Welcome to training on how to use the Search Demographics feature of the Employer Self-Service portal.

How Do I Navigate Employee Demographics?

The Search demographics module allows you to do the following.

- Update demographic information,
- Update enrollments,
- Add a new Employee,
- Maintain Leave of absence or LOA Status Information,
- Maintain Enrollment Work Units History, and
- Add a New Employee without a social security number.

To navigate to the **Search Demographics** screen, hover your mouse over the **Services** menu, then select **Search Demographics**.

The **Search Employee Demographics** screen displays.

You can search for a member by Social Security Number, PID, or name. To perform an advanced search, click on the *Advanced Search* link.

This allows you to search by **Enrollment Begin Date**, **Enrollment End Reason**, or **Birth Date**. You can also toggle between showing Active Members only, or historic Members by clicking the **Show Active** or **Show All Buttons**. The **Add New Employee** button will be used to add a new employee record.

If you scroll to the bottom of the screen, you can review the results of your search.

To conduct a search, enter at least one search criterion.

How Do I Update Demographic Information?

Search demographics can be used to update demographic information like employee name or address. Navigate to search demographics by hovering your mouse over **Services**. Select **Search Demographics**.

The **Search Employee Demographics** screen displays. Enter at least one of the search criteria, and click **Search**.

Search results display in the *Search Details* section. Identify the employee to edit and click **Maintain**.

Select **Demographics** from the **Maintain** drop-down menu.

The **Edit Employee Demographics** screen displays.

In this example, Jane's middle name is spelled incorrectly. I will update the demographics information, scroll to the bottom of the screen, and click **Save Changes**.

Upon clicking **Save Changes**, the data will be validated against the business validations. If there are any errors, they will be displayed in the *Demographics Validation Errors* section. These errors are classified into three categories. Informational, Warnings, and Errors. Informational messages do not require any action. Warnings may require an action or can be overridden by clicking the override warnings checkbox to save the record. Errors must be resolved and require action on the employer's part before proceeding.

<u>How Do I Update Enrollment Information?</u>

Returning to the **Search Demographics** screen, search for the member whose enrollment requires updating.

Click **Search**.

From the **Maintain** menu, select **Enrollments**.

The employee's existing enrollment information displays. On this screen, users can edit enrollment information, leave of absence, or LOA status, and enrollments work history.

To edit an enrollment, select the enrollment record in the employee’s detail grid you wish to edit.

Click **Edit**.

The edit enrollment pop-up window displays. Update the necessary fields.

Click **Save Changes**.

If there are errors in the enrollment, you will be alerted with a prompt at the top of the edit enrollment pop-up window. These errors must be fixed. Since there are no errors, exit out of the pop-up window.

To update leave of absence information, first select the enrollment record requiring updates. Then, in the *LOA Status History* section, click the **Action** button.

You have the option to edit or delete this information. In this example, this record does not require edits.

To add a new record, enter information in the empty row.

Click **Save**.

Notice the *Enrollment Work Units History* section has an **Action** button, similar to the *LOA Status History Section*.

The options to edit or delete a record are available here too.

In this example, I will add a new record.

Remember to save the information that is entered here.

Finally, if a new enrollment needed to be created, click **Add New Enrollment**.

I will click back to return to the search demographics screen.

<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.

Click 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.

Next, enter the information in the *Address Information* section.

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.

Now, click **Go to Enrollments**.

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

Scroll to the bottom of the screen, and click **Add New Enrollment**.

The New Enrollment pop up window displays. Fill in all required fields. First, choose a **Retirement Plan**. The **Contribution Group** is dependent on which plan is selected.

For TRS agencies, it is important to note, that the **Units Annually Contracted to Work** must match what is on the employer **Contract Schedule**. To learn more, please visit the Contract Schedule demonstration video.

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. Close out of the pop up window.

The **Add Edit Enrollments** screen displays. Notice that this employee's new enrollment displays in the *Employee Details* section, and they are now part of Tier 2 since an enrollment has been created for them.

<u>How Do I Report the Death of an Active Employee in an Enrollment File?</u>

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 or ESR at 334 517 7005 or employer.services@rsa-al.gov.