

# *IQue* Help Guide

Employer Self Service: **877-473-7799**

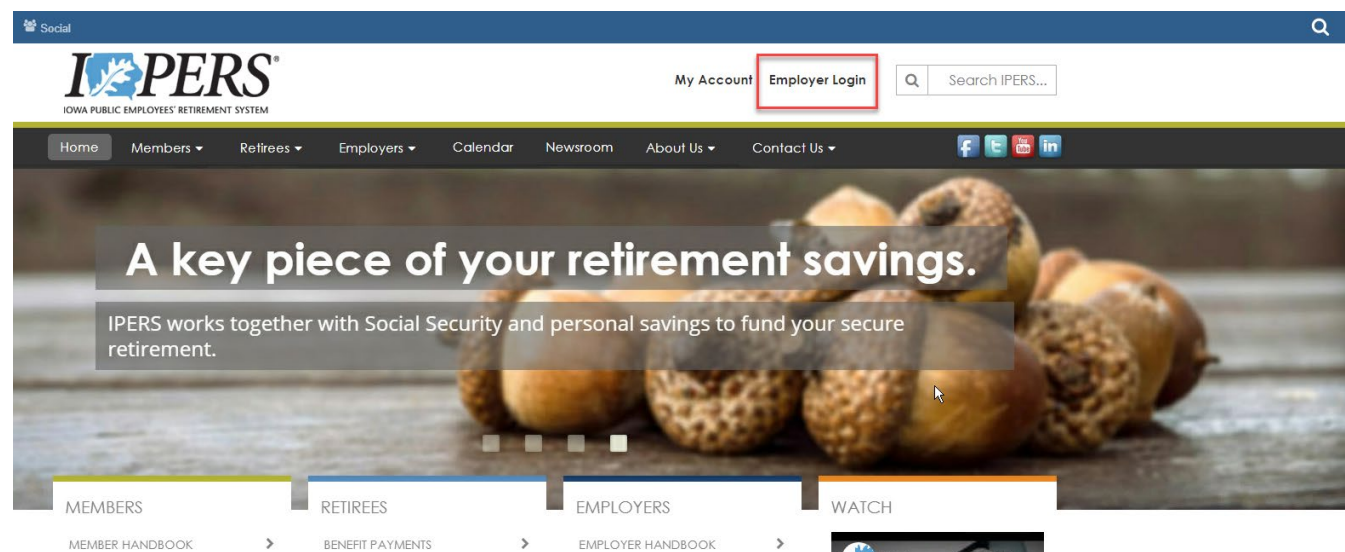


## What's Inside

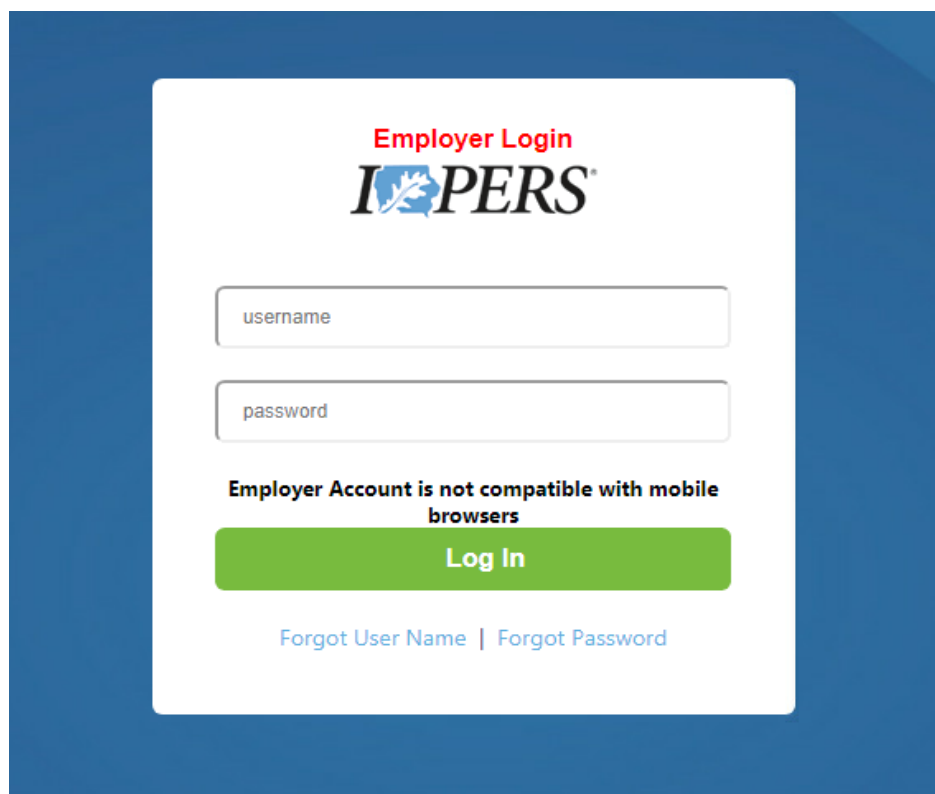
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## Log In

Go to [www.ipers.org](http://www.ipers.org) and select **Employer Login**.



Enter your username and password and select **Log In**.

The screenshot shows the "Employer Login" form. At the top, there is the IPERS logo and the text "Employer Login". Below the logo, there are two input fields: "username" and "password". Below the input fields, there is a message: "Employer Account is not compatible with mobile browsers". Below the message, there is a green "Log In" button. At the bottom, there are two links: "Forgot User Name" and "Forgot Password".

Your username is your 5-digit IPERS employer ID number, the first letter of your first name, and the first 6 letters of your last name (example: 99999TJOHNSO).

Passwords:

- Must be at least 8 characters long
- Must begin with a letter
- Must contain at least 2 letters
- Must contain at least 1 number
- Must contain at least 1 special character
  - Special characters are !, @, \$, &, %, \*, #, or \_
- Are case-sensitive

If you do not have a username or password, complete the [Employer Account Demographics](#) form and submit it to IPERS. The form is available on [www.ipers.org](http://www.ipers.org) under Employers>Forms.

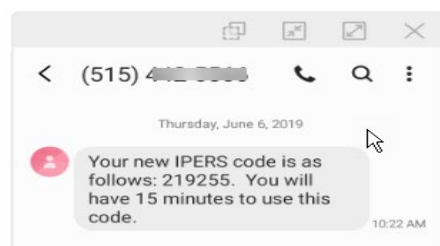
Click on the email or phone number to receive your verification code.  
Be sure you select the radio button for both the number and how you want the code sent.  
Select **Next**



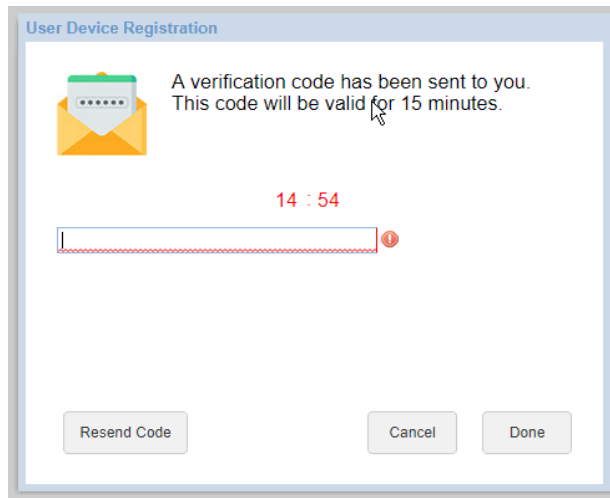
The form is titled "User Device Registration". It contains an icon of an envelope with a keyhole. The text reads: "In order to protect access to your account, we require you to select an email or a phone number to receive a verification code." Below this, there are two main options: an email address "ti\*\*\*\*\*@ipers.org" and a phone number "(\*\*\*).\*\*\*-7882". Each has a radio button. Under the phone number, there are two sub-options: "Send me a Text Message" (selected) and "Call me on this number". Below these, there is another phone number "(\*\*\*).\*\*\*-0001" with similar sub-options. At the bottom right are "Cancel" and "Next" buttons.

A unique six digit verification code will be provided to you based on this selection

Example of text verification received.

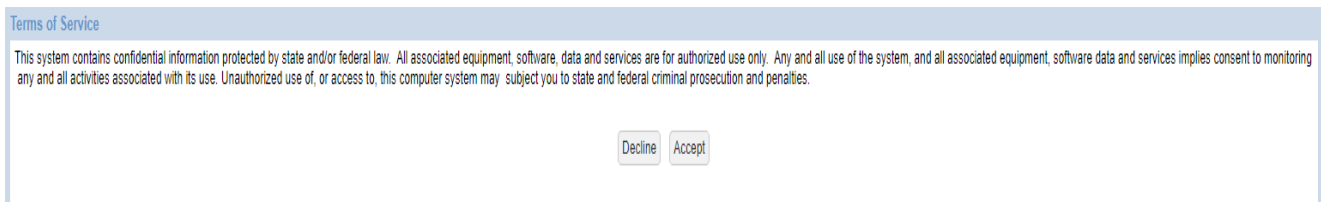


Enter the six digit number in the User Device Registration field within the allotted 15 minutes. Select Done



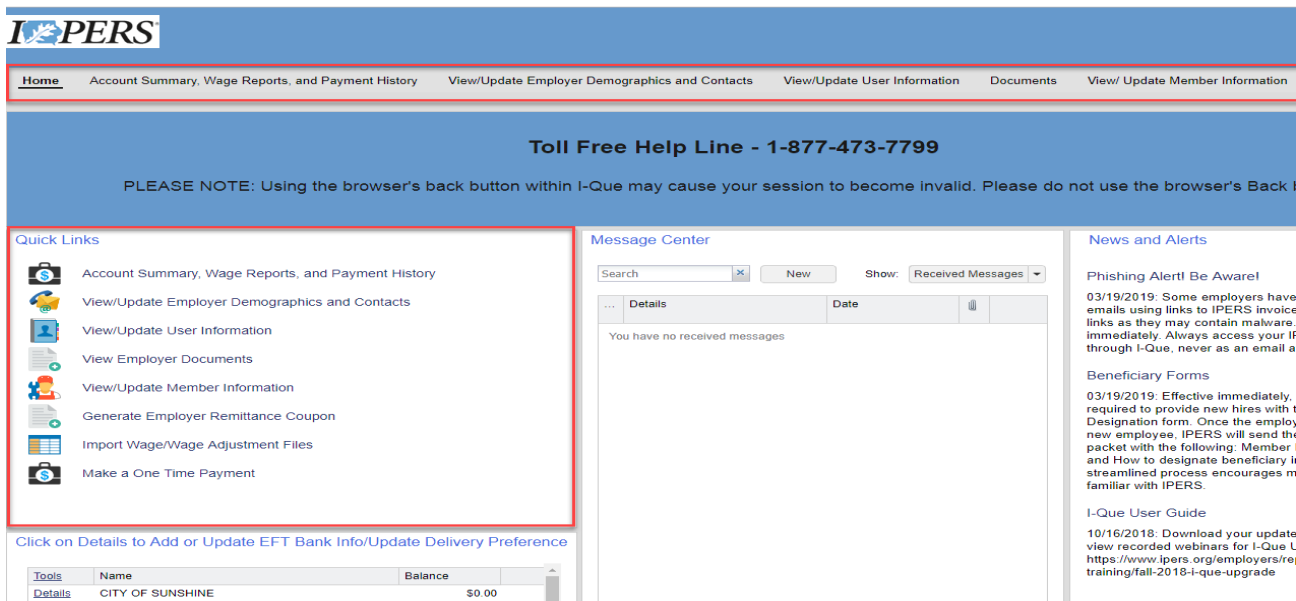
The dialog box is titled "User Device Registration". It contains an icon of an envelope with a lock. The text reads: "A verification code has been sent to you. This code will be valid for 15 minutes." Below the text is a red timer showing "14 : 54". There is a text input field with a red dashed border and a red exclamation mark icon to its right. At the bottom are three buttons: "Resend Code", "Cancel", and "Done".

Select **Accept** on the Terms of Service.



The dialog box is titled "Terms of Service". It contains the following text: "This system contains confidential information protected by state and/or federal law. All associated equipment, software, data and services are for authorized use only. Any and all use of the system, and all associated equipment, software data and services implies consent to monitoring any and all activities associated with its use. Unauthorized use of, or access to, this computer system may subject you to state and federal criminal prosecution and penalties." At the bottom are two buttons: "Decline" and "Accept".

You will be on the I-Que home page. Quick links are across the top and along the left side of the page.



The I-PERS I-Que home page features a blue header with the I-PERS logo. Below the header is a navigation bar with links: Home, Account Summary, Wage Reports, and Payment History, View/Update Employer Demographics and Contacts, View/Update User Information, Documents, and View/ Update Member Information. A large blue banner displays the "Toll Free Help Line - 1-877-473-7799" and a "PLEASE NOTE" about the browser's back button. The main content area is divided into three sections: "Quick Links" on the left, "Message Center" in the middle, and "News and Alerts" on the right. The "Quick Links" section is highlighted with a red box and contains a list of links with icons. The "Message Center" section has a search bar and a "New" button. The "News and Alerts" section contains a "Phishing Alert" and "Beneficiary Forms" information.

**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files
- Make a One Time Payment

**Message Center**

Search [ ] New Show: Received Messages

Details Date

You have no received messages

**News and Alerts**

**Phishing Alert! Be Aware!**

03/19/2019: Some employers have emails using links to IPERS Invoice links as they may contain malware. Immediately. Always access your IP through I-Que, never as an email a

**Beneficiary Forms**

03/19/2019: Effective immediately, required to provide new hires with t Designation form. Once the employ new employee, IPERS will send the packet with the following: Member I and How to designate beneficiary is streamlined process encourages n familiar with IPERS.

**I-Que User Guide**

10/16/2018: Download your update view recorded webinars for I-Que L <https://www.ipers.org/employers/re training/fall-2018-i-que-upgrade>

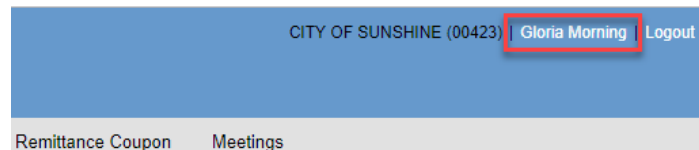
**Click on Details to Add or Update EFT Bank Info/Update Delivery Preference**

Tools	Name	Balance
Details	CITY OF SUNSHINE	\$0.00

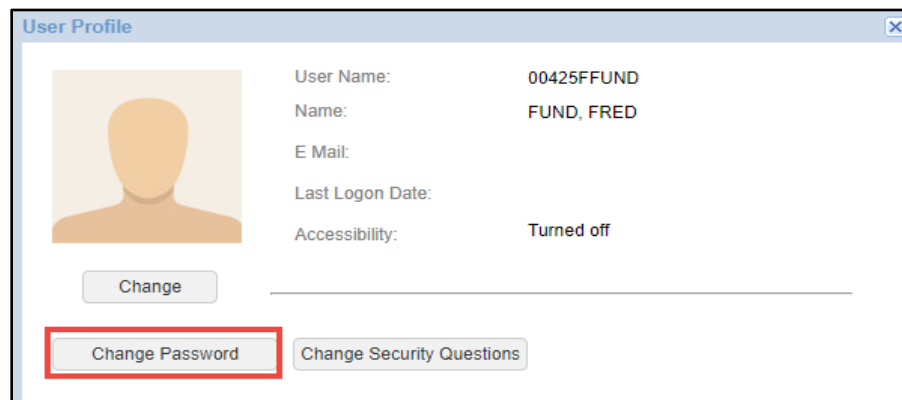


# Change Your Password or Security Questions

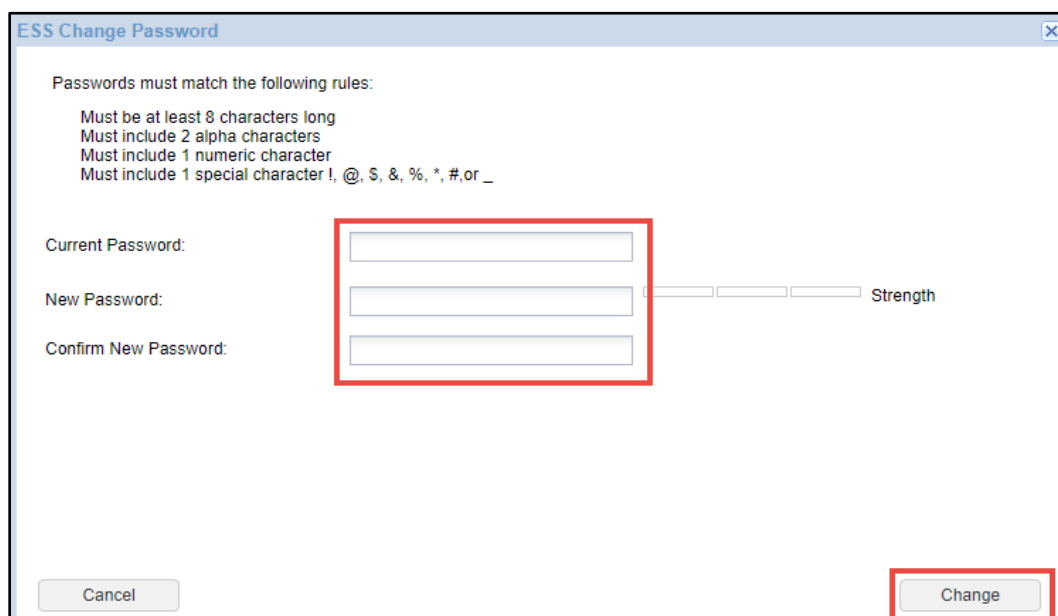
From any page, select your name in the top right corner of the page.



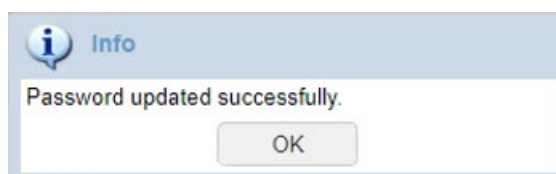
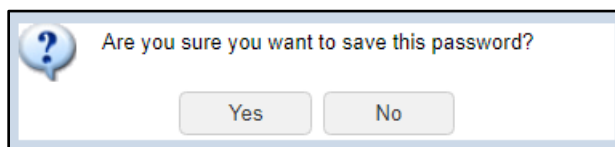
To change your password, select **Change Password**.



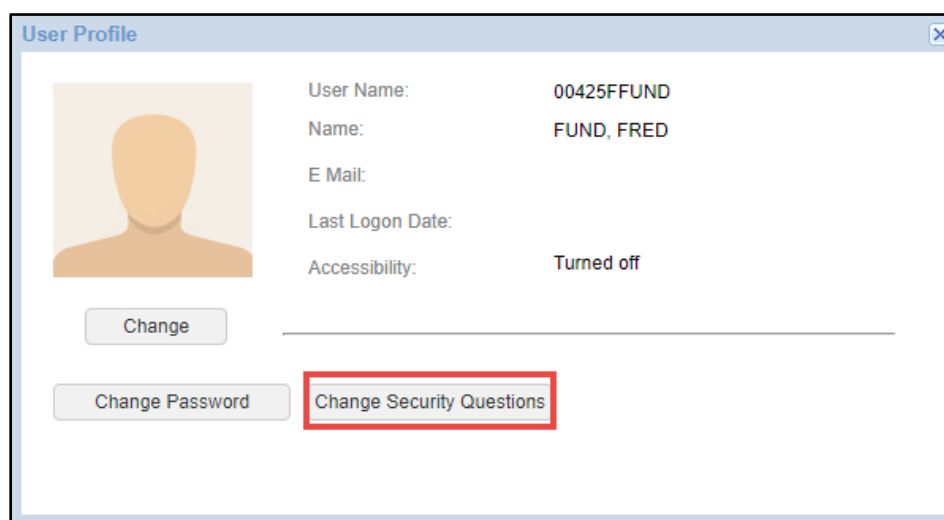
To change your password, fill in the text fields and select **Change**. The strength of your password will be measured. Stronger passwords are more secure.



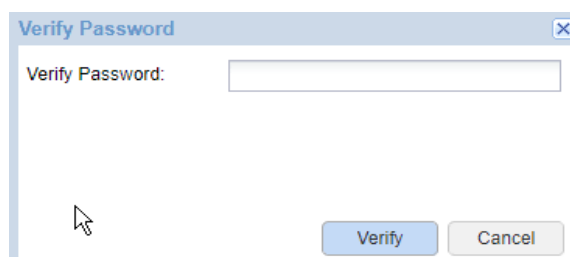
Follow the prompts to save your new password.



To update your security questions, select **Change Security Questions**.

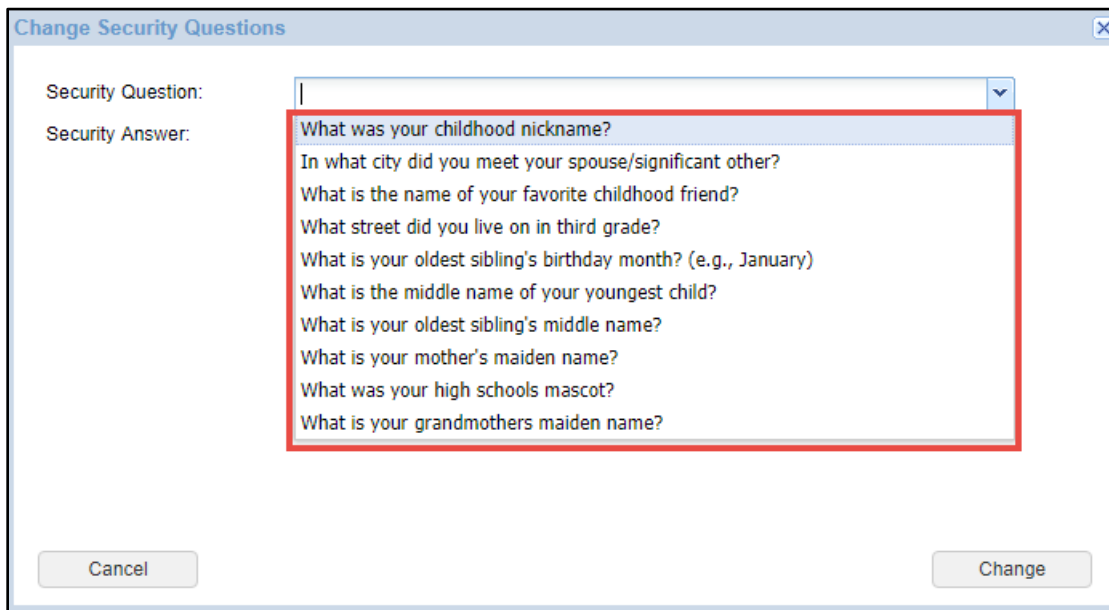


Enter your password. Select Verify.





Select a security question from the drop-down menu.



The dialog box titled "Change Security Questions" has a close button (X) in the top right corner. It contains two labels: "Security Question:" and "Security Answer:". The "Security Question:" label is followed by a drop-down menu. The "Security Answer:" label is followed by a text input field. A red rectangular box highlights the drop-down menu, which is open and displays a list of ten security questions. At the bottom of the dialog box, there are two buttons: "Cancel" on the left and "Change" on the right.

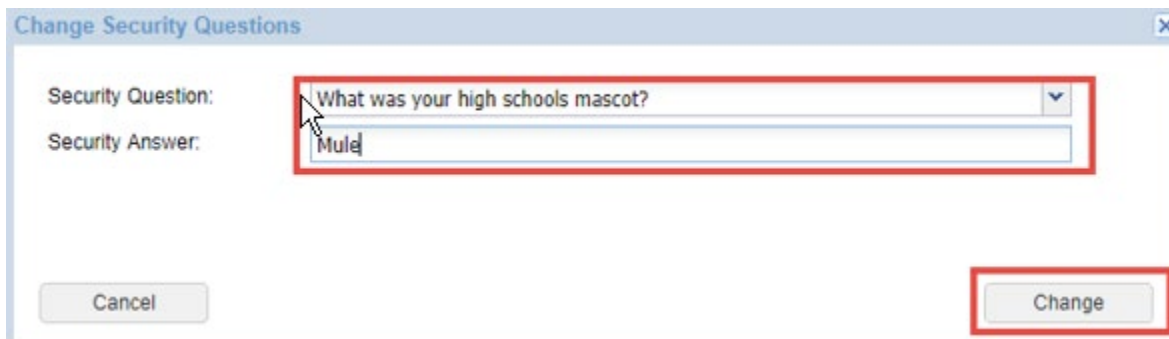
Security Question:

Security Answer:

- What was your childhood nickname?
- In what city did you meet your spouse/significant other?
- What is the name of your favorite childhood friend?
- What street did you live on in third grade?
- What is your oldest sibling's birthday month? (e.g., January)
- What is the middle name of your youngest child?
- What is your oldest sibling's middle name?
- What is your mother's maiden name?
- What was your high schools mascot?
- What is your grandmothers maiden name?

Cancel Change

Fill in the answer and select **Change**.



The dialog box titled "Change Security Questions" is shown with the "Security Question:" drop-down menu set to "What was your high schools mascot?". The "Security Answer:" text input field contains the word "Mule". A red rectangular box highlights the "Security Answer:" field. Another red rectangular box highlights the "Change" button at the bottom right of the dialog box. The "Cancel" button is at the bottom left.

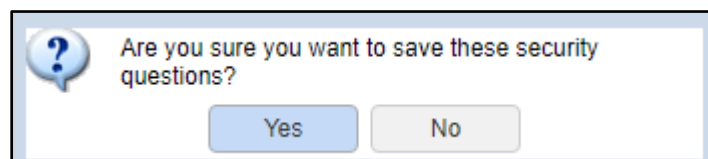
Security Question:

Security Answer:

Mule

Cancel Change

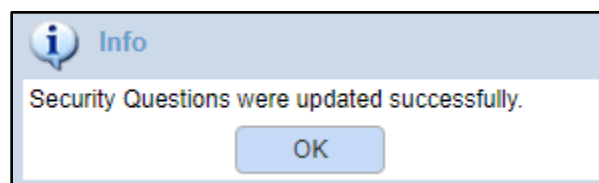
Follow the prompts to save your new security question.



A confirmation dialog box with a question mark icon on the left. The text reads: "Are you sure you want to save these security questions?". Below the text are two buttons: "Yes" and "No".

Are you sure you want to save these security questions?

Yes No



An information dialog box with an "i" icon on the left. The text reads: "Security Questions were updated successfully.". Below the text is an "OK" button.

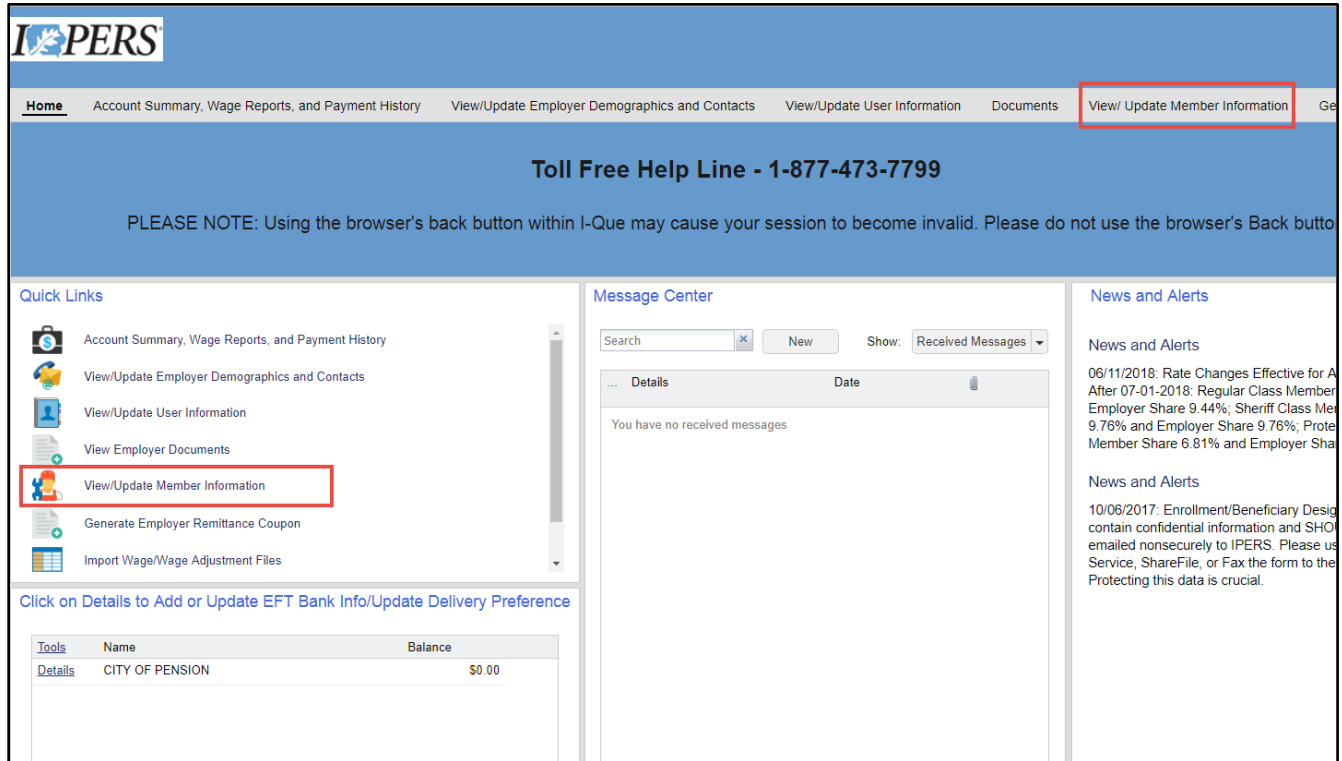
Info

Security Questions were updated successfully.

