

Arizona State
Retirement System



Online Enrollment

Employer User Guide

Revised March 2014

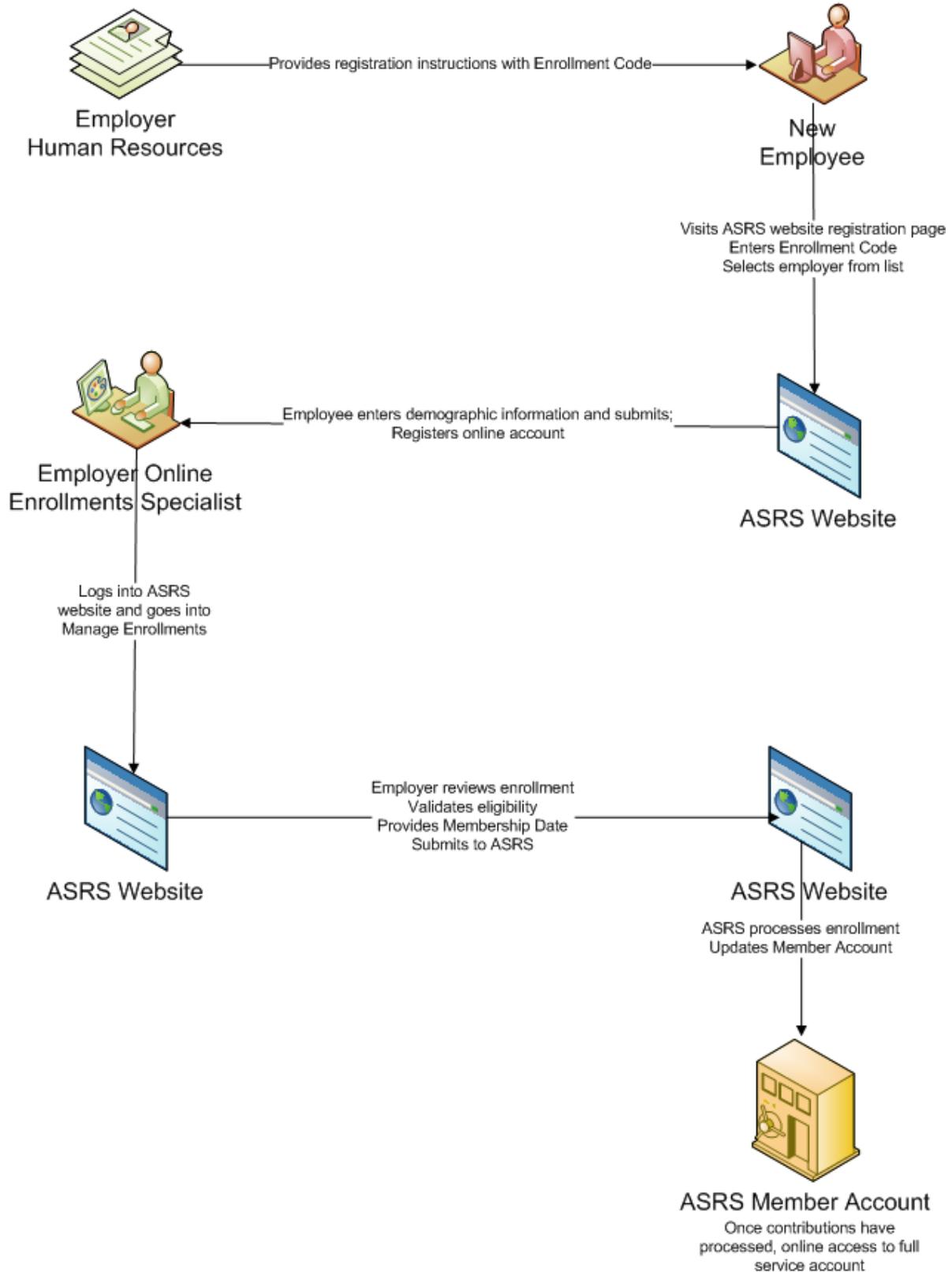
TABLE OF CONTENTS

<u>Section One: Online Registration Process</u>	3
Online Registration Process (illustrated)	4
ASRS Web User Administration (illustrated).....	5
<u>Section Two: Roles Defined</u>	6
<u>Section Three: Employer Administrator Role</u>	8
Function #1: Create Web User.....	9
Function #2: Maintain Web User	10
Function #3: Assign Application Manager Role	11
<u>Section Four: Online Enrollments Manager Role</u>	13
Function #1: Create Web User	14
Function #2: Maintain Web User.....	14
Function #3: Assign Application Specialist Role	15
Function #4: Enrollment Codes	17
<u>Section Five: Online Enrollments Specialist Role</u>	20
Function #1: Reissue an Enrollment Code.....	21
Function #2: Provide New Hire/Eligible Member with Enrollment Instructions.....	22
Function #3: Manage Enrollments.....	23
Function #4: Manage Enrollment Reports.....	25

