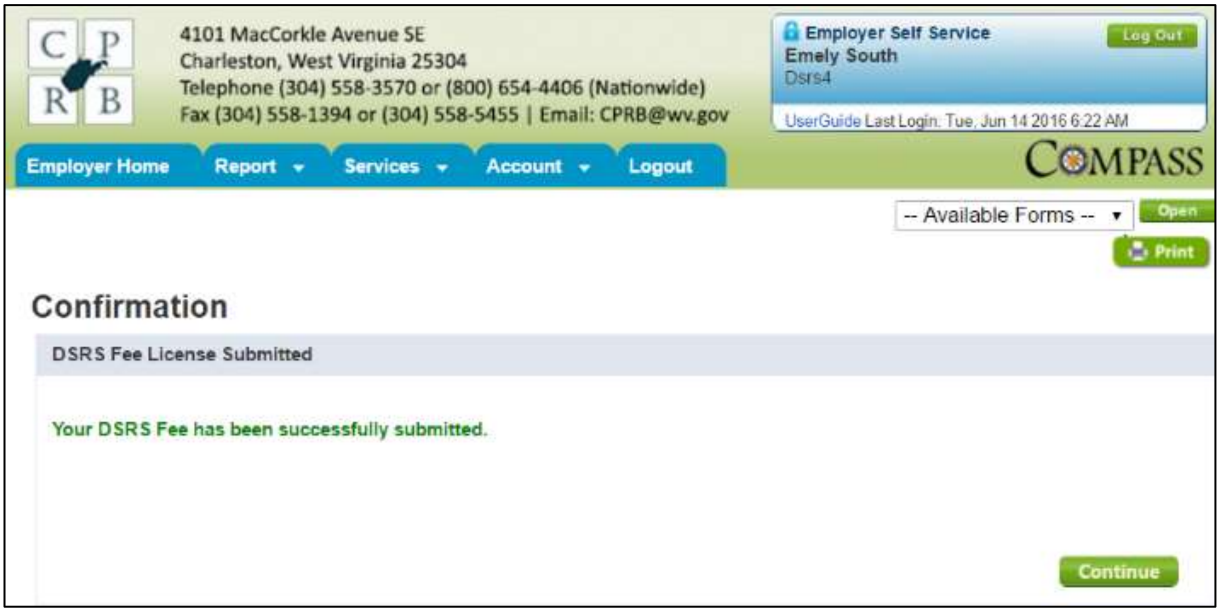
Report Date: 01/2016

License Count	License Name	License Rate	License Cost
WV State Code 7-14E-2			
# 20	Of Traffic Accident Reports	@ $10.00 each	200.00
#	Of Criminal Investigation Reports	@ $10.00 each	
#	Of Incident Reports	@ $10.00 each	
#	Of Property Reports	@ $10.00 each	
Sub-Section B			
#	Of Adult Private Employment Fingerprinitng	@ $5.00 each	
#	Of Federal Firearm Permit Fingerprinitng	@ $5.00 each	
#	Of Motor Vehicle Number I.D.	@ $5.00 each	
#	Of Adult I.D. Cards	@ $5.00 each	
#	Of Photo I.D. Cards	@ $5.00 each	
Sub-Section C			
#	Of Non-Governmental Background Investigation	@ $5.00 each	
WV State Code 17A-3-17			
#	Of Renewal of Class A or G Vehicle Registration	@ $0.50 each	
#	Of Two Year Renewal of Class A or G Vehicle Registration	@ $1.00 each	
WV State Code 59-1-14			
#	Of Orders, Notices, Summons Served & Returned	@ $2.00 each	
#	Of Levying an Attachment on Real Estate	@ $2.00 each	
#	Of Other Levies	@ $2.00 each	
#	Of Writ of Possessions Served	@ $2.00 each	
#	Of Attachments or Other Process Served on Any Person	@ $2.00 each	

TOTAL =$ 200.00

Calculate | Save | Submit

Step 8 -- The "**Your DSRS Fee has been successfully submitted**" message is displayed which confirms that the DSRS Fee is submitted.



Note: Following the same steps in the **Submit DSRS Fee** Section of this manual, the reports that were previously submitted can be viewed in read-only mode.

18. Process Invoices

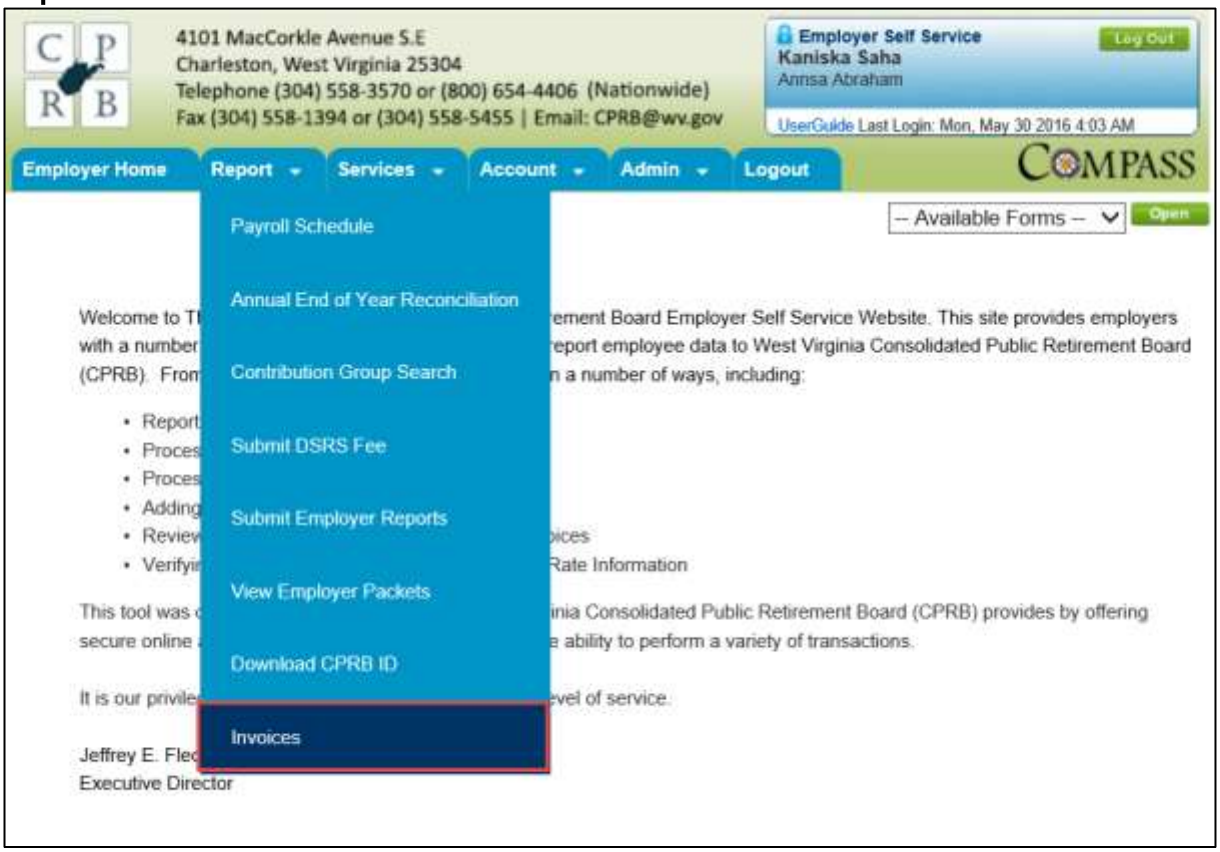
The **Invoices** screen enables employers to view the invoices and allows payment of invoices through ACH. Using this screen, employers can apply payments to outstanding debit invoices.

Note: Credit invoices are not displayed in the **Invoices** screen, credit invoices are instead shown in the Contribution summary at the time the report is submitted.

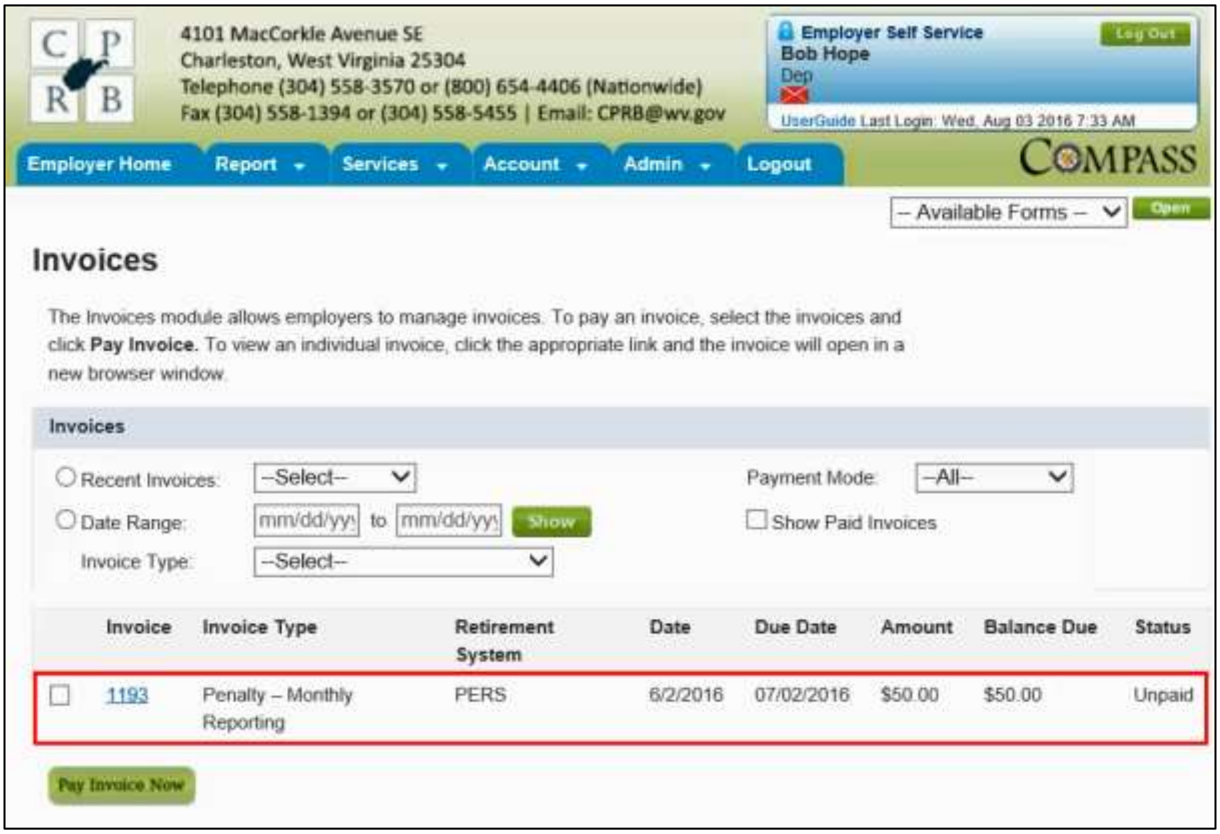
Follow the steps below to pay an invoice in ESS:

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

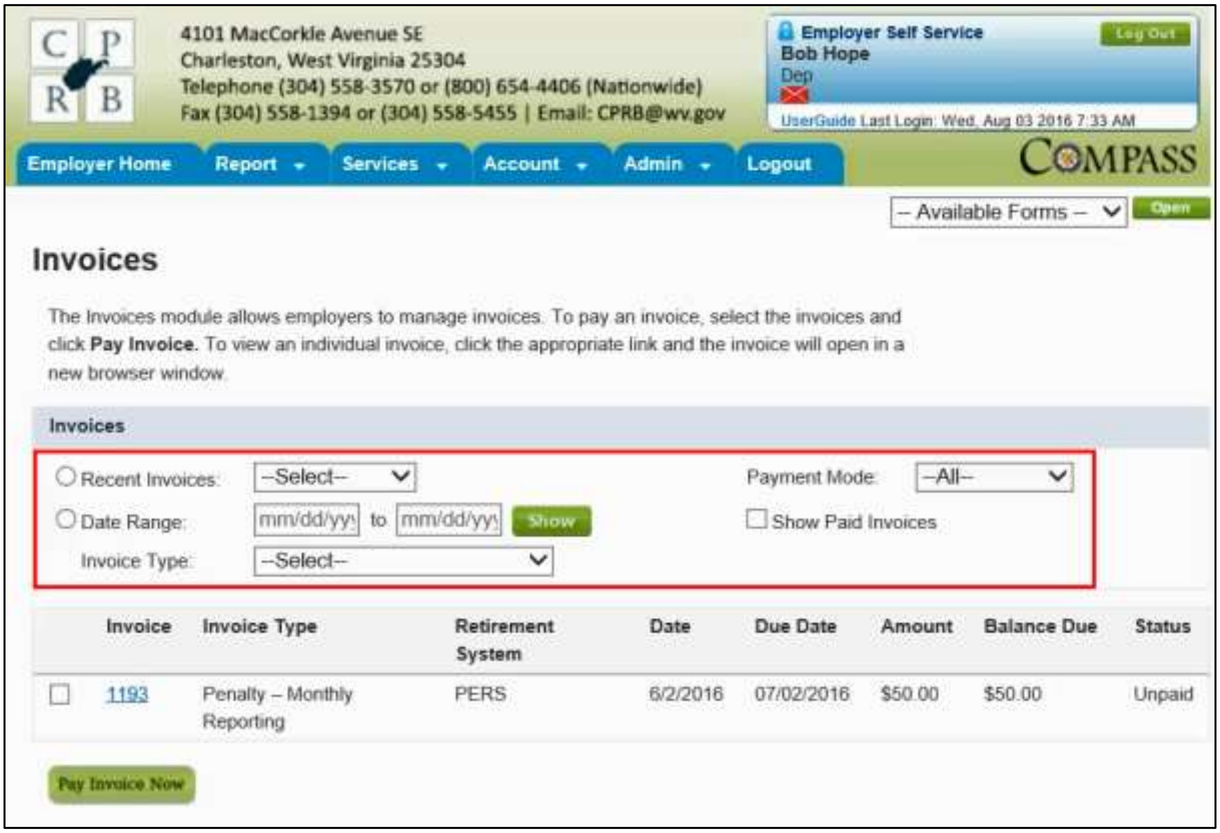
Report > **Invoices**



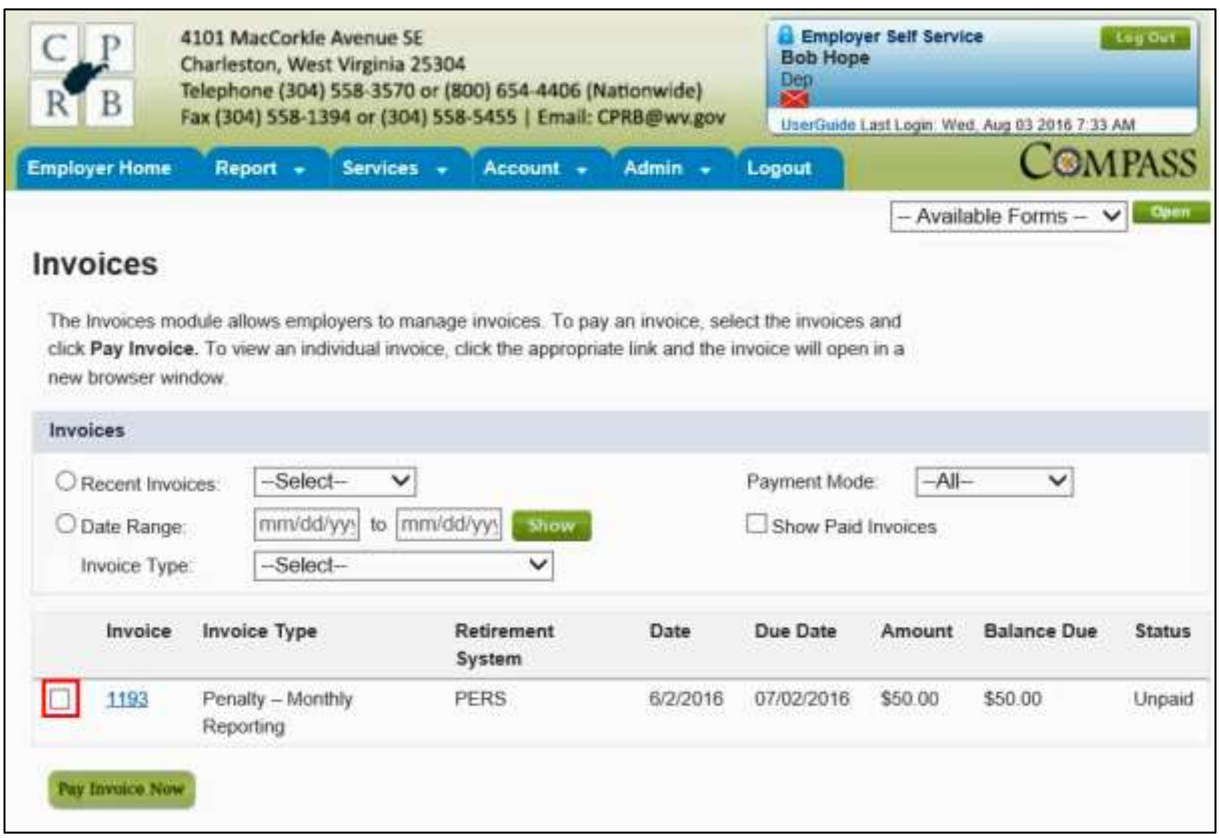
Step 2 -- The **Invoices** screen displays with unpaid invoices listed.