OK

## Add a New Member/Employee

On the I-Que home page, select **View/Update Member Information**.



**I-PERS**

Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents **View/ Update Member Information** Get

**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not use the browser's Back button

**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information**
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
<a href="#">Details</a>	CITY OF PENSION	\$0.00

**Message Center**

Search [x] New Show: Received Messages

Details Date

You have no received messages

**News and Alerts**

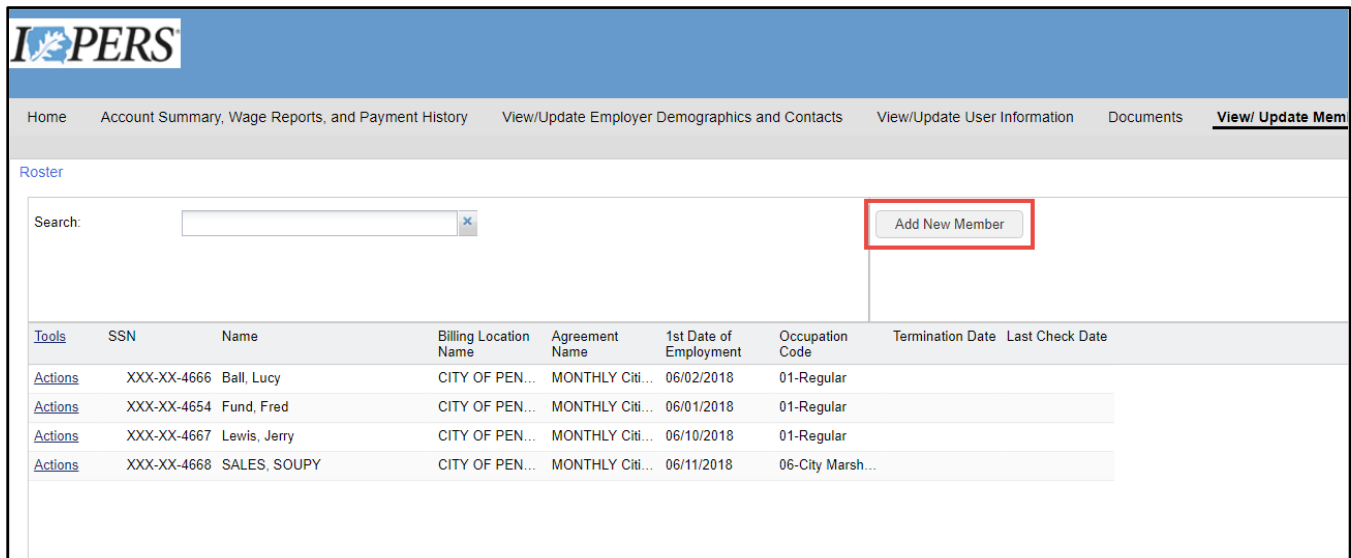
News and Alerts

06/11/2018: Rate Changes Effective for After 07-01-2018: Regular Class Member Employer Share 9.44%; Sheriff Class Member Share 9.76% and Employer Share 9.76%; Protective Class Member Share 6.81% and Employer Share 6.81%

News and Alerts

10/06/2017: Enrollment/Beneficiary Design contain confidential information and SHOULD be emailed nonsecurely to I-PERS. Please use Service, ShareFile, or Fax the form to the I-PERS. Protecting this data is crucial.

Select **Add New Member**.



**I-PERS**

Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents **View/ Update Member Information**

**Roster**

Search: [x]

**Add New Member**

Tools	SSN	Name	Billing Location Name	Agreement Name	1st Date of Employment	Occupation Code	Termination Date	Last Check Date
<a href="#">Actions</a>	XXX-XX-4666	Ball, Lucy	CITY OF PEN...	MONTHLY Citi...	06/02/2018	01-Regular		
<a href="#">Actions</a>	XXX-XX-4654	Fund, Fred	CITY OF PEN...	MONTHLY Citi...	06/01/2018	01-Regular		
<a href="#">Actions</a>	XXX-XX-4667	Lewis, Jerry	CITY OF PEN...	MONTHLY Citi...	06/10/2018	01-Regular		
<a href="#">Actions</a>	XXX-XX-4668	SALES, SOUPY	CITY OF PEN...	MONTHLY Citi...	06/11/2018	06-City Marsh...		

The **Add Member** window will open. Enter the new employee's Social Security number (SSN) and select **Search**.

**IMPORTANT:** Make sure to enter the SSN accurately. From this point on, the first 5 digits of the SSN will **not** be displayed.



The screenshot shows the 'Add Member' window with a progress bar at the top indicating five steps: 1. Search, 2. Verification, 3. Person Demographics, 4. Employment, and 5. Confirm. Step 1 is currently active. Below the progress bar, the text 'Please provide the employee's SSN' is followed by a label 'SSN:' and an empty text input field. A red box highlights this input field. At the bottom right, there is a 'Search' button, also highlighted with a red box. A 'Cancel' button is located at the bottom left.

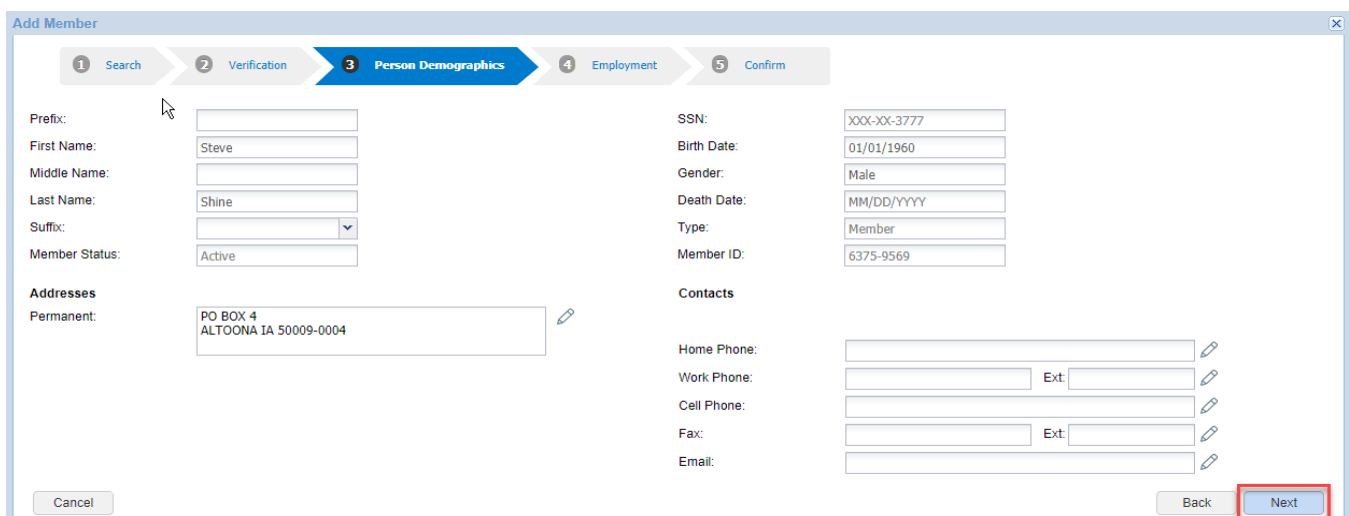
If I-Que finds an existing record of a person with the SSN you entered, select **Next**.

**\*\*If member is not found, go to page 11 and follow the directions.**



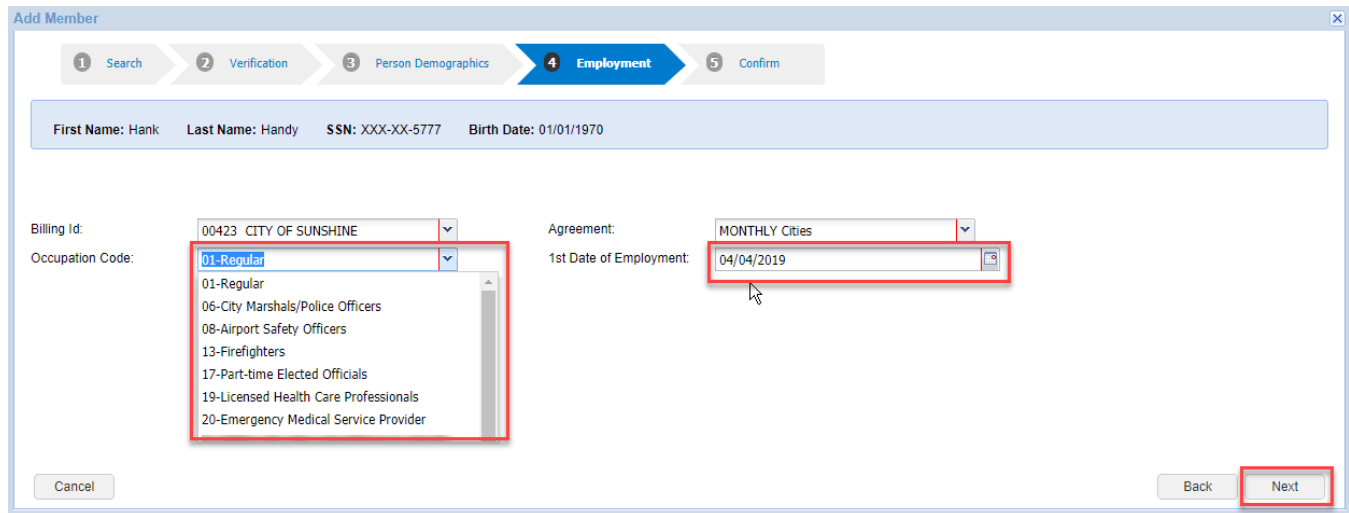
The screenshot shows the 'Add Member' window with the progress bar now highlighting step 2, 'Verification'. Under the heading 'Entered Fields', the 'SSN:' is displayed as 'XXX-XX-2725'. Below this, a red box highlights the message 'A record is found matching the criteria'. At the bottom right, there are two buttons: 'Back' and 'Next'. The 'Next' button is highlighted with a red box. A 'Cancel' button is at the bottom left.

Make any updates to the information about the person, select **Next**.



The screenshot shows the 'Add Member' window with the progress bar highlighting step 3, 'Person Demographics'. The form is divided into several sections. On the left, there are fields for 'Prefix:', 'First Name:' (containing 'Steve'), 'Middle Name:', 'Last Name:' (containing 'Shine'), 'Suffix:' (a dropdown menu), and 'Member Status:' (a dropdown menu set to 'Active'). Below these is an 'Addresses' section with a 'Permanent:' address field containing 'PO BOX 4 ALTOONA IA 50009-0004'. On the right, there are fields for 'SSN:' (containing 'XXX-XX-3777'), 'Birth Date:' (containing '01/01/1960'), 'Gender:' (containing 'Male'), 'Death Date:' (containing 'MM/DD/YYYY'), 'Type:' (containing 'Member'), and 'Member ID:' (containing '6375-9569'). Below these is a 'Contacts' section with fields for 'Home Phone:', 'Work Phone:', 'Cell Phone:', 'Fax:', and 'Email:', each followed by an 'Ext:' field. At the bottom right, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red box. A 'Cancel' button is at the bottom left.

From the drop-down menu, select the **Occupation Code** and enter the **1st Date of Employment**. Select **Next**.



**Add Member**

1 Search 2 Verification 3 Person Demographics 4 **Employment** 5 Confirm

First Name: Hank Last Name: Handy SSN: XXX-XX-5777 Birth Date: 01/01/1970

Billing Id: 00423 CITY OF SUNSHINE

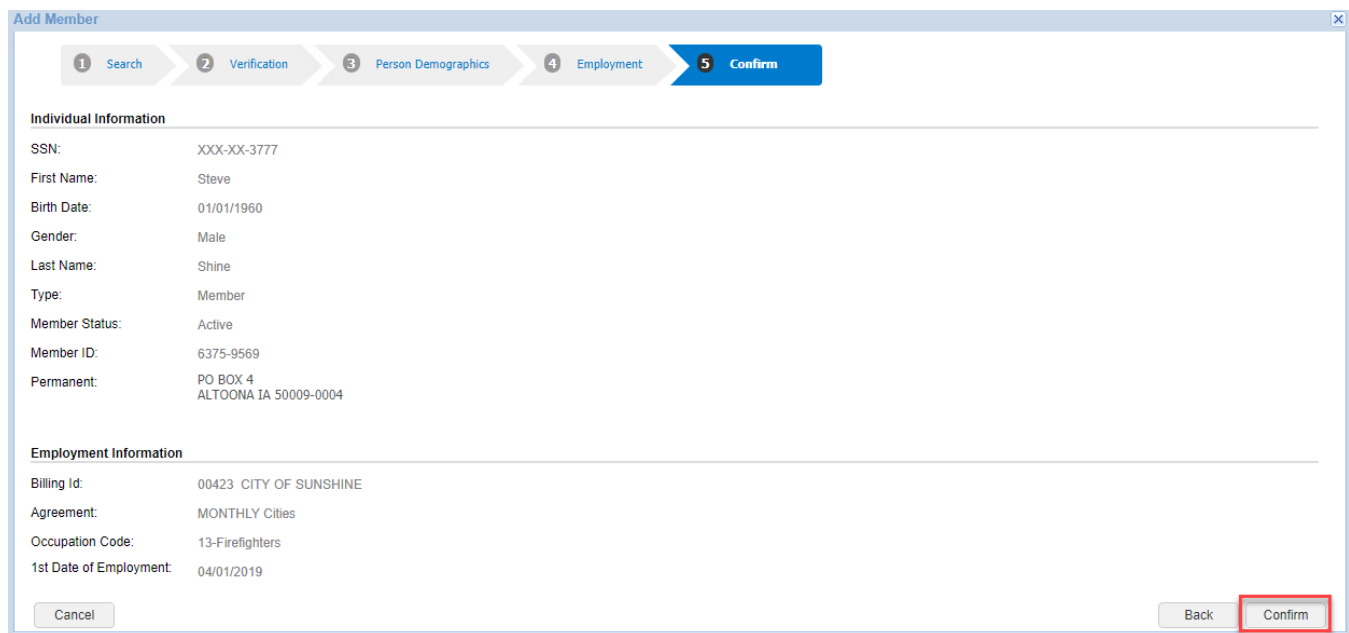
Occupation Code: 01-Regular  
06-City Marshals/Police Officers  
08-Airport Safety Officers  
13-Firefighters  
17-Part-time Elected Officials  
19-Licensed Health Care Professionals  
20-Emergency Medical Service Provider

Agreement: MONTHLY Cities

1st Date of Employment: 04/04/2019

Cancel Back **Next**

Verify the information is correct. If not, select **Back** to re-enter information. When correct, select **Confirm**.



**Add Member**

1 Search 2 Verification 3 Person Demographics 4 Employment 5 **Confirm**

**Individual Information**

SSN: XXX-XX-3777

First Name: Steve

Birth Date: 01/01/1960

Gender: Male

Last Name: Shine

Type: Member

Member Status: Active

Member ID: 6375-9569

Permanent: PO BOX 4  
ALTOONA IA 50009-0004

**Employment Information**

Billing Id: 00423 CITY OF SUNSHINE

Agreement: MONTHLY Cities

Occupation Code: 13-Firefighters

1st Date of Employment: 04/01/2019

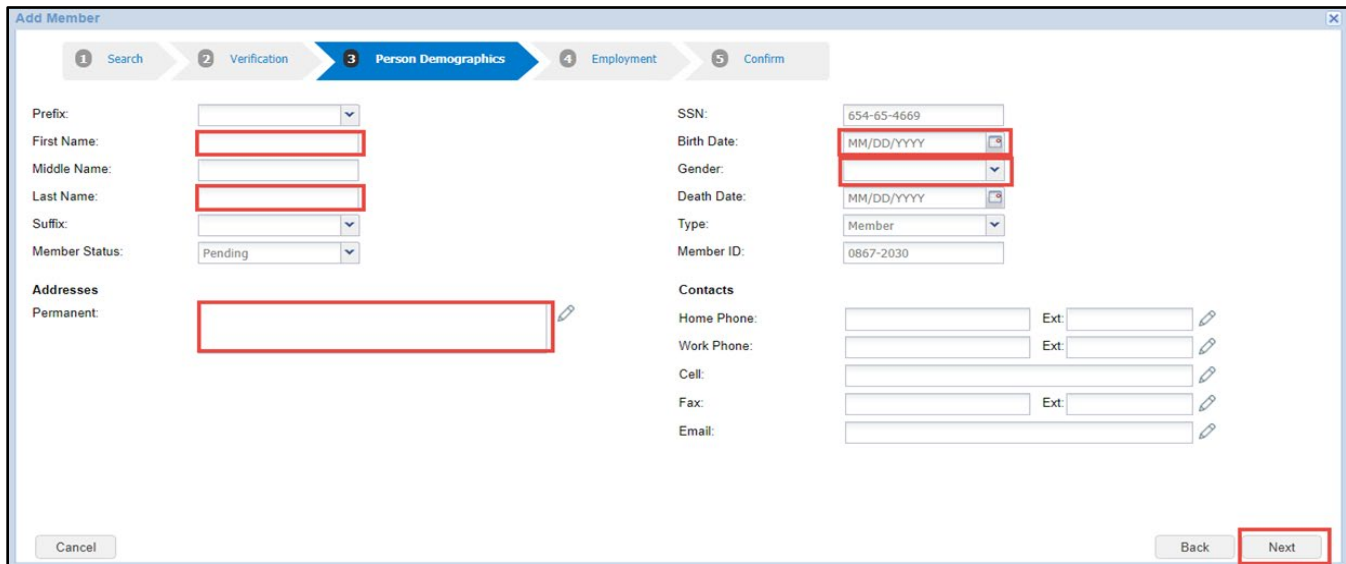
Cancel Back **Confirm**

If member is not found, select **New Member** at the bottom of the window.



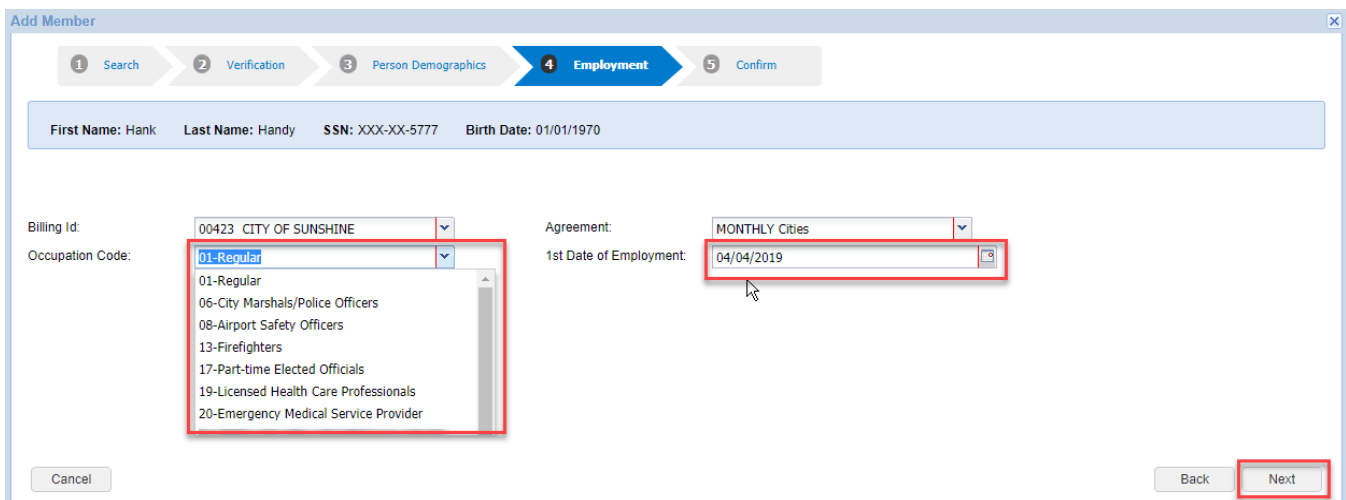
The screenshot shows the 'Add Member' window at the 'Verification' step. The progress bar indicates steps: 1 Search, 2 Verification (active), 3 Person Demographics, 4 Employment, and 5 Confirm. Under 'Entered Fields', the SSN is 'XXX-XX-4669'. A red box highlights the message 'This member is not found.' At the bottom right, a red box highlights the 'New Member' button.

Fill in the information about the person, and select **Next**.



The screenshot shows the 'Add Member' window at the 'Person Demographics' step. The progress bar indicates steps: 1 Search, 2 Verification, 3 Person Demographics (active), 4 Employment, and 5 Confirm. Fields include Prefix, First Name, Middle Name, Last Name, Suffix, Member Status (Pending), SSN (654-65-4669), Birth Date (MM/DD/YYYY), Gender, Death Date (MM/DD/YYYY), Type (Member), and Member ID (0867-2030). There are also sections for Addresses (Permanent) and Contacts (Home Phone, Work Phone, Cell, Fax, Email). A red box highlights the 'Next' button at the bottom right.

From the drop-down menu, select the **Occupation Code** and enter the **1st Date of Employment**. Select **Next**.



The screenshot shows the 'Add Member' window at the 'Employment' step. The progress bar indicates steps: 1 Search, 2 Verification, 3 Person Demographics, 4 Employment (active), and 5 Confirm. A summary bar shows: First Name: Hank, Last Name: Handy, SSN: XXX-XX-5777, Birth Date: 01/01/1970. Fields include Billing Id (00423 CITY OF SUNSHINE), Occupation Code (01-Regular), Agreement (MONTHLY Cities), and 1st Date of Employment (04/04/2019). A red box highlights the 'Next' button at the bottom right.

Verify the information is correct. If not, select **Back** to re-enter information. When correct, select **Confirm**.

**Add Member**

1 Search 2 Verification 3 Person Demographics 4 Employment 5 **Confirm**

**Individual Information**

SSN: XXX-XX-3777  
 First Name: Steve  
 Birth Date: 01/01/1960  
 Gender: Male  
 Last Name: Shine  
 Type: Member  
 Member Status: Active  
 Member ID: 6375-9569  
 Permanent: PO BOX 4  
 ALTOONA IA 50009-0004

**Employment Information**

Billing Id: 00423 CITY OF SUNSHINE  
 Agreement: MONTHLY Cities  
 Occupation Code: 13-Firefighters  
 1st Date of Employment: 04/01/2019

Cancel Back **Confirm**

You will automatically return to the roster and the new member will be displayed.

**I-PERS**

Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents **View/**

**Roster**

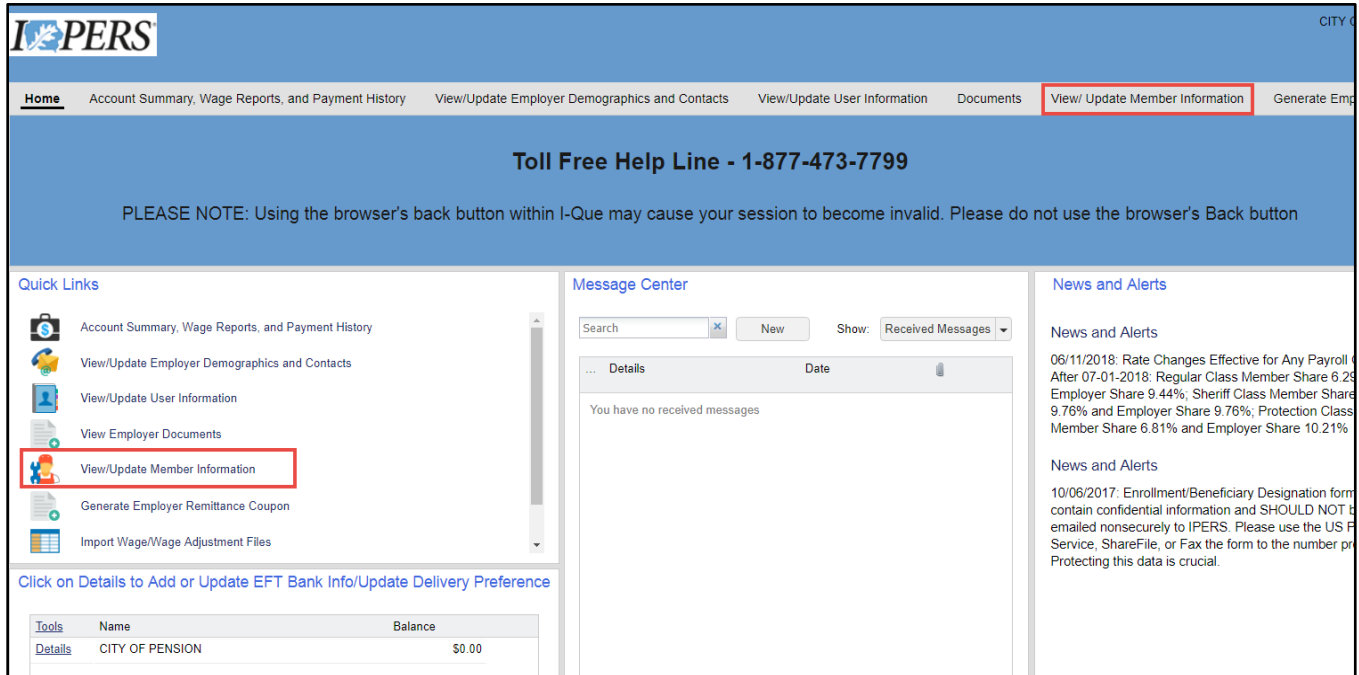
Search:  Add New Member

Tools	SSN	Name	Billing Location Name	Agreement Name	1st Date of Employment	Occupation Code	Termination Date	Last Check Date
<a href="#">Actions</a>	XXX-XX-4669	ALDA, ALAN	CITY OF PEN...	MONTHLY Citi...	06/10/2018	13-Firefighters		
<a href="#">Actions</a>	XXX-XX-4666	Ball, Lucy	CITY OF PEN...	MONTHLY Citi...	06/02/2018	01-Regular		
<a href="#">Actions</a>	XXX-XX-4654	Fund, Fred	CITY OF PEN...	MONTHLY Citi...	06/01/2018	01-Regular		
<a href="#">Actions</a>	XXX-XX-4667	Lewis, Jerry	CITY OF PEN...	MONTHLY Citi...	06/10/2018	01-Regular		

**IMPORTANT:** If a terminated employee is rehired, start a new employment record with the new hire date. The previous employment record should include the termination and last check dates.

# Update an Existing Member

On the I-Que home page, select **View/Update Member Information**.



**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information**
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files

**Message Center**

Search:  New Show: Received Messages

**News and Alerts**

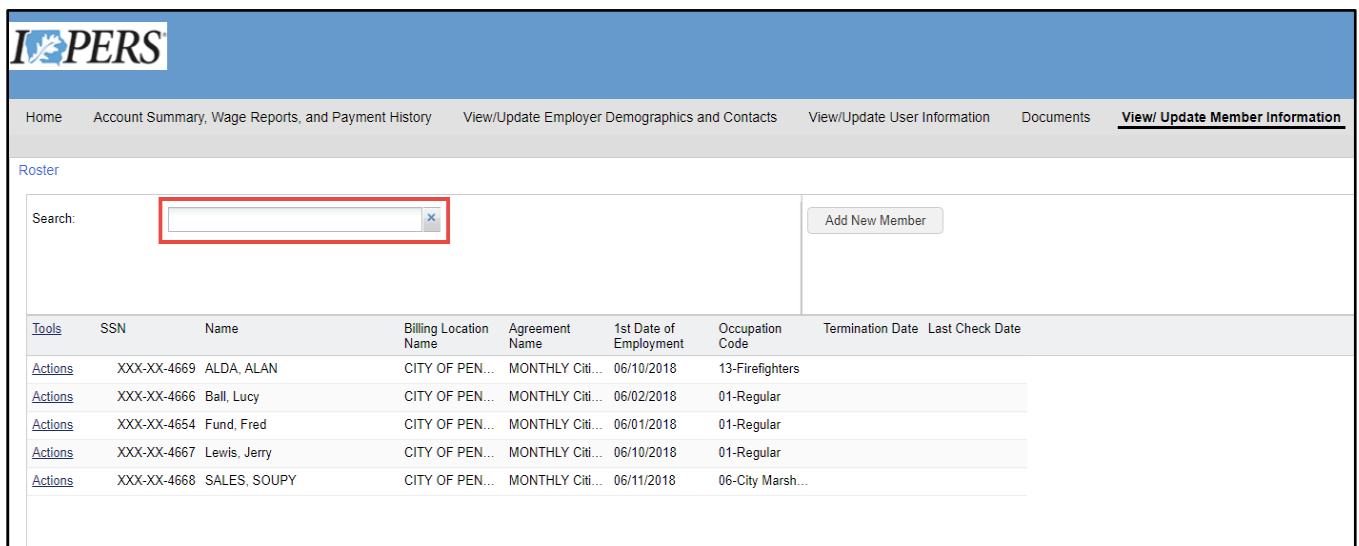
06/11/2018: Rate Changes Effective for Any Payroll After 07-01-2018: Regular Class Member Share 6.29%, Employer Share 9.44%; Sheriff Class Member Share 9.76% and Employer Share 9.76%; Protection Class Member Share 6.81% and Employer Share 10.21%

10/06/2017: Enrollment/Beneficiary Designation forms contain confidential information and SHOULD NOT be emailed nonsecurely to IPERS. Please use the US F Service, ShareFile, or Fax the form to the number provided. Protecting this data is crucial.