Section One:

Online Registration Process

ONLINE REGISTRATION PROCESS



ASRS Employer Web User Administration

ASRS Support (Employer Relations)

Assigns or creates new Employer Administrator
Notifies Employer Administrator to register



ASRS Support

Employer Administrator

Registers on the ASRS website
Receives email with link to login
Clicks on link and logs into ASRS website



Employer Administrator

CREATES

Employer Application Manager

Receives ASRS ID from Employer Administrator
Receives email with temporary password
Logs in at ASRS website
Maintains Employer Application Specialists



Application Manager

CREATES

Employer Application Specialist

Receives ASRS ID from Employer Administrator/
Application Manager
Receives email with temporary password
Logs in at ASRS website
Manages application functions



Application Specialists

Section Two:
Roles Defined

ASRS Employer Online Applications: *Roles*

EMPLOYER ADMINISTRATOR

An authorized Approver must designate an individual to act as the Employer Administrator for ASRS online applications. Only one Employer Administrator per employer is permitted at any time.

The Employer Administrator's responsibilities include:

- Act as the primary employer contact for the ASRS for access to online applications
- Register an employer account
- Assign and revoke the Application Manager roles
- View all users' information and roles
- Maintain, when necessary, user accounts:
 - Create a Web User account
 - Activate/deactivate a Web User account
- Other roles as required

APPLICATION MANAGER

The ASRS has three online applications – Online Contribution Reporting, Online Enrollment and Online Ending Payroll Verification. Each of these applications may have only one Application Manager for that application at any time. Each Application Manager will have access only to their application-specific processes.

Each Application Manager's responsibilities include:

- Assign, maintain and revoke Application Specialist roles
- View all users' information and roles
- Maintain user accounts:
 - Create a Web User account
 - Activate/deactivate a Web User account
- Other roles as required

APPLICATION SPECIALIST

The Application Specialist is assigned certain roles by an Application Manager. The roles and functions are specific to the application to which the Application Specialist is assigned. For example, an Online Contribution Reporting Application Specialist may have a role to “Maintain a CSR” or “Maintain Payment;” an Online Enrollment Application Specialist may “Reissue a Region Code” or “Manage Enrollment Exceptions.” An application may have an unlimited number of Application Specialists.

Each Application Specialist's responsibilities include:

- Perform application-specific functions and/or roles
- Maintain and update own user profile
- May have multiple roles

WEB USER

An Employer Administrator or Application Manager must create a Web User before they can assign a role. An employer may have an unlimited number of Web Users.

Each Web User's responsibilities include:

- Maintain and update own user profile
- View and download ASRS forms
- May be assigned roles (not required)

Section Three:

Employer Administrator Role

Employer Administrator Role (3 functions)

EMPLOYER ADMINISTRATOR FUNCTION #1: *Create Web User*

Step 1

To create a new web user, visit the ASRS website at www.azasrs.gov and hover over the

Employers

tab at the top of the page.

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click

Login

Step 3

After you have arrived at the **Employer Home** page, select

Maintain Employer Users

from the left-hand navigation menu under Other Operations.

Step 4

At the bottom of the **Maintain Employer Users** page, click

Add a new Employer User

Step 5

Enter the new user information in the form fields on the **Add New Employer Users** page and click

Save

The new user will now appear on the **Maintain Employer Users** page in a “pending” status and a temporary password will be emailed to the new user.

NOTES:

1. The Login ID is something that you create for the person (they can later change it). The Login ID can be up to 32 characters and may contain letters, numbers and most punctuation.
2. The Login ID is not included in the email with the temporary password. You will need to inform the person of the Login ID you created so that they can use that ID and the temporary password to login to the secure website.
3. To create a web user only, do not check any boxes under Application Groups.
4. At the same time you create a web user, you may assign to them an Application Manager role, if available.