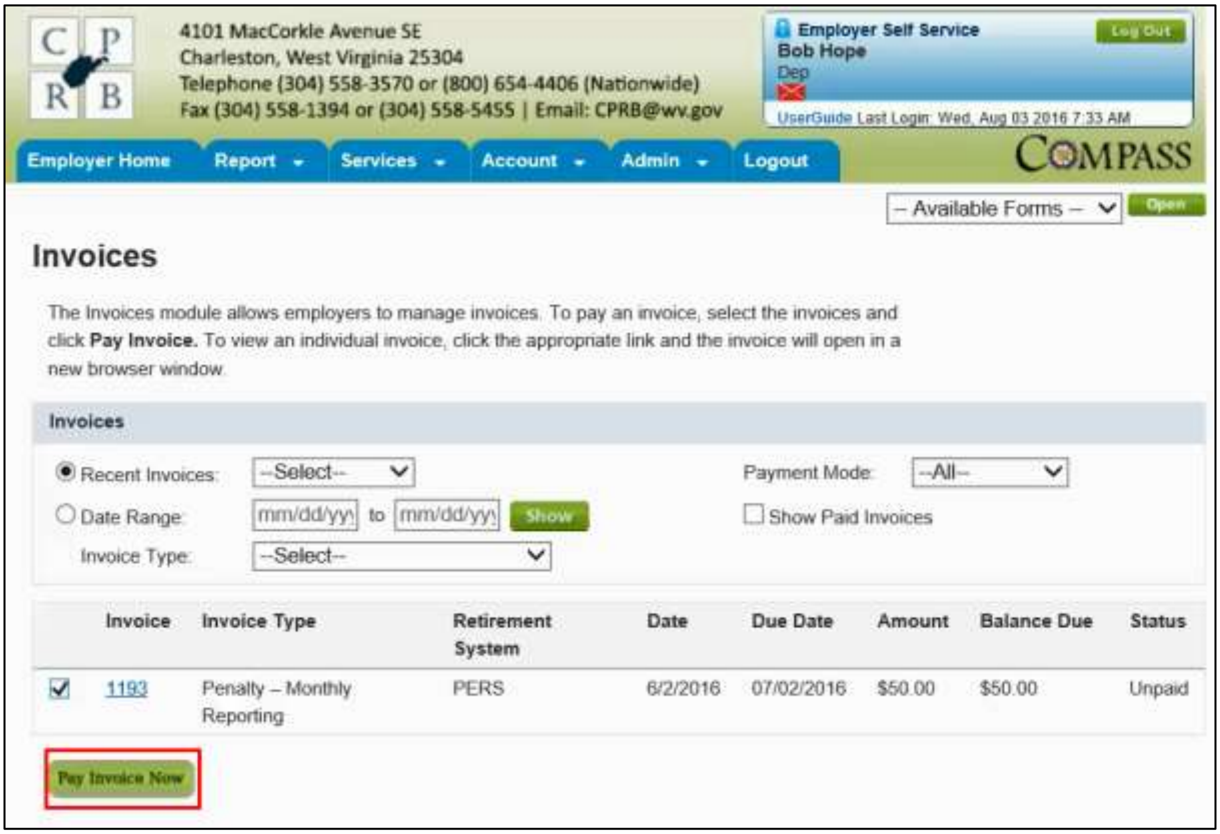
Step 3 -- Search for an invoice using the search criteria of **Recent Invoices**, **Date Range**, **Payment Mode**, or **Invoice Type**.



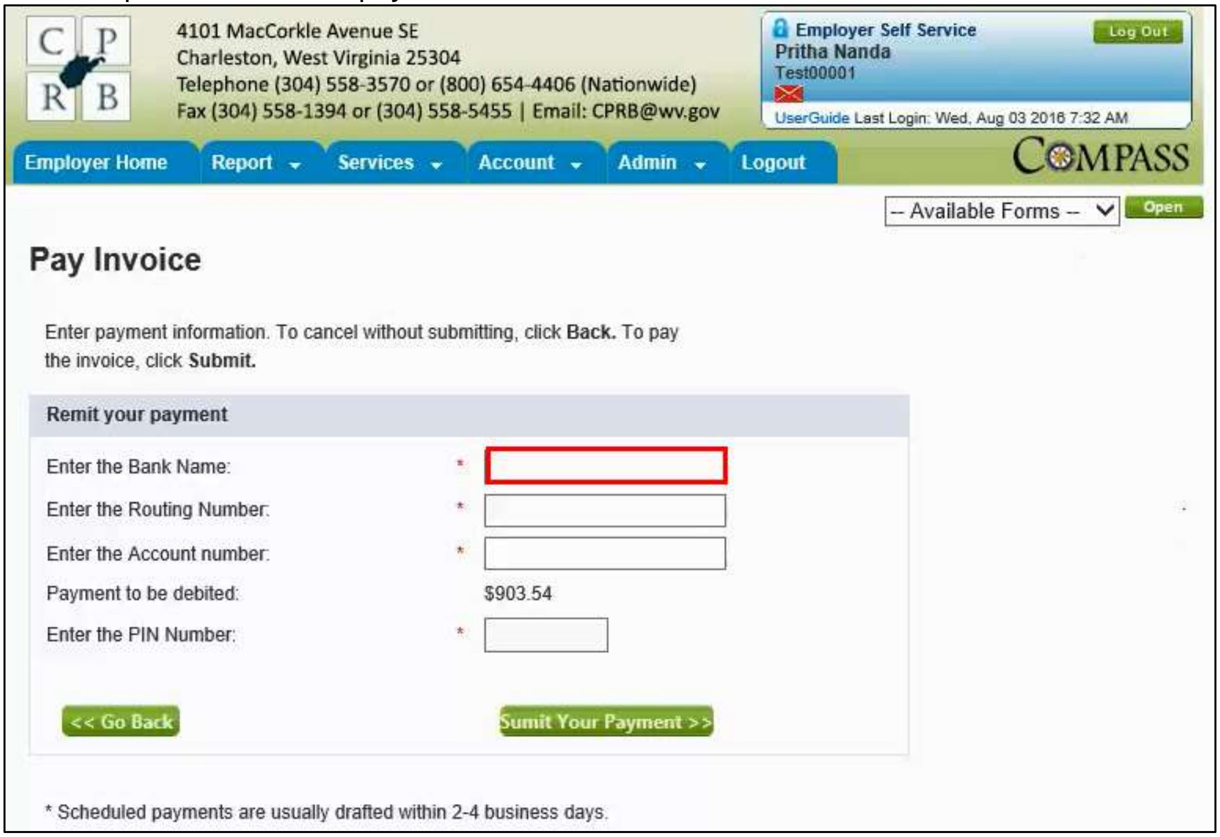
Step 4 -- Select the check box next to the invoice that needs to be paid.



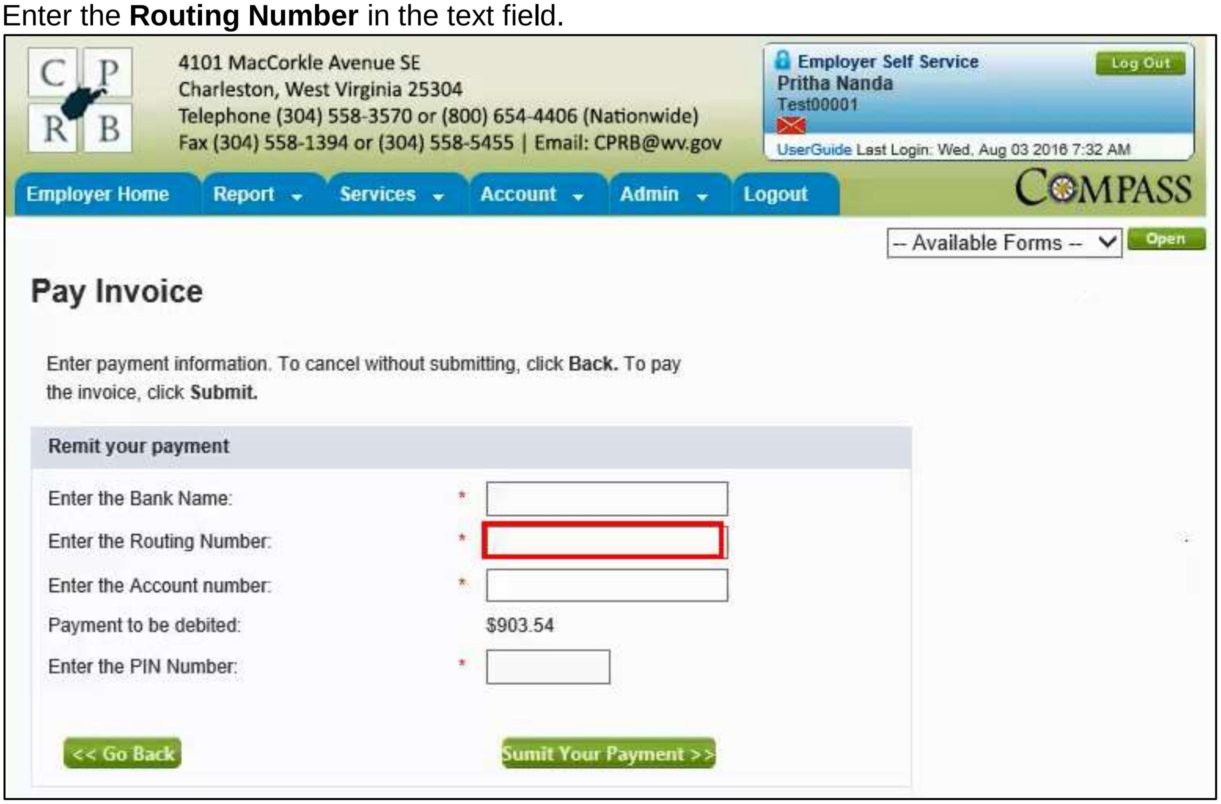
Step 5 -- Click the **Pay Invoice Now** button.



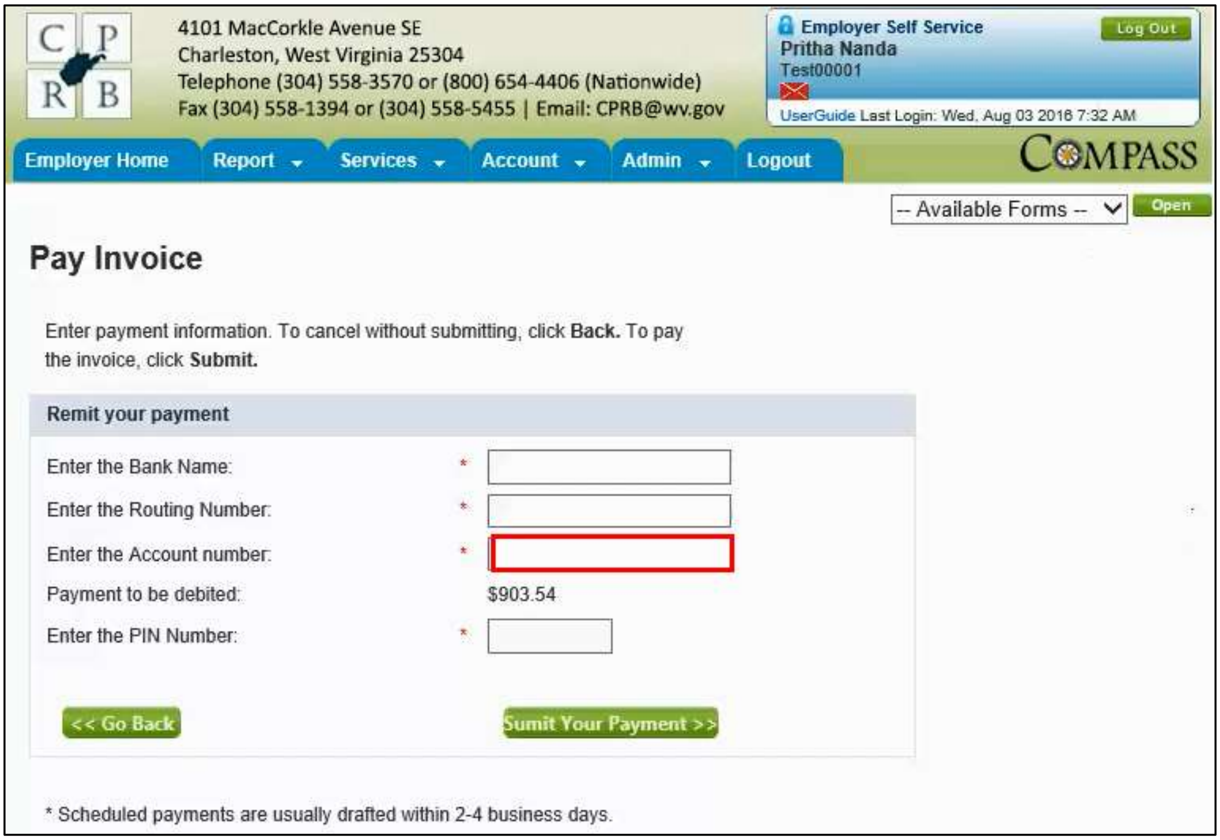
Step 6 -- The **Pay Invoice** screen is displayed. Enter the Bank Name.
Note: If the employer payment remittance type is ACH the PIN Number is the only field that is required to remit the payment.



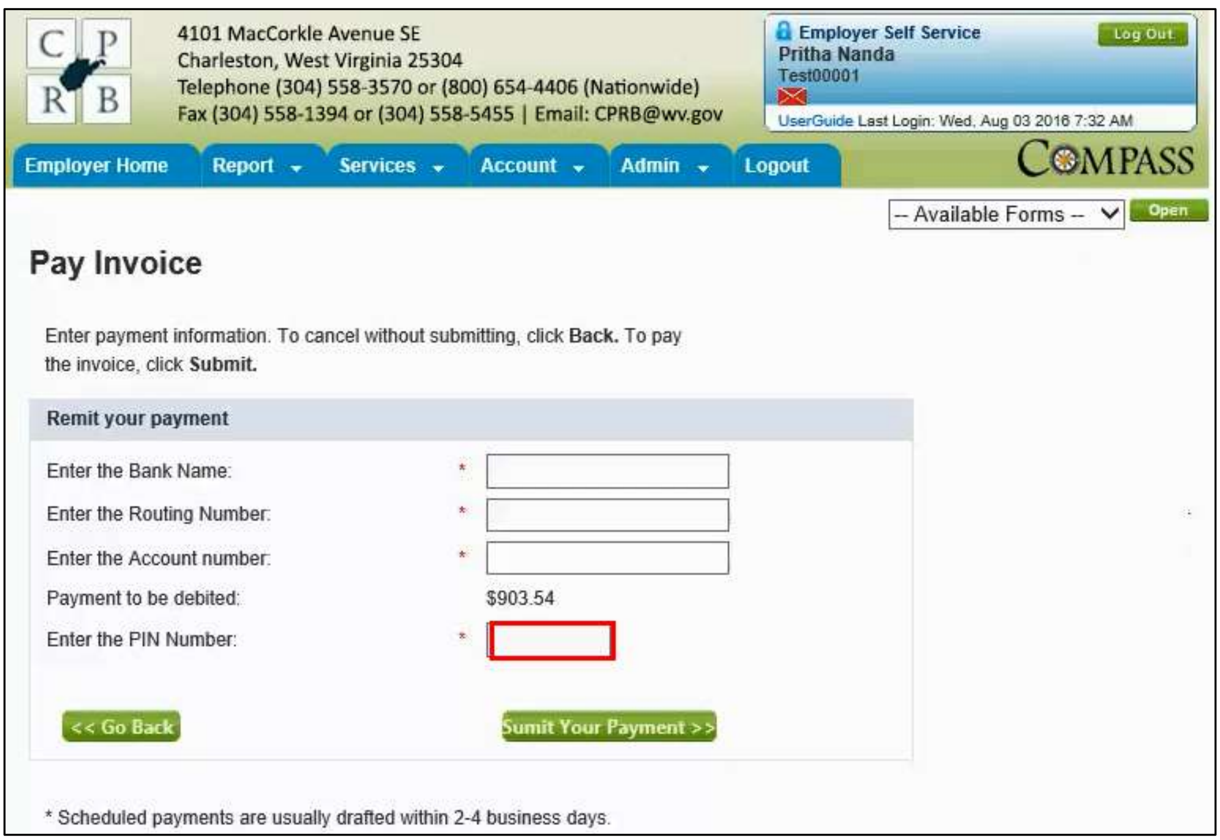
Step 7 -- Enter the **Routing Number** in the text field.