**Click on Details to Add or Update EFT Bank Info/Update Delivery Preference**

Tools	Name	Balance
<a href="#">Details</a>	CITY OF PENSION	\$0.00

In the **Search** field, enter the employee's SSN or last name. As you type, I-Que will begin displaying member records with that information. \*\*\* Don't hit enter, the screen will go blank.



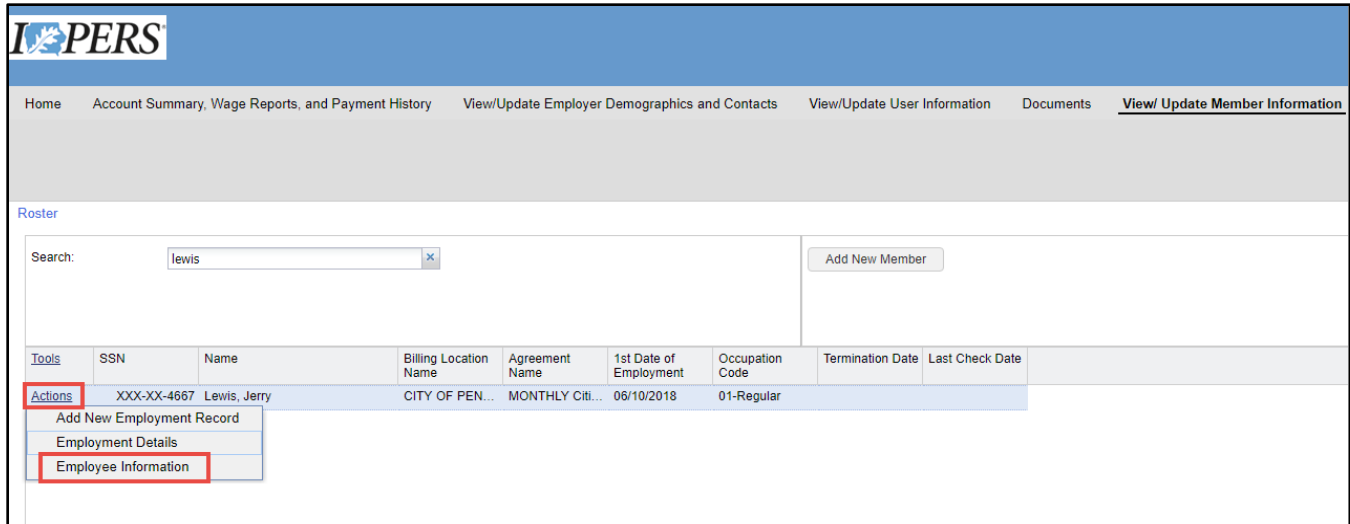
**Roster**

Search:  Add New Member

Tools	SSN	Name	Billing Location Name	Agreement Name	1st Date of Employment	Occupation Code	Termination Date	Last Check Date
<a href="#">Actions</a>	XXX-XX-4669	ALDA, ALAN	CITY OF PEN...	MONTHLY Citi...	06/10/2018	13-Firefighters		
<a href="#">Actions</a>	XXX-XX-4666	Ball, Lucy	CITY OF PEN...	MONTHLY Citi...	06/02/2018	01-Regular		
<a href="#">Actions</a>	XXX-XX-4654	Fund, Fred	CITY OF PEN...	MONTHLY Citi...	06/01/2018	01-Regular		
<a href="#">Actions</a>	XXX-XX-4667	Lewis, Jerry	CITY OF PEN...	MONTHLY Citi...	06/10/2018	01-Regular		
<a href="#">Actions</a>	XXX-XX-4668	SALES, SOUPY	CITY OF PEN...	MONTHLY Citi...	06/11/2018	06-City Marsh...		



Select **Actions**. In this example, the employee's date of birth will be corrected. Select **Employee Information**.



**I-PERS**

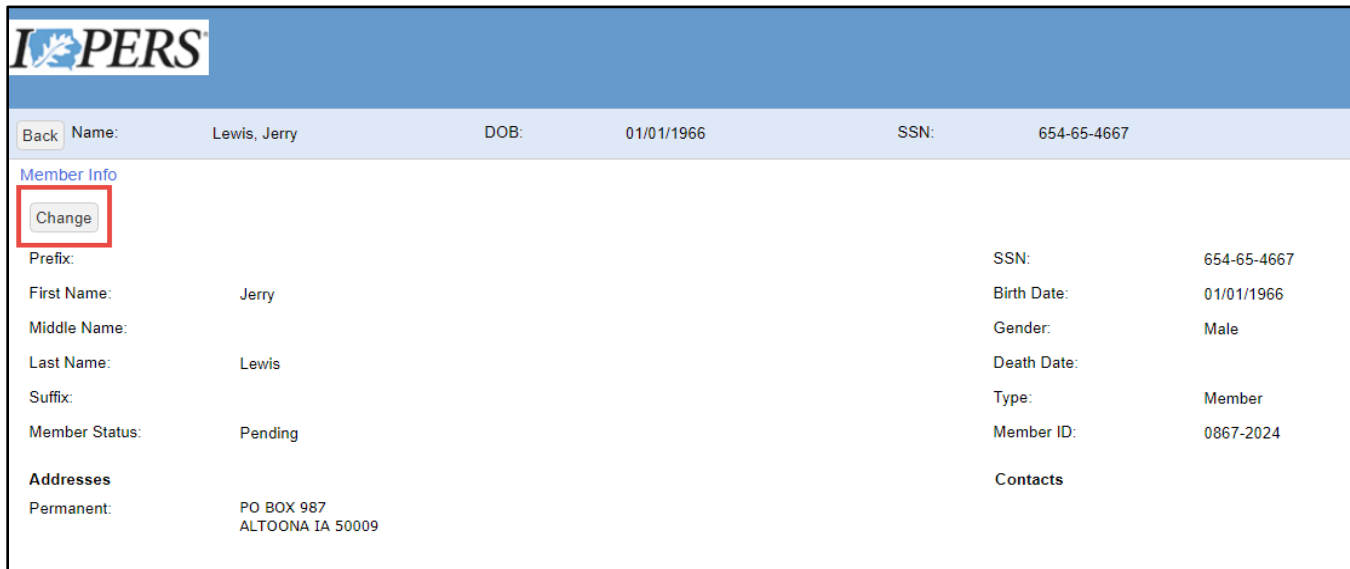
Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information

Roster

Search:

Tools	SSN	Name	Billing Location Name	Agreement Name	1st Date of Employment	Occupation Code	Termination Date	Last Check Date
<b>Actions</b>	XXX-XX-4667	Lewis, Jerry	CITY OF PEN...	MONTHLY Citi...	06/10/2018	01-Regular		
<div><input type="button" value="Add New Employment Record"/> <input type="button" value="Employment Details"/> <input type="button" value="Employee Information"/></div>								

Select **Change**.



**I-PERS**

Name: Lewis, Jerry DOB: 01/01/1966 SSN: 654-65-4667

[Member Info](#)

Prefix: SSN: 654-65-4667

First Name: Jerry Birth Date: 01/01/1966

Middle Name: Gender: Male

Last Name: Lewis Death Date:

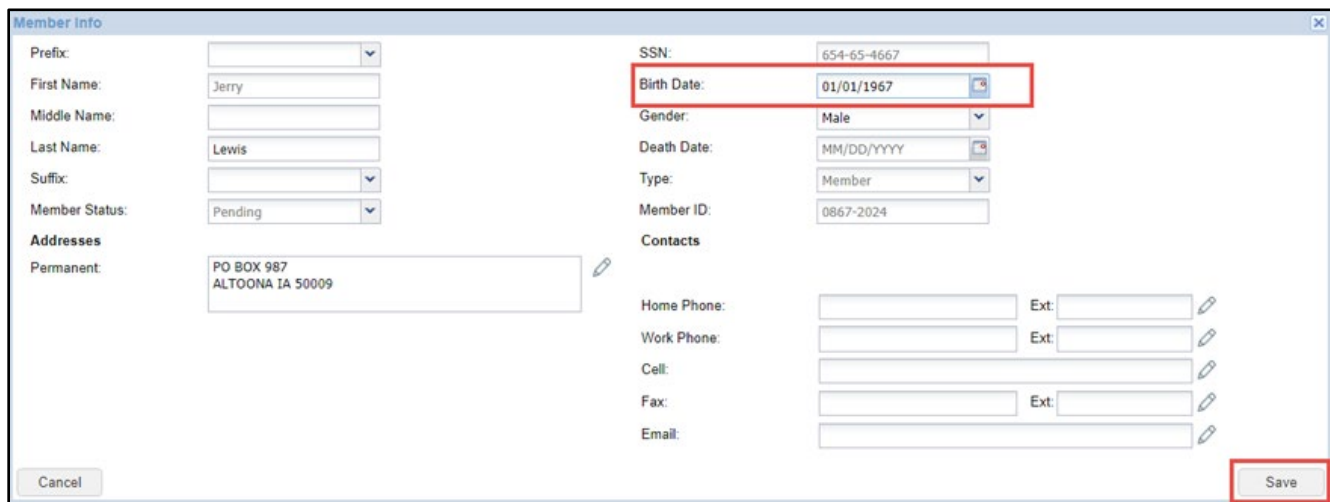
Suffix: Type: Member

Member Status: Pending Member ID: 0867-2024

**Addresses** **Contacts**

Permanent: PO BOX 987  
ALTOONA IA 50009

Update the necessary information. Select **Save**. (Middle/Last Name, DOB, Gender, Address or Phone/Email)



**Member Info**

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Member Status:

**Addresses**

Permanent:

SSN:

**Birth Date:**

Gender:

Death Date:

Type:

Member ID:

**Contacts**

Home Phone:  Ext:

Work Phone:  Ext:

Cell:

Fax:  Ext:

Email:

Cancel Save

Verify the information. If it is incorrect, select **Back** to re-enter information. When correct, select **Confirm**.



**Member Info**

Please verify and click 'Confirm' to permanently save the changes.

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Member Status:

**Addresses**

Permanent:

SSN:

Birth Date:

Gender:

Death Date:

Type:

Member ID:

**Contacts**

Home Phone:  Ext:

Work Phone:  Ext:

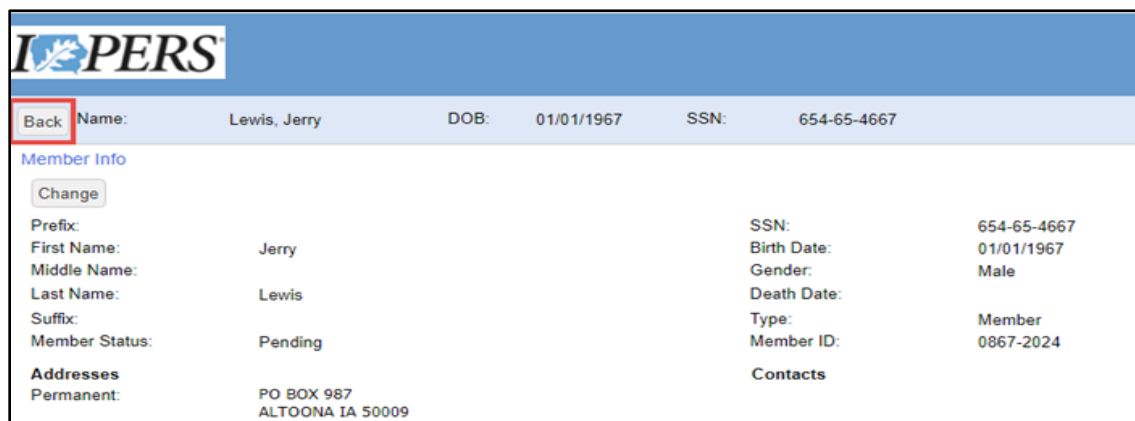
Cell:

Fax:  Ext:

Email:

Cancel Back Confirm

To return to the roster, select **Back**.



**I-PERS**

Back Name: Lewis, Jerry DOB: 01/01/1967 SSN: 654-65-4667

**Member Info**

Change

Prefix:

First Name:

Middle Name:

Last Name:

Suffix:

Member Status:

**Addresses**

Permanent:

SSN:

Birth Date:

Gender:

Death Date:

Type:

Member ID:

**Contacts**

Home Phone:  Ext:

Work Phone:  Ext:

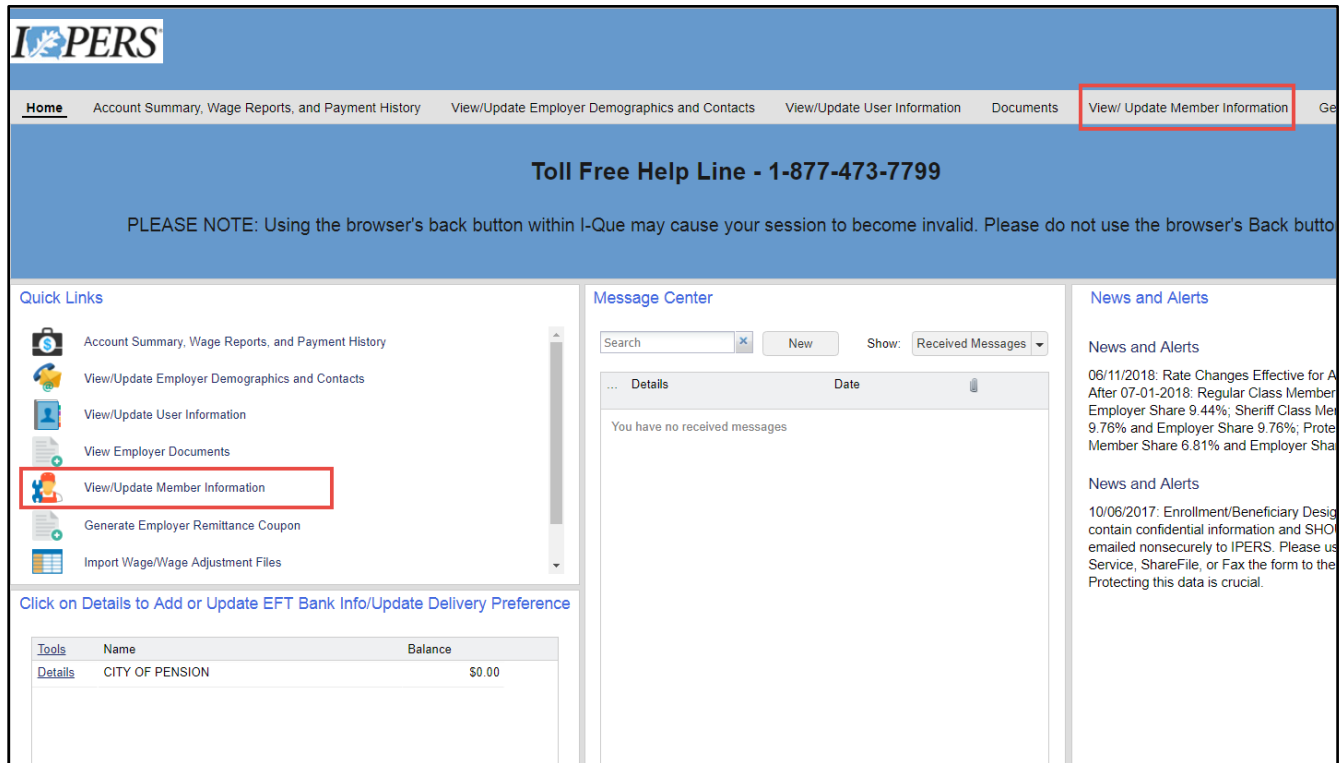
Cell:

Fax:  Ext:

Email:

# Update Member Employment Records

On the I-Que home page, select **View/Update Member Information**.



**I-PERS**

Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents **View/ Update Member Information** Gen

**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not use the browser's Back button

**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information**
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
Details	CITY OF PENSION	\$0.00

**Message Center**

Search [x] New Show: Received Messages

Details Date

You have no received messages

**News and Alerts**

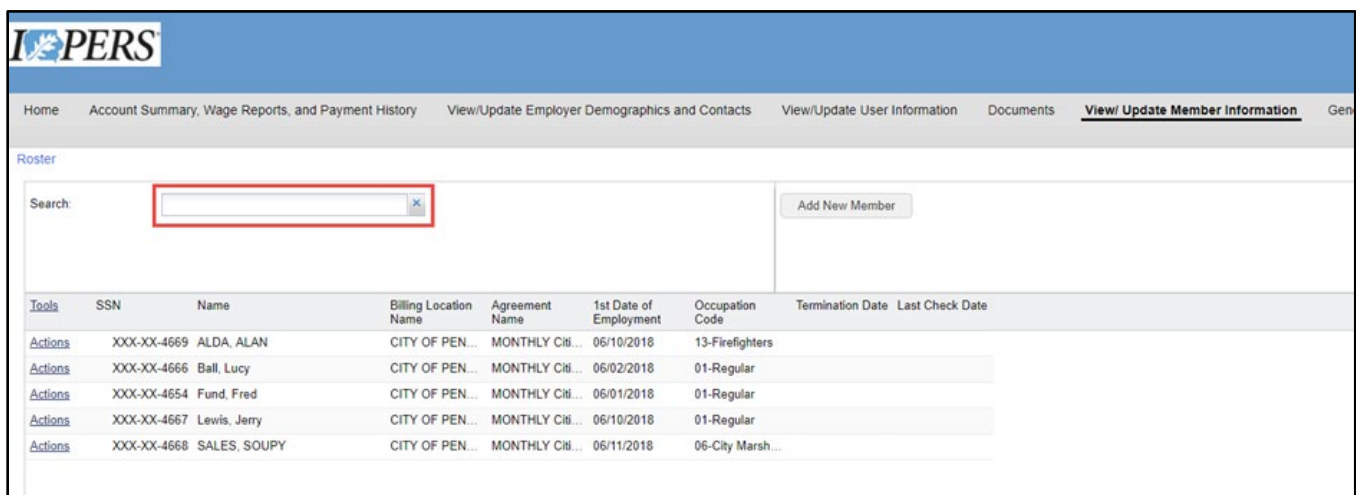
News and Alerts

06/11/2018: Rate Changes Effective for A After 07-01-2018: Regular Class Member Employer Share 9.44%; Sheriff Class Me 9.76% and Employer Share 9.76%; Prote Member Share 6.81% and Employer Sha

News and Alerts

10/06/2017: Enrollment/Beneficiary Design contain confidential information and SHON emailed nonsecurely to IPERS. Please us Service, ShareFile, or Fax the form to the Protecting this data is crucial.

In the **Search** field, enter the employee's SSN or last name. As you type, I-Que will begin displaying member records with that information. \*\*\* Don't hit enter, the screen will go blank.



**I-PERS**

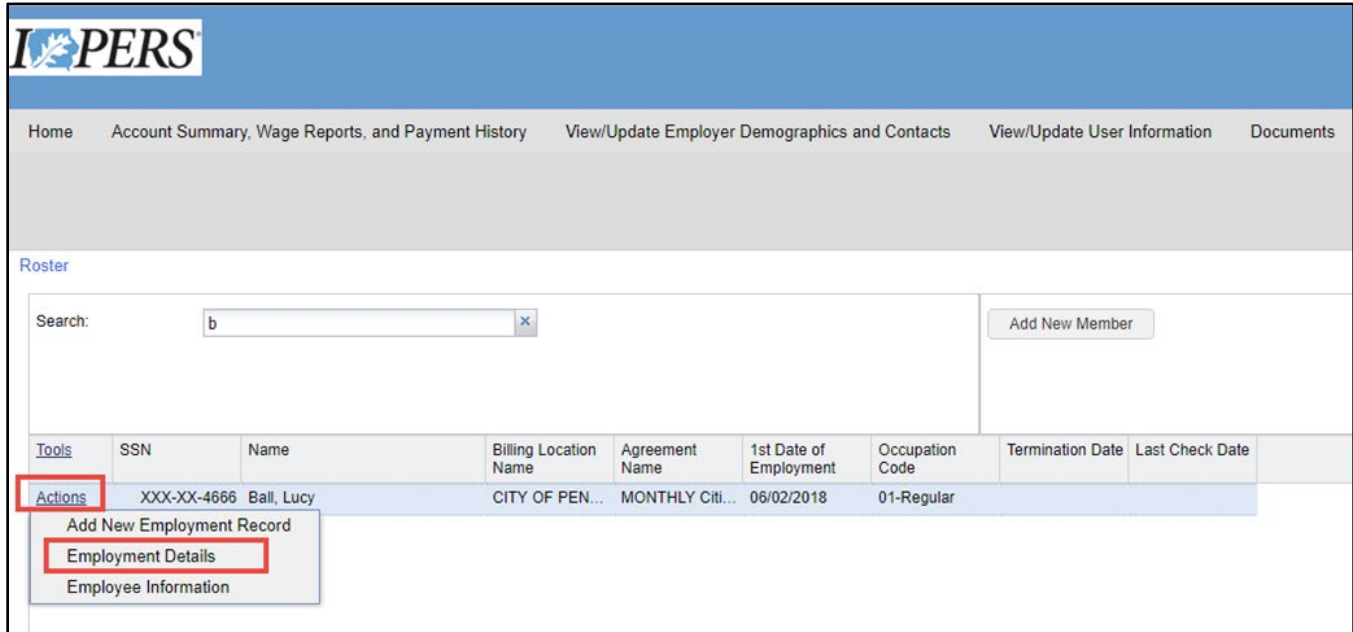
Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents **View/ Update Member Information** Gen

**Roster**

Search: [x] Add New Member

Tools	SSN	Name	Billing Location Name	Agreement Name	1st Date of Employment	Occupation Code	Termination Date	Last Check Date
Actions	XXX-XX-4669	ALDA, ALAN	CITY OF PEN...	MONTHLY Citi...	06/10/2018	13-Firefighters		
Actions	XXX-XX-4666	Ball, Lucy	CITY OF PEN...	MONTHLY Citi...	06/02/2018	01-Regular		
Actions	XXX-XX-4654	Fund, Fred	CITY OF PEN...	MONTHLY Citi...	06/01/2018	01-Regular		
Actions	XXX-XX-4667	Lewis, Jerry	CITY OF PEN...	MONTHLY Citi...	06/10/2018	01-Regular		
Actions	XXX-XX-4668	SALES, SOUPY	CITY OF PEN...	MONTHLY Citi...	06/11/2018	06-City Marsh...		

Select **Actions**. In this example, the member's termination and last check dates will be added. Select **Employment Details**.



**I-PERS**

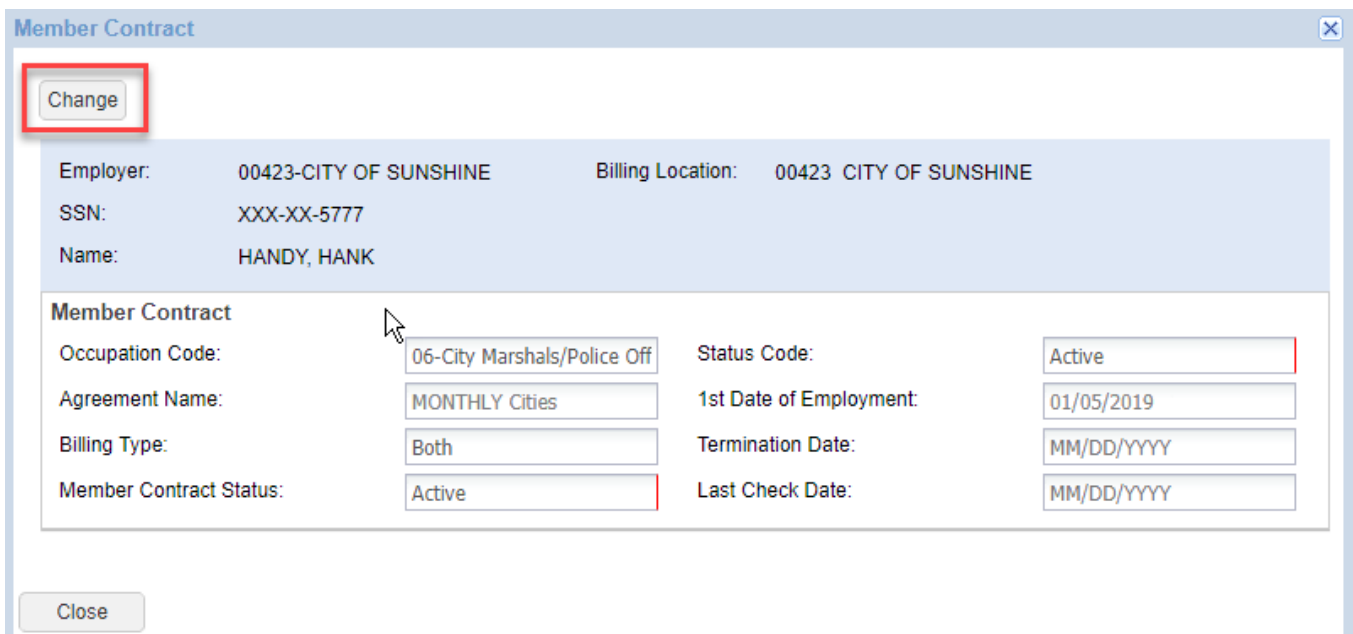
Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents

Roster

Search:

Tools	SSN	Name	Billing Location Name	Agreement Name	1st Date of Employment	Occupation Code	Termination Date	Last Check Date
<b>Actions</b>	XXX-XX-4666	Ball, Lucy	CITY OF PEN...	MONTHLY Citi...	06/02/2018	01-Regular		

Select **Change**.