EMPLOYER ADMINISTRATOR FUNCTION #2: *Maintain Web User*

After a web user has been created, the Employer Administrator may deactivate and then activate the account.

Step 1

To maintain a web user account, visit the ASRS website at www.azasrs.gov and hover over the **Employers**

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click **Login**

Step 3

After you've arrived at the **Employer Home** page, select **Maintain Employer Users** from the left-hand navigation menu under Other Operations.

1.) TO DEACTIVATE A USER:

Find the user and click on the user's **Login ID**.

Click **Deactivate**

Click **Continue** on the **Deactivate Confirmation** page.

2.) TO ACTIVATE A USER:

Find the user and click on the user's **Login ID**.

Click **Activate**

Click **Continue** on the **Reactivation Confirmation** page.

NOTE: The user will receive an email containing a new temporary password.

Step 4

Click **Return to Maintain Employer Users** to return to the user list.

EMPLOYER ADMINISTRATOR FUNCTION #3: *Assign Application Manager Role*

PLEASE NOTE: Only ONE person can be assigned to an Application Manager Role for each application. However, a person may serve in the Application Manager Role for more than one application (e.g., both Contribution Reporting and Online Enrollment). Only the Employer Administrator may assign/re-assign an Application Manager Role. And, an Application Manager Role is the only role that the Employer Administrator may assign/re-assign.

To Assign Application Manager Role to Another User:

Step 1

To assign a Manager Role, visit the ASRS website at www.azasrs.gov and hover over the

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click

Login

Step 3

After you have arrived at the **Employer Home** page, select **Maintain Employer Users** from the left-hand navigation menu under Other Operations.

Step 4

From the list provided on the **Maintain Employer Users** page, click on the user's **Login ID**.

Step 5

Under **Application Groups**, select one or more of the following roles:

- File Upload/Web Reporting Manager
- Online Enrollments Manager
- Ending Payroll Verification Manager

Click

Save Group Changes

The Manager role will now appear under the user's **Application / Group Information** on the **Maintain Employer Users** page.

NOTE: If no items appear under **Available Groups**, this means that another person has been assigned to the Application Manager role(s). This role must be de-selected from the previous user's Available Roles before it can be reassigned to another user.

To Assign Application Manager Role to Self*:

** If you are also the Employer Administrator*

Step 1

To assign a Manager Role to yourself, visit the ASRS website at www.azasrs.gov and hover over the  tab at the top of the page.

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click 

Step 3

After you have arrived at the **Employer Home** page, select  from the left-hand navigation menu under Your Profile.

Step 4

Under **Application Groups**, select one or more of the following roles:

- File Upload/Web Reporting Manager
- Online Enrollments Manager
- Ending Payroll Verification Manager

Enter **Current Password** to confirm you want to change your profile.

Click 

NOTE: If no items appear under **Available Groups**, this means that another person has been assigned to the Application Manager role(s). This role must be de-selected from the previous user's Available Roles before it can be reassigned to yourself.

Also, links to perform the newly-assigned functions will not appear as part of your profile until you log out and log back in with your **Employer Login ID**.

Section Four:

Online Enrollments Manager Role

Online Enrollments Manager Role (4 functions)

ONLINE ENROLLMENTS MANAGER FUNCTION #1: *Create Web User*

The process is the same as outlined under the **Employer Administrator Role** on page 9.

ONLINE ENROLLMENTS MANAGER FUNCTION #2: *Maintain Web User*

The process is the same as outlined under the **Employer Administrator Role** on page 10.

ONLINE ENROLLMENTS MANAGER FUNCTION #3: *Assign Application Specialist Role*

PLEASE NOTE: An unlimited number of people may be assigned to an Application Specialist Role, and a person may have more than one Application Specialist Role. Only the Application Manager may assign/re-assign an Application Specialist Role within an application (i.e., Contribution Reporting or Online Enrollments). And, the Application Specialist Roles associated with that application are the only roles that the Application Manager may assign/re-assign.

To Assign Application Specialist Role to Another User:

Step 1

To assign a Process Enrollments role, please visit the ASRS website at www.azasrs.gov and hover over the

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click

Login

Step 3

After you have arrived at the **Employer Home** page, select **Maintain Employer Users** from the left-hand navigation menu under Other Operations.

Step 4

From the list provided on the **Maintain Employers Users** page, click on the user's **Login ID**.