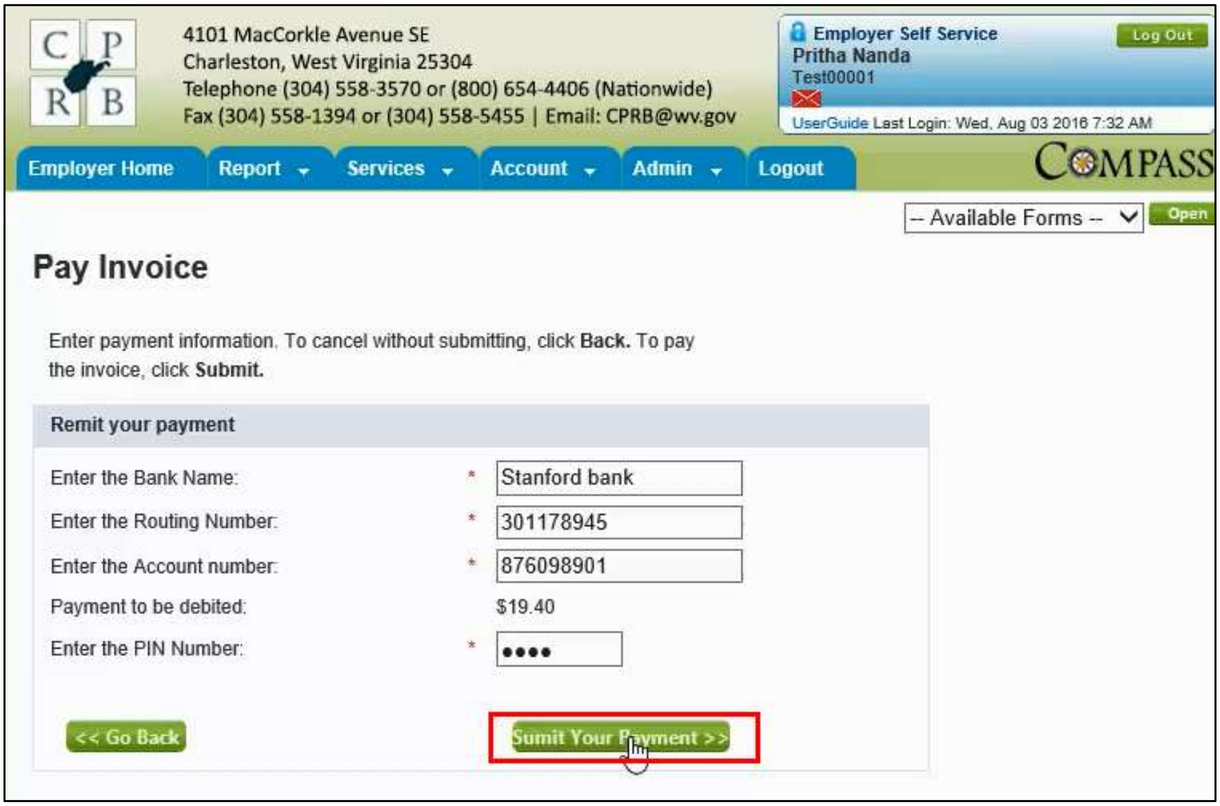
Step 8 -- Enter the **Account Number** in the text field.



Step 9 -- Enter the **PIN Number** in the text field.

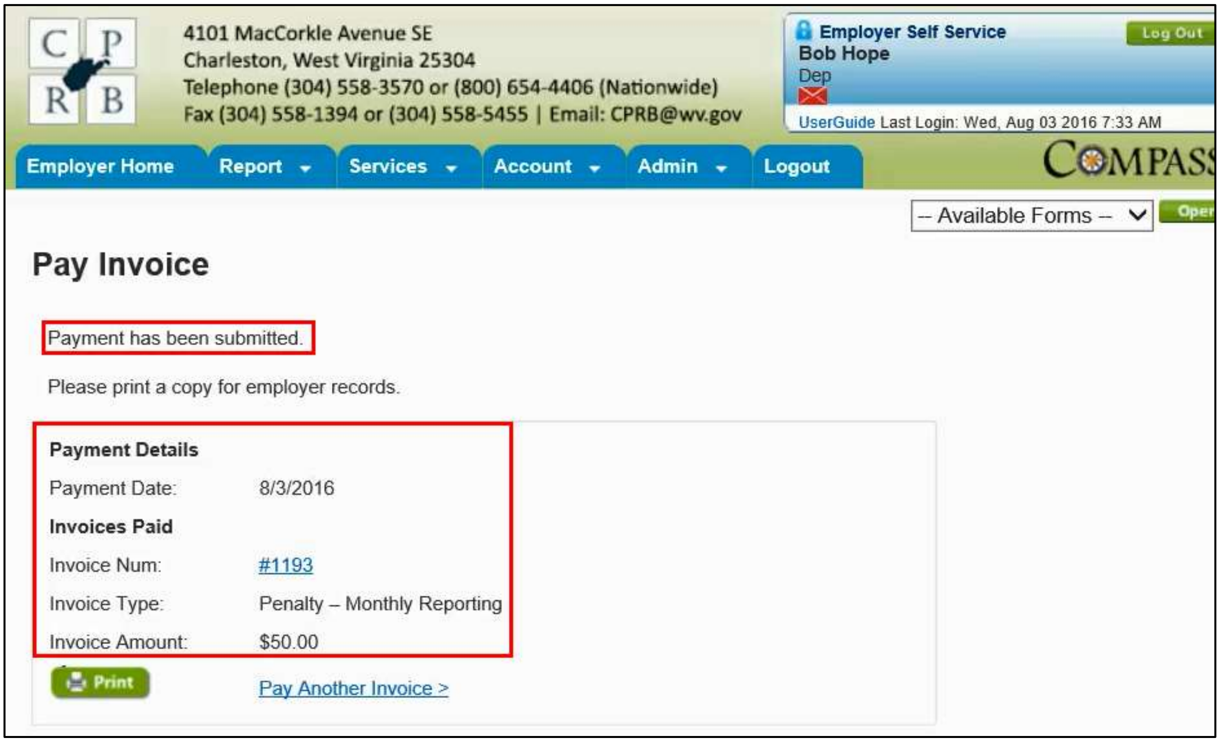


Step 10 -- Click the  button.



Step 11 -- The "**Payment has been submitted**" message is displayed along with the **Payment Details** and the **Invoices Paid** details.

Note: The Pay Invoice confirmation screen can be printed by clicking the  button.

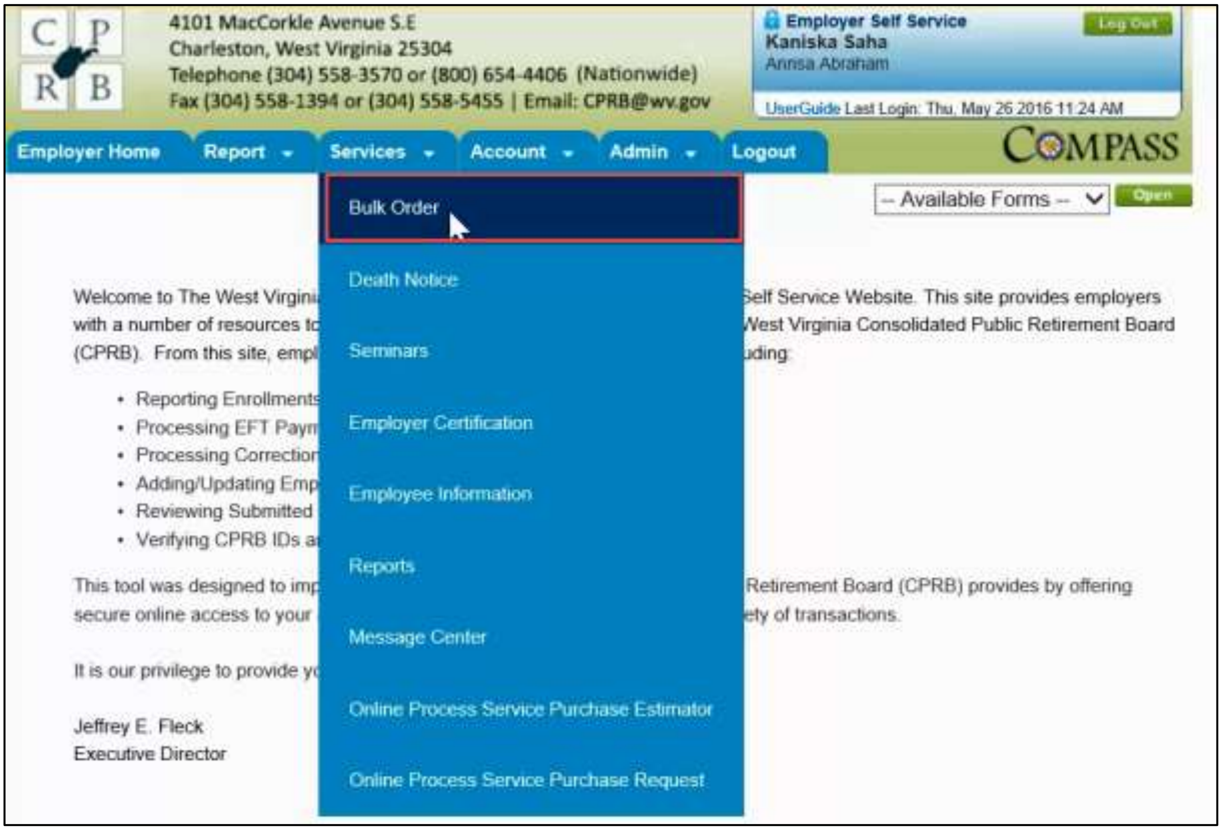


19. Submit a Bulk Order

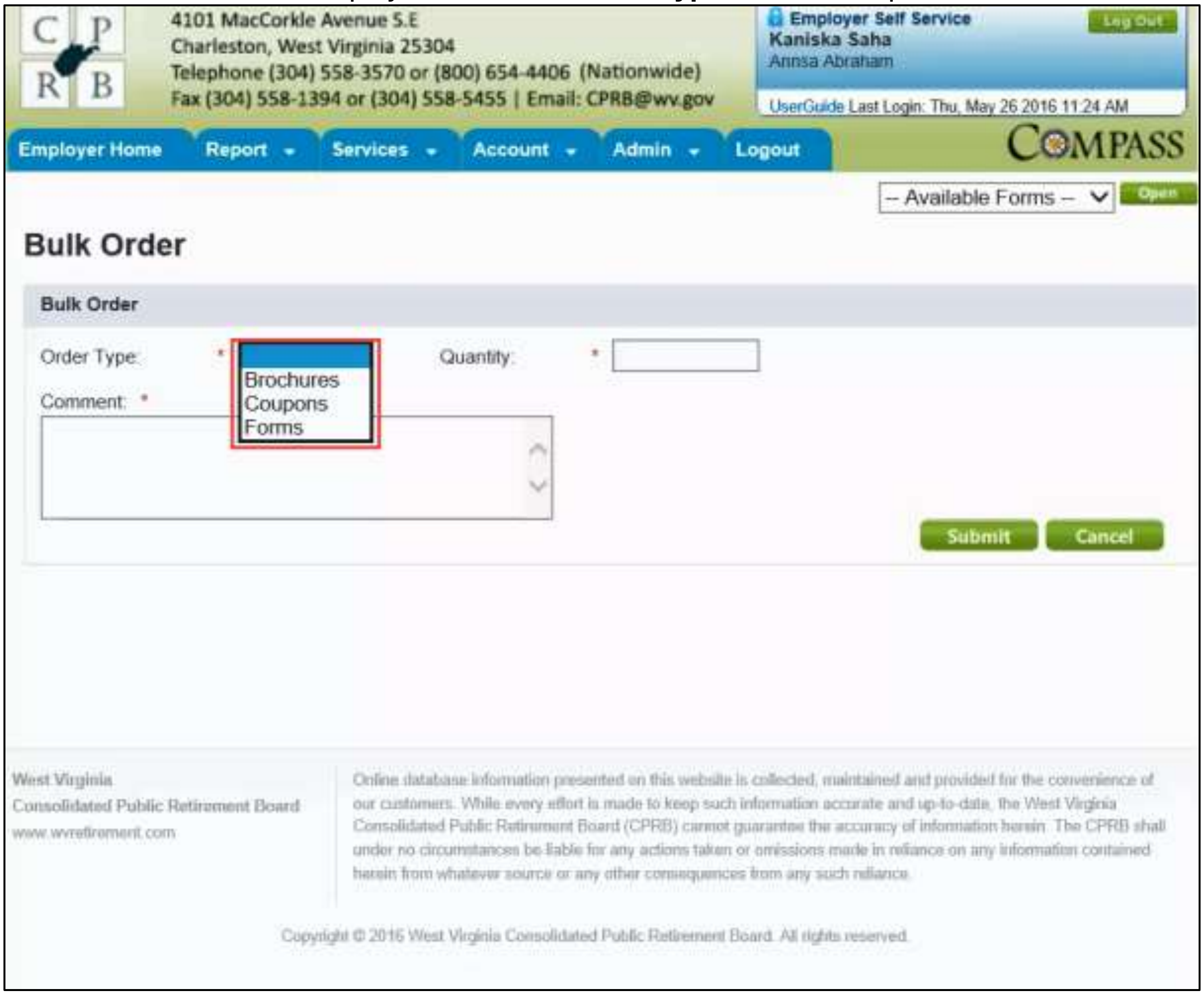
The **Bulk Orders** screen can be used to order forms, brochures, and coupons to be printed in bulk from CPRB. The employer will need to specify the order type, quantity, and include a comment for the bulk order. The following steps demonstrate how to request a bulk print order from CPRB:

Step 1 -- To navigate to the **Bulk Order** screen, click the following menu options:

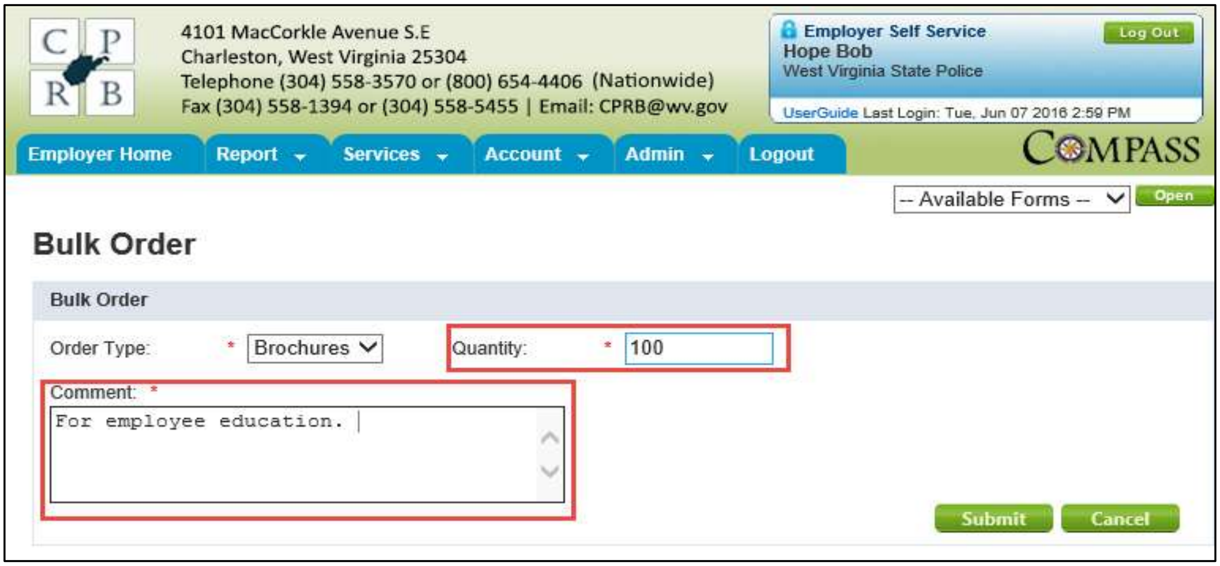
Services > **Bulk Order**



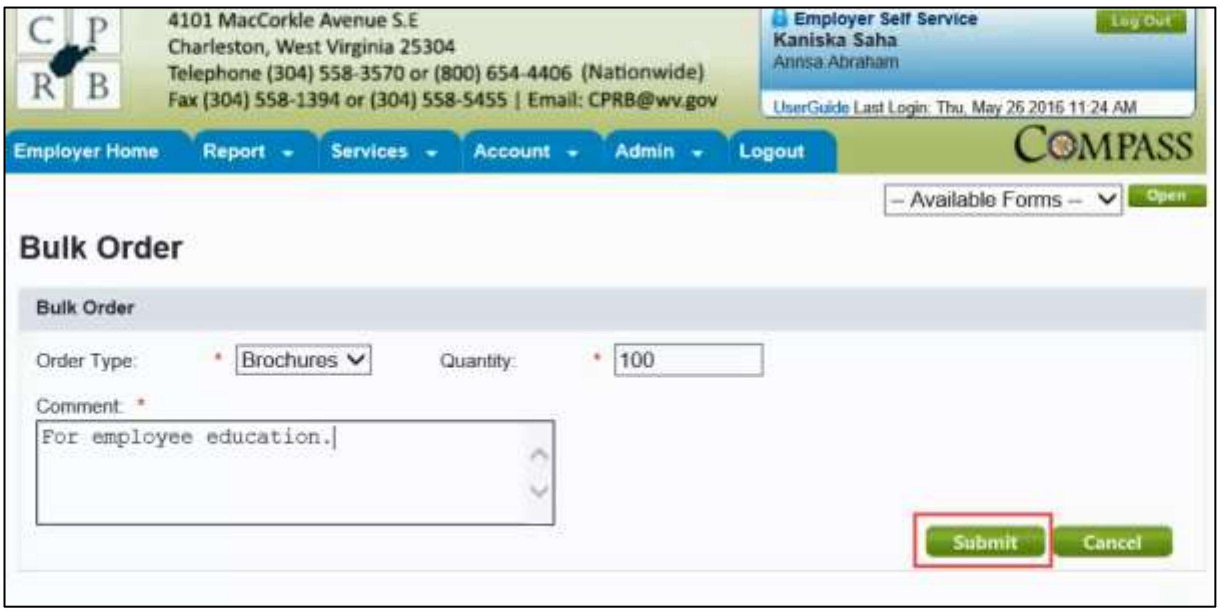
Step 2 -- The **Bulk Order** screen displays. Select the **Order Type** from the drop down menu.