**Member Contract**

Employer: 00423-CITY OF SUNSHINE Billing Location: 00423 CITY OF SUNSHINE

SSN: XXX-XX-5777

Name: HANDY, HANK

**Member Contract**

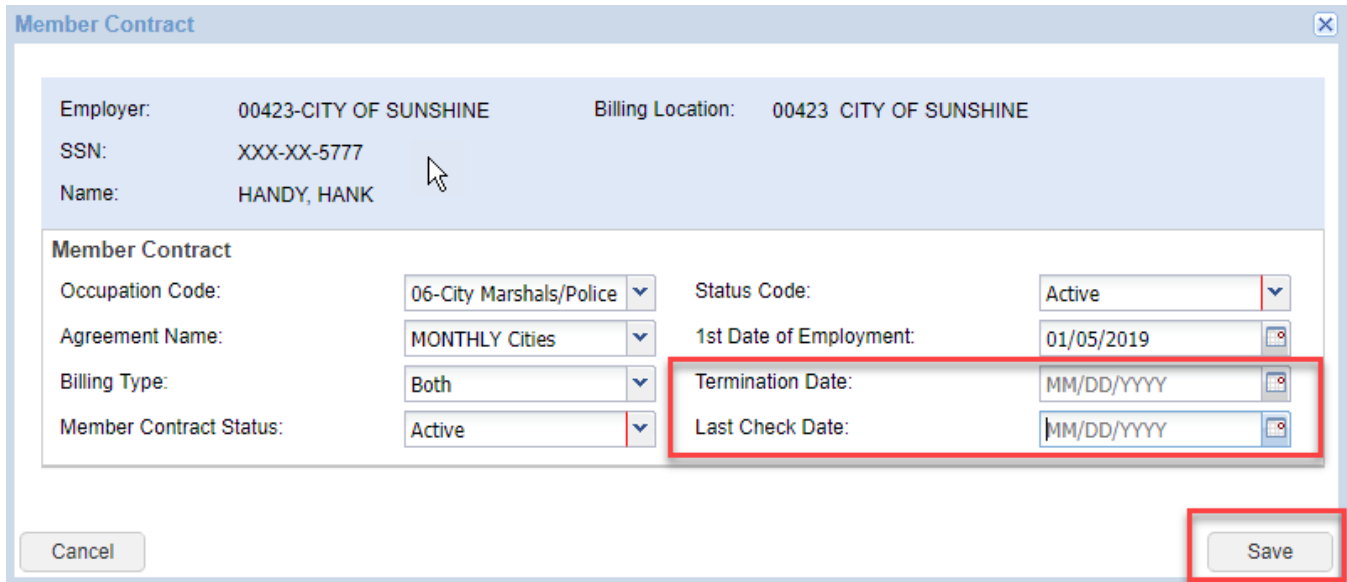
Occupation Code:  Status Code:

Agreement Name:  1st Date of Employment:

Billing Type:  Termination Date:

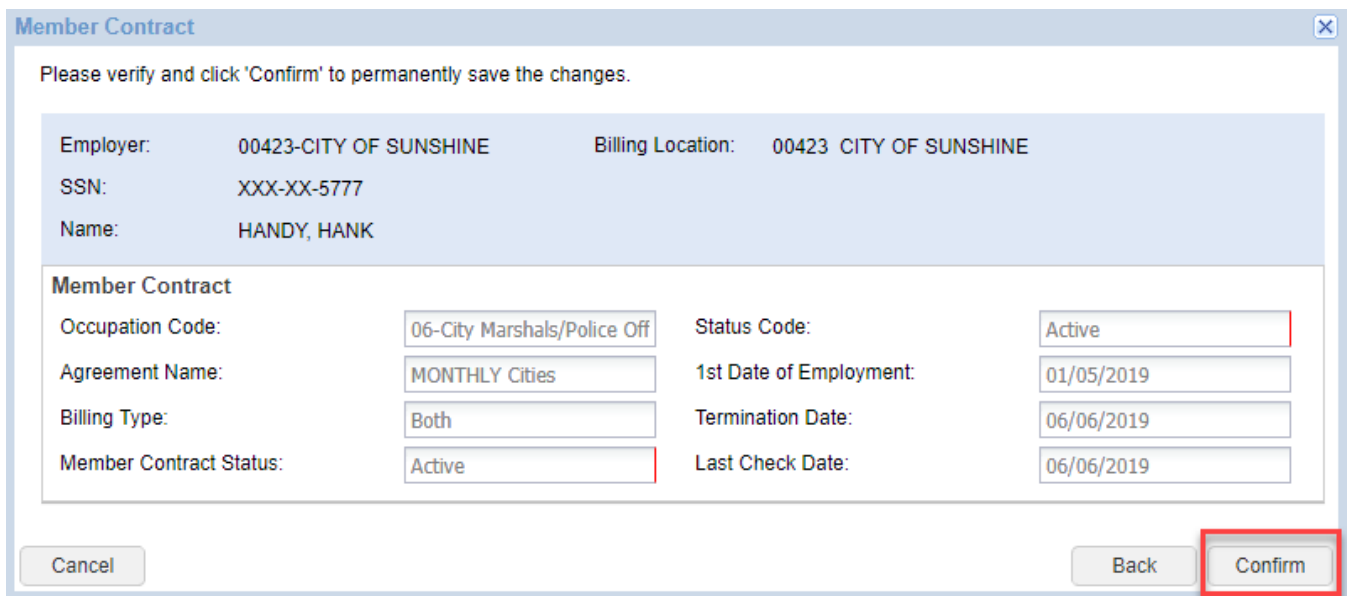
Member Contract Status:  Last Check Date:

Enter the **Termination Date** and **Last Check Date**. The last check date is the last pay date that will show an IPERS deduction from this terminating employee. Select **Save**.



The screenshot shows the 'Member Contract' form. At the top, it displays 'Employer: 00423-CITY OF SUNSHINE' and 'Billing Location: 00423 CITY OF SUNSHINE'. Below this, 'SSN: XXX-XX-5777' and 'Name: HANDY, HANK' are listed. The main section is titled 'Member Contract' and contains several fields: 'Occupation Code' (06-City Marshals/Police), 'Status Code' (Active), 'Agreement Name' (MONTHLY Cities), '1st Date of Employment' (01/05/2019), 'Billing Type' (Both), 'Termination Date' (MM/DD/YYYY), 'Member Contract Status' (Active), and 'Last Check Date' (MM/DD/YYYY). The 'Termination Date' and 'Last Check Date' fields are highlighted with a red box. At the bottom right, the 'Save' button is also highlighted with a red box.

Select **Confirm**.

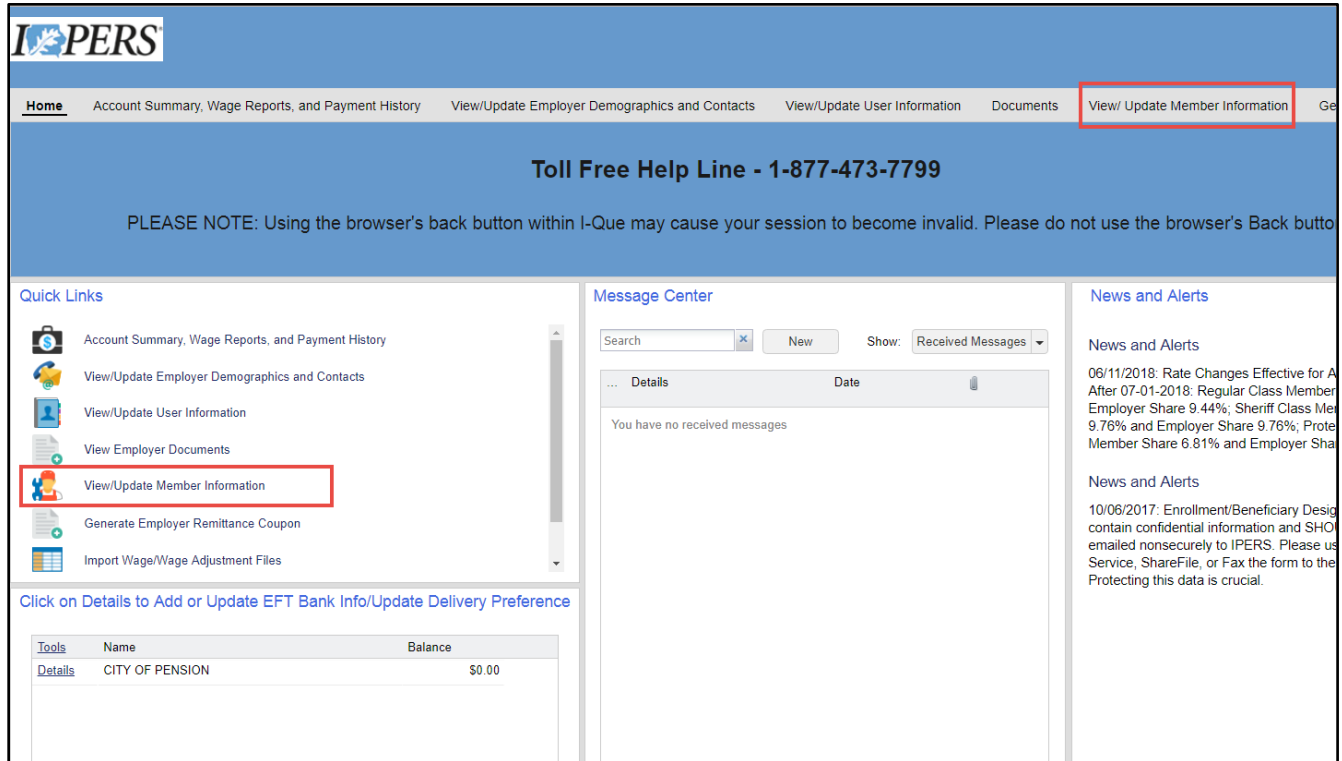


This screenshot shows the 'Member Contract' form after data entry. It includes the same header information as the previous form. The 'Member Contract' section now shows 'Occupation Code: 06-City Marshals/Police Off', 'Status Code: Active', 'Agreement Name: MONTHLY Cities', '1st Date of Employment: 01/05/2019', 'Billing Type: Both', 'Termination Date: 06/06/2019', 'Member Contract Status: Active', and 'Last Check Date: 06/06/2019'. A message at the top says 'Please verify and click 'Confirm' to permanently save the changes.' At the bottom right, the 'Confirm' button is highlighted with a red box.

**IMPORTANT:** Always create a new employment record if the member is rehired. IPERS will not allow you to remove the termination and last check date from an employee's record if that period of employment has been used in a benefit payment.

# Add a New Employment Record

On the I-Que home page, select **View/Update Member Information**.



**I-PERS**

Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents **View/ Update Member Information** Gen

**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not use the browser's Back button

**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information**
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
Details	CITY OF PENSION	\$0.00

**Message Center**

Search [x] New Show: Received Messages

Details Date

You have no received messages

**News and Alerts**

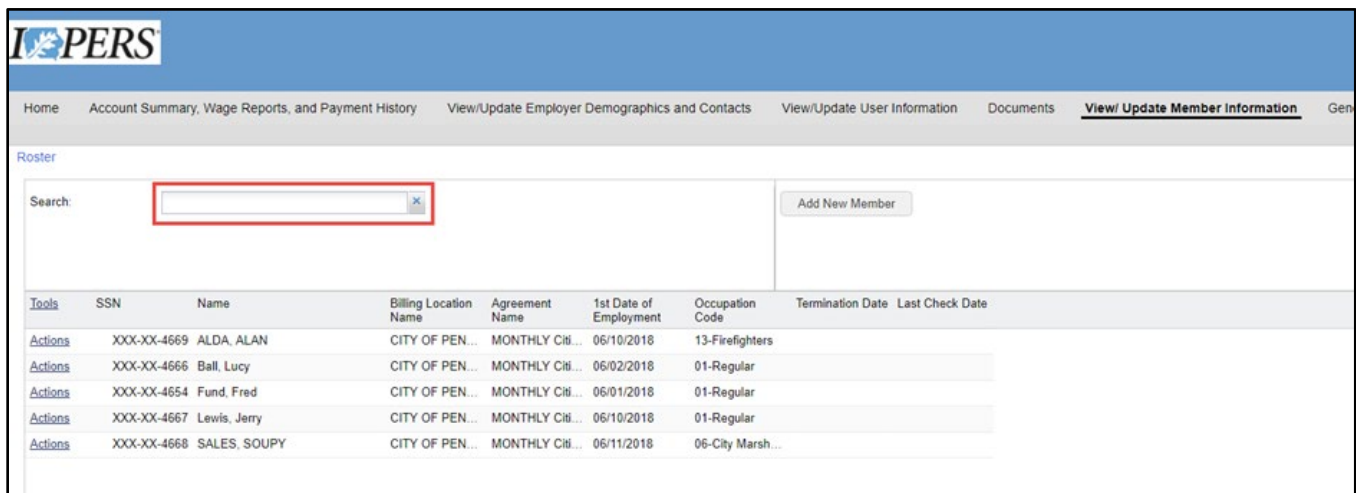
News and Alerts

06/11/2018: Rate Changes Effective for After 07-01-2018: Regular Class Member Employer Share 9.44%; Sheriff Class Member Share 9.76% and Employer Share 9.76%; Protective Class Member Share 6.81% and Employer Share 6.81%

News and Alerts

10/06/2017: Enrollment/Beneficiary Designation contain confidential information and SHOULD be emailed nonsecurely to I-PERS. Please use Service, ShareFile, or Fax the form to the I-PERS office. Protecting this data is crucial.

In the **Search** field, enter the employee's SSN or last name. As you type, I-Que will begin displaying member records with that information. \*\*\* Don't hit enter, the screen will go blank.



**I-PERS**

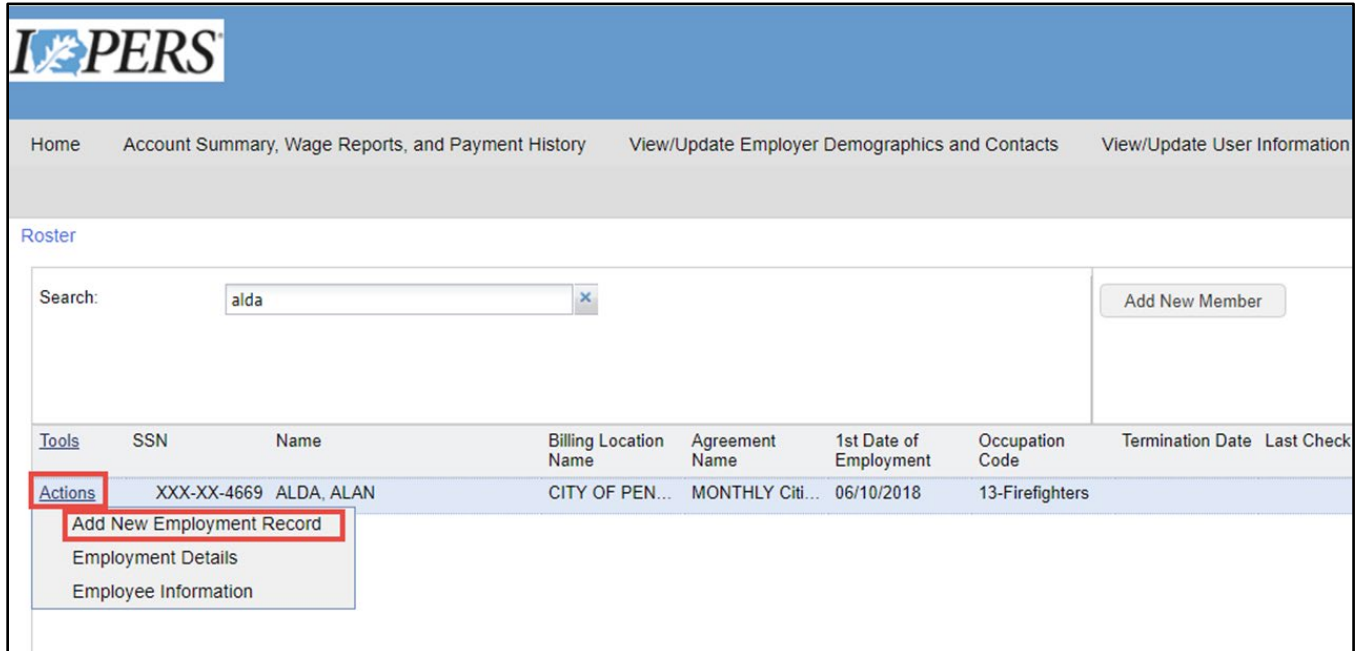
Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents **View/ Update Member Information** Gen

**Roster**

Search: [x] Add New Member

Tools	SSN	Name	Billing Location Name	Agreement Name	1st Date of Employment	Occupation Code	Termination Date	Last Check Date
Actions	XXX-XX-4669	ALDA, ALAN	CITY OF PEN...	MONTHLY Citi...	06/10/2018	13-Firefighters		
Actions	XXX-XX-4666	Ball, Lucy	CITY OF PEN...	MONTHLY Citi...	06/02/2018	01-Regular		
Actions	XXX-XX-4654	Fund, Fred	CITY OF PEN...	MONTHLY Citi...	06/01/2018	01-Regular		
Actions	XXX-XX-4667	Lewis, Jerry	CITY OF PEN...	MONTHLY Citi...	06/10/2018	01-Regular		
Actions	XXX-XX-4668	SALES, SOUPY	CITY OF PEN...	MONTHLY Citi...	06/11/2018	06-City Marsh...		

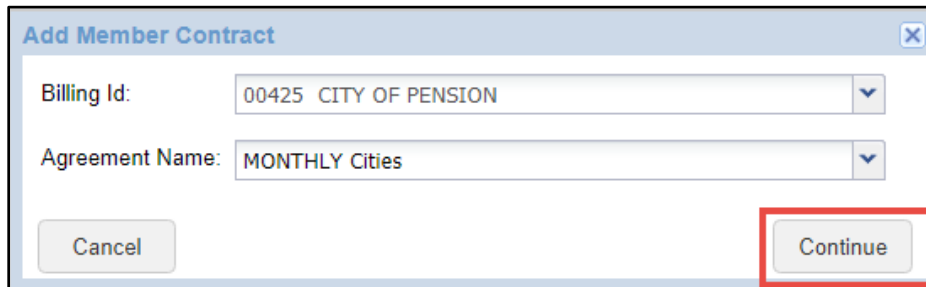
Select **Actions**. In this example, a new employment record will be added for this member. Select **Add New Employment Record**.



The screenshot shows the I-PERS Roster page. At the top, there is a navigation bar with links: Home, Account Summary, Wage Reports, and Payment History, View/Update Employer Demographics and Contacts, and View/Update User Information. Below the navigation bar, the page title is "Roster". There is a search bar with the text "alda" and a button "Add New Member". Below the search bar, there is a table with the following columns: Tools, SSN, Name, Billing Location Name, Agreement Name, 1st Date of Employment, Occupation Code, Termination Date, and Last Check. The table contains one row for member ALDA, ALAN. The "Tools" column for this row has a dropdown menu open, showing the following options: "Add New Employment Record", "Employment Details", and "Employee Information". The "Add New Employment Record" option is highlighted with a red box.

Tools	SSN	Name	Billing Location Name	Agreement Name	1st Date of Employment	Occupation Code	Termination Date	Last Check
Actions	XXX-XX-4669	ALDA, ALAN	CITY OF PEN...	MONTHLY Citi...	06/10/2018	13-Firefighters		

Select **Continue**.



The screenshot shows a dialog box titled "Add Member Contract". It contains two dropdown menus: "Billing Id:" with the value "00425 CITY OF PENSION" and "Agreement Name:" with the value "MONTHLY Cities". At the bottom of the dialog box, there are two buttons: "Cancel" and "Continue". The "Continue" button is highlighted with a red box.



Select the appropriate **Occupation Code** and enter the member's first date of employment. Select **Save**.

**Member Contract**

Employer: 00425-CITY OF PENSION      Billing Location: 00425 CITY OF PENSION  
 SSN: XXX-XX-4669  
 Name: ALDA, ALAN

**Member Contract**

Occupation Code: 01-Regular      Status Code: Active  
 Agreement Name: MONTHLY Cities      1st Date of Employment: 08/01/2018  
 Billing Type: Both      Termination Date: MM/DD/YYYY  
 Member Contract Status: Active      Last Check Date: MM/DD/YYYY

Cancel      Save

Your employment roster will display and the new employment record will be included in it.

**I-PERS**

Home   Account Summary, Wage Reports, and Payment History   View/Update Employer Demographics and Contacts   View/Update User Information

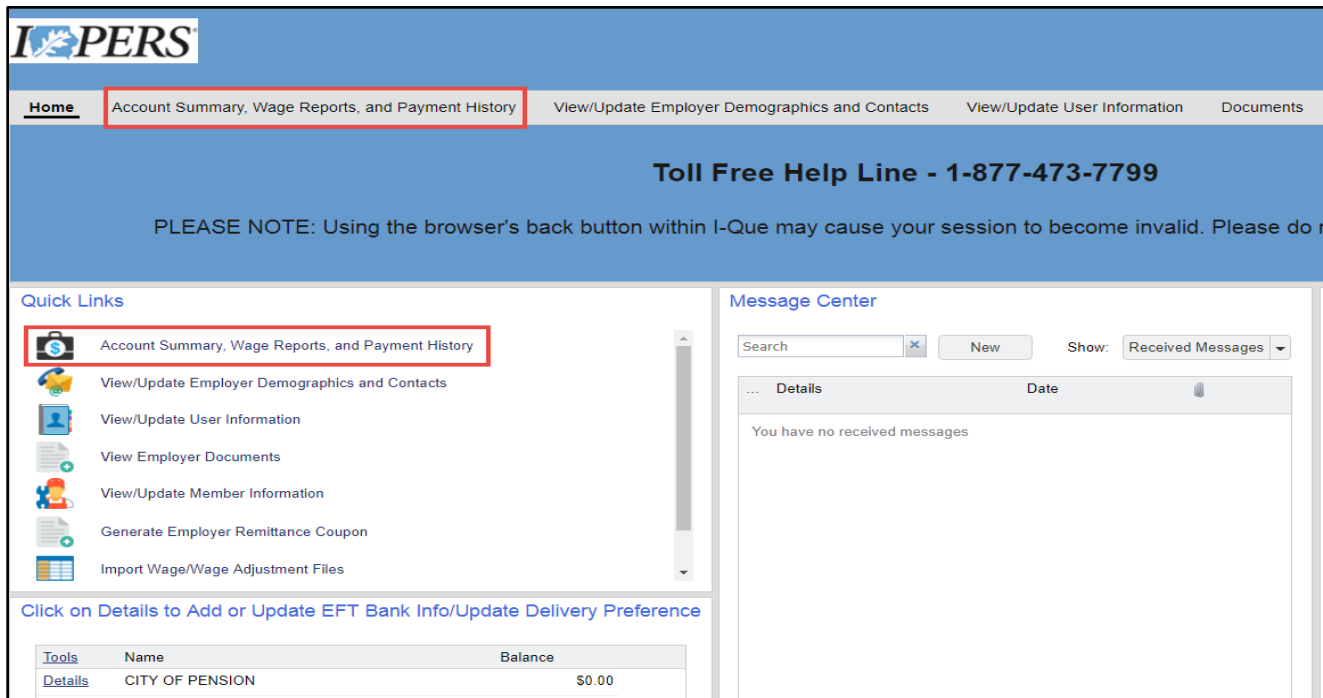
**Roster**

Search: alda      Add New Member

Tools	SSN	Name	Billing Location Name	Agreement Name	1st Date of Employment	Occupation Code	Termination Date	Last Check
<a href="#">Actions</a>	XXX-XX-4669	ALDA, ALAN	CITY OF PEN...	MONTHLY Citi...	06/10/2018	13-Firefighters		
<a href="#">Actions</a>	XXX-XX-4669	ALDA, ALAN	CITY OF PEN...	MONTHLY Citi...	08/01/2018	01-Regular		

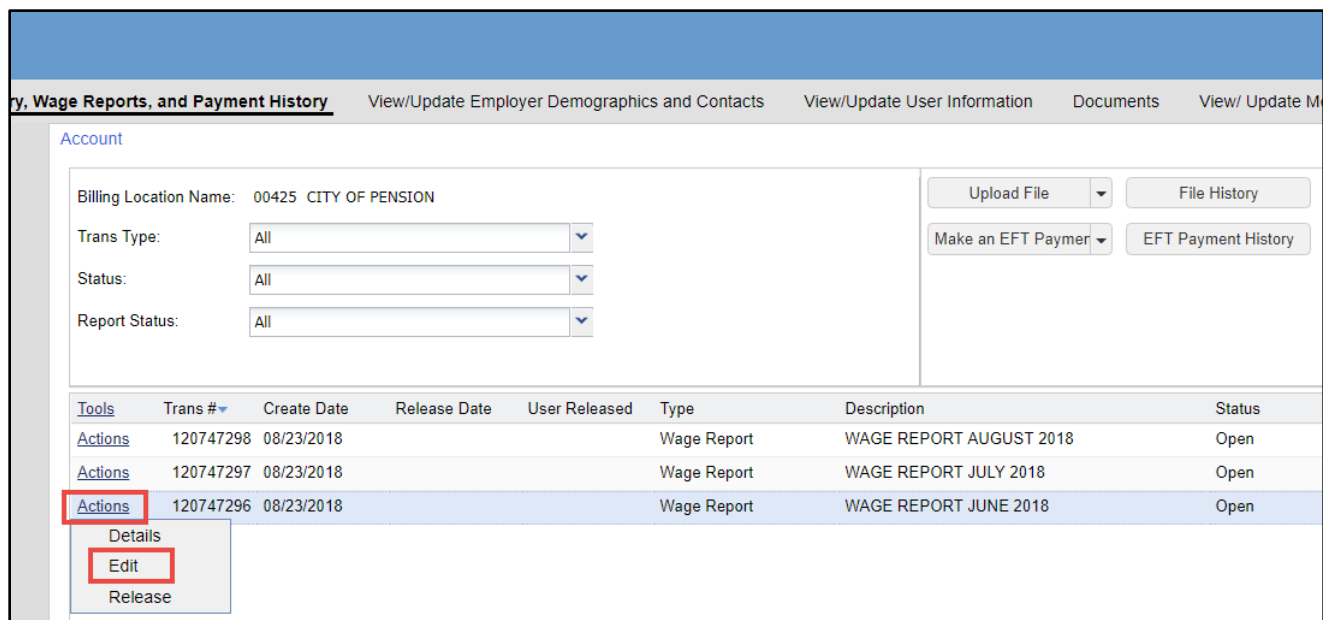
# Submit a Manual Wage Report

On the I-Que home page, select **Account Summary, Wage Reports, and Payment History**.



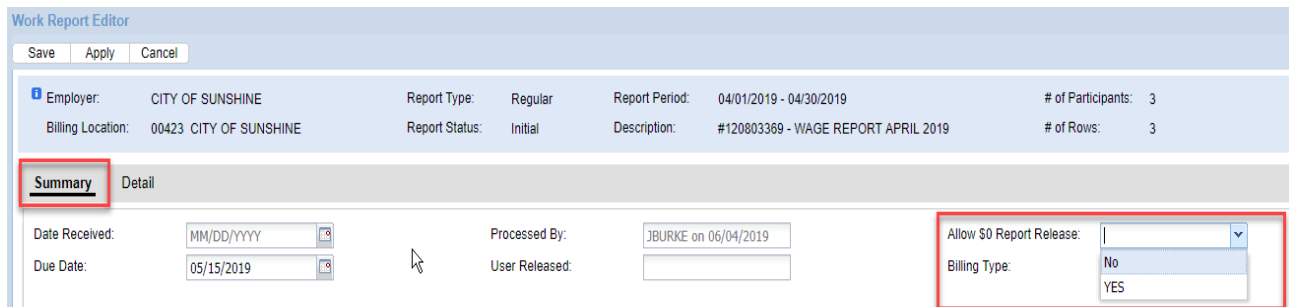
Find the wage report to be completed, click on the line and make sure it is highlighted.

Select **Actions**, then select **Edit** from the drop-down menu.

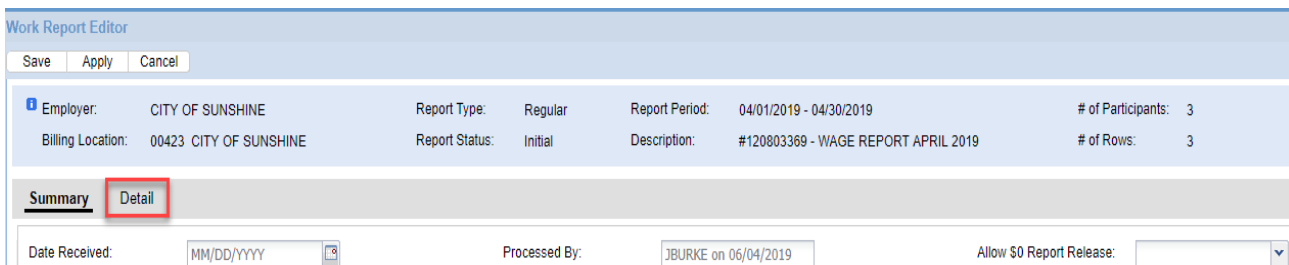


If you are releasing a Zero Wage Report, use the drop down arrow to select **Yes** on the Wage Report Editor Summary screen.

If not, go to the next step.

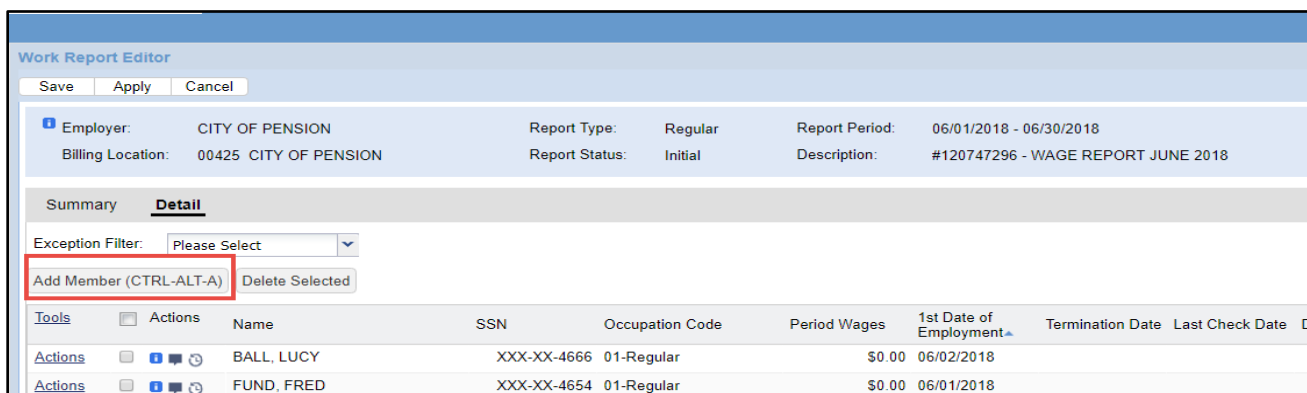


Select **Detail** to see all current members on your active roster and enter their IPERS-covered wages.



