Welcome to training on how to enter enrollments online, add a new employee, and add a new enrollment.

<u>How Do I Enter Enrollments Online?</u>

The Enter Online functionality allows you to add a new employee and enrollment, as well as review and update existing employees and their enrollments.

A Payroll Schedule must be set up before you can add an enrollment.

To access the **Report** screen, click on the **Report** menu option.

Select **Submit Report**.

The **Submit Report** screen displays. Click on **Enter Online**. The **Enter Online** button will direct you to the **Search Employee Demographics** screen.

The **Search Demographics** screen displays. Note. You can also access this same screen by clicking on the **Services** menu, **Search Demographics**.

By default, only the active Employees are shown on this screen.

If you'd like to view all employees who have ever worked for you, select the **Show All** button.

You can also search for a specific employee by using the search criteria listed, and clicking **Search**.

You can edit an Employee listed below by clicking the **Maintain** option.

Then, you can click **Demographics** or **Enrollments** to edit their information.

Note: If the employee does not currently work for you, the **Demographics** option will be grayed out,

and you will not be able to edit the Employee's demographic information.

Please view the **Search Demographics** demonstration video to learn more.

<u>How Do I Add a New Employee?</u>

To add a new employee, select the **Add a New Employee** button.

First, enter the social security number of the new employee.

Enter the new employee's date of birth. Choose the date from the calendar, or enter it in the **Date** field.

Select the **Verify SSN and Date of Birth** button to see if this person exists yet in the system.
If the employee does not yet exist in the system, you will receive the confirmation message to continue adding the new employee record.

Once the SSN and Date of Birth are verified, you may continue with the Personal Information and Address Information sections.

Enter the **First Name**.

Enter the **Last Name**.

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

Next, enter in the street information.

Enter the **City**.

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

Enter the **Zip Code**.

Enter the **Address Effective Date**. Choose the date from the calendar, or enter it in the **Date** field.

Note: The **Address Effective Date** must be today's date or a future date.

Once you have filled in all required fields, click **Save Changes**.

A success message displays at the bottom of the screen that the record was created successfully.

<u>How Do I Add a New Enrollment?</u>

Now, click **Go to Enrollments.**

The **Add/Edit Enrollments** screen displays.

Notice that this employee is currently listed as Tier 99.

Tier 99 means the employee does not yet have an enrollment, or is non-participating.

Now, click the **Add New Enrollment** button.

The New Enrollment pop up window displays. Fill in all required fields. First, click on the **Retirement Plan** drop-down menu.

Click on the **Retirement Plan** for the employee.

Next, choose the **Contribution Group** from the drop-down menu.

The **Contribution Group** is dependent on which **Retirement Plan** is selected.

Next, choose the **Position Status** from the drop-down menu.

Enter the **Scheduled Units to Work** per week.

Select the **Scheduled Type of Units Worked** from the drop-down menu.

Enter the **Scheduled Full Time Units** per week.

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

Enter the **Enrollment Begin Date**. Choose the date from the calendar, or enter it in the **Date** field.

The **Scheduled Units Effective Date** and the **LOA Details** automatically populate with the Enrollment Begin Date. Click **Save Changes.**

The data you've entered will be validated against the business validations.

If there are any errors, they would be displayed in the *Enrollment Validation Errors* section.

Since the record was created successfully, close out of the pop up window by clicking on the **X** in the top right-hand corner.

The **Add Edit Enrollments** screen displays. Notice that this employee is now Tier 2 since an enrollment has been created for the employee.

Click **Back** to go back to the **Search Demographics** screen.

For details on editing an existing enrollment, please see the **Search Demographics** demonstration video for more information.

How Do I Report the Death of an Active Employee?

It is important that an Active Employee's death is accurately reported.

This can be done in the Enrollment record that you submit. When an Employee dies, you must change the Enrollment End Date to be the same as the Date of Death, either in the .ENRL file or using the **Search Demographics** module.

Let's take a look at an example of how you can submit this information to the RSA.

In this example, The Employee is actively employed. You become aware that the Employee's death occurred on Sunday, October 7th. The Enrollment End Date reported should be October 7th.

Please view the **Death Notice** demonstration video for more information on how you can report an Employee's death in Employer Self-Service.

For additional information or assistance, please contact an Employer Services Representative at 334-517-7005 or employer.services@rsa-al.gov.