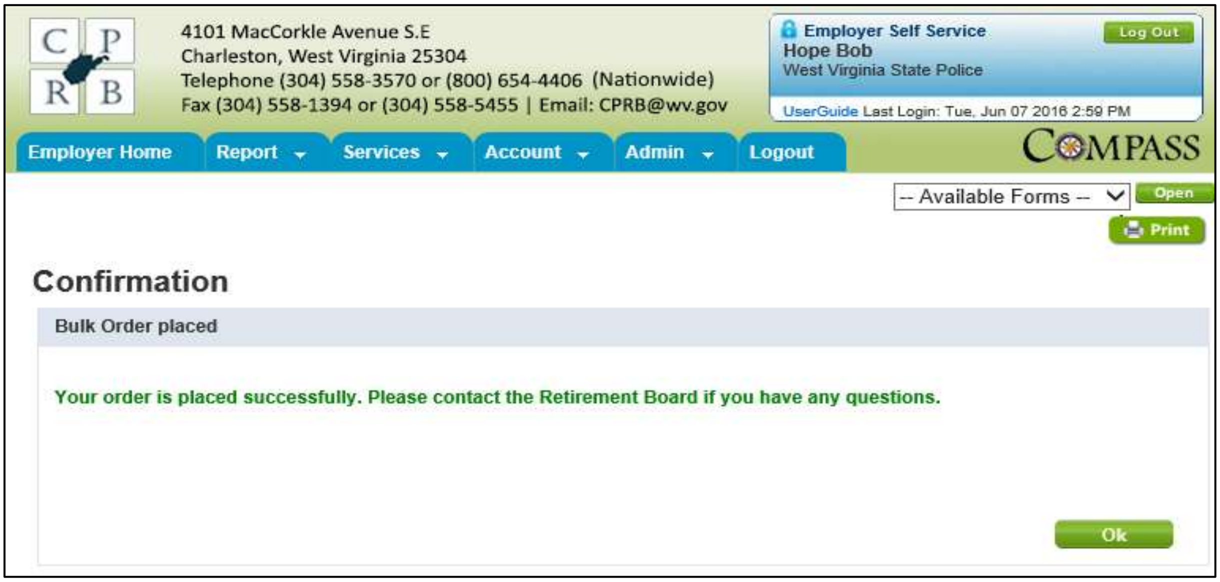
Step 3 -- Enter the required number for bulk order in the **Quantity** field and relevant comments in the **Comment** field.



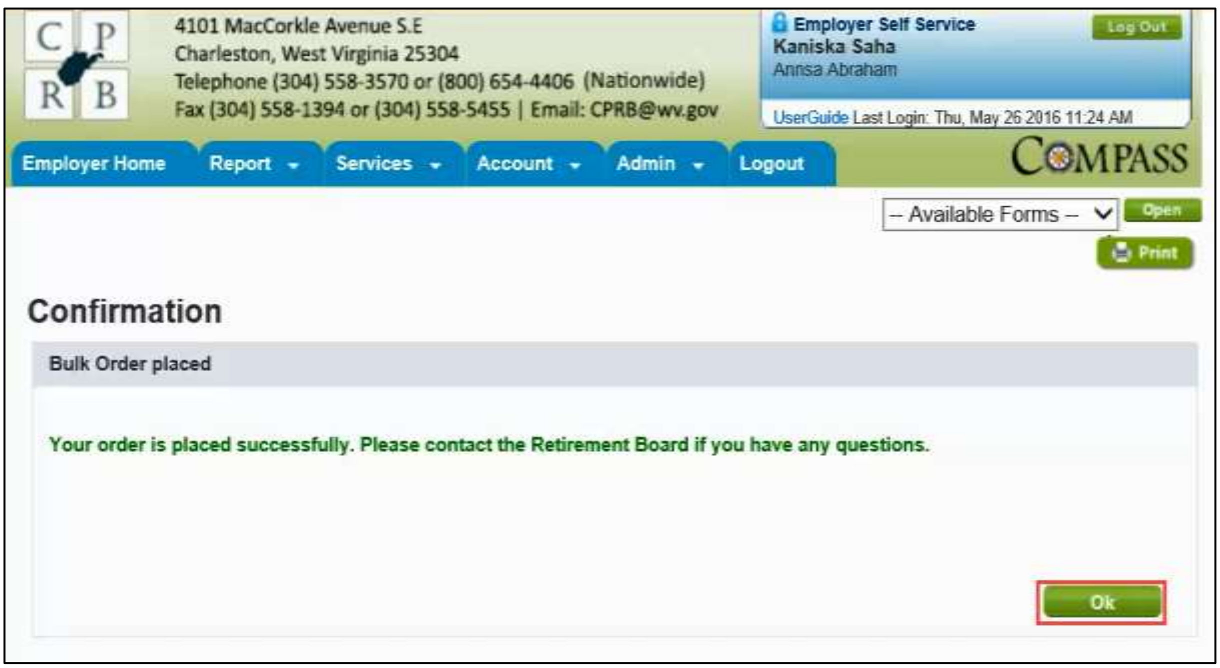
Step 4 -- Click the  button.



Step 5 -- The **Confirmation** screen displays indicating that the bulk order was successfully sent to CPRB.



Step 6 -- Click the  button to return to the **Home** screen.

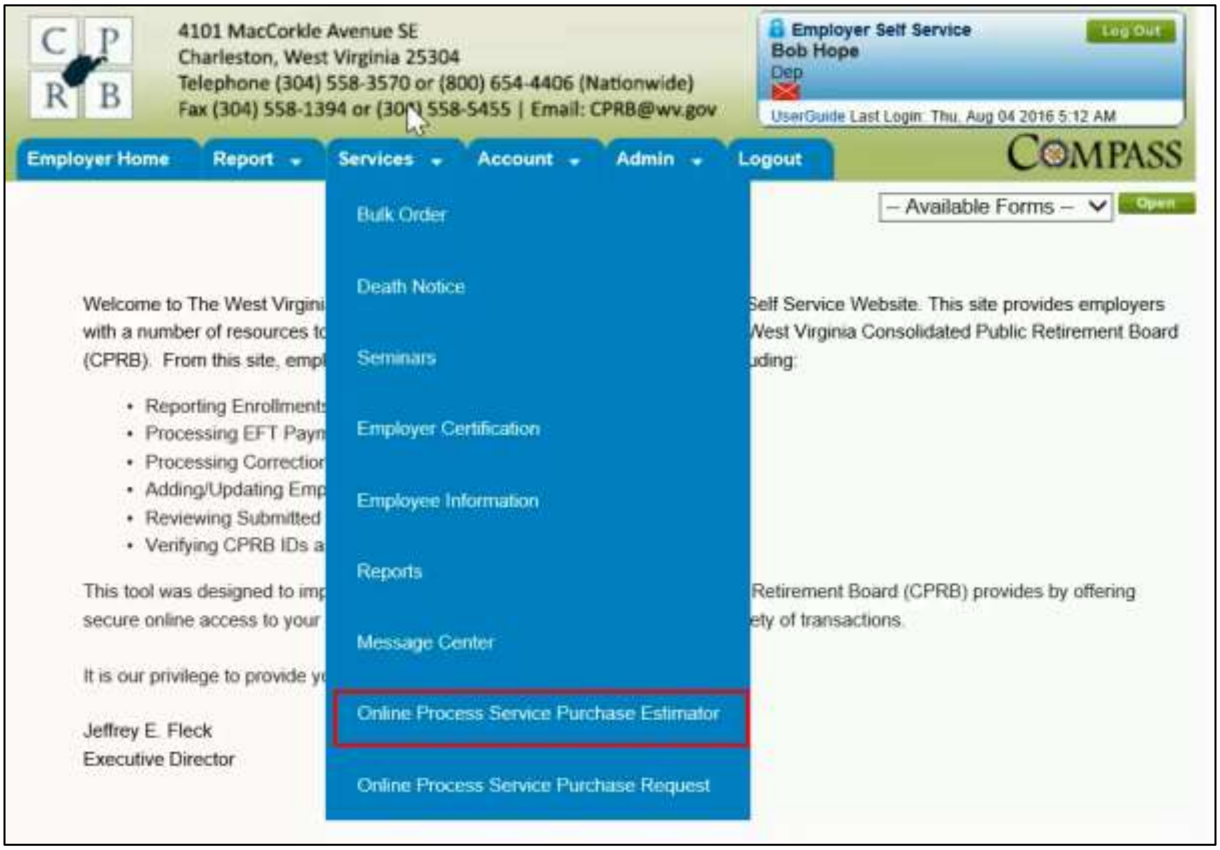


20. Service Purchase Calculator

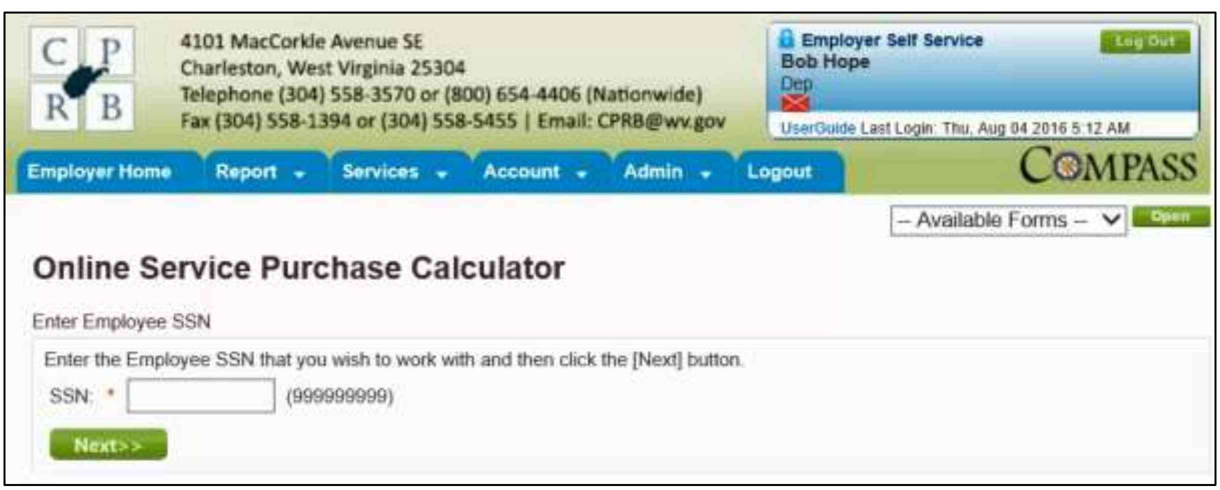
The **Service Purchase Calculator** allows employers to calculate a Service Purchase cost estimate for the various service types within a retirement system. Employers typically receive service purchase cost estimate requests from the members in the system.

Step 1 -- To navigate to the **Service Purchase Calculator** screen, click the following menu options:

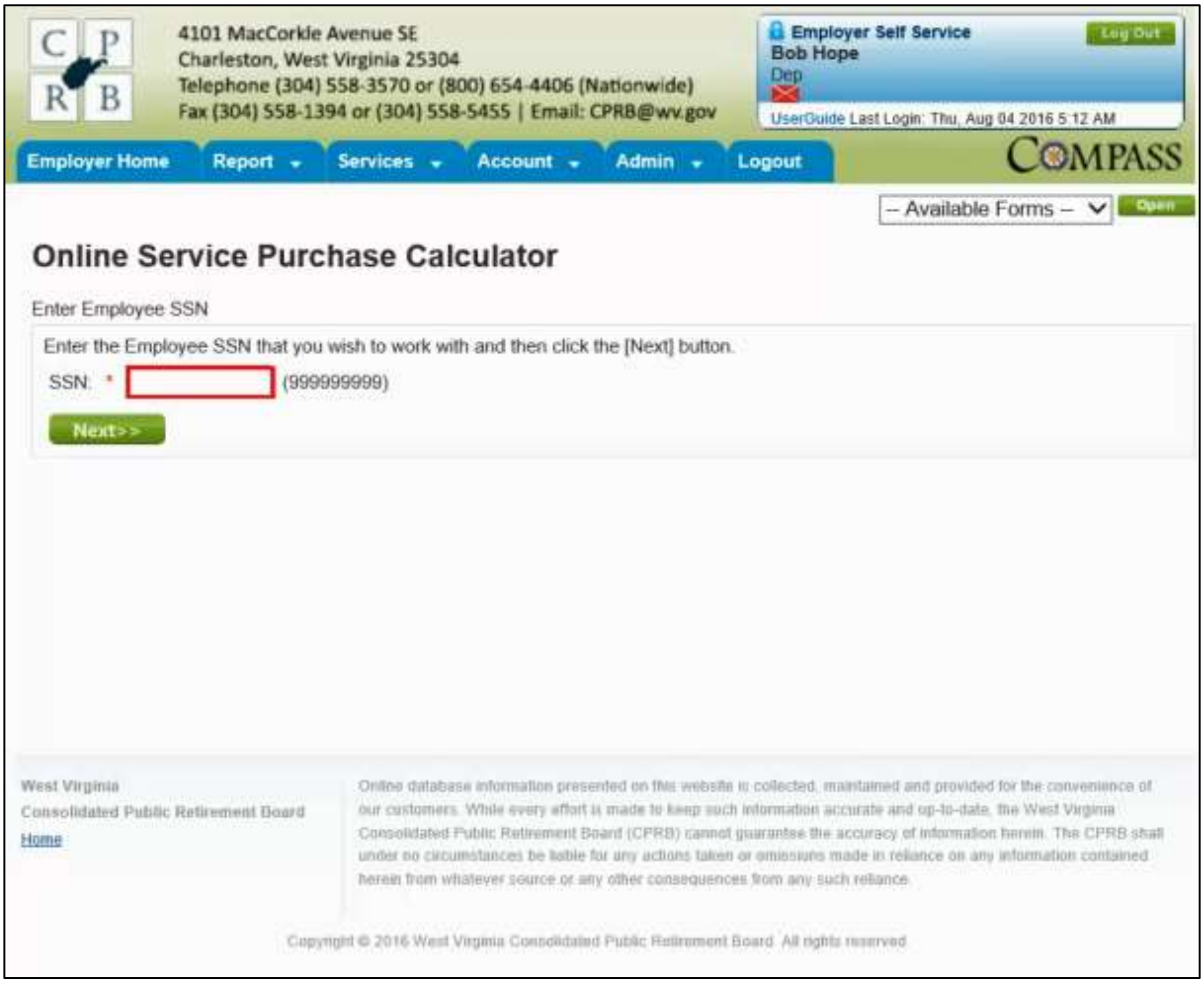
Services > **Service Purchase Estimator**



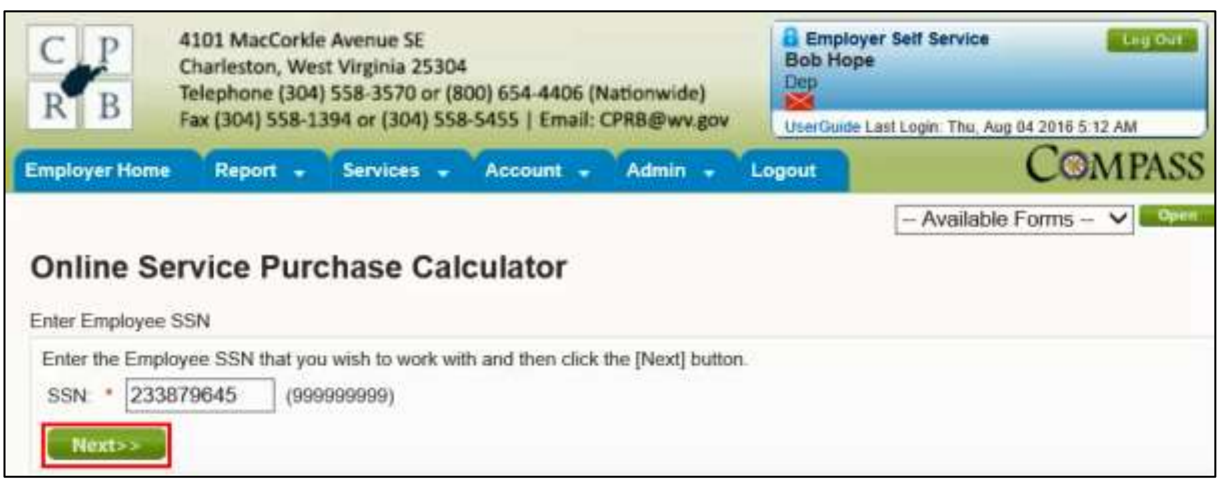
Step 2 -- The **Enter Employee SSN** screen displays.