Step 5

Under **Application Groups**, select:

Process Enrollments

Click

Save Group Changes

NOTE: The new role will now appear under the user's **Application / Group Information** on the **Maintain Employer Users** page.

To Assign Application Specialist Role to Self*:

** If you are also the Application Manager*

Step 1

To assign a Process Enrollments role to yourself, visit the ASRS website at www.azasrs.gov and hover over the **Employers** tab at the top of the page.

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click **Login**

Step 3

After you have arrived at the **Employer Home** page, select **Edit Profile/Email** from the left-hand navigation menu under Your Profile.

Step 4

Under **Application Groups**, select the following role:

Process Enrollments

Enter **Current Password** to confirm you want to change your profile.

Click **Save**

NOTE: Links to perform the newly-assigned functions will not appear as part of your profile until you log out and log back in with your employer **Login ID**.

ONLINE ENROLLMENTS MANAGER FUNCTION #4: *Enrollment Codes (5 sub-functions)*

Enrollment Codes allow ASRS to identify the employer through which an employee is enrolling/registering. For employers who choose to use more than one enrollment code, they enable the employer to organize and manage enrollments by providing a way to determine which new hires receive which code and which specialists manage which enrollments. A code may be defined in any manner that is helpful. For example, a code may be defined for names beginning A-J, for different office locations, or for different staff classifications such as certified versus classified staff. From 2010 until early 2014, Enrollment Codes were known as Enrollment Regions. You may notice some remaining language referring to a code as a region – the terms are interchangeable and the term “region” is being phased out.

PLEASE NOTE: The Online Enrollments Manager is the only role that may create, rename, merge, and delete a code and assign specialists to a code. More than one specialist may be assigned to a code. You must have or create at least one code.

1.) CREATE AN ENROLLMENT CODE AND ASSIGN A SPECIALIST TO A CODE:

Step 1

To create an enrollment code, please visit the ASRS website at www.azasrs.gov and hover over the **Employers** tab at the top of the page.

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click **Login**

Step 3

After you have arrived at the **Employer Home** page, select **Maintain Enrollment Codes** from the left-hand navigation menu under Online Enrollments.

Maintain Enrollment Codes

Step 4

Below the table on-screen, click **Create an Enrollment Code**

Create an Enrollment Code

Step 5

Type in the name of your choice and click **Create and Issue Code**

Create and Issue Code

From the next screen, click **Back to Enrollment Regions**

Back to Enrollment Regions

Step 6

Find the newly created enrollment code and under **Assigned Processors**, click

Add/Change

Step 7

From the **Manage Users for Region** page, under the “Available” column, select the user(s) you wish to assign and click

Add Users

NOTE: If there are no users listed under the “Available” column, you must first assign the Process Enrollments role to a user and they must be in a “registered” (not “pending”) status, meaning they have logged on at least once.

Step 8

Click

Back to Enrollment Regions

2.) TO DELETE AN ENROLLMENT CODE:

Step 1

From the **Enrollment Codes** screen you will see a table of enrollment codes. Click **Delete** beside the code you wish to remove.

You will receive a confirmation screen verifying the name and code deleted.

NOTE: You cannot delete a code that has “entered” or “saved” enrollments. You must either process these enrollments before deleting that code or use the **Merge Enrollment Codes** function to move the enrollments to another enrollment code.

Step 2

Click

Back to Enrollment Regions

3.) TO MERGE ENROLLMENT CODES:

Step 1

On the bottom of the **Enrollment Codes** screen click

Merge Enrollment Codes

Step 2

Using the **Source Region** drop-down menu, select the name of the region you wish to merge into another (deleting the “source region” in the process).

Then, using the **Target Region** drop-down menu, choose the region you wish to merge into.

Click **Merge Regions**

Step 3

Click **Back to Enrollment Regions**

4.) TO REISSUE AN ENROLLMENT CODE:

The code given to new ASRS members by employer representatives is unique to the employer. It assists the ASRS in verifying the employer for whom the newly enrolling member works. From time to time, employers may wish to update the code or generate (reissue) a new one for security reasons.

Step 1

From the **Enrollment Codes** screen you will see a table of codes. Click **Reissue Code** beside the code you wish to change.

You will receive a confirmation screen verifying the name and the existing code.