Your roster will be displayed. If you have added any new employees to I-Que (under View/Update Member Information), select **Add Member (CTRL-ALT-A)** to add them to this wage report.

**\*\*If no new members to add, go to the bottom of page 24.**



Enter the employee's SSN by clicking in the SSN field. Click Enter or hit the Tab key and the employee's name will autofill if you have already added them to the roster in I-Que.

**Work Report Editor**

Save Apply Cancel

Employer: CITY OF SUNSHINE Report Type: Regular Report Period: 04/01/2019 - 04/30/2019 # of Participants: 3  
Billing Location: 00423 CITY OF SUNSHINE Report Status: Initial Description: #120803369 - WAGE REPORT APRIL 2019 # of Rows: 3

Summary **Detail**

Exception Filter: Please Select

Add Member (CTRL-ALT-A) Delete Selected

Tools	Actions	Name	Ssn	Occupation Code	Period Wages	1st Date of Employment	Termination Date	Last Check Date	Date Released
Work...				01-Regular	\$0.00				
Work...		MORNING, G...	XXX-XX-5333	01-Regular	\$0.00	01/01/2019			

Select the appropriate **Occupation Code** and fill in the **1st Date of Employment** for the employee.

**Work Report Editor**

Save Apply Cancel

Employer: CITY OF SUNSHINE Report Type: Regular Report Period: 04/01/2019 - 04/30/2019 # of Participants: 3  
Billing Location: 00423 CITY OF SUNSHINE Report Status: Initial Description: #120803369 - WAGE REPORT APRIL 2019 # of Rows: 3

Summary **Detail**

Exception Filter: Please Select

Add Member (CTRL-ALT-A) Delete Selected

Tools	Actions	Name	Ssn	Occupation Code	Period Wages	1st Date of Employment	Termination Date	Last Check Date	Date Released
Work...		HANDY, HANK	XXX-XX-5777	01-Regular	\$0.00				
Work...		MORNING, G...	XXX-XX-5333	01-Regular	\$0.00	01/01/2019			
Work...		HANDY, HANK	XXX-XX-5777	06-City Marsh...	\$0.00	01/05/2019			
Work...		SHINE, STEVE	XXX-XX-3777	17-Part-time E...	\$0.00	01/02/2019			

Enter the **Period Wages** for each employee who earned wages during this wage report's period. Enter any **Termination Dates** and **Last Check Dates**, if applicable. Select **Save**.

**Work Report Editor**

Save Apply Cancel

Employer: CITY OF SUNSHINE Report Type: Regular Report Period: 04/01/2019 - 04/30/2019 # of Participants: 3  
Billing Location: 00423 CITY OF SUNSHINE Report Status: Initial Description: #120803369 - WAGE REPORT APRIL 2019 # of Rows: 3

Summary **Detail**

Exception Filter: Please Select

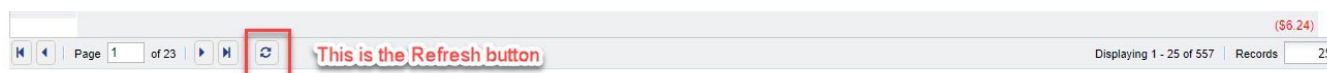
Add Member (CTRL-ALT-A) Delete Selected

Tools	Actions	Name	Ssn	Occupation Code	Period Wages	1st Date of Employment	Termination Date	Last Check Date	Date Released
Work...		SHINE, STEVE	XXX-XX-3777	13-Firefighters	\$300.00	04/01/2019			
Work...		MORNING, G...	XXX-XX-5333	01-Regular	\$1,050.00	01/01/2019			
Work...		HANDY, HANK	XXX-XX-5777	06-City Marsh...	\$700.00	01/05/2019			
Work...		SHINE, STEVE	XXX-XX-3777	17-Part-time E...	\$50.00	01/02/2019	04/30/2019	04/30/2019	

**\*\*Note**, if an employee had no wages, leave \$0.00 in the **Period Wages** field or delete the record.

The **Account Summary** screen will display. The amount owed for this wage report shows under the **Original Balance** column. If the amount owed is different than expected, go back and check the period wages for each employee, making corrections where necessary.

If the Original Balance is still displaying \$0.00 or you need it to update the changes made, go to the bottom left hand side of the screen next to the page number and select the Refresh button



Find the wage report to be completed, click on the line and make sure it is highlighted. Select **Actions**. Select **Release** to submit to IPERS.

**Wage Reports, and Payment History** | View/Update Employer Demographics and Contacts | View/Update User Information | Documents | View/ Update Member Information | Generate Employer Remittance Coupon

**Account**

Billing Location Name: 00425 CITY OF PENSION

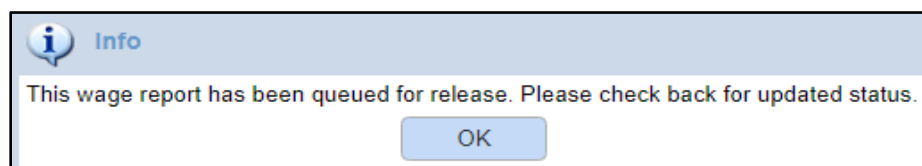
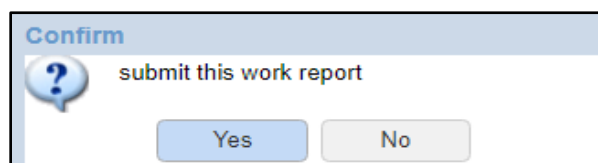
Trans Type: All | Status: All | Report Status: All

Upload File | File History | Make an EFT Paymer | EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Balance
Actions	120747298	08/23/2018			Wage Report	WAGE REPORT AUGUST 2018	Open	Initial	\$0.00	\$0.00
Actions	120747297	08/23/2018			Wage Report	WAGE REPORT JULY 2018	Open	Initial	\$0.00	\$0.00
Actions	120747296	08/23/2018			Wage Report	WAGE REPORT JUNE 2018	Open	Initial	\$1,730.89	\$1,730.89

Details | Edit | Release

Follow the prompts to submit the wage report.



**Important:** If any wages are incorrect after you release the report, wage adjustments will be necessary to correct them.

Account

Billing Location Name:

00423 CITY OF SUNSHINE

Trans Type:

All

Status:

All

Report Status:

All

Upload File

File History

Make an EFT Payment

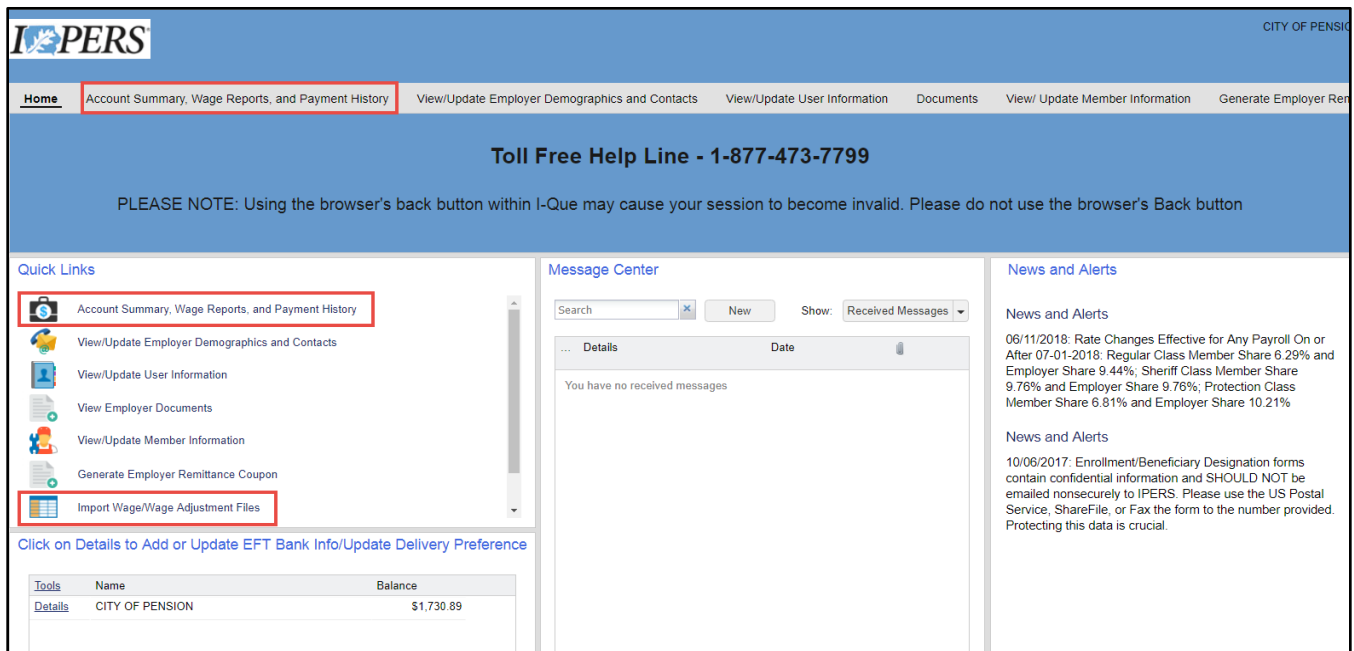
EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Bal...	Re
Export		06/04/2019			Payment	Dep Dt 06/04/2019-Chl# -Tr# 120803372	Open		(\$4,706.05)	(\$4,706.05)	
View Row		06/04/2019			Wage Report	WAGE REPORT JUNE 2019	Open	Initial	\$0.00	\$0.00	
Revert Settings		06/04/2019			Wage Report	WAGE REPORT MAY 2019	Open	Initial	\$0.00	\$0.00	
Advanced Sort		06/04/2019			Wage Report	WAGE REPORT APRIL 2019	Open	Initial	\$0.00	\$0.00	
Reports		Wage and Contribution Report		3GMOR...	Wage Report	WAGE REPORT MARCH 2019	Open	Released	\$1,455.00	\$1,455.00	Cc
Refresh		06/04/2019	06/04/2019	00423GMOR...	Wage Report	WAGE REPORT FEBRUARY 2019	Open	Released	\$1,685.75	\$1,685.75	Cc
25 Records		06/04/2019	06/04/2019	00423GMOR...	Wage Report	WAGE REPORT JANUARY 2019	Open	Released	\$1,565.30	\$1,565.30	Cc

[illegible]

# Import a Wage Report

On the I-Que home page, select **Account Summary, Wage Reports, and Payment History** or **Import Wage/Wage Adjustment Files**.



**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files

**Message Center**

Search: [x] New Show: Received Messages

Details Date

You have no received messages

**News and Alerts**

News and Alerts

06/11/2018: Rate Changes Effective for Any Payroll On or After 07-01-2018: Regular Class Member Share 6.29% and Employer Share 9.44%; Sheriff Class Member Share 9.76% and Employer Share 9.76%; Protection Class Member Share 6.81% and Employer Share 10.21%

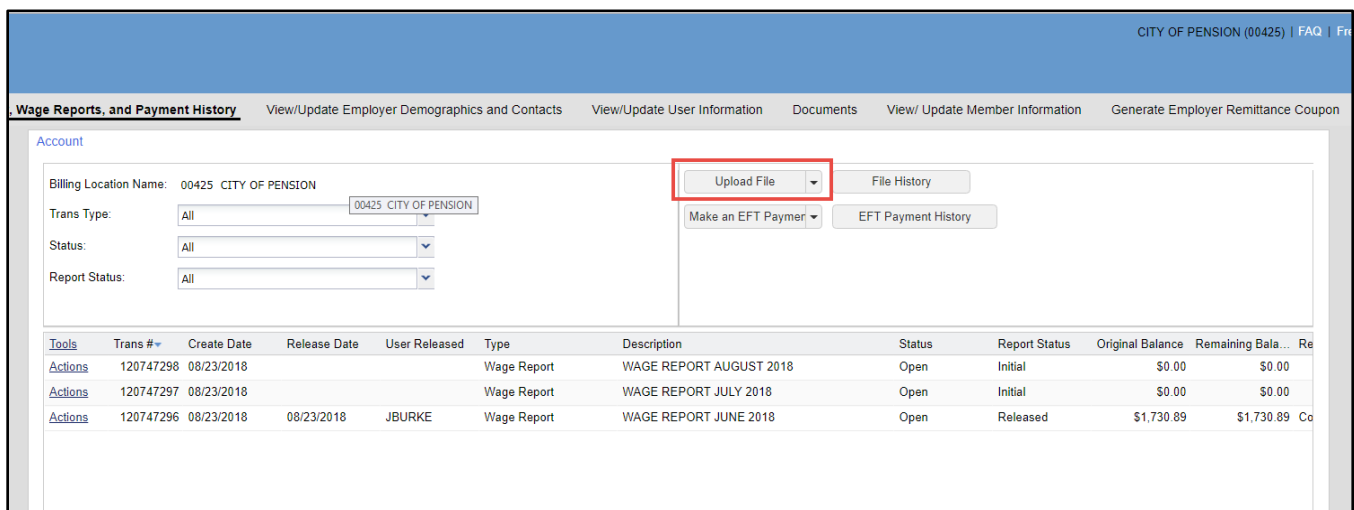
News and Alerts

10/06/2017: Enrollment/Beneficiary Designation forms contain confidential information and SHOULD NOT be emailed nonsecurely to IPERS. Please use the US Postal Service, ShareFile, or Fax the form to the number provided. Protecting this data is crucial.

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
Details	CITY OF PENSION	\$1,730.89

Select **Upload File**.



**Wage Reports, and Payment History**

Account

Billing Location Name: 00425 CITY OF PENSION

Trans Type: All 00425 CITY OF PENSION

Status: All

Report Status: All

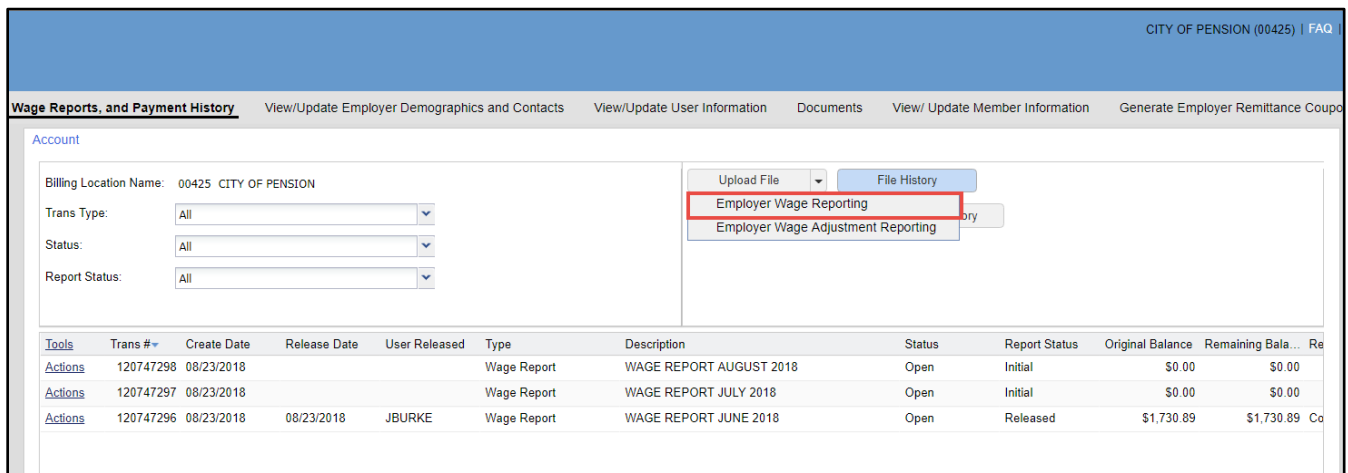
Upload File File History

Make an EFT Paymer EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Bala...	Re
Actions	120747298	08/23/2018			Wage Report	WAGE REPORT AUGUST 2018	Open	Initial	\$0.00	\$0.00	
Actions	120747297	08/23/2018			Wage Report	WAGE REPORT JULY 2018	Open	Initial	\$0.00	\$0.00	
Actions	120747296	08/23/2018	08/23/2018	JBURKE	Wage Report	WAGE REPORT JUNE 2018	Open	Released	\$1,730.89	\$1,730.89	Co



Select **Employer Wage Reporting** from the drop down.



CITY OF PENSION (00425) | FAQ

**Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon

Account

Billing Location Name: 00425 CITY OF PENSION

Trans Type: All

Status: All

Report Status: All

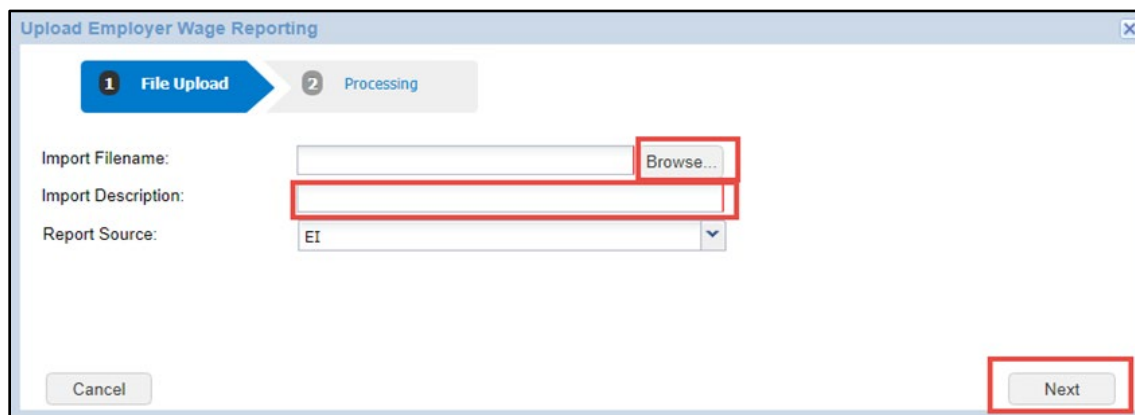
Upload File File History

Employer Wage Reporting

Employer Wage Adjustment Reporting

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Balance	Reported
<a href="#">Actions</a>	120747298	08/23/2018			Wage Report	WAGE REPORT AUGUST 2018	Open	Initial	\$0.00	\$0.00	
<a href="#">Actions</a>	120747297	08/23/2018			Wage Report	WAGE REPORT JULY 2018	Open	Initial	\$0.00	\$0.00	
<a href="#">Actions</a>	120747296	08/23/2018	08/23/2018	JBURKE	Wage Report	WAGE REPORT JUNE 2018	Open	Released	\$1,730.89	\$1,730.89	Co

Select **Browse** to find your wage report import file. Fill in the **Import Description**. Select **Next**.



Upload Employer Wage Reporting

1 File Upload 2 Processing

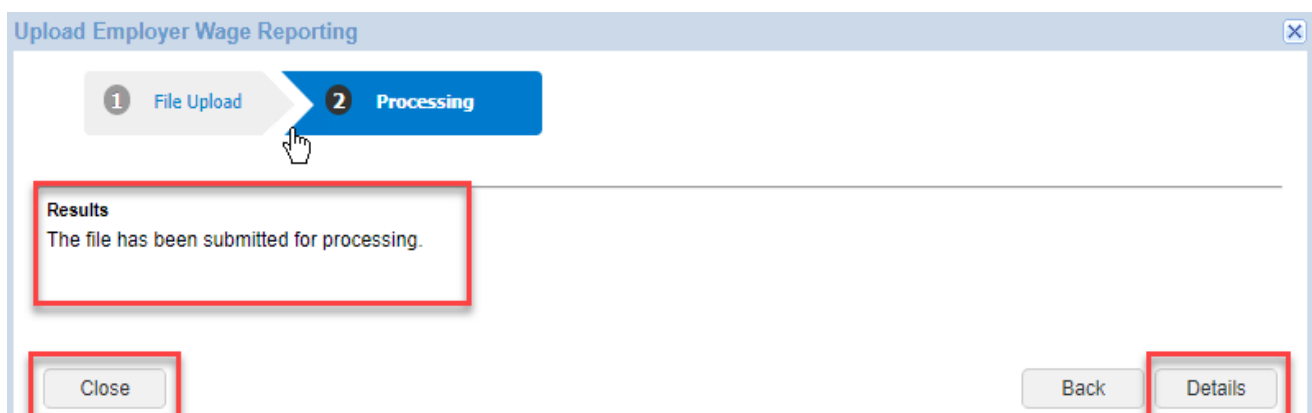
Import Filename: Browse...

Import Description:

Report Source: EI

Cancel Next

To validate the file, select **Details** or **Close**. If you select **Details** go to bottom of page 29.



Upload Employer Wage Reporting

1 File Upload 2 Processing

Results

The file has been submitted for processing.

Close Back Details

If you selected **Close**, you can find the imported file under File History on the Account Summary page.

**Account Summary, Wage Reports, and Payment History** | View/Update Employer Demographics and Contacts | View/Update User Information | Documents | View/ Update Member Information | Generate Employer Remittance Coupon | Meeting

**Account**

Billing Location Name: 00423 CITY OF SUNSHINE

Trans Type: All

Status: All

Report Status: All

Upload File | **File History**

Make an EFT Payment | EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Bal...	Re
<a href="#">Details</a>	120803372	06/04/2019			Payment	Dep Dt 06/04/2019-Chk# -Trf# 120803372	Open		(\$4,706.05)	(\$4,706.05)	
<a href="#">Actions</a>	120803371	06/04/2019			Wage Report	WAGE REPORT JUNE 2019	Open	Initial	\$0.00	\$0.00	
<a href="#">Actions</a>	120803370	06/04/2019			Wage Report	WAGE REPORT MAY 2019	Open	Initial	\$0.00	\$0.00	
<a href="#">Actions</a>	120803369	06/04/2019			Wage Report	WAGE REPORT APRIL 2019	Open	Initial	\$0.00	\$0.00	

Select **Actions**, then **Details**

File History

Close

Import #: All Date Range: 05/27/2019 To: 06/10/2019

Status: All

Tools	Import Header Id	Process Flag	Import Name	Import Description	Status	File Load Start	File Process Start	Duration	Rows Loaded	Rows Processed	Rows in Error	Rows in Exception	Rows Successfully Processed	Inserted By	Has Comment Flag
Actions	184252	Validated	Employer Wag...	ERID 00423 (...)	Validated with Excepti...	06/10/2019 10:55 AM ...	06/10/2019 11:11 AM ...	< 1 sec	6	0	0	0	0	00423GMOR...	
Details	184250	Validated	Employer Wag...	ERID 00423 (...)	Validated with Errors	06/07/2019 03:05 PM ...	06/07/2019 03:15 PM ...	1 sec	6	0	0	0	0	00423GMOR...	
Validate	184248	Completed	Employer Wag...	ERID 00423 (...)	Voided	06/05/2019 03:50 PM ...	06/05/2019 03:50 PM ...	3 sec	6	0	0	0	0	JBURKE	

Validate  
Process  
Void  
Download  
Export

The following screen will display. Select **Validate**.

**Details**

Save Cancel

Import Name: Employer Wage Reporting Import Description: ERID 00423 (2019-05) May 201...

Status: Not Processed Import Header Id: 184250 Inserted By: 06/07/2019

Process Flag: Ready Inserted Date: 06/07/2019 Updated By: 06/07/2019

Summary **Details**

Import Detail Status: All Type: All Display Rows: From To Show Deleted Rows: ☐

New Row Set All to Resubmit Set None to Resubmit **Validate** Void Download

Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	Agency Code	Occupation Code	SSN	Last Name	First Name
<a href="#">Actions</a>		1	Not Processed		<input checked="" type="checkbox"/>	1	00423	20190	50	000100626	22	
<a href="#">Actions</a>		2	Not Processed		<input checked="" type="checkbox"/>	2	00423		01	777555333	MORNING	GLORIA
<a href="#">Actions</a>		3	Not Processed		<input checked="" type="checkbox"/>	2	00423		06	333555777	HANDY	HANK
<a href="#">Actions</a>		4	Not Processed		<input checked="" type="checkbox"/>	2	00423		17	555333777	SHINE	STEVE
<a href="#">Actions</a>		5	Not Processed		<input checked="" type="checkbox"/>	2	00423		13	333777555	FIRESTONE	EDWARD
<a href="#">Actions</a>		6	Not Processed		<input checked="" type="checkbox"/>	3	00423	20190	50	000000004		

If the **Import Detail Status** is **Validated With Errors**, click on one of the lines in the file details, then select **Tools**. Under the Tools drop-down menu, select **Reports**, then **Standard Import Report**.

**CITY OF PENSION (00425) | PAID**

### Details

Edit Close

Import Name:	Employer Wage Reporting	Import Description:	ERID 00425 (2018-07) .July Wag...
Status:	Validated with Errors	Import Header Id:	158977
Process Flag:	Validated	Inserted By:	08/23/2018
		Updated By:	08/23/2018

Summary Details

Import Detail Status: All Type: All Display Rows: From To Show Deleted Rows:

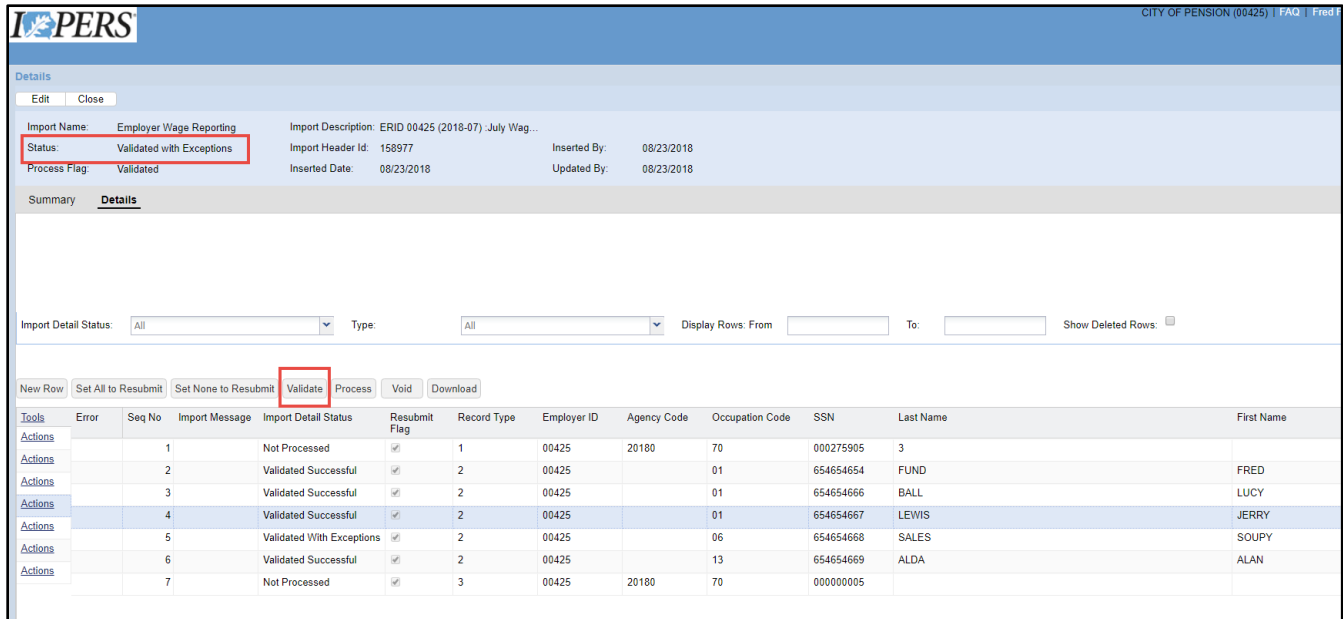
New Row Set All to Resubmit Set None to Resubmit Validate Process Void Download

Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	Agency Code	Occupation Code	SSN	Last Name	First Name
Export												
View Row		1	Not Processed			1	00425	20180	70	000275905	3	
Revert Settings		2	Validated Successful			2	00425		01	654654654	FUND	FRED
Advanced Sort		3	Validated Successful			2	00425		01	654654666	BALL	LUCY
Reports			Standard Import Report	With Errors		2	00425		01	654654667	LEWIS	JERRY
Refresh		5	Validated With Exceptions			2	00425		06	654654668	SALES	SOUPY
Records		6	Validated Successful			2	00425		13	654654669	ALDA	ALAN
Actions		7	Not Processed			3	00425	20180	70	000000005		

The **Standard Import Report** will display. Select **Print** or **Export**.

[illegible]

Correct the errors on the Standard Import Report either in the member's account or on the Details screen shown below. Select **Validate**, to re-validate your file. When all errors are fixed the **Import Detail Status** will be **Validated with Exceptions** or **Validated Successful**. Please note, it may not be necessary to upload a new file.