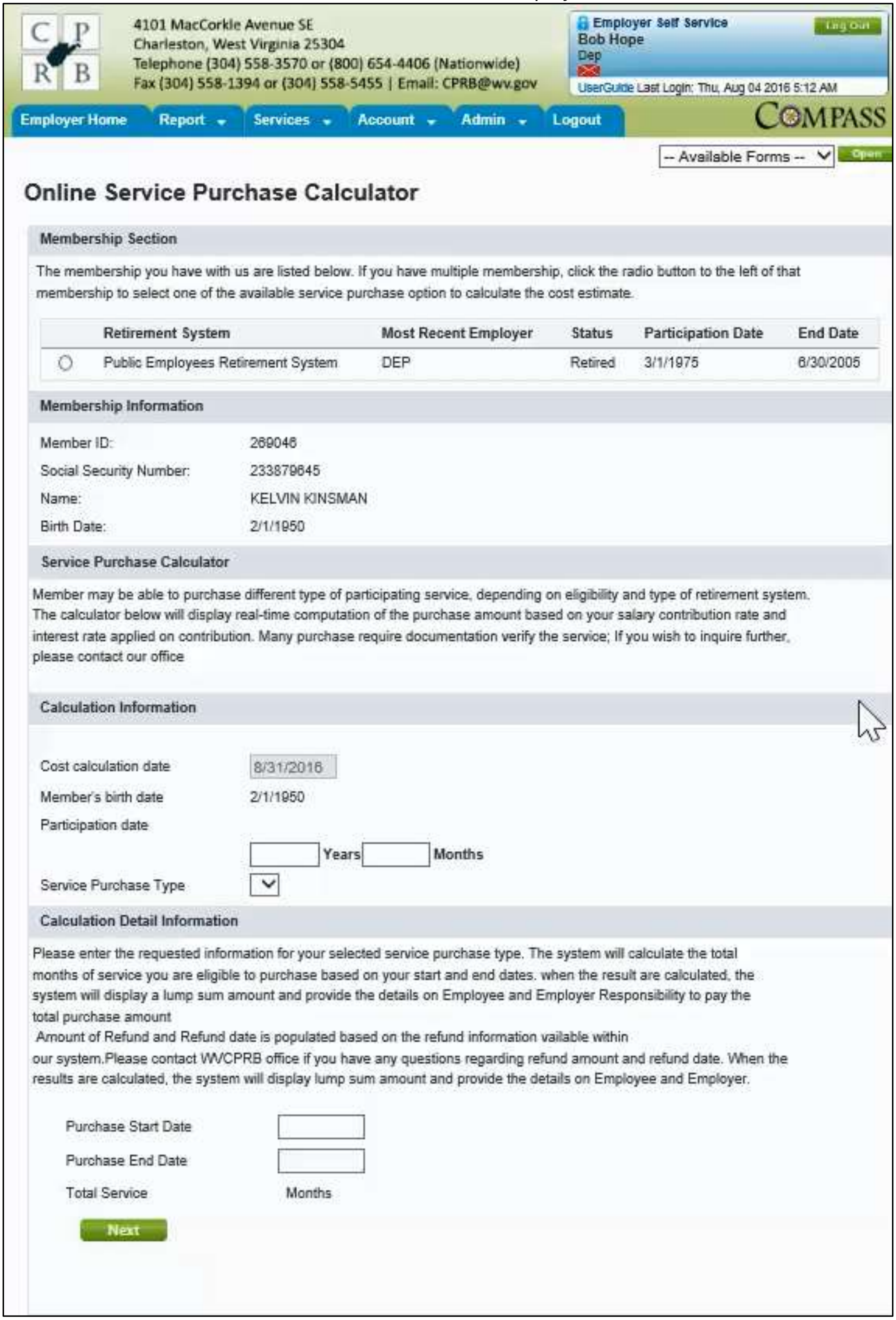
Step 3 -- Enter the SSN of the employee into the **SSN** field.



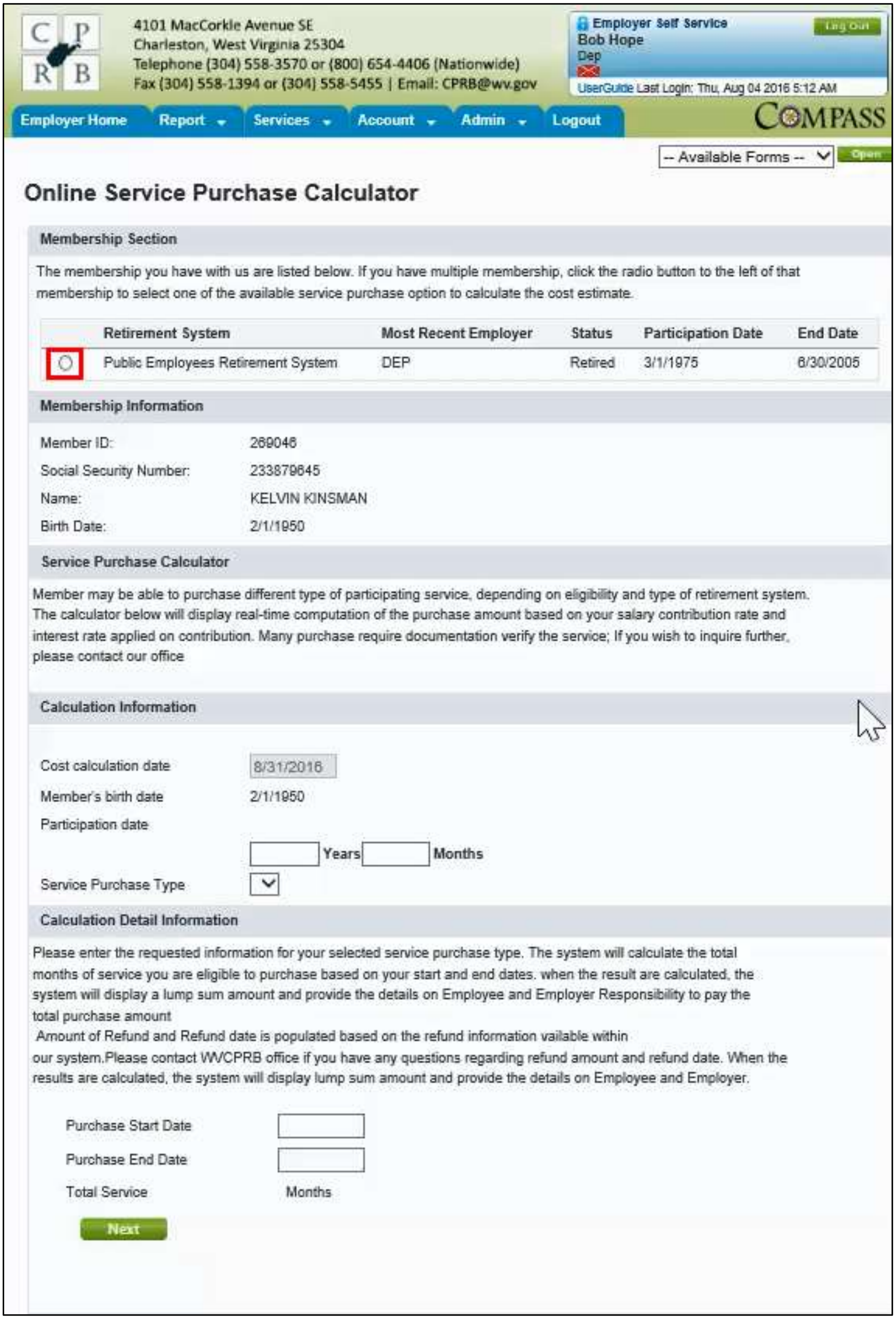
Step 4 -- Click the Next>> button.



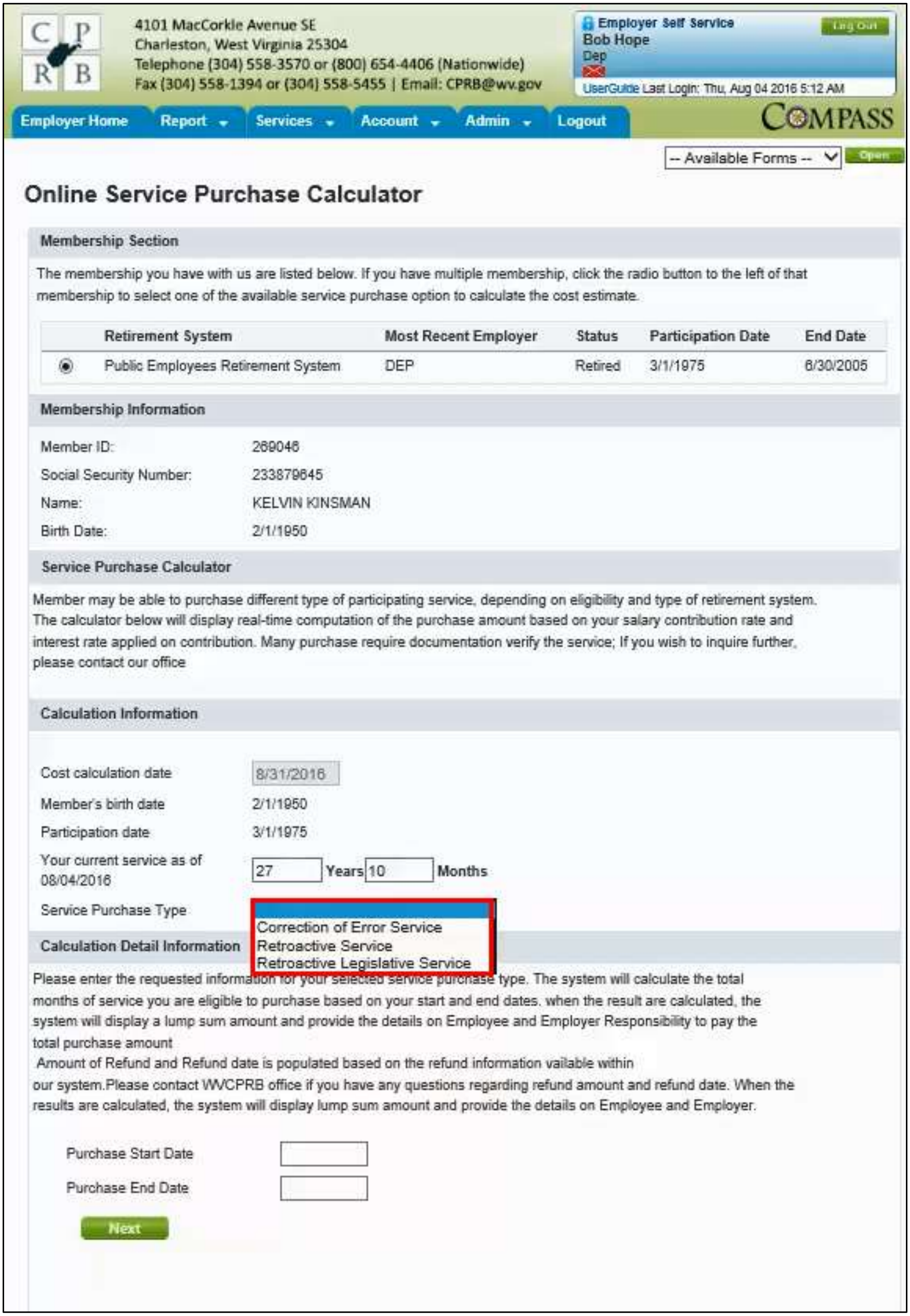
Step 5 -- The **Online Service Purchase Calculator** screen is displayed.



Step 6 -- Select the radio button next to the Retirement System name to calculate the service purchase.



Step 7 -- Select the **Service Purchase Type** from the drop down menu.



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-- Available Forms -- | Open

Online Service Purchase Calculator

Membership Section

The membership you have with us are listed below. If you have multiple membership, click the radio button to the left of that membership to select one of the available service purchase option to calculate the cost estimate.

	Retirement System	Most Recent Employer	Status	Participation Date	End Date
◉	Public Employees Retirement System	DEP	Retired	3/1/1975	6/30/2005

Membership Information

Member ID:	269046
Social Security Number:	233879645
Name:	KELVIN KINSMAN
Birth Date:	2/1/1950

Service Purchase Calculator

Member may be able to purchase different type of participating service, depending on eligibility and type of retirement system. The calculator below will display real-time computation of the purchase amount based on your salary contribution rate and interest rate applied on contribution. Many purchase require documentation verify the service; If you wish to inquire further, please contact our office

Calculation Information

Cost calculation date	8/31/2016
Member's birth date	2/1/1950
Participation date	3/1/1975
Your current service as of 08/04/2016	27 Years 10 Months
Service Purchase Type	Correction of Error Service Retroactive Service Retroactive Legislative Service

Calculation Detail Information

Please enter the requested information for your selected service purchase type. The system will calculate the total months of service you are eligible to purchase based on your start and end dates. when the result are calculated, the system will display a lump sum amount and provide the details on Employee and Employer Responsibility to pay the total purchase amount

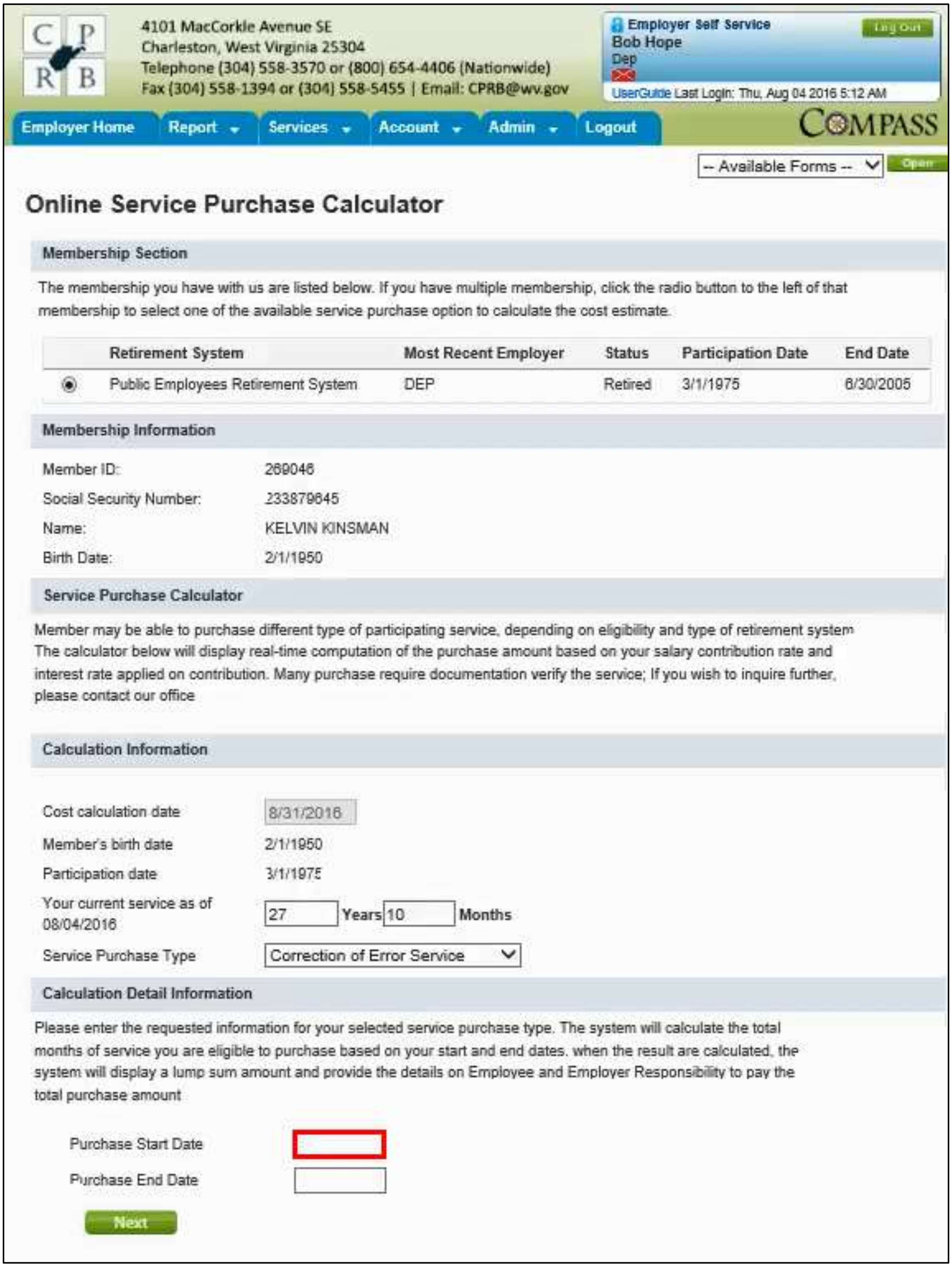
Amount of Refund and Refund date is populated based on the refund information vailable within our system.Please contact WVCPRB office if you have any questions regarding refund amount and refund date. When the results are calculated, the system will display lump sum amount and provide the details on Employee and Employer.