Click **Reissue Code**

Step 2

Click **Back to Enrollment Regions**

5.) TO RENAME AN ENROLLMENT CODE:

Step 1

From the **Enrollment Codes** screen you will see a table of codes. Click **Rename** beside the code you wish to change.

Step 2

Type in the new name and click **Rename the Region**.

You will receive a confirmation screen verifying both the former and the new name of the enrollment codes.

Step 3

Click **Back to Enrollment Regions**

Section Five:

Online Enrollments Specialist Role

Online Enrollments Specialist Role (4 functions)

ONLINE ENROLLMENTS SPECIALIST FUNCTION #1: *Reissue an Enrollment Code*

The process is the same as listed under the **Application Manager Role** -“Reissue an Enrollment Code” on page 19.

ONLINE ENROLLMENTS SPECIALIST FUNCTION #2: *Provide New Hire/Eligible Member with Enrollment Instructions*

Step 1

To find the instructions and enrollment code to give to a new hire, visit the ASRS website at www.azasrs.gov and hover over the  tab at the top of the page.

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click 

Step 3

After you have arrived at the **Employer Home** page, select  from the left-hand navigation menu under Online Enrollments.

Step 4

In the top gray box, click on the Employee Online Instructions. This document will provide a direct URL for employees to begin the enrollment process and the enrollment code to enter in order to identify their current employer.

Step 5

Email or give the instructions to the employee.

ONLINE ENROLLMENTS SPECIALIST FUNCTION #3: *Manage Enrollments*

Step 1

To manage enrollments, visit the ASRS website at www.azasrs.gov and hover over the

Employers

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click

Login

Step 3

After you have arrived at the **Employer Home** page, select

Manage Enrollments

from the left-hand navigation menu under Online Enrollments.

Step 4

If you have been assigned as a processor to more than one enrollment code, select the appropriate enrollment name from the drop down menu and click

Update

Step 5

In the gray box for Enrollments Pending Employer Verification, click

View Pending

Step 6

To select an employee, click on the

SSN

Step 7

Under **Employee Data**, review the information entered by the employee.

NOTES: If any information is incorrect, you may click on “Update” and correct the information. Or, you may opt to “Delete” the enrollment and request the employee enter a new one. If you open an enrollment in a “Rejected” status, a message will appear in red near the top indicating the error.

Step 8

Under **Employer Data**, enter the Membership Date. Click on the “Member Eligibility” box to confirm the employee’s eligibility for ASRS participation.

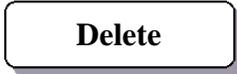
Click  to send the enrollment to the ASRS.

On the next page, click  to confirm.

OR...

Click  if you would like to save any changes but do not want to submit it to the ASRS yet.

OR...

Click  to end the enrollment. On the next page, click  to confirm.

OR...

Click  to return to Enrollments Pending Employer Verification.

NOTE: Submitted and/or Deleted enrollments will no longer populate when “View Pending” is selected.

ONLINE ENROLLMENTS SPECIALIST FUNCTION #4: *Manage Enrollment Reports*

These functions allow you to view all employees for whom the ASRS has received an enrollment but no contributions, and all employees for whom the ASRS has received contributions but no enrollment. Employees will not appear on either report once the ASRS has been able to “match” an enrollment and contributions. This process may take several weeks from the employee’s hire or eligibility date to complete.

Step 1

To manage enrollment reports, visit the ASRS website at www.azasrs.gov and hover over the **Employers** tab at the top of the page.

Select **Employer Login** from the pop-up sub-menu.

Step 2

On the **Employer Login and Registration** page, type in the **Login ID** and **password**.

Click **Login**

Step 3

After you have arrived at the **Employer Home** page, select **Manage Enrollments** from the left-hand navigation menu under Online Enrollments.

Step 4

If necessary, update your enrollment code.

Step 5

Click **View Report** for the desired list.

Enrollments Required will display contributing employees who are not currently enrolled in ASRS.

Enrollments With No Contributions will display all enrolled employees for whom contributions have not yet been received and processed by the ASRS.

Step 6

Click **Export to PDF** or **Export to EXCEL** to save or print the report.

NOTE: If an enrollment was submitted in error, you may choose to “Delete” a record with an enrollment but no contributions from this screen by clicking on the box in the last column and clicking on “Delete Selected.”

The selection box does not appear on records of employees for whom the ASRS has received contributions but no enrollments. Contributions cannot be “deleted” through this application. If contributions were submitted in error, adjustments should be made through the contribution reporting process.