**I-PERS** CITY OF PENSION (00425) | FAQ | Fred

**Details**  
Edit Close

Import Name: Employer Wage Reporting Import Description: ERID 00425 (2018-07) July Wag...  
 Status: **Validated with Exceptions** Import Header Id: 158977 Inserted By: 08/23/2018  
 Process Flag: Validated Inserted Date: 08/23/2018 Updated By: 08/23/2018

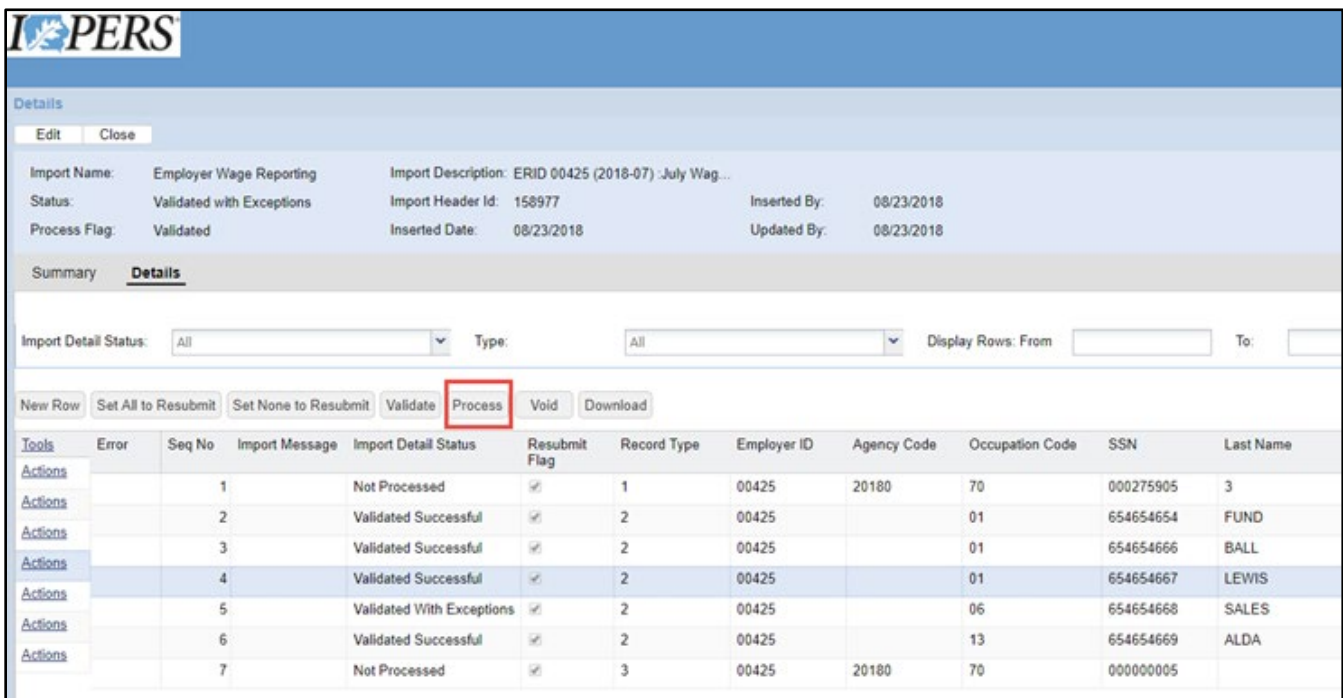
Summary **Details**

Import Detail Status: All Type: All Display Rows: From To Show Deleted Rows: ☐

New Row Set All to Resubmit Set None to Resubmit **Validate** Process Void Download

Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	Agency Code	Occupation Code	SSN	Last Name	First Name
Actions		1	Not Processed		1	00425	20180	70	000275905	3		
Actions		2	Validated Successful		2	00425		01	654654654	FUND		FRED
Actions		3	Validated Successful		2	00425		01	654654666	BALL		LUCY
Actions		4	Validated Successful		2	00425		01	654654667	LEWIS		JERRY
Actions		5	Validated With Exceptions		2	00425		06	654654668	SALES		SOUPY
Actions		6	Validated Successful		2	00425		13	654654669	ALDA		ALAN
Actions		7	Not Processed		3	00425	20180	70	000000005			

Once the imported file is **Validated with Exceptions** or **Validated Successful**, select **Process**.



**I-PERS**

**Details**  
Edit Close

Import Name: Employer Wage Reporting Import Description: ERID 00425 (2018-07) July Wag...  
 Status: Validated with Exceptions Import Header Id: 158977 Inserted By: 08/23/2018  
 Process Flag: Validated Inserted Date: 08/23/2018 Updated By: 08/23/2018

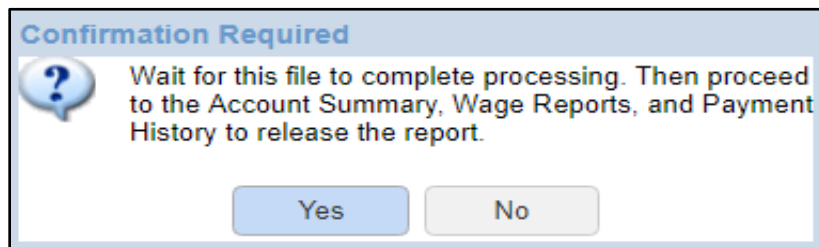
Summary **Details**

Import Detail Status: All Type: All Display Rows: From To

New Row Set All to Resubmit Set None to Resubmit Validate **Process** Void Download

Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	Agency Code	Occupation Code	SSN	Last Name
Actions		1	Not Processed		1	00425	20180	70	000275905	3	
Actions		2	Validated Successful		2	00425		01	654654654	FUND	
Actions		3	Validated Successful		2	00425		01	654654666	BALL	
Actions		4	Validated Successful		2	00425		01	654654667	LEWIS	
Actions		5	Validated With Exceptions		2	00425		06	654654668	SALES	
Actions		6	Validated Successful		2	00425		13	654654669	ALDA	
Actions		7	Not Processed		3	00425	20180	70	000000005		

Read the confirmation message and select **Yes**.



The status of your imported file should now be **Processed with Exceptions** or **Processed Successfully**. Select **Close**.

Details

Edit **Close**

Import Name: Employer Wage Reporting Import Description: ERID 00425 (2018-07) :July Wag...

Status: **Processed with Exceptions** Import Header Id: 158977 Inserted By: 08/23/2018

Process Flag: Completed Inserted Date: 08/23/2018 Updated By: 08/23/2018

Summary **Details**

Import Detail Status: All Type: All Display Rows: From To:

New Row: Set All to Resubmit Set None to Resubmit Download

Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	Agency Code	Occupation Code	SSN	Last Name
Actions		1	Not Processed		<input checked="" type="checkbox"/>	1	00425	20180	70	000275905	3
Actions		2	Processed Successfully		<input type="checkbox"/>	2	00425		01	654654654	FUND

To see the amount due from this imported wage report, select the **Refresh** icon at the bottom of the page.

**Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon

Account

Billing Location Name: 00425 CITY OF PENSION

Trans Type: All

Status: All

Report Status: All

Upload File File History

Make an EFT Paymer EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Bala...	Re
Actions	120747298	08/23/2018			Wage Report	WAGE REPORT AUGUST 2018	Open	Initial	\$0.00	\$0.00	
Actions	120747297	08/23/2018			Wage Report	WAGE REPORT JULY 2018	Open	Initial	<b>\$4,470.78</b>	\$4,470.78	
										\$4,470.78	
										\$6,201.67	

Page 1 of 2

Displaying 1 - 2 of 3 Records 2

Verify the amount owed. If it is accurate, release the wage report by selecting **Actions** and Release button under the appropriate wage report.

**Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon

Account

Billing Location Name: 00425 CITY OF PENSION

Trans Type: All

Status: All

Report Status: All

Upload File File History

Make an EFT Paymer EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Bala...	Re
Actions	120747298	08/23/2018			Wage Report	WAGE REPORT AUGUST 2018	Open	Initial	\$0.00	\$0.00	
Actions	120747297	08/23/2018			Wage Report	WAGE REPORT JULY 2018	Open	Initial	\$4,470.78	\$4,470.78	

Details

Edit

Release

Follow the prompts to submit the report.

**Confirm**

? submit this work report

Yes No

**Info**

This wage report has been queued for release. Please check back for updated status.

OK

Confirm the file's **Report Status** is **Released**. You may need to refresh the screen to see updated status.

**Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon

Account

Billing Location Name: 00425 CITY OF PENSION

Trans Type: All

Status: All

Report Status: All

Upload File File History

Make an EFT Paymer EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Bala...	Re
Actions	120747298	08/23/2018			Wage Report	WAGE REPORT AUGUST 2018	Open	Initial	\$0.00	\$0.00	
Actions	120747297	08/23/2018	08/23/2018	JBURKE	Wage Report	WAGE REPORT JULY 2018	Open	Released	\$4,470.78	\$4,470.78	Co

Account

Billing Location Name:

00423 CITY OF SUNSHINE

Trans Type:

All

Status:

All

Report Status:

All

Upload File

File History

Make an EFT Payment

EFT Payment History

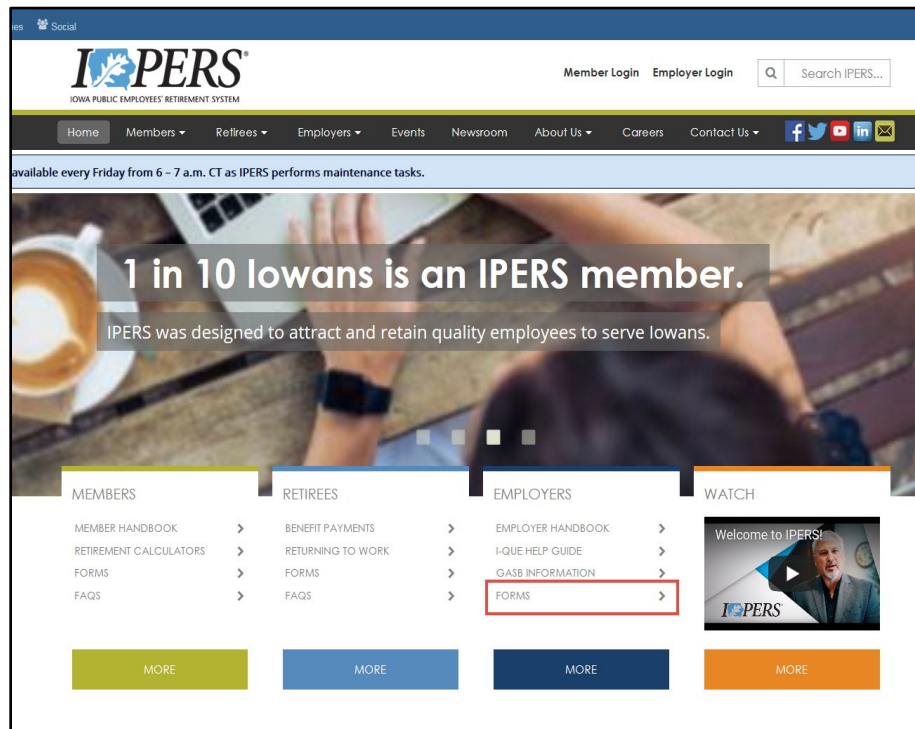
Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Bal...	Re
Export		06/04/2019			Payment	Dep Dt 06/04/2019-Chl# -Tr# 120803372	Open		(\$4,706.05)	(\$4,706.05)	
View Row		06/04/2019			Wage Report	WAGE REPORT JUNE 2019	Open	Initial	\$0.00	\$0.00	
Revert Settings		06/04/2019			Wage Report	WAGE REPORT MAY 2019	Open	Initial	\$0.00	\$0.00	
Advanced Sort		06/04/2019			Wage Report	WAGE REPORT APRIL 2019	Open	Initial	\$0.00	\$0.00	
Reports		06/04/2019			Wage and Contribution Report	WAGE REPORT MARCH 2019	Open	Released	\$1,455.00	\$1,455.00	Cc
Refresh		06/04/2019	06/04/2019	00423GMOR...	Wage Report	WAGE REPORT FEBRUARY 2019	Open	Released	\$1,685.75	\$1,685.75	Cc
Records		06/04/2019	06/04/2019	00423GMOR...	Wage Report	WAGE REPORT JANUARY 2019	Open	Released	\$1,565.30	\$1,565.30	Cc

[illegible]



## Import a Wage Adjustment

Go to [www.ipers.org](http://www.ipers.org) and select **Forms** under the **Employers** quick links.

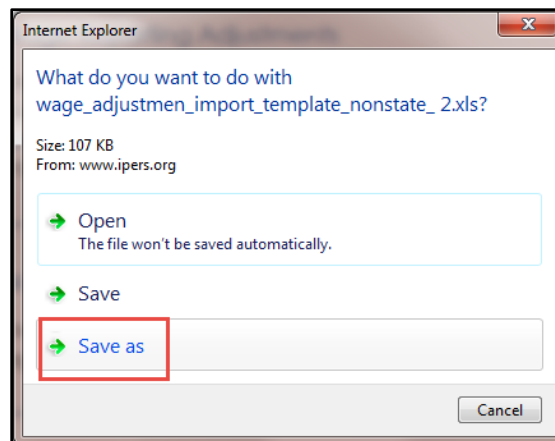


Scroll to the bottom of the Employer Forms webpage. Under Wage Reporting Adjustments, select **Wage Adjustment Import Spreadsheet**.

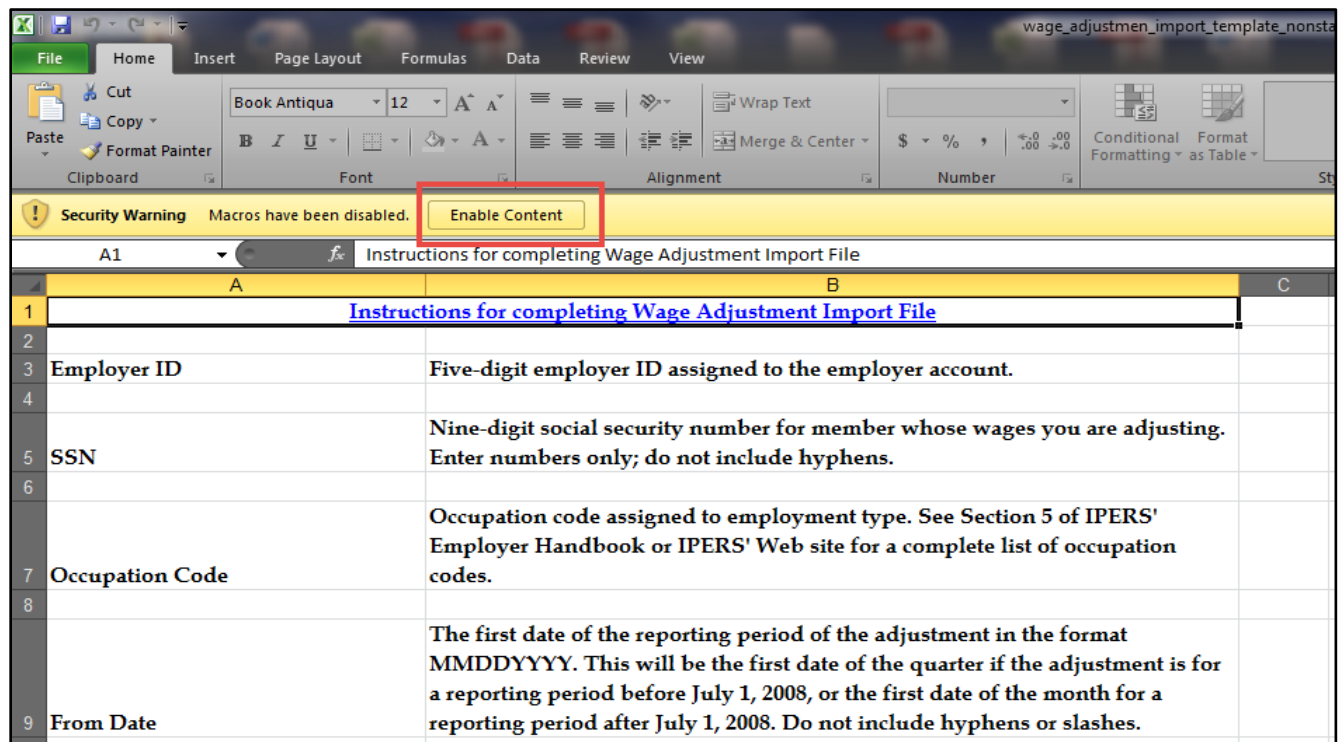
### Wage Reporting Adjustments

Use this form to request corrections to wages that were unreported or erroneously reported during a previous quarter. If you have a PC with Windows and Excel 2003, you may also use the [Wage Adjustment Import Spreadsheet](#) to create and save a spreadsheet to your computer. You may then export the spreadsheet to IPERS through I-Que.

Select **Save As** to save the spreadsheet to your computer.



Close the website version of the spreadsheet. Open the spreadsheet saved on your computer. It will open to the instructions sheet with a Security Warning stating, "Macros have been disabled." Select **Enable Content**.



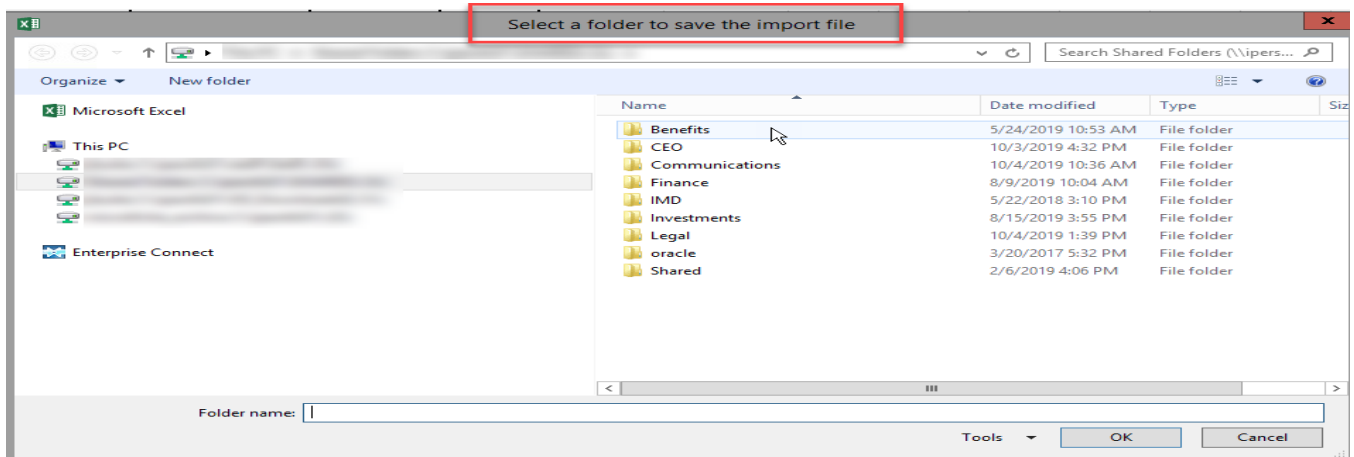
Select the **Import Data** tab to add information about your wage adjustment.

Instructions for completing Wage Adjustment Import File	
A	B
1	<a href="#">Instructions for completing Wage Adjustment Import File</a>
2	
3	Employer ID
4	Five-digit employer ID assigned to the employer account.
5	SSN
6	Nine-digit social security number for member whose wages you are adjusting. Enter numbers only; do not include hyphens.
7	Occupation Code
8	Occupation code assigned to employment type. See Section 5 of IPERS' Employer Handbook or IPERS' Web site for a complete list of occupation codes.
9	From Date
10	The first date of the reporting period of the adjustment in the format MMDDYYYY. This will be the first date of the quarter if the adjustment is for a reporting period before July 1, 2008, or the first date of the month for a reporting period after July 1, 2008. Do not include hyphens or slashes.
11	To Date
12	The last date of the reporting period of the adjustment in the format MMDDYYYY. This will be the last date of the quarter if the adjustment is for a reporting period before July 1, 2008, or the last date of the month for a reporting period after July 1, 2008. Do not include hyphens or slashes.
13	Wage Adjustment Amount
14	The dollar amount that you are increasing or decreasing the originally reported wages by. Include a negative sign in front of the dollar amount when decreasing wages.
15	Final Wages
16	The sum of the originally reported wages and the wage adjustment amount in the previous two columns. Must be at least \$0.00.
17	Adjustment Reason Code
18	The reason code number for the wage adjustment from the list below.
19	Corrected SSN
20	If correcting wages reported under an incorrect SSN, enter the correct SSN here.
21	When completely done, hit "Create Import File" button. This will save this file to your desktop.
22	The Wage Adjustment Report will now be available to process using the import feature of I-Que.
23	

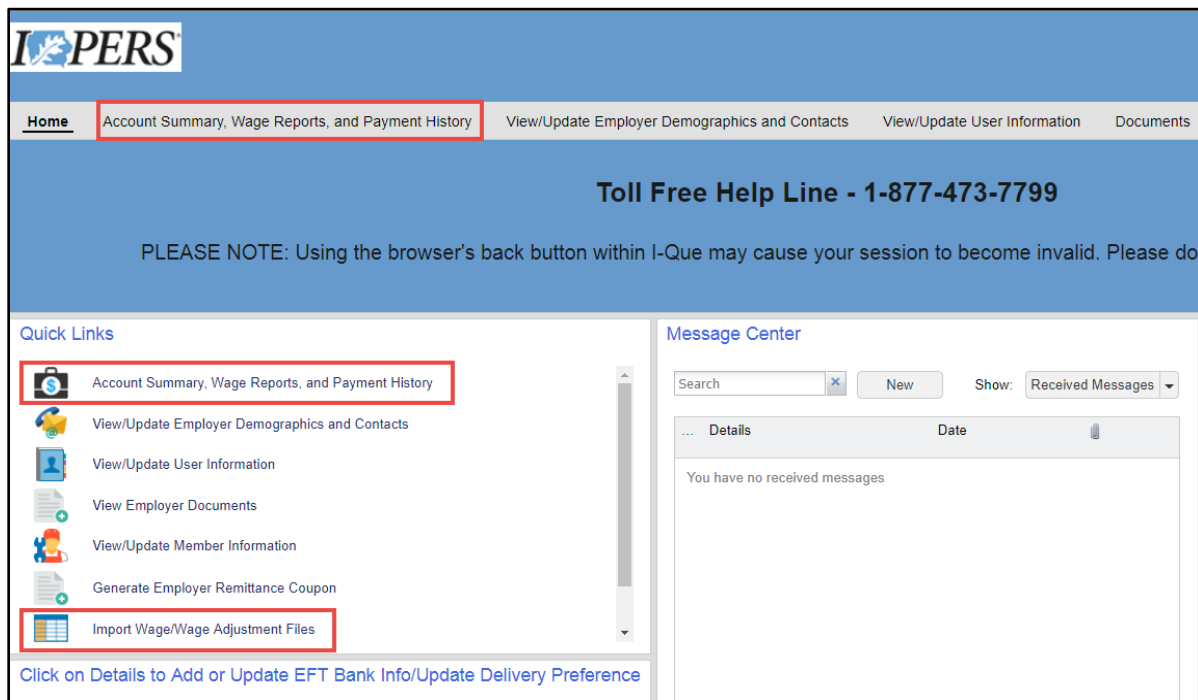
Enter the information exactly as requested (a sample header line is shown below) or the file will not process correctly when imported. When finished, select the blue **Create Import File** to export the file to your desired location.

wage_adjustmen_import_template_nonstate_2.xls [Compatibility Mode] - Microsoft Excel									
Q5	C	D	F	G	I	M	O	P	Q
4	Employer ID	SSN	Occupation Code	From Date (MMDDYYYY)	To Date (MMDDYYYY)	Wage Adjustment Amount	Final Wages	Adjustment Reason Code	Corrected SSN
5	425	654654666	01	06012018	06302018	\$1,000.00	\$3,356.56	03	
6									

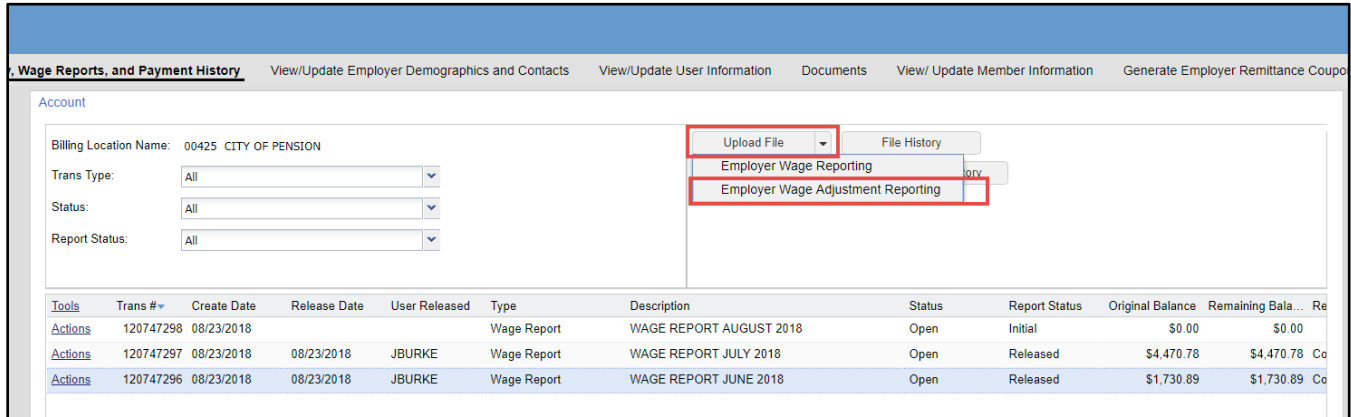
Chose where you wish to save this file and then Select **OK** and close the Wage Adjustment Import Spreadsheet.



Now that you have created your wage adjustment import file, log in to I-Que. On the I-Que home page, select **Import Wage/Wage Adjustment Files** or **Account Summary, Wage Reports, and Payment History**.



Select **Upload File**. In the drop-down menu, select **Employer Wage Adjustment Reporting**.



**Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon

Account

Billing Location Name: 00425 CITY OF PENSION

Trans Type: All

Status: All

Report Status: All

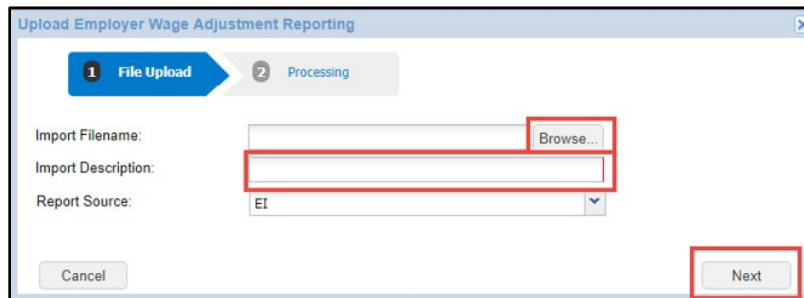
Upload File File History

Employer Wage Reporting

Employer Wage Adjustment Reporting

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Balance	Re
Actions	120747298	08/23/2018			Wage Report	WAGE REPORT AUGUST 2018	Open	Initial	\$0.00	\$0.00	
Actions	120747297	08/23/2018	08/23/2018	JBURKE	Wage Report	WAGE REPORT JULY 2018	Open	Released	\$4,470.78	\$4,470.78	Co
Actions	120747296	08/23/2018	08/23/2018	JBURKE	Wage Report	WAGE REPORT JUNE 2018	Open	Released	\$1,730.89	\$1,730.89	Co

Select **Browse** to locate your wage adjustment import file. Add an **Import Description**. Select **Next**.



Upload Employer Wage Adjustment Reporting

1 File Upload 2 Processing

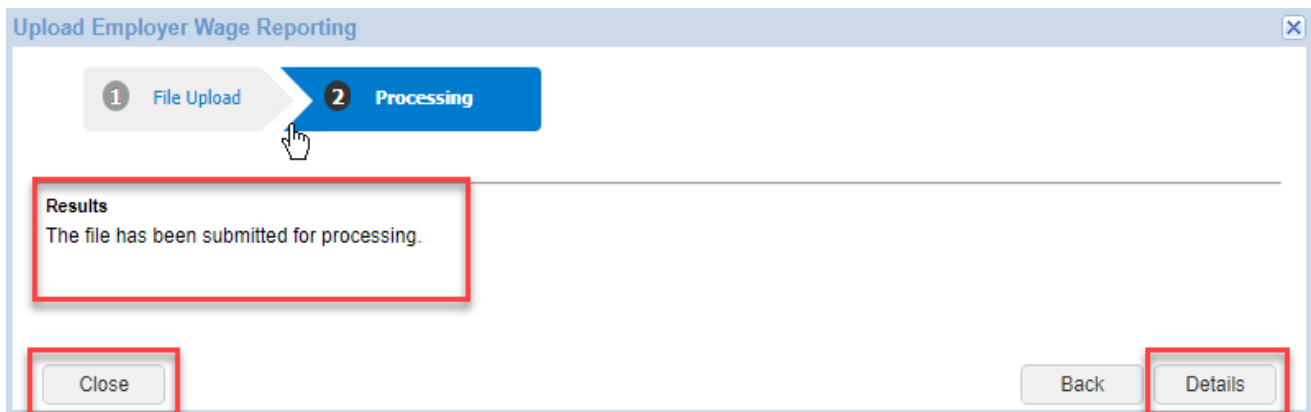
Import Filename: Browse...