Purchase Start Date

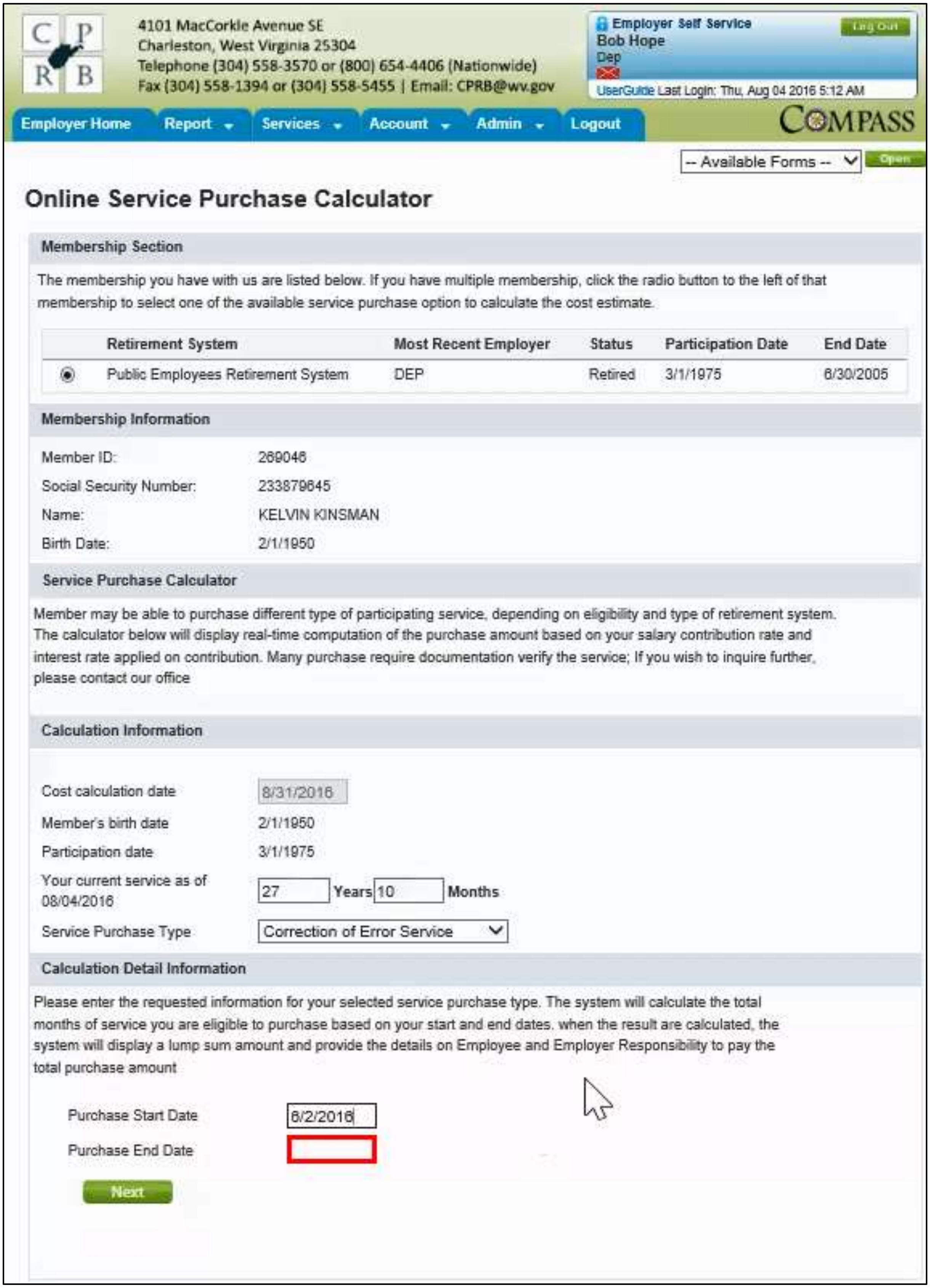
Purchase End Date

Next

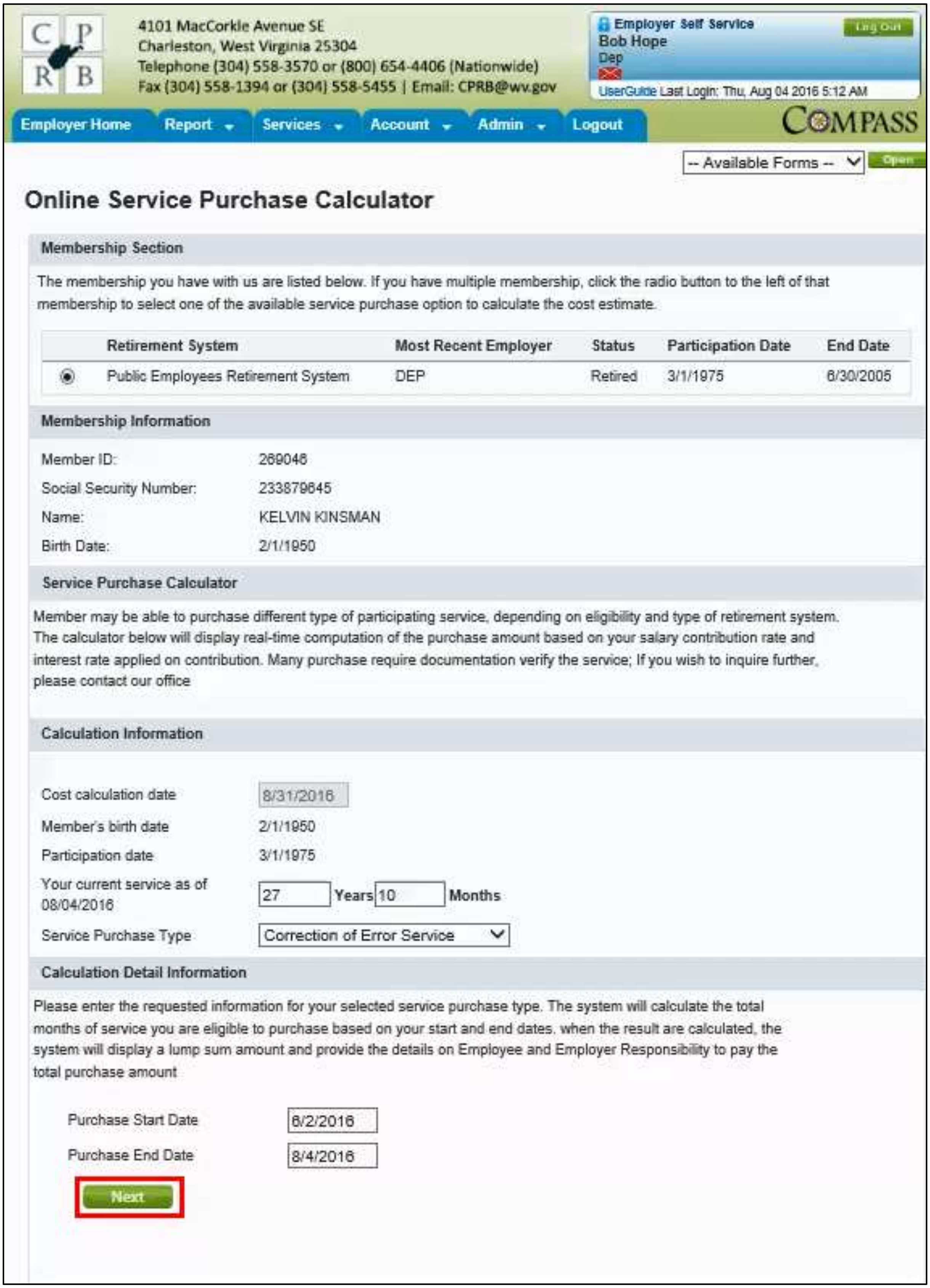
Step 8 -- Enter the date in the **Purchase Start Date** field.



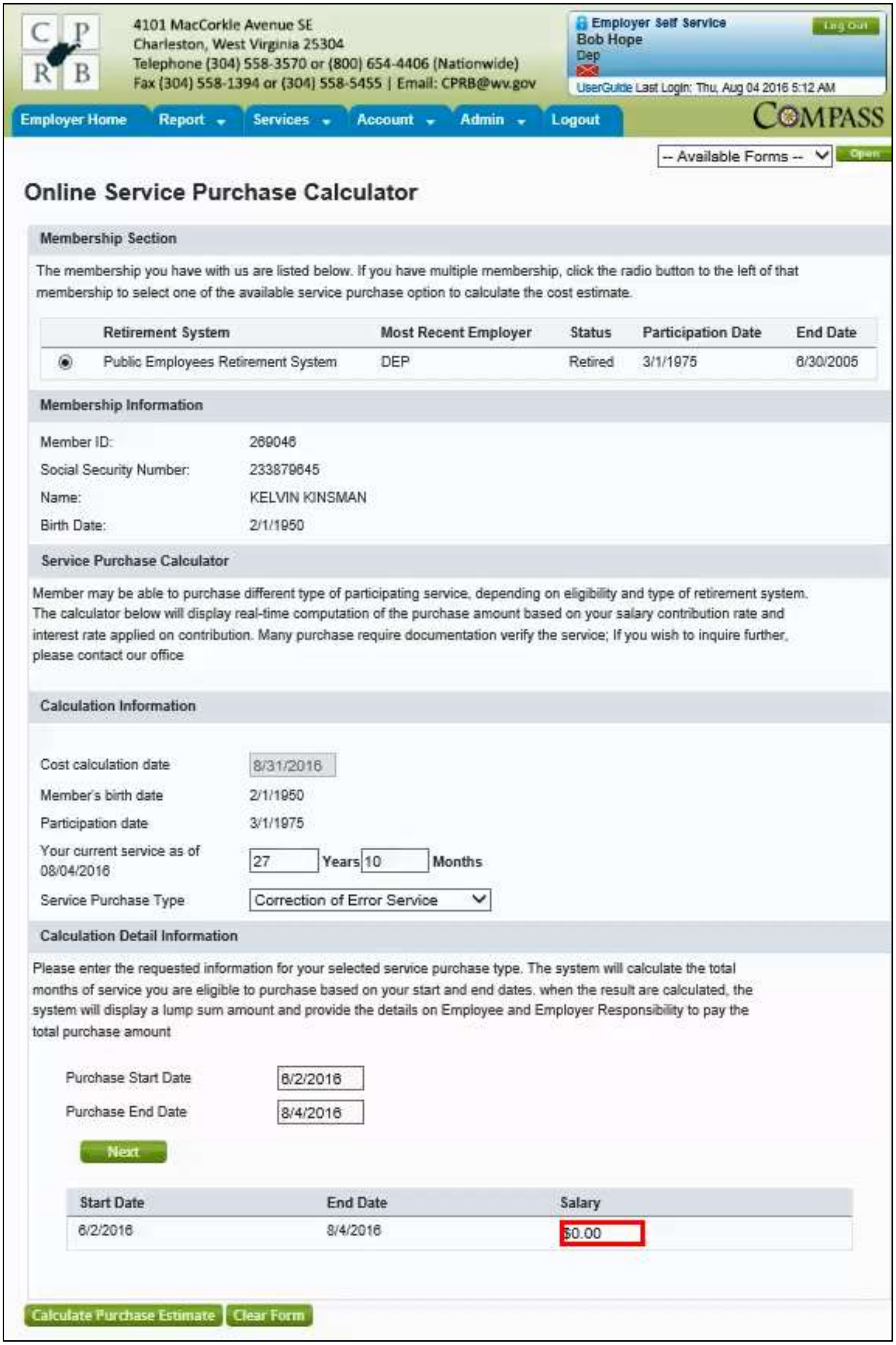
Step 9 -- Enter the date in the **Purchase End Date** field.



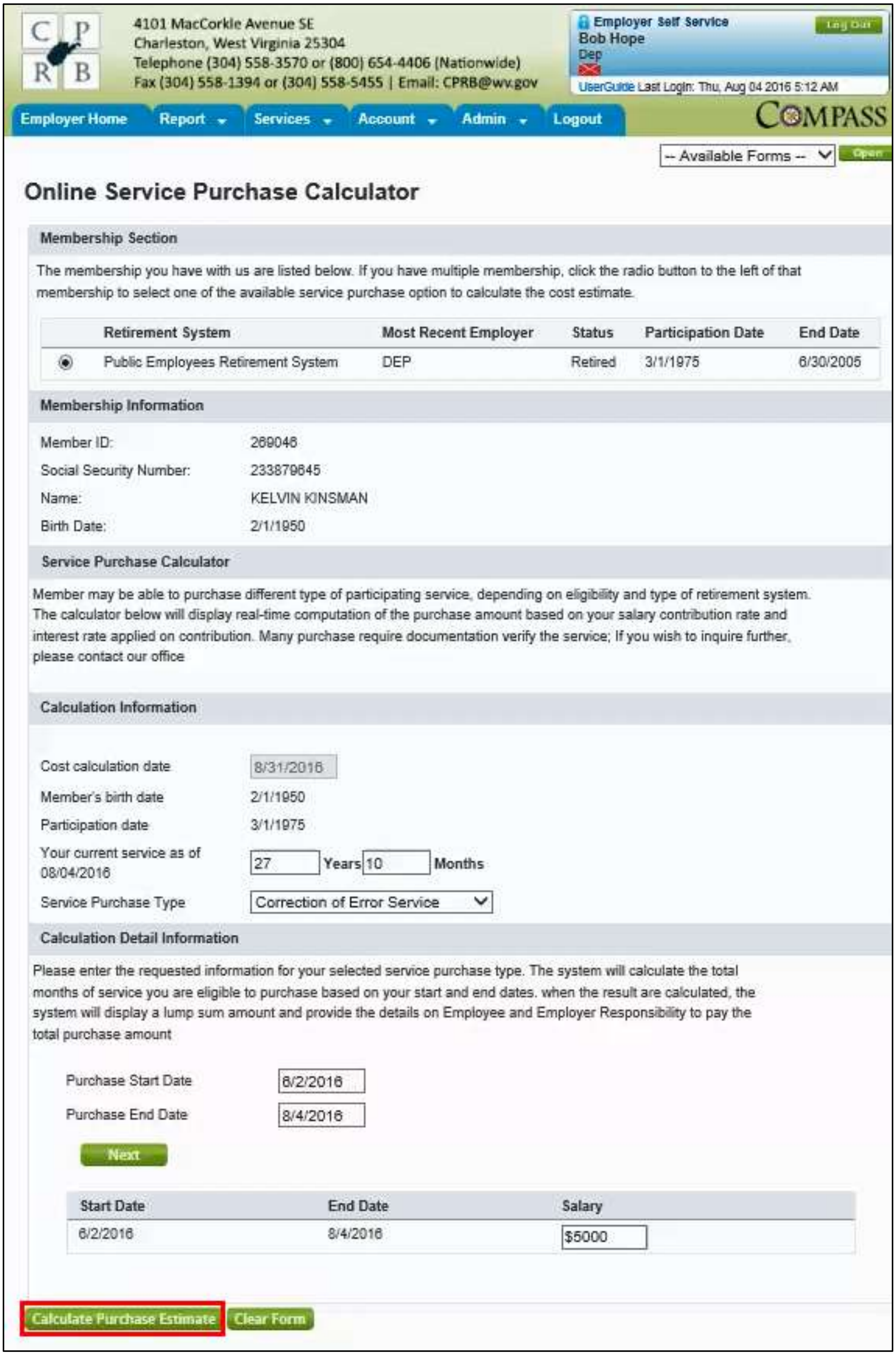
Step 10 -- Click the Next>> button.



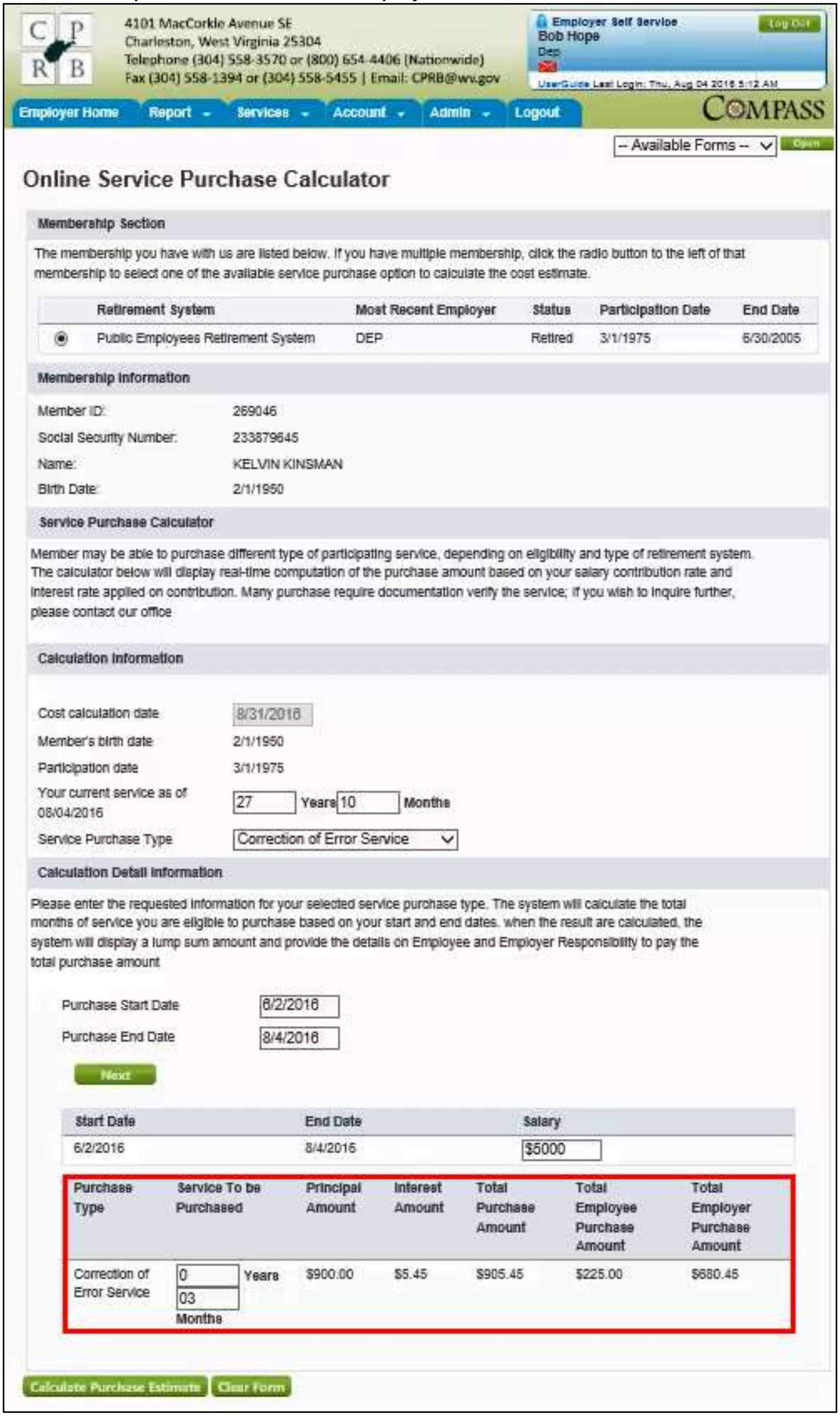
Step 11 -- Enter the salary amount in the **Salary** field.



Step 12 -- Click the Calculate Purchase Estimate button.



Step 13 -- The service purchase estimate is displayed.



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Online Service Purchase Calculator

Membership Section

The membership you have with us are listed below. If you have multiple membership, click the radio button to the left of that membership to select one of the available service purchase option to calculate the cost estimate.

