Special Edition

EMPLOYER Update

e-delivery

In preparation for compliance with Indiana Code (IC) 5-10.3-7-12.5, beginning July 1, 2010, PERF will no longer accept paper membership records. PERF Online provides the electronic functionality necessary to upload these records one at a time or in bulk saving employers time.

PERF's Employer Services Group is here to help you through the transition. Please contact us at (888) 526-1687 if we can be of any assistance throughout this process.

The following are step-by-step instructions to upload single and bulk membership records.

Single Submission:

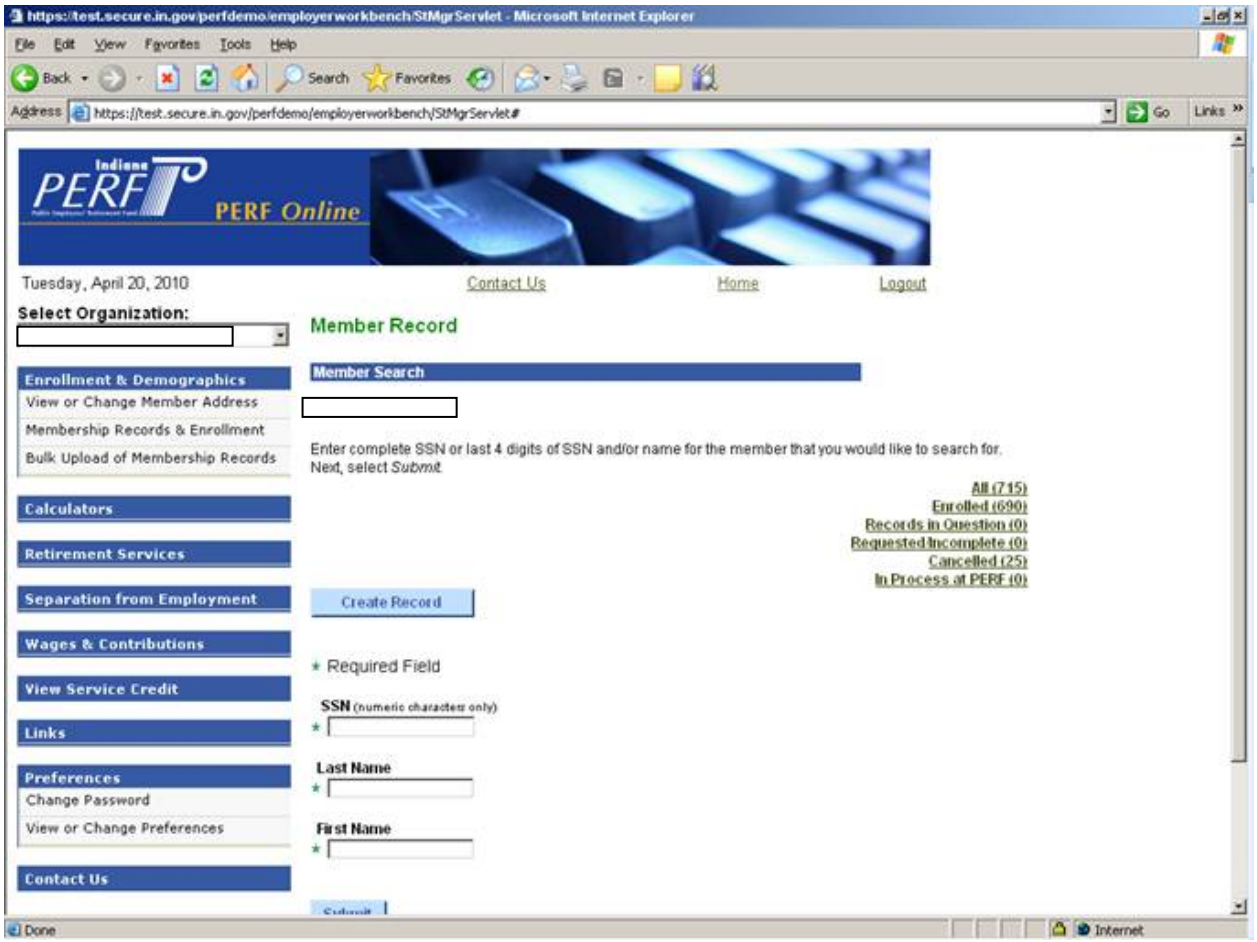
- Select the Enrollment & Demographics section of PERF Online for employers
- Select Membership Records & Enrollments
- Click the "Create Record" button
- Enter the new enrollee's information
- Click Next
- Fill in the Authorized Agent's Information
- Select Save Changes
- You will receive a message stating "Successfully submitted"

Bulk Upload:

- Select the Enrollment & Demographics section of PERF Online for employers
- Select Bulk Upload of Membership Records
- Click the link at the bottom of the page titled "Click here to view Templates"
- Save the Sample Excel File to your computer (make sure to save it as 1997 – 2003 Excel)
- Complete the information for the new enrollments
- In PERF Online for employers, return to the Bulk Upload of Membership Records
- Browse for your file and then select Upload File
- Correct any errors that will be highlighted with red boxes
- Check the Select All box
- Enter the Authorized Agent's Information
- Select Save Changes
- You will receive a message showing the records that were submitted to PERF

You can also save a record as Incomplete and return to finish it at any step in the process.

The electronic membership record does not include an employee's beneficiary information. The member may submit this information by using the Application for Change of Beneficiary – Active Member form.



https://test.secure.in.gov/perfdemo/employerworkbench/StMgrServlet - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address https://test.secure.in.gov/perfdemo/employerworkbench/StMgrServlet# Go Links

Bulk Upload of Membership Records

Calculators

Retirement Services

Separation from Employment

Wages & Contributions

View Service Credit

Links

Preferences

Contact Us

ABOUT SSL CERTIFICATES

*City

*State IN

*Zip Code -

*Home Telephone #

Other Telephone #

Email Address

*Gender
- MALE
- FEMALE
- UNKNOWN

*Current Marital Status
- SINGLE
- MARRIED
- UNKNOWN

*Date of Hire

*Position --Select--

Position Title

*Is this an elected position? --Select--

*Has this employee been a member of PERF before? --Select--

Please provide previous employment dates (if applicable) in the comments box

Comment

Reset | Save as Incomplete | Next

Done Internet