Import Description:

Report Source: EI

Cancel Next

A message will appear indicating that the file has been submitted. To validate the Wage Adjustment Import file, select **Details**. Otherwise, select **Close**. If you selected **Details** go to bottom of page 40.



Upload Employer Wage Reporting

1 File Upload 2 Processing

Results

The file has been submitted for processing.

Close Back Details

If you selected **Close**, you can find the imported file under File History on the Account Summary page.

**Account Summary, Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon Meeting

Account

Billing Location Name: 00423 CITY OF SUNSHINE

Trans Type: All

Status: All

Report Status: All

Upload File File History

Make an EFT Payment EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Bal...	Re
Details	120803372	06/04/2019			Payment	Dep Dt 06/04/2019-Chk# -Trf# 120803372	Open		(\$4,706.05)	(\$4,706.05)	
Actions	120803371	06/04/2019			Wage Report	WAGE REPORT JUNE 2019	Open	Initial	\$0.00	\$0.00	
Actions	120803370	06/04/2019			Wage Report	WAGE REPORT MAY 2019	Open	Initial	\$0.00	\$0.00	
Actions	120803369	06/04/2019			Wage Report	WAGE REPORT APRIL 2019	Open	Initial	\$0.00	\$0.00	

Locate the Wage Adjustment Import file, select **Actions**, then **Details**

File History

Close

Import #: All Date Range: 05/27/2019 To: 06/10/2019

Status: All

Tools	Import Header Id	Process Flag	Import Name	Import Description	Status	File Load Start	File Process Start	Duration	Rows Loaded	Rows Processed	Rows in Error	Rows in Exception	Rows Successfully Processed	Inserted By	Has Comment Flag
Actions	184252	Validated	Employer Wag...	ERID 00423 (...)	Validated with Excepti...	06/10/2019 10:55 AM ...	06/10/2019 11:11 AM ...	< 1 sec	6	0	0	0	0	00423GMOR...	
Details	184250	Validated	Employer Wag...	ERID 00423 (...)	Validated with Errors	06/07/2019 03:05 PM ...	06/07/2019 03:15 PM ...	1 sec	6	0	0	0	0	00423GMOR...	
Validate	184248	Completed	Employer Wag...	ERID 00423 (...)	Voided	06/05/2019 03:50 PM ...	06/05/2019 03:50 PM ...	3 sec	6	0	0	0	0	JBURKE	

Process Void Download Export

From the **Details** tab, select **Validate**.

Details

Save Cancel

Import Name: Employer Wage Adjustment Rep... Import Description: ERID 00425 :Wage Adjustment fr...

Status: Not Processed Import Header Id: 158983 Inserted By: 08/23/2018

Process Flag: Ready Inserted Date: 08/23/2018 Updated By: 08/23/2018

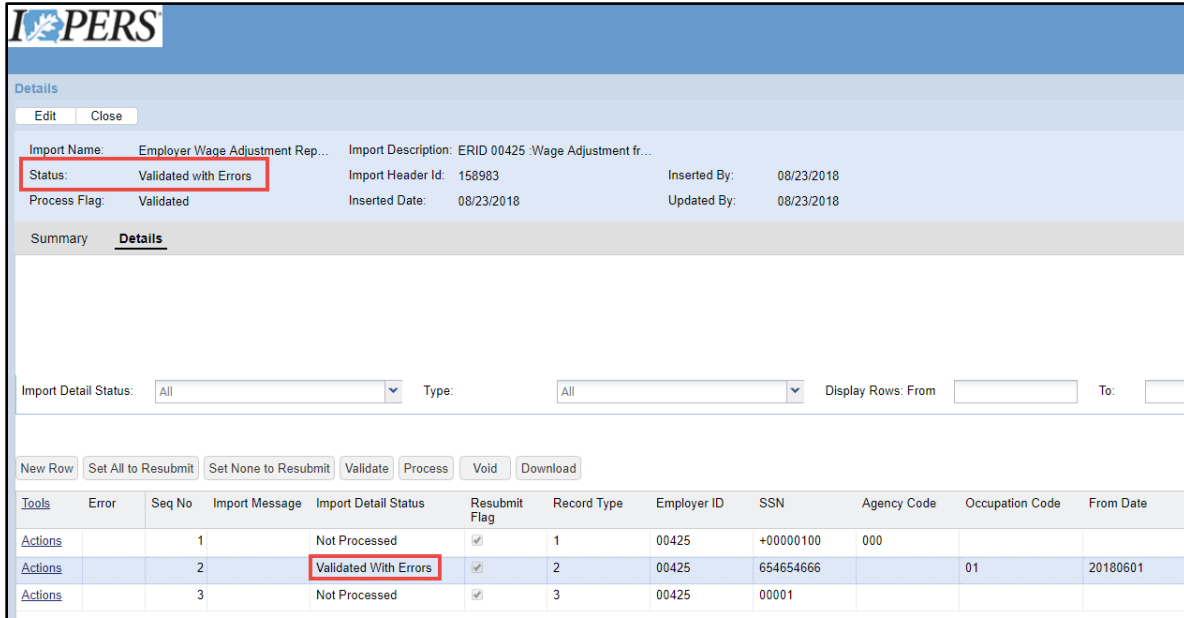
Summary **Details**

Import Detail Status: All Type: All Display Rows: From

New Row Set All to Resubmit Set None to Resubmit **Validate** Void Download

Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	SSN	Agency Code	Occu
Actions		1		Not Processed	<input checked="" type="checkbox"/>	1	00425	+00000100	000	
Actions		2		Not Processed	<input checked="" type="checkbox"/>	2	00425	654654666		01
Actions		3		Not Processed	<input checked="" type="checkbox"/>	3	00425	00001		

Check the **Status** or **Import Detail Status** of the file. If it contains errors, you must correct them before processing the adjustment.



**I-PERS**

Details

Edit Close

Import Name: Employer Wage Adjustment Rep... Import Description: ERID 00425 :Wage Adjustment fr...

Status: Validated with Errors Import Header Id: 158983 Inserted By: 08/23/2018

Process Flag: Validated Inserted Date: 08/23/2018 Updated By: 08/23/2018

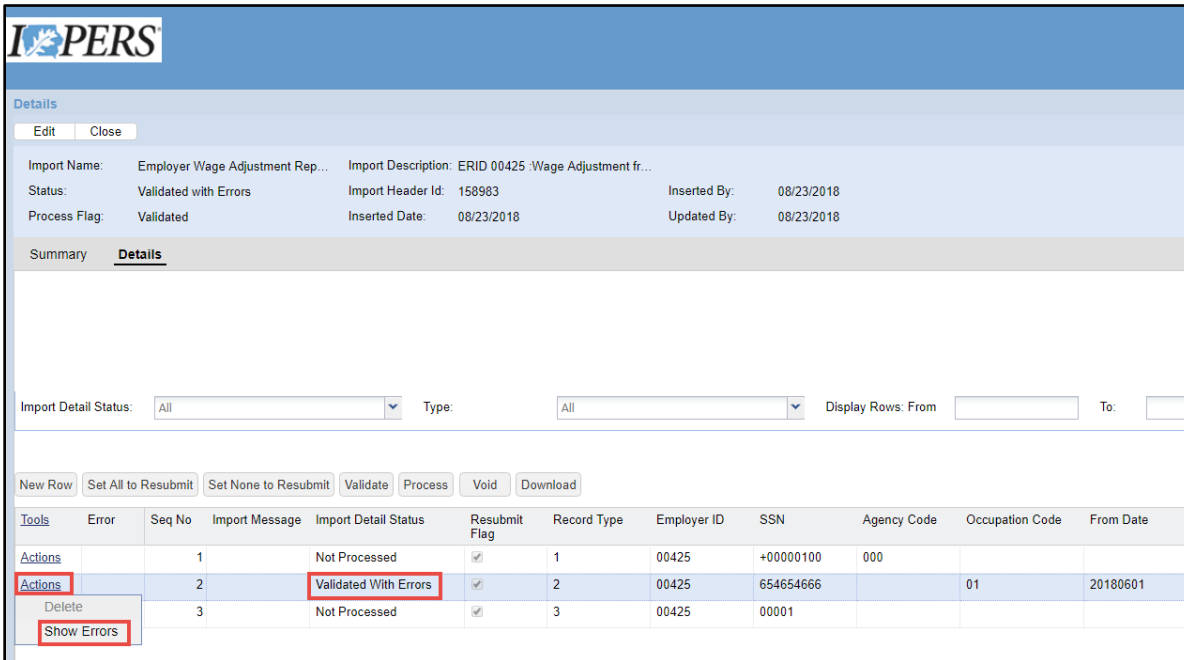
Summary Details

Import Detail Status: All Type: All Display Rows: From To:

New Row Set All to Resubmit Set None to Resubmit Validate Process Void Download

Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	SSN	Agency Code	Occupation Code	From Date
Actions		1		Not Processed	<input checked="" type="checkbox"/>	1	00425	+00000100	000		
Actions		2		Validated With Errors	<input checked="" type="checkbox"/>	2	00425	654654666		01	20180601
Actions		3		Not Processed	<input checked="" type="checkbox"/>	3	00425	00001			

Select **Actions** next to the row that shows as **Validated with Errors**. Select **Show Errors** in the drop-down menu.



**I-PERS**

Details

Edit Close

Import Name: Employer Wage Adjustment Rep... Import Description: ERID 00425 :Wage Adjustment fr...

Status: Validated with Errors Import Header Id: 158983 Inserted By: 08/23/2018

Process Flag: Validated Inserted Date: 08/23/2018 Updated By: 08/23/2018

Summary Details

Import Detail Status: All Type: All Display Rows: From To:

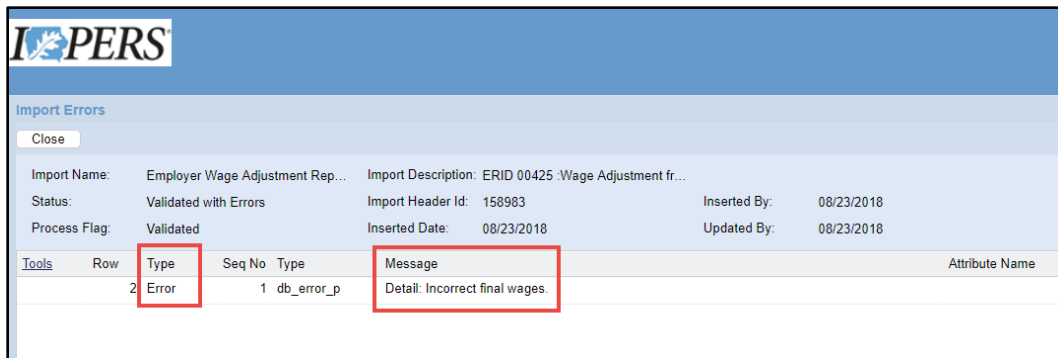
New Row Set All to Resubmit Set None to Resubmit Validate Process Void Download

Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	SSN	Agency Code	Occupation Code	From Date
Actions		1		Not Processed	<input checked="" type="checkbox"/>	1	00425	+00000100	000		
Actions		2		Validated With Errors	<input checked="" type="checkbox"/>	2	00425	654654666		01	20180601
Actions		3		Not Processed	<input checked="" type="checkbox"/>	3	00425	00001			

Delete

Show Errors

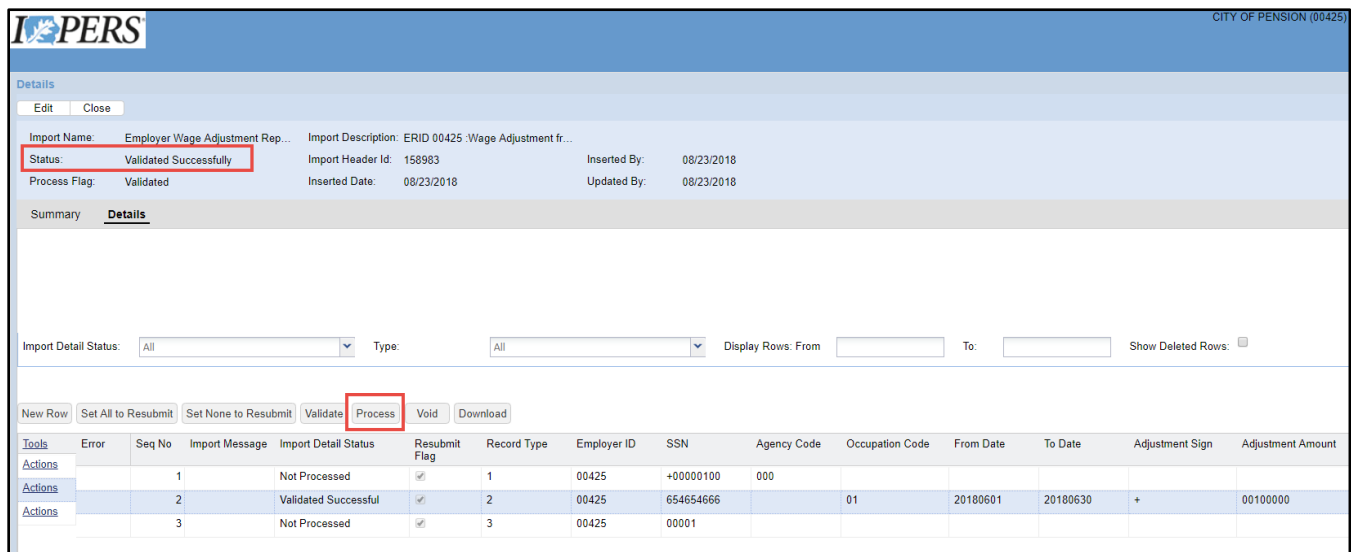
Research to correct errors or contact IPERS ERAM at 1-877-473-7799.



Tools	Row	Type	Seq No	Type	Message	Attribute Name
	2	Error	1	db_error_p	Detail: Incorrect final wages.	

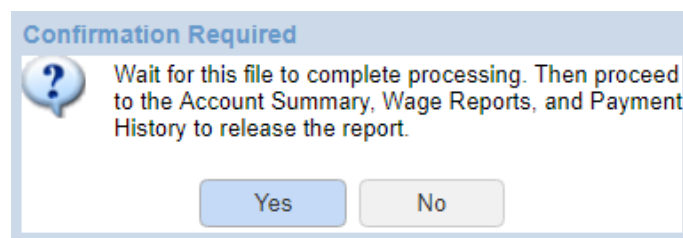
Once errors have been corrected, Re-validate your file. The file status should be **Validated Successfully**.

Select **Process**.



Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	SSN	Agency Code	Occupation Code	From Date	To Date	Adjustment Sign	Adjustment Amount
Actions		1		Not Processed	<input checked="" type="checkbox"/>	1	00425	+00000100	000					
Actions		2		Validated Successful	<input checked="" type="checkbox"/>	2	00425	654654666		01	20180601	20180630	+	00100000
Actions		3		Not Processed	<input checked="" type="checkbox"/>	3	00425	00001						

Read the confirmation message and select **Yes**.



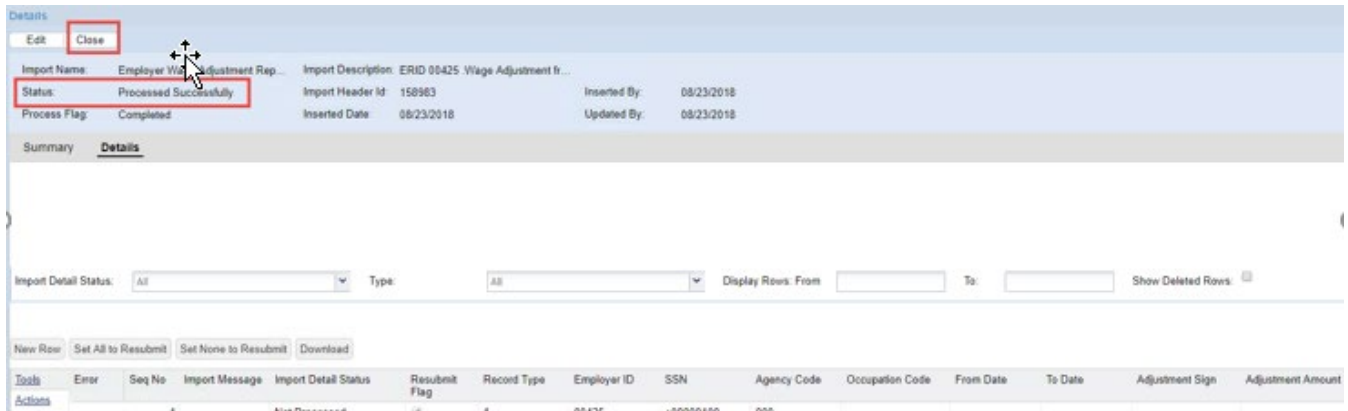
**Confirmation Required**

Wait for this file to complete processing. Then proceed to the Account Summary, Wage Reports, and Payment History to release the report.

Yes No

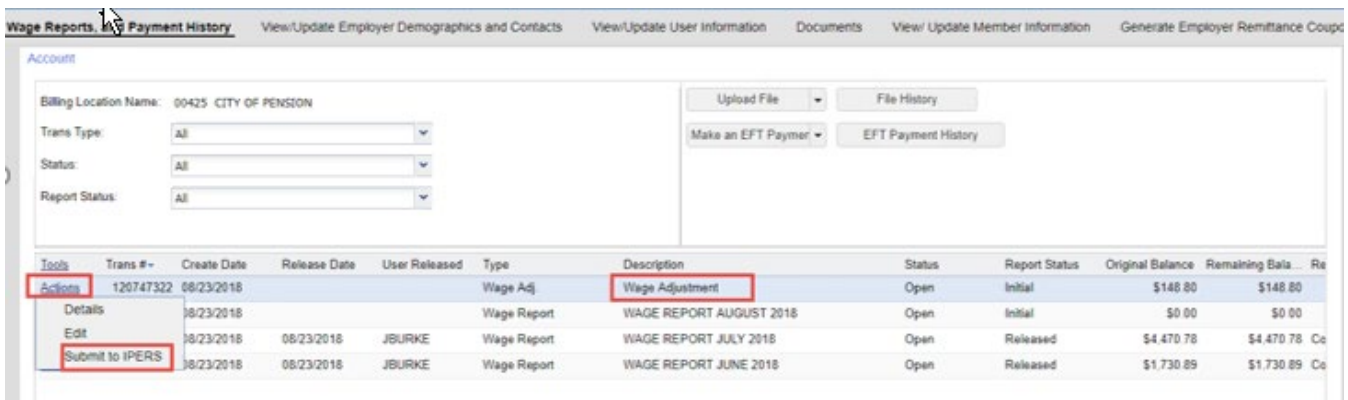


Status should be **Processed Successfully**. If so, select **Close**. Go to the **Account Summary, Wage Reports and Payment History** screen to submit the adjustment.

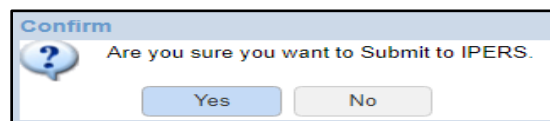
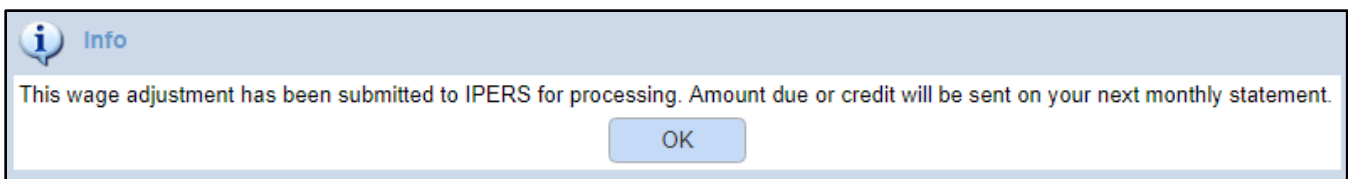


You will need to refresh the screen to see the wage adjustment amount. Make sure you have highlighted the correct wage adjustment to submit by clicking on the appropriate transaction.

Select **Actions** and **Submit to IPERS** for the adjustment you are releasing.



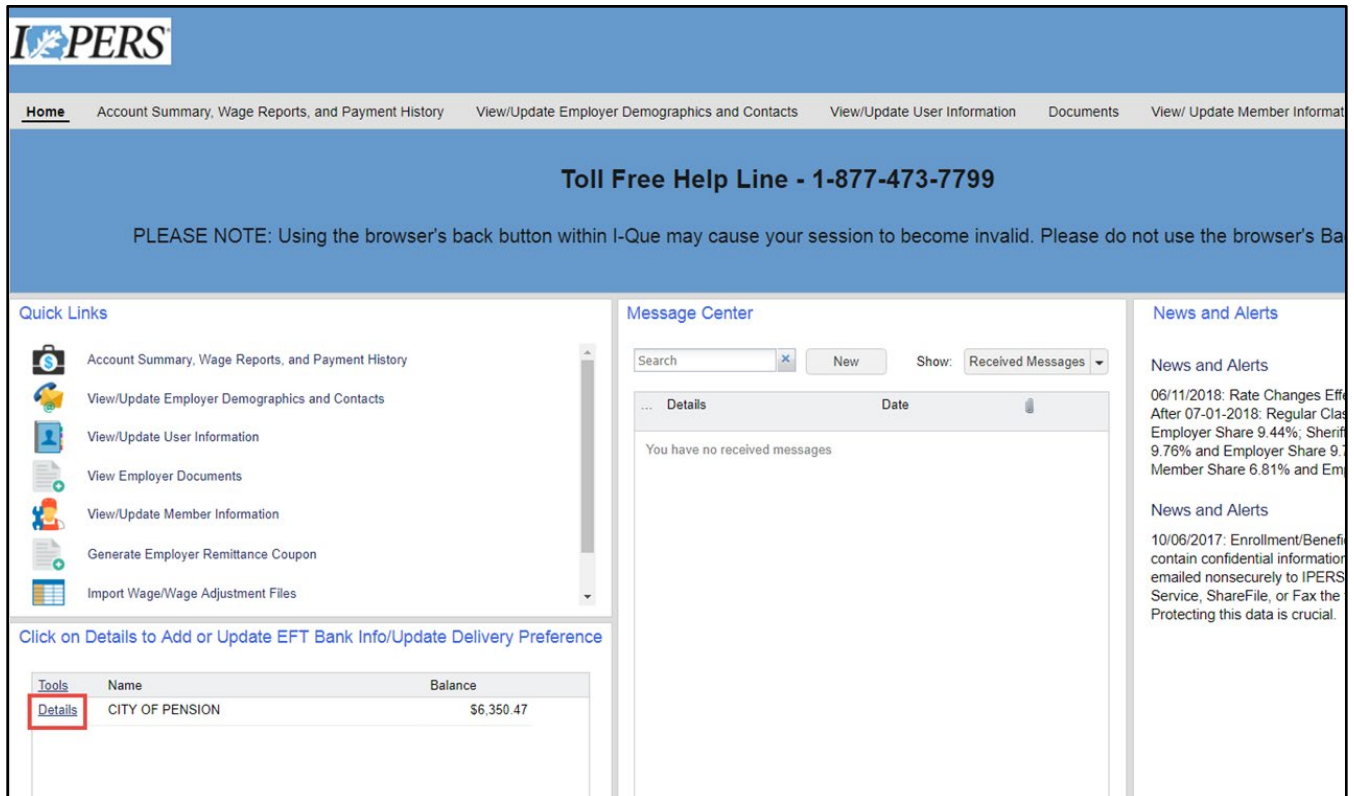
Follow the prompts to submit your file to IPERS.

A workflow request will be submitted to IPERS and your adjustment should be released within 24 hours.

## Add a Financial Institution

On the I-Que home page, select **Details**.



The screenshot shows the I-PERS home page. At the top is the I-PERS logo. Below it is a navigation bar with links: Home, Account Summary, Wage Reports, and Payment History, View/Update Employer Demographics and Contacts, View/Update User Information, Documents, and View/ Update Member Information. A large blue banner displays the Toll Free Help Line - 1-877-473-7799 and a note: PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not use the browser's Back button.

Below the banner are three main sections:

- Quick Links:** A list of links with icons: Account Summary, Wage Reports, and Payment History; View/Update Employer Demographics and Contacts; View/Update User Information; View Employer Documents; View/Update Member Information; Generate Employer Remittance Coupon; and Import Wage/Wage Adjustment Files.
- Message Center:** A section with a search bar, a 'New' button, and a 'Show:' dropdown menu set to 'Received Messages'. Below this is a table with columns 'Details' and 'Date'. The message area states 'You have no received messages'.
- News and Alerts:** A section with two alerts. The first alert is dated 06/11/2018 and mentions Rate Changes Effective After 07-01-2018, Regular Class Employer Share 9.44%, Sheriff 9.76% and Employer Share 9.76%, and Member Share 6.81% and Employer Share 6.81%. The second alert is dated 10/06/2017 and mentions Enrollment/Benefit information containing confidential information emailed nonsecurely to IPERS Service, ShareFile, or Fax the information. Protecting this data is crucial.

Below the Quick Links section, there is a link: Click on Details to Add or Update EFT Bank Info/Update Delivery Preference. Below this link is a table with columns 'Tools', 'Name', and 'Balance'. The table contains one row: 'Details' (highlighted with a red box), 'CITY OF PENSION', and '\$6,350.47'.

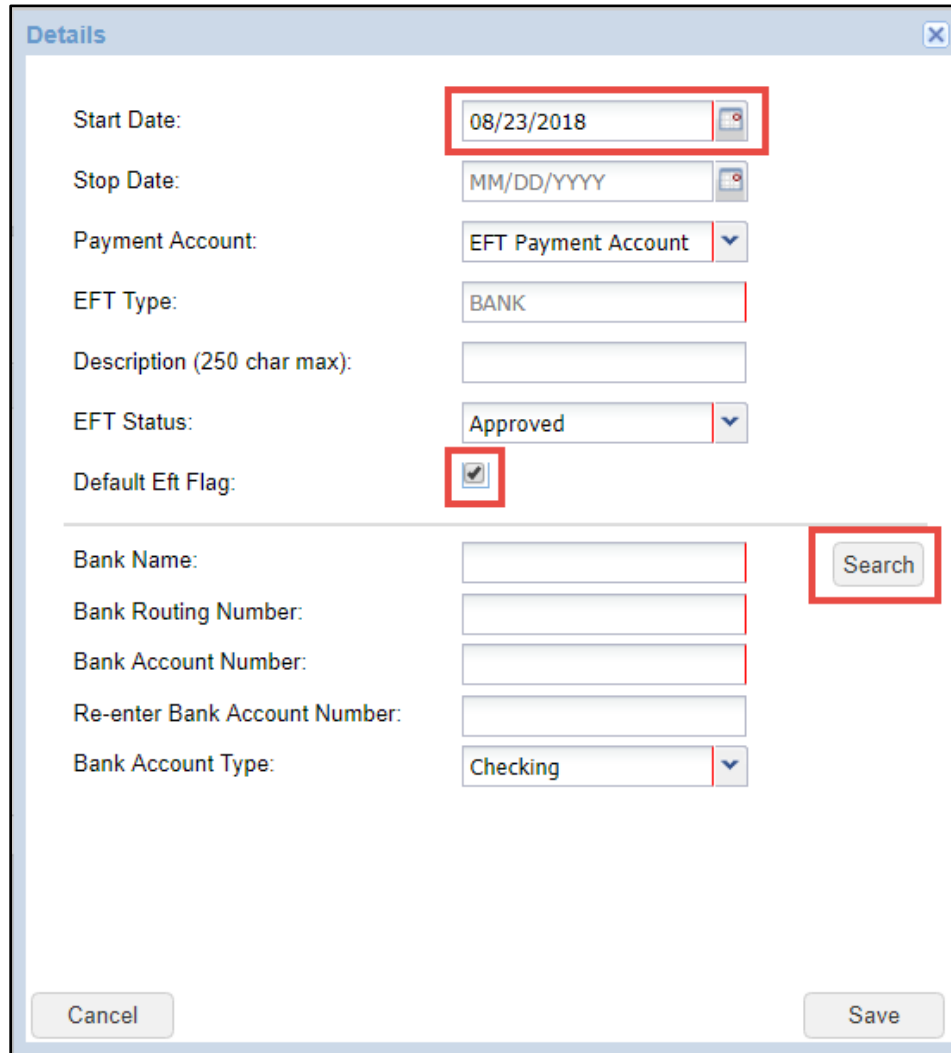
Select **Add Bank Account**.



The screenshot shows the I-PERS Billing Location Info page. At the top is the I-PERS logo. Below it is a navigation bar with links: Back, Billing Location ID: 00425, Billing Location Name: CITY OF PENSION, and a 'Change' button. Below the navigation bar is a section titled 'Billing Location Info' with a 'Change' button and a 'Delivery Preference: U.S. Mail' label.