	Retirement System	Most Recent Employer	Status	Participation Date	End Date
◉	Public Employees Retirement System	DEP	Retired	3/1/1975	6/30/2005

Membership Information

Member ID:	269046
Social Security Number:	233879645
Name:	KELVIN KINSMAN
Birth Date:	2/1/1950

Service Purchase Calculator

Member may be able to purchase different type of participating service, depending on eligibility and type of retirement system. The calculator below will display real-time computation of the purchase amount based on your salary contribution rate and interest rate applied on contribution. Many purchase require documentation verify the service; if you wish to inquire further, please contact our office

Calculation Information

Cost calculation date	8/31/2016
Member's birth date	2/1/1950
Participation date	3/1/1975
Your current service as of 08/04/2016	27 Years 10 Months
Service Purchase Type	Correction of Error Service

Calculation Detail Information

Please enter the requested information for your selected service purchase type. The system will calculate the total months of service you are eligible to purchase based on your start and end dates. when the result are calculated, the system will display a lump sum amount and provide the details on Employee and Employer Responsibility to pay the total purchase amount

Purchase Start Date	6/2/2016
Purchase End Date	8/4/2016

Next

Start Date	End Date	Salary
6/2/2016	8/4/2016	$5000

Purchase Type	Service To be Purchased	Principal Amount	Interest Amount	Total Purchase Amount	Total Employee Purchase Amount	Total Employer Purchase Amount
Correction of Error Service	0 Years 03 Months	$900.00	$5.45	$905.45	$225.00	$680.45

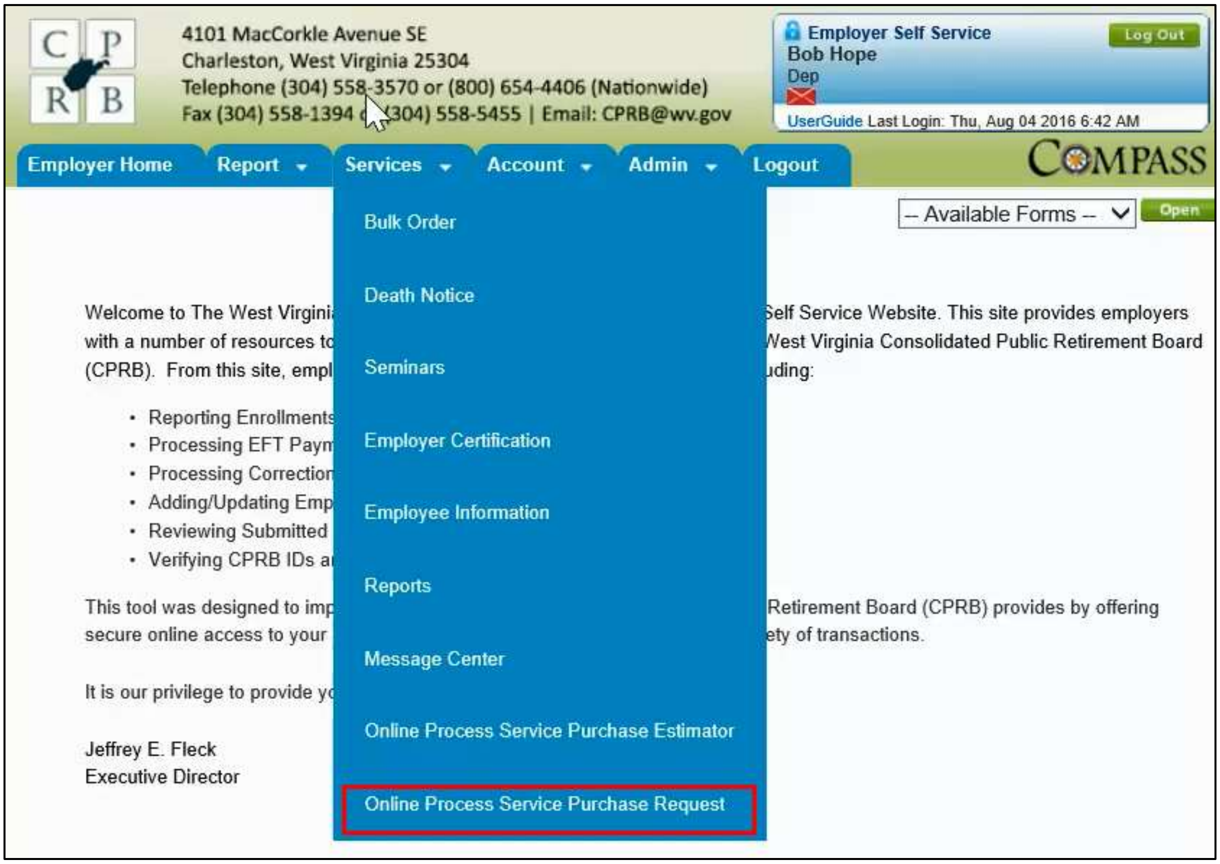
Calculate Purchase Estimate | Clear Form

21. Service Purchase Request

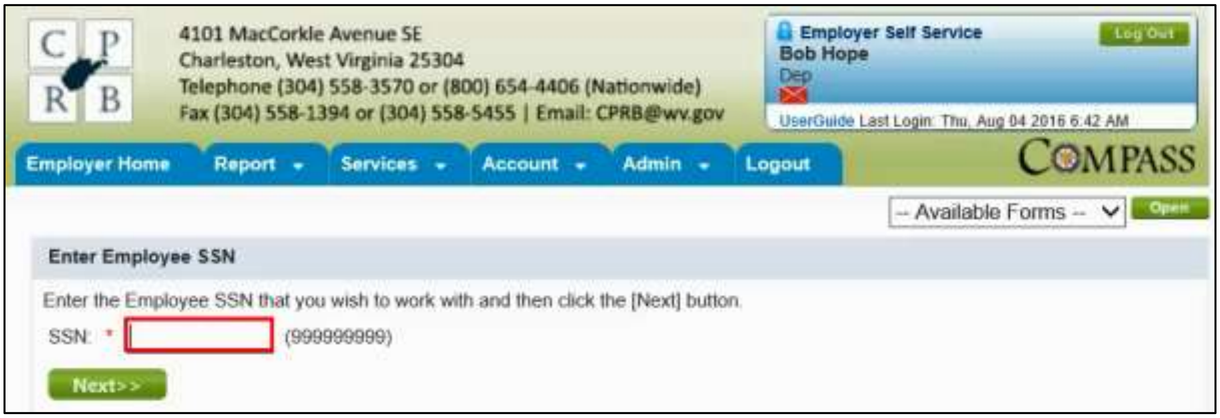
Through the **Service Purchase Request** screen, employers can request that certain service purchase estimates be prepared by CPRB and sent to the member on whose behalf the request was made. Members, however, have to be eligible to purchase relevant service type within the retirement system.

Step 1 -- To navigate to the **Online Service Purchase Request** screen, click the following menu options: e

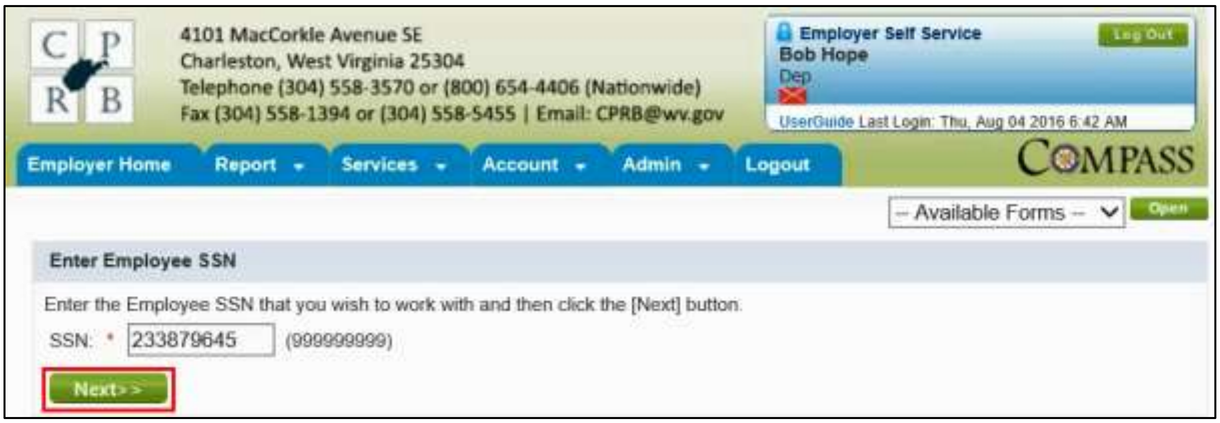
Services > **Online Service Purchase Request**



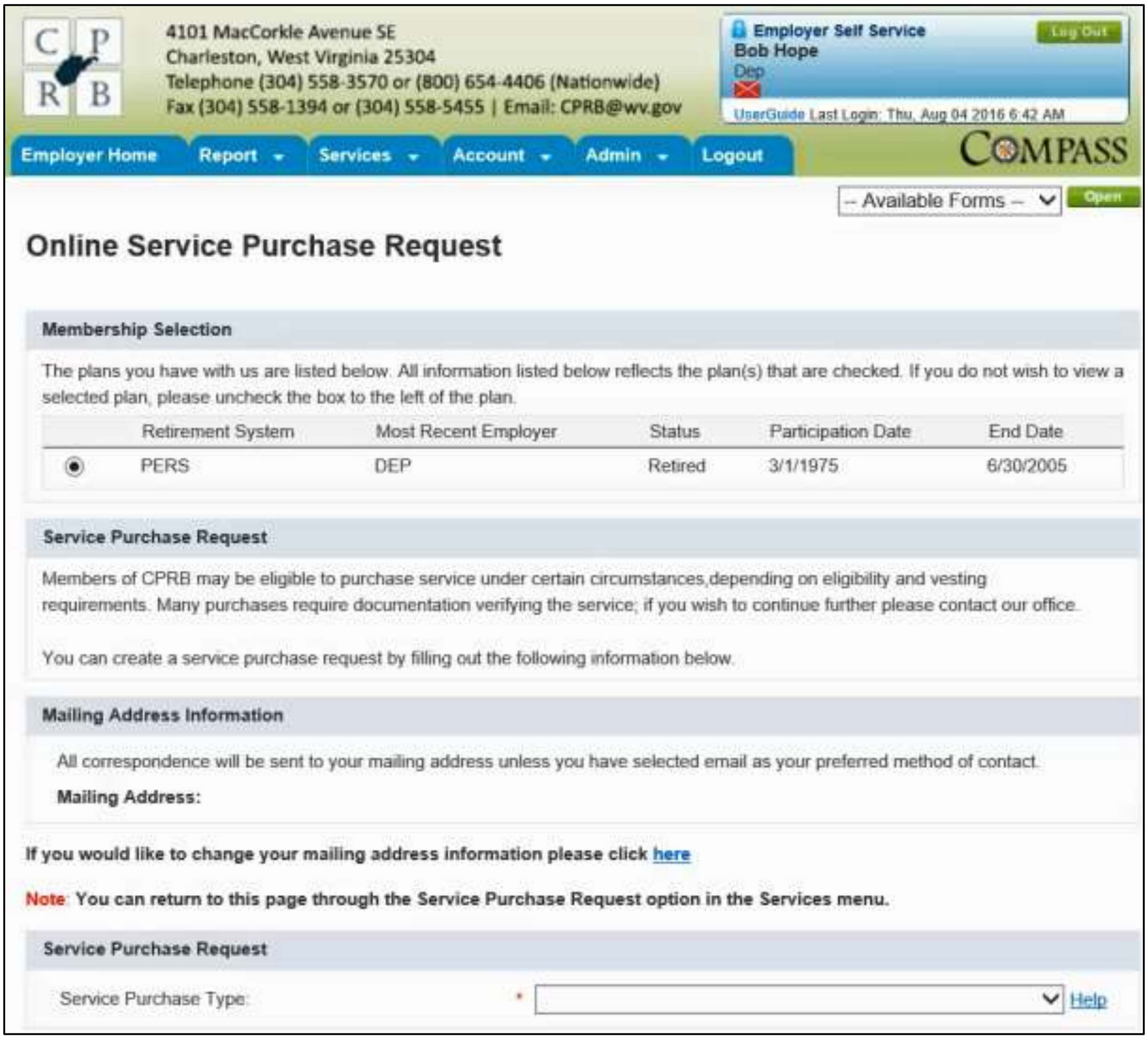
Step 2 -- The **Enter Employee SSN** screen displays. Enter the SSN of an employee into the **SSN** field.



Step 3 -- Click the Next>> button.



Step 4 -- The **Online Service Purchase Request** screen displays.



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Online Service Purchase Request

Membership Selection

The plans you have with us are listed below. All information listed below reflects the plan(s) that are checked. If you do not wish to view a selected plan, please uncheck the box to the left of the plan.

	Retirement System	Most Recent Employer	Status	Participation Date	End Date
◉	PERS	DEP	Retired	3/1/1975	6/30/2005

Service Purchase Request

Members of CPRB may be eligible to purchase service under certain circumstances,depending on eligibility and vesting requirements. Many purchases require documentation verifying the service; if you wish to continue further please contact our office.

You can create a service purchase request by filling out the following information below.

Mailing Address Information

All correspondence will be sent to your mailing address unless you have selected email as your preferred method of contact.

Mailing Address:

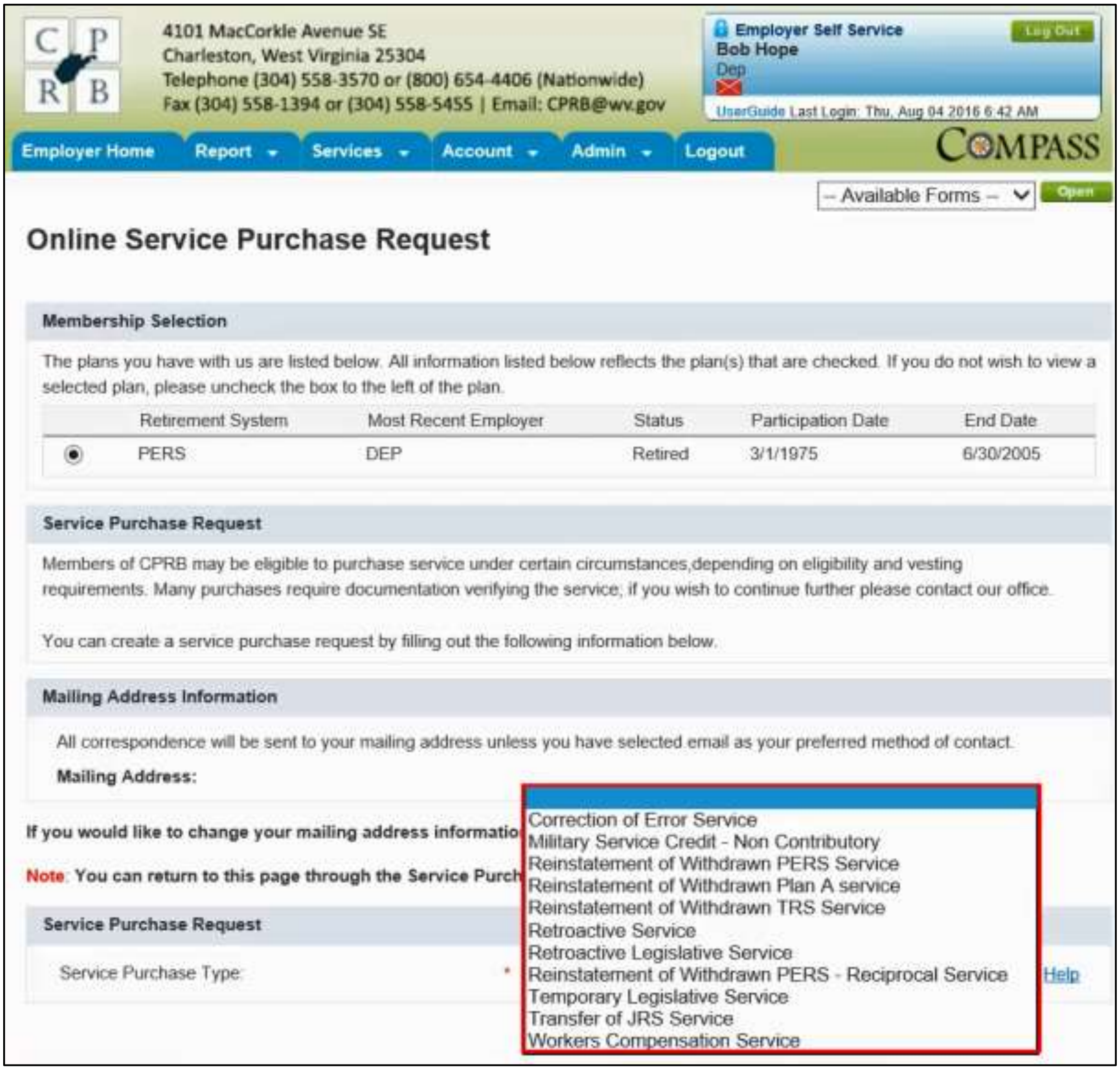
If you would like to change your mailing address information please click here

Note: **You can return to this page through the Service Purchase Request option in the Services menu.**

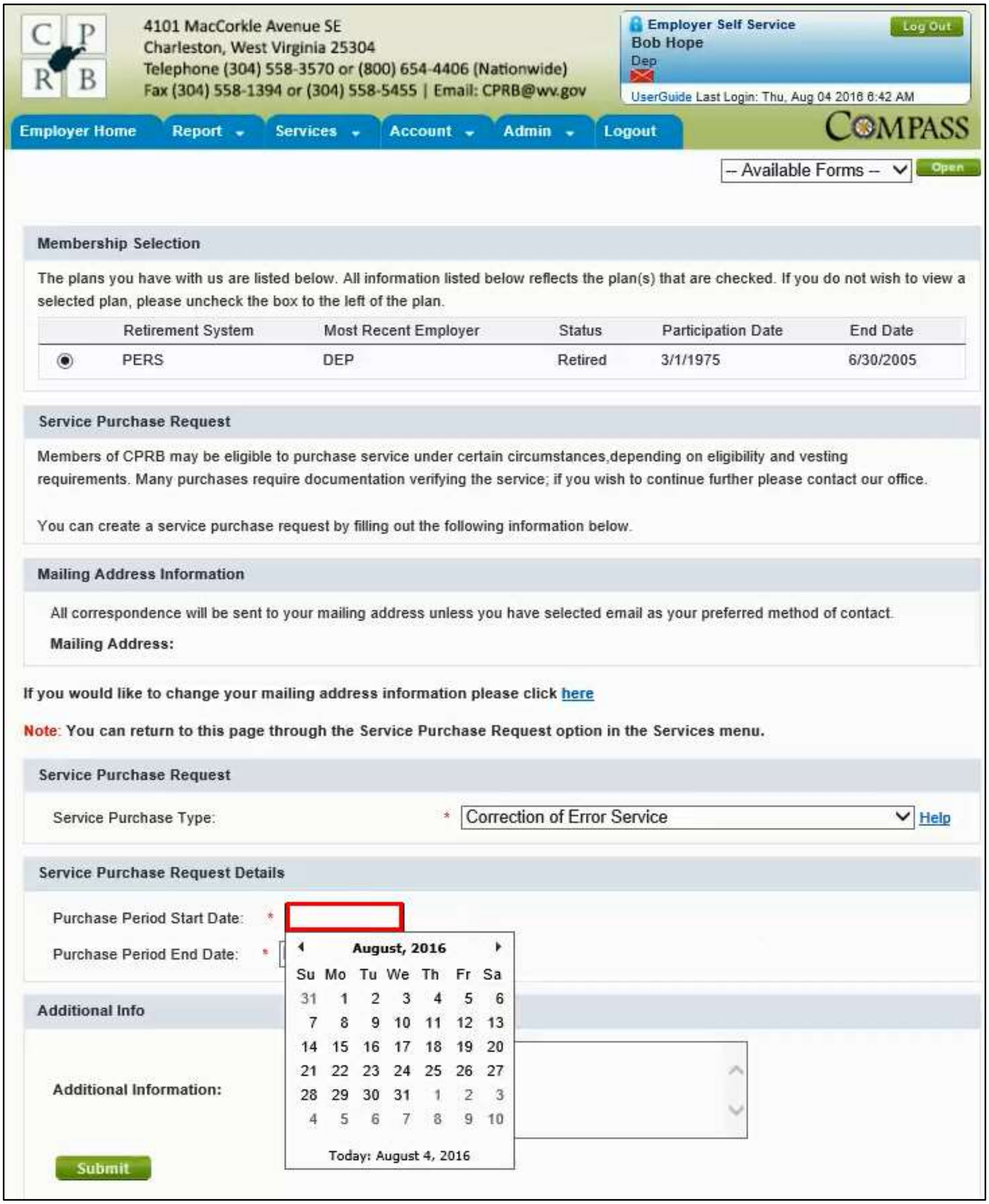
Service Purchase Request

Service Purchase Type: * Help

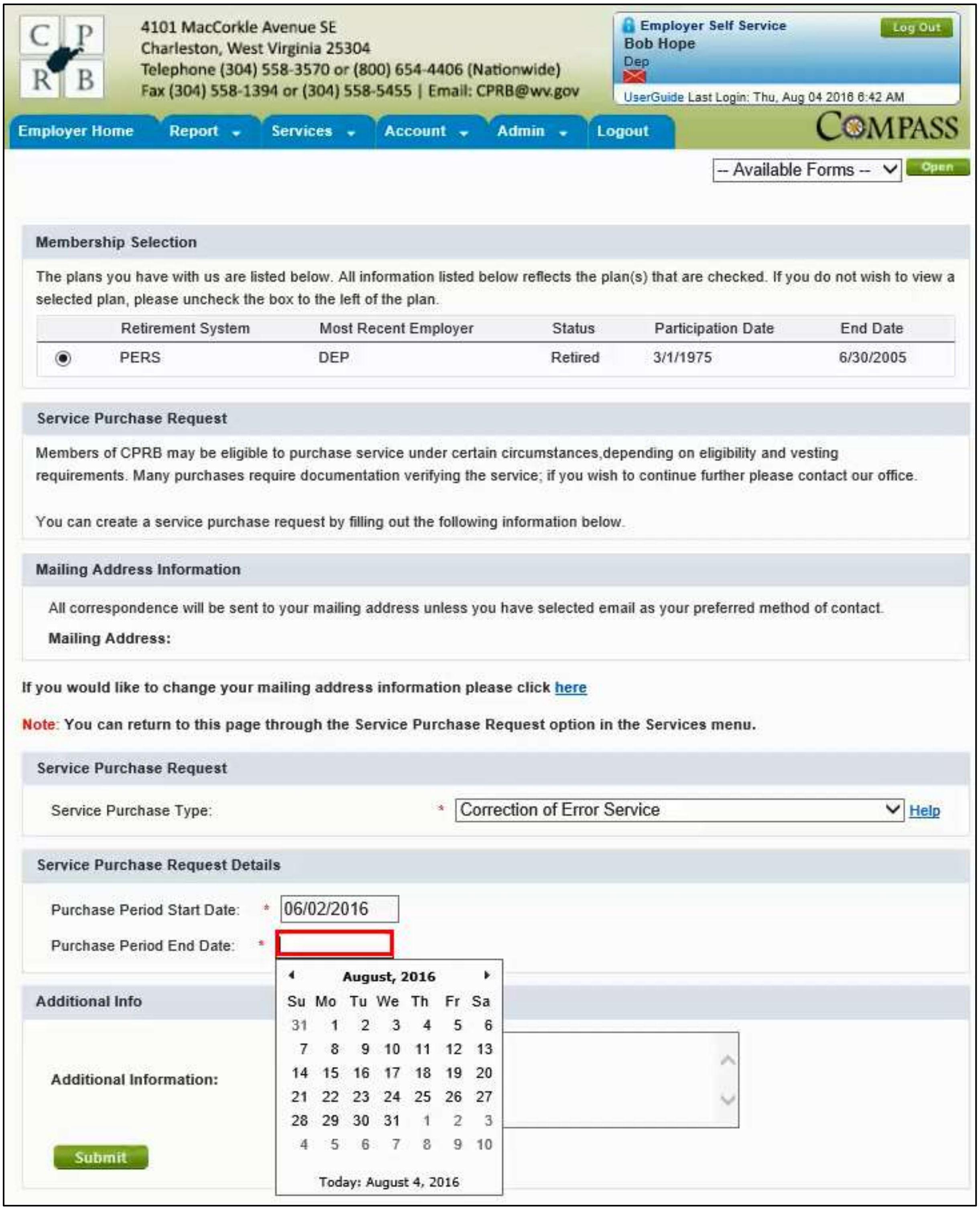
Step 5 -- Select a **Service Purchase Type** from the drop down menu.



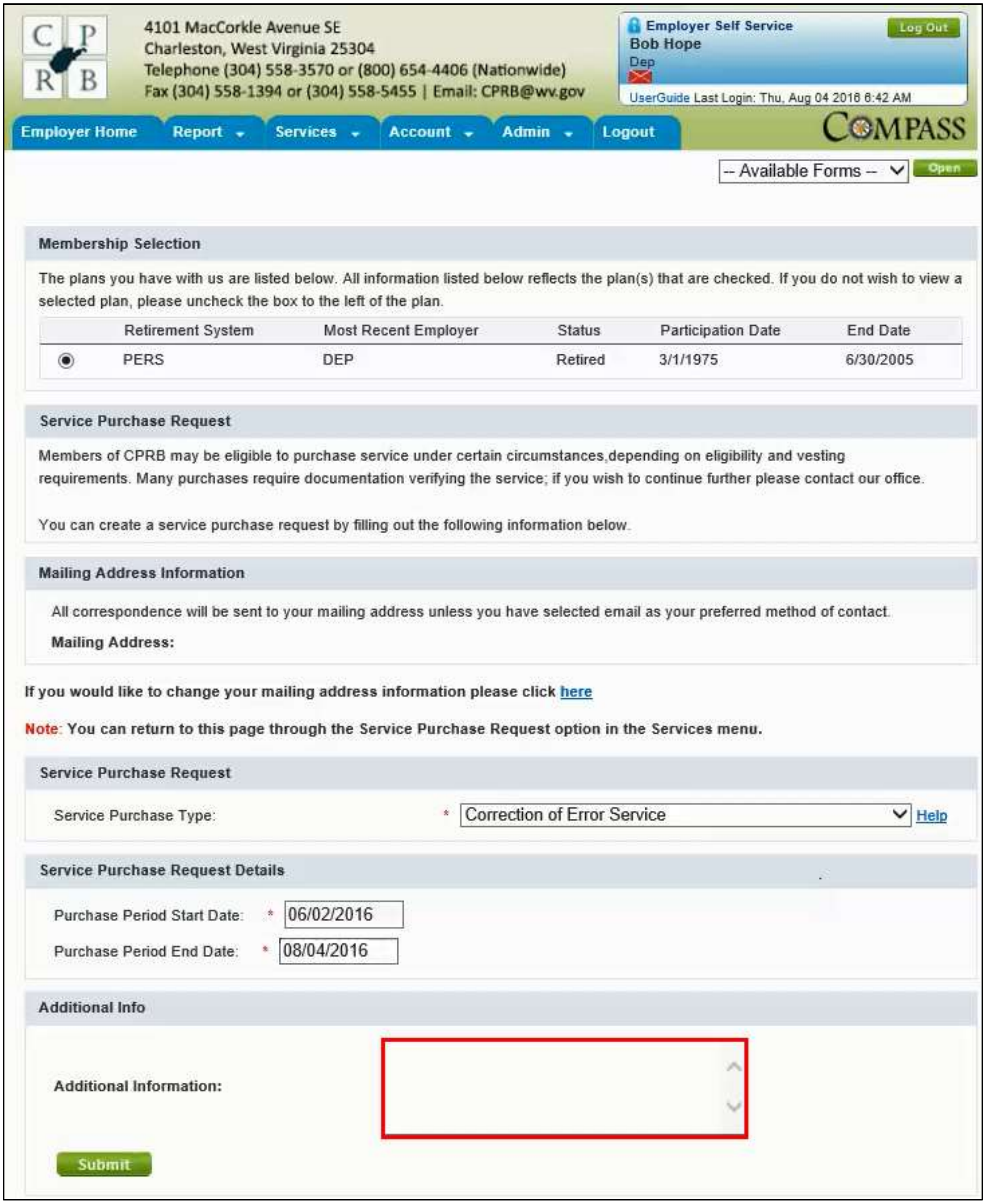
Step 6 -- Enter the date in the **Purchase Period Start Date** field.



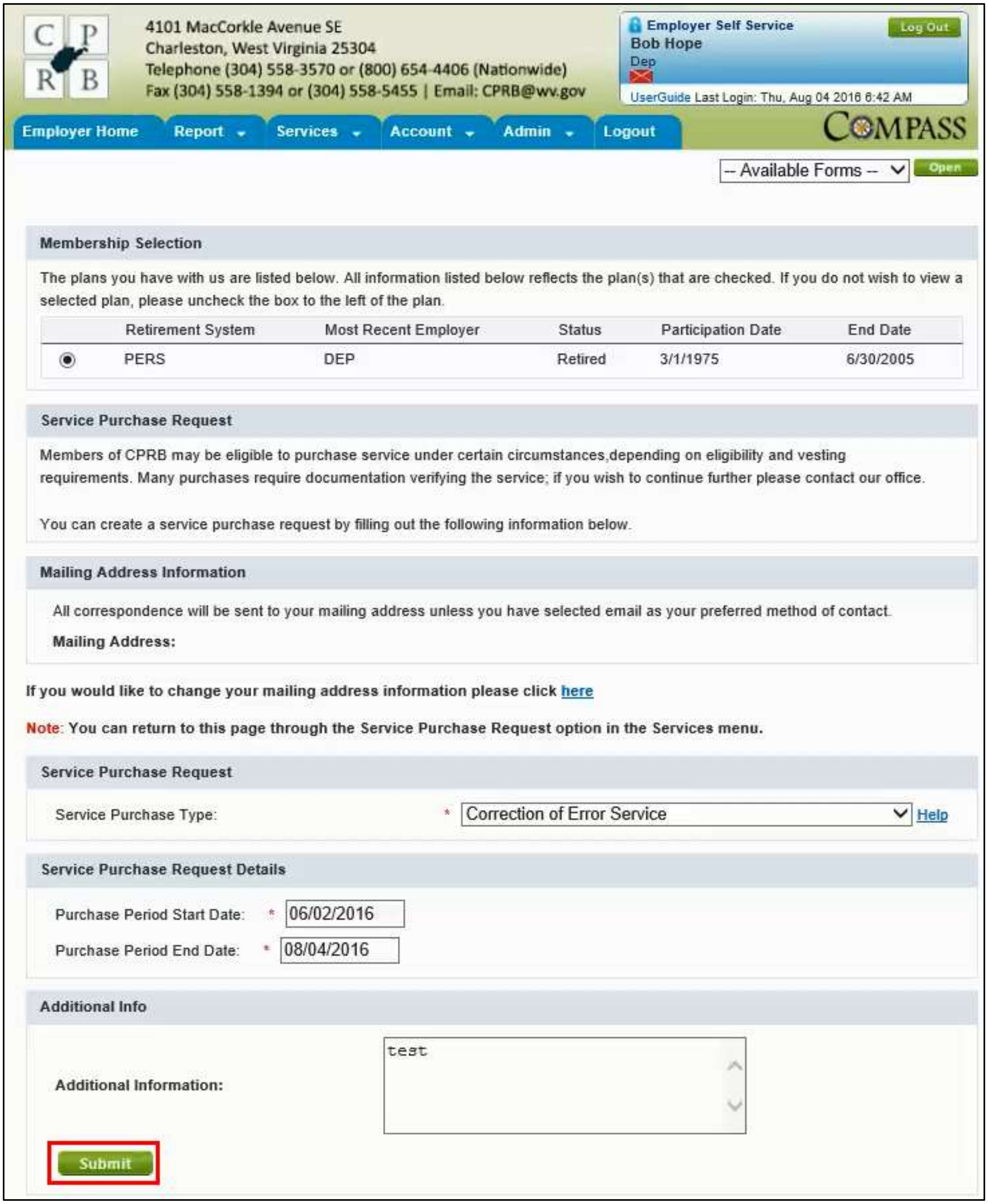
Step 7 -- Enter the end date in the **Purchase Period End Date** field.



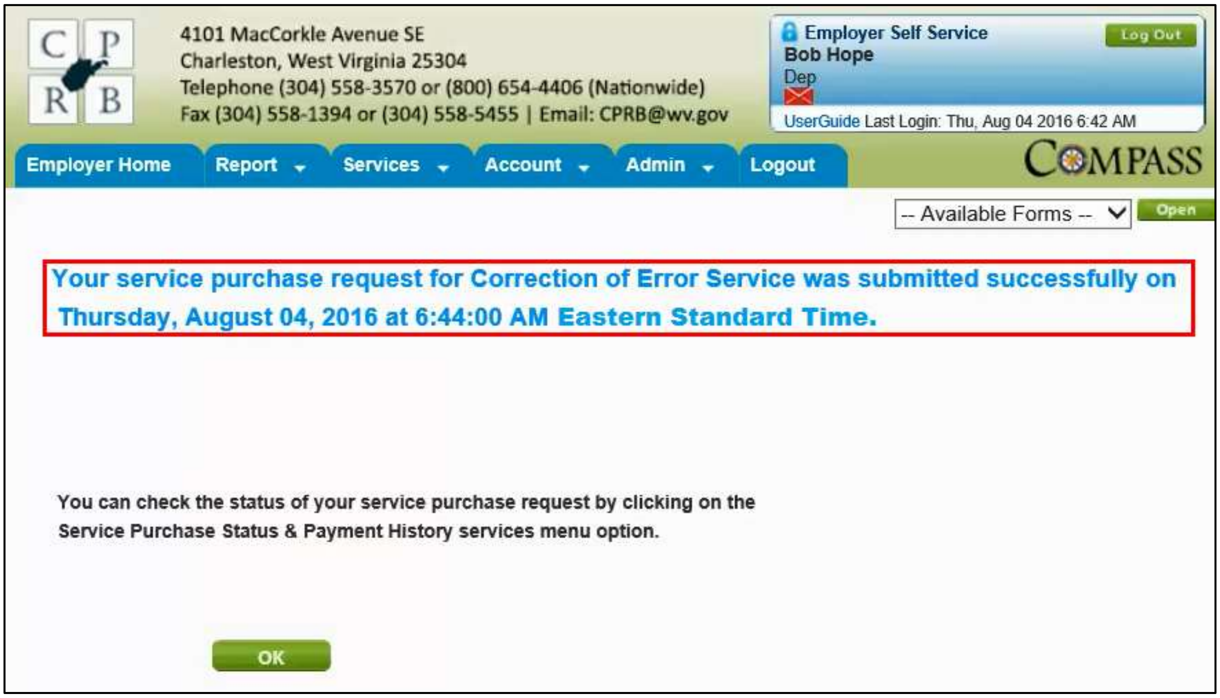
Step 8 -- Enter the relevant comments, if any, in the **Additional Information** field.



Step 9 -- Click the Submit button.



Step 10 -- The "**Your service purchase request for Correction of Error Service was submitted successfully on Thursday, August 04, 2016 at 6:44:00 AM Eastern Standard Time.**" message displays confirming that the request is submitted.



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