Below the Billing Location Info section is a section titled 'EFT Bank Account Details'. This section contains a link 'Add Bank Account' (highlighted with a red box) and a table with columns: Tools, Description (250 char max), EFT Type, Period, EFT Status, and Default EFT. The table is currently empty.

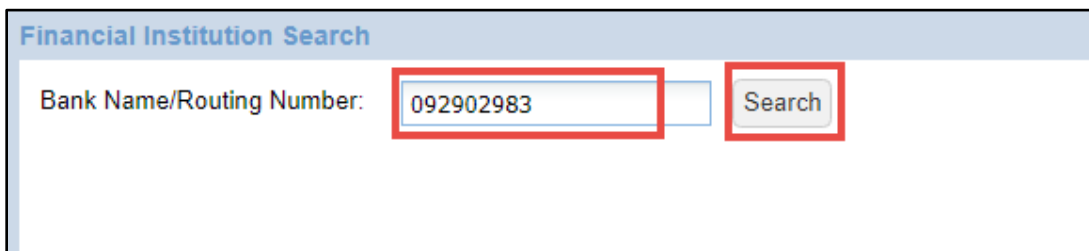
In the **Start Date** field, enter today's date. Leave the **Stop Date** field blank. Check the **Default Eft Flag** box to set this financial institution as the default EFT account for future payments. Select **Search**.



The 'Details' dialog box contains the following fields and controls:

- Start Date:** Text field with '08/23/2018' entered. (Red box)
- Stop Date:** Text field with 'MM/DD/YYYY' placeholder. (Red box)
- Payment Account:** Dropdown menu showing 'EFT Payment Account'.
- EFT Type:** Text field with 'BANK' entered. (Red box)
- Description (250 char max):** Empty text field.
- EFT Status:** Dropdown menu showing 'Approved'.
- Default Eft Flag:** Checked checkbox. (Red box)
- Bank Name:** Empty text field.
- Bank Routing Number:** Empty text field.
- Bank Account Number:** Empty text field.
- Re-enter Bank Account Number:** Empty text field.
- Bank Account Type:** Dropdown menu showing 'Checking'.
- Search:** Button. (Red box)
- Cancel:** Button.
- Save:** Button.

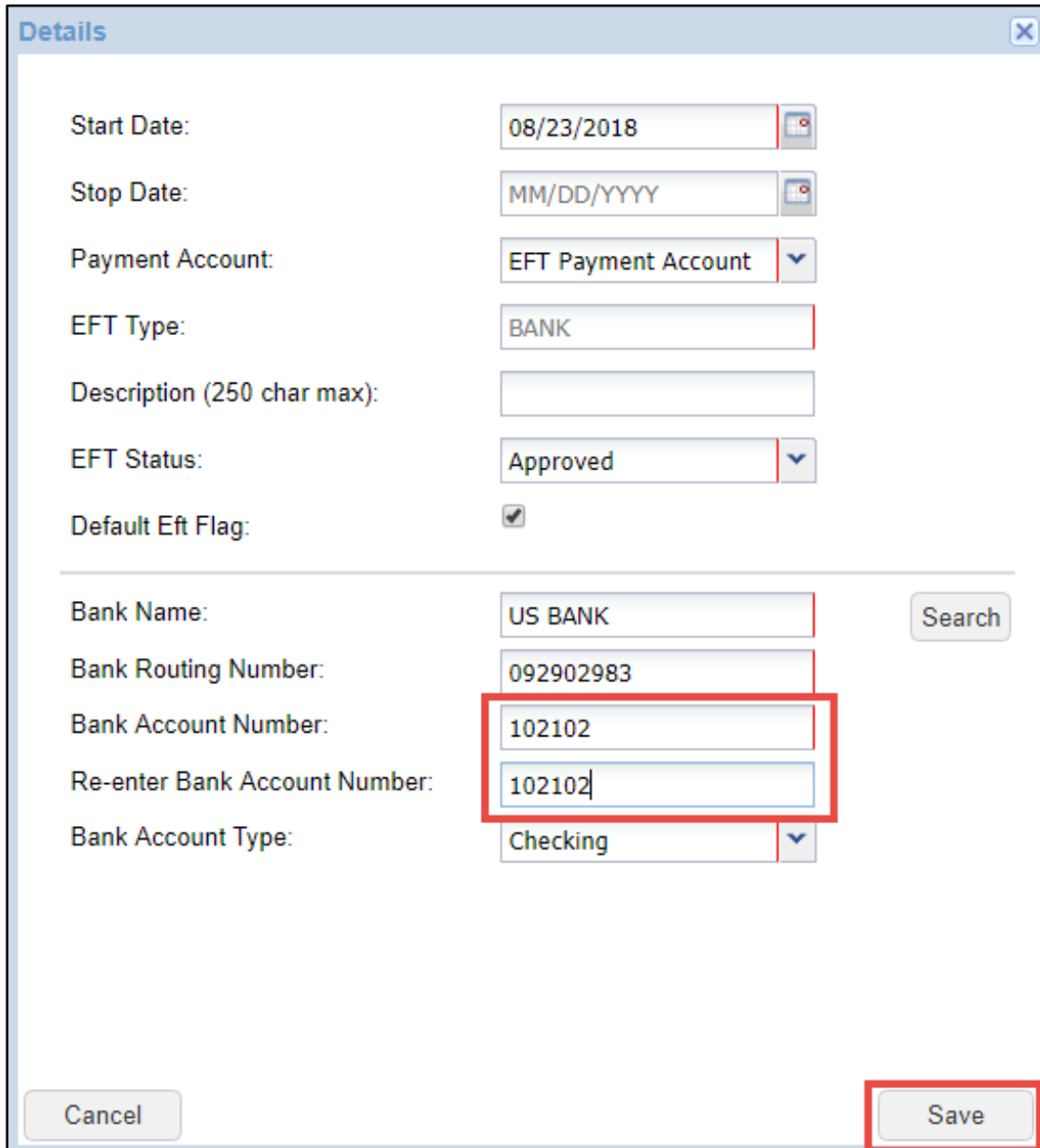
Enter your bank's Routing Number. Select **Search**.



The 'Financial Institution Search' dialog box contains the following fields and controls:

- Bank Name/Routing Number:** Text field with '092902983' entered. (Red box)
- Search:** Button. (Red box)

Enter Bank Account number as indicated. Re-enter to confirm. Select **Save**.



The image shows a 'Details' window with a close button (X) in the top right corner. The form is divided into two sections by a horizontal line. The top section contains the following fields: 'Start Date' with a date picker showing '08/23/2018'; 'Stop Date' with a date picker showing 'MM/DD/YYYY'; 'Payment Account' with a dropdown menu showing 'EFT Payment Account'; 'EFT Type' with a text box showing 'BANK'; 'Description (250 char max):' with an empty text box; 'EFT Status' with a dropdown menu showing 'Approved'; and 'Default Eft Flag' with a checked checkbox. The bottom section contains: 'Bank Name' with a text box showing 'US BANK' and a 'Search' button; 'Bank Routing Number' with a text box showing '092902983'; 'Bank Account Number' with a text box showing '102102'; 'Re-enter Bank Account Number' with a text box showing '102102'; and 'Bank Account Type' with a dropdown menu showing 'Checking'. A red rectangular box highlights the 'Bank Account Number' and 'Re-enter Bank Account Number' fields. At the bottom of the window, there are two buttons: 'Cancel' on the left and 'Save' on the right, with the 'Save' button also highlighted by a red rectangular box.

Start Date:	08/23/2018	
Stop Date:	MM/DD/YYYY	
Payment Account:	EFT Payment Account	▼
EFT Type:	BANK	
Description (250 char max):		
EFT Status:	Approved	▼
Default Eft Flag:	<input checked="" type="checkbox"/>	

---

Bank Name:	US BANK	Search
Bank Routing Number:	092902983	
Bank Account Number:	102102	
Re-enter Bank Account Number:	102102	
Bank Account Type:	Checking	▼

Cancel Save

If necessary – use the drop down to change the Bank Account Type to Savings – then select Save.

Review and select **Confirm** or **Back** to make any corrections.

Details

Please verify and click 'Confirm' to permanently save the changes.

Start Date:

08/23/2018

Stop Date:

MM/DD/YYYY

Payment Account:

EFT Payment Account

EFT Type:

BANK

Description (250 char max):

EFT Status:

Approved

Default Eft Flag:

☒

Bank Name:

US BANK

Search

Bank Routing Number:

092902983

Bank Account Number:

102102

Re-enter Bank Account Number:

102102

Bank Account Type:

Checking

Cancel


Back

Confirm

Complete the form by entering your name and title. Select **Confirm**.

Eft Definition Authorization

Agreement Summary



EMPLOYER/RECEIVER AUTHORIZATION AND AGREEMENT FOR ACH DEBIT

Originator: IOWA PUBLIC EMPLOYEES' RETIREMENT SYSTEM

The Employer/Receiver hereunder, CITY OF PENSION ("EMPLOYER"), hereby authorizes IPERS to initiate both recurring and single entry debit entries to EMPLOYER'S Checking Account indicated below at the depository financial institution named below ("DEPOSITORY"), and to debit the same to such account. EMPLOYER acknowledges that the origination of ACH transactions to said account must comply with the provisions of U.S. law and the rules of the National Automated Clearinghouse Association ("NACHA") and agrees that transactions hereunder shall be in the NACHA CCD format, unless mutually agreed otherwise.

Depository Name: US BANK

Routing Number: 092902983

Account Number: XXXX2102

EMPLOYER acknowledges and agrees that it has the sole responsibility to ensure that the bank account listed above will be open to accept transactions hereunder, that sufficient funds will be maintained in that account to cover said transactions, and that it has verified that DEPOSITORY is capable of complying with the U.S. laws and NACHA rules governing transactions hereunder. This authorization shall remain in full force and effect until IPERS has received written notification of its termination from EMPLOYER. The termination notice may be delivered by e-mail, facsimile, or first class mail, provided that the delivery of such termination notice shall provide IPERS and DEPOSITORY a reasonable opportunity to act on it.

Date:08/23/2018By: Fred FundTitle: Clerk


Cancel

Confirm

Select **Print** and then **Finish**.

**Eft Definition Authorization**

Agreement Summary



**EMPLOYER/RECEIVER AUTHORIZATION AND AGREEMENT FOR ACH DEBIT**

Originator: IOWA PUBLIC EMPLOYEES' RETIREMENT SYSTEM

The Employer/Receiver hereunder, CITY OF PENSION ("EMPLOYER"), hereby authorizes IPERS to initiate both recurring and single entry debit entries to EMPLOYER'S **Checking** Account indicated below at the depository financial institution named below ("DEPOSITORY"), and to debit the same to such account. EMPLOYER acknowledges that the origination of ACH transactions to said account must comply with the provisions of U.S. law and the rules of the National Automated Clearinghouse Association ("NACHA") and agrees that transactions hereunder shall be in the NACHA CCD format, unless mutually agreed otherwise.

Depository Name: US BANK

Routing Number: 092902983

Account Number: XXXX2102

EMPLOYER acknowledges and agrees that it has the sole responsibility to ensure that the bank account listed above will be open to accept transactions hereunder, that sufficient funds will be maintained in that account to cover said transactions, and that it has verified that DEPOSITORY is capable of complying with the U.S. laws and NACHA rules governing transactions hereunder. This authorization shall remain in full force and effect until IPERS has received written notification of its termination from EMPLOYER. The termination notice may be delivered by e-mail, facsimile, or first class mail, provided that the delivery of such termination notice shall provide IPERS and DEPOSITORY a reasonable opportunity to act on it.

Date: 08/23/2018

By: Fred Fund


Title: Clerk

Cancel

Finish

Print

To return to the I-Que home page, select **Back**.



Back

Billing Location ID: 00425

Billing Location Name: CITY OF PENSION

Billing Location Info

Change

Delivery Preference: U.S. Mail

EFT Bank Account Details

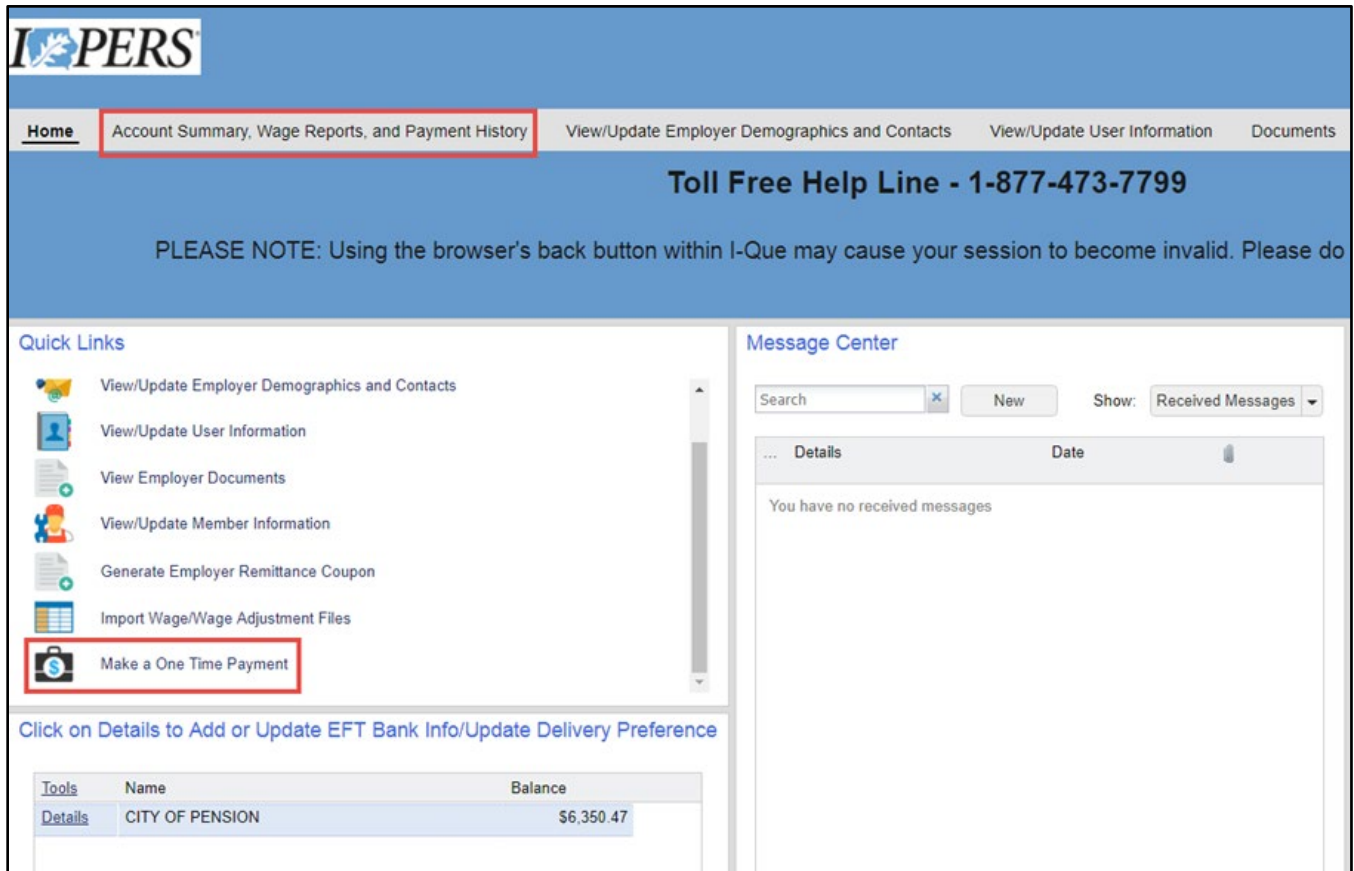
Add Bank Account

Tools	Description (250 char max)	EFT Type	Period	EFT Status	Default EFT
Actions	US BANK (Checking) XXXX02102	BANK	08/23/2018 - current	Approved	<input checked="" type="checkbox"/>



## Make an Online EFT Payment

On the home page, select **Make a One Time Payment** or **Account Summary, Wage Reports, and Payment History**.



**I-PERS**

Home **Account Summary, Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents

**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not click the back button.

**Quick Links**

- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files
- Make a One Time Payment**

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
<a href="#">Details</a>	CITY OF PENSION	\$6,350.47

**Message Center**

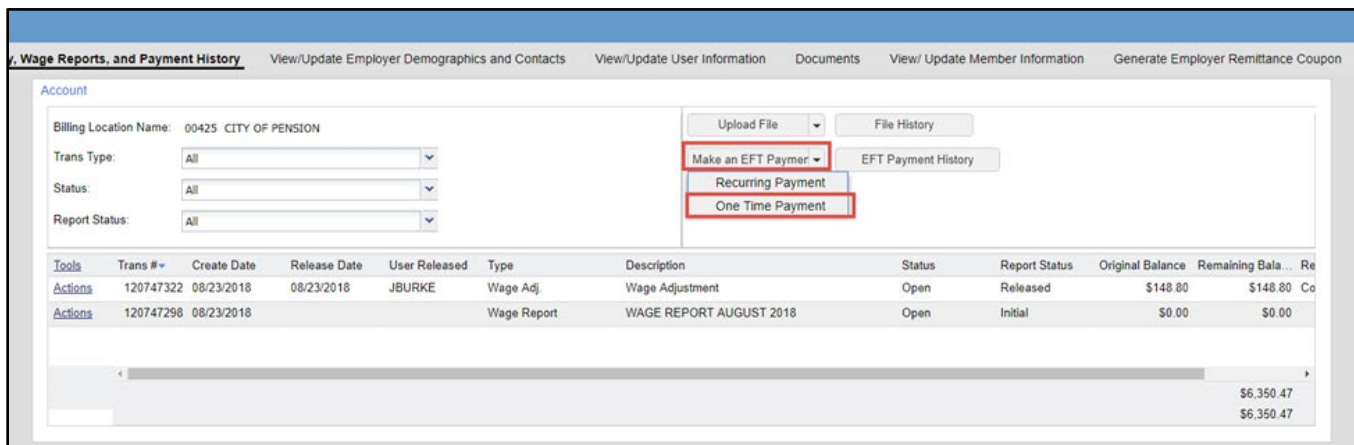
Search [x] New Show: Received Messages

... Details Date

You have no received messages

If you selected **Account Summary, Wage Reports, and Payment History**, select **Make an EFT Payment**.

If you selected **Make a One Time Payment** from the Home page, skip this step.



**Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon

Account

Billing Location Name: 00425 CITY OF PENSION

Trans Type: All

Status: All

Report Status: All

Upload File File History

**Make an EFT Payment** EFT Payment History

Recurring Payment

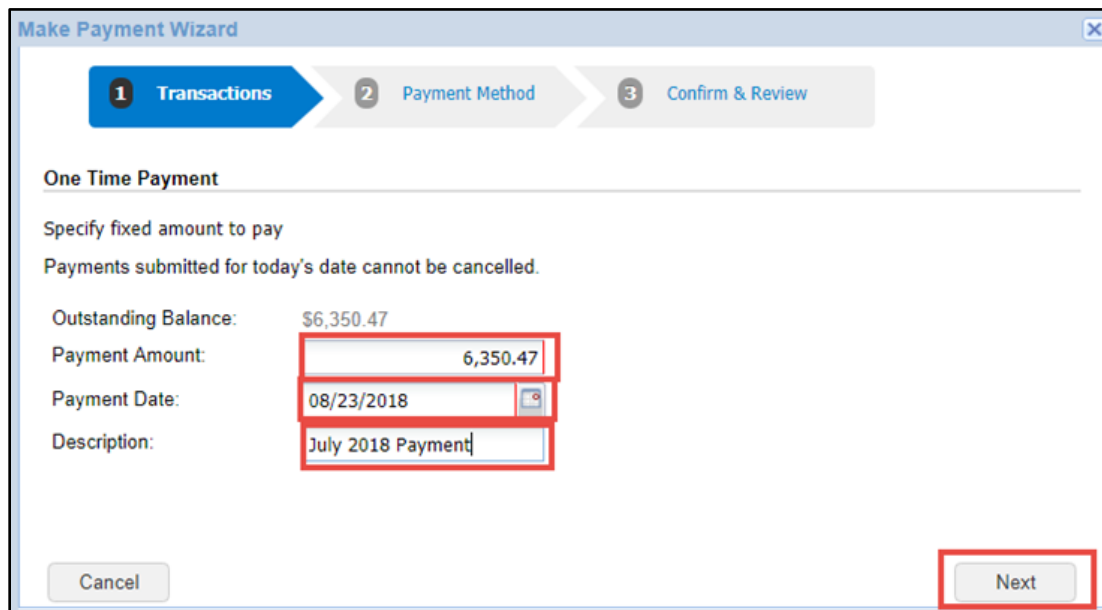
One Time Payment

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Bala...	Re
<a href="#">Actions</a>	120747322	08/23/2018	08/23/2018	JBURKE	Wage Adj.	Wage Adjustment	Open	Released	\$148.80	\$148.80	Co
<a href="#">Actions</a>	120747298	08/23/2018			Wage Report	WAGE REPORT AUGUST 2018	Open	Initial	\$0.00	\$0.00	
										\$6,350.47	
										\$6,350.47	

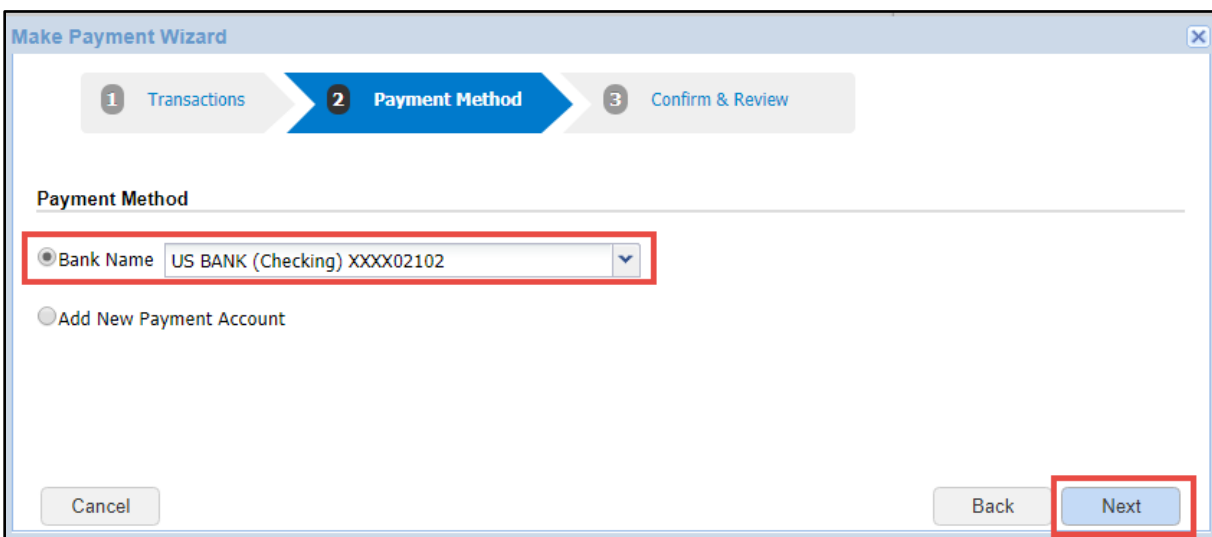
The **Make Payment Wizard** will open. Fill in the **Payment Amount**, **Payment Date**, and **Description**.

- To make the payment immediately, leave the **Payment Date** as is.
- To schedule this payment for some time in the future, indicate the date you wish IPERS to be paid.

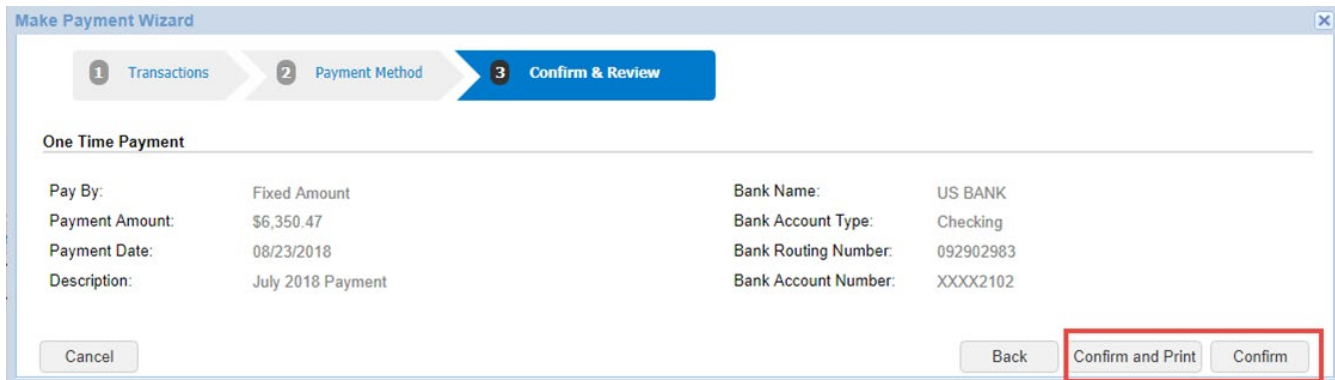
Select **Next**.



Select the account to make the payment from in the **Bank Name** field, or select **Add New Payment Account**.  
Select **Next**.



Select **Confirm** or **Confirm and Print**.

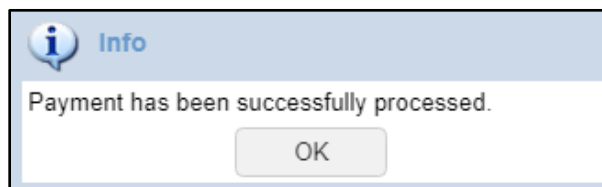


The "Make Payment Wizard" dialog box shows a three-step process: 1 Transactions, 2 Payment Method, and 3 Confirm & Review. The "Confirm & Review" step is active. It displays payment details for a "One Time Payment":

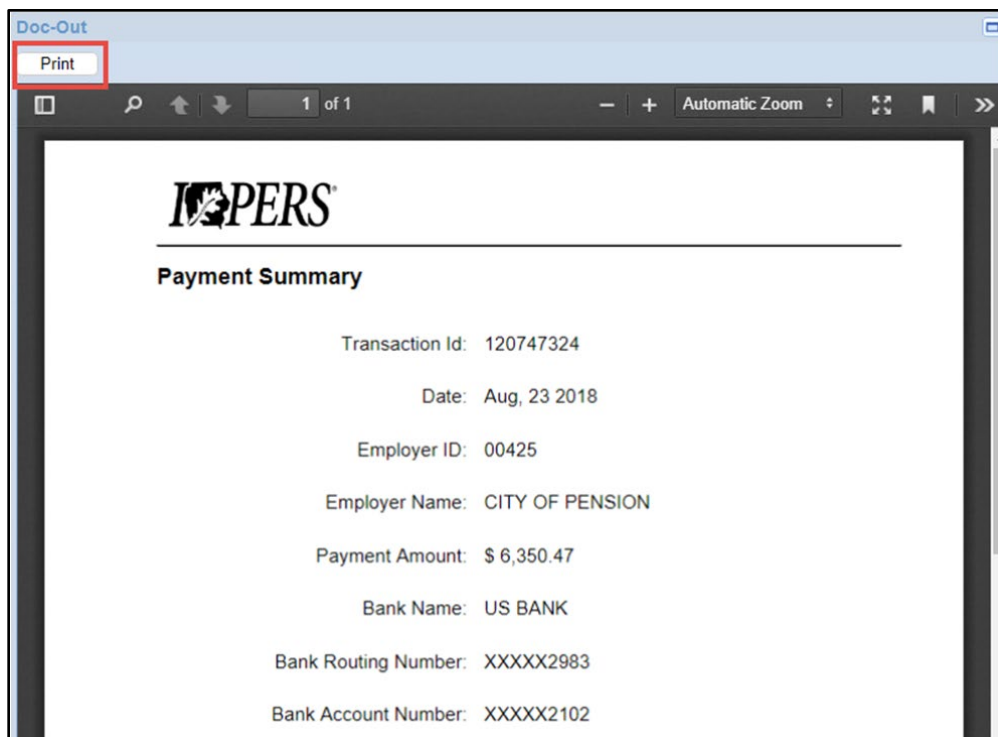
One Time Payment	
Pay By:	Fixed Amount
Payment Amount:	\$6,350.47
Payment Date:	08/23/2018
Description:	July 2018 Payment
Bank Name:	US BANK
Bank Account Type:	Checking
Bank Routing Number:	092902983
Bank Account Number:	XXXX2102

At the bottom, there are buttons for "Cancel", "Back", "Confirm and Print" (highlighted with a red box), and "Confirm".

A confirmation message will display. Select **OK**.



The **Payment Summary** will display. Select **Print** or close out of the Summary using the icon in the upper right corner of the window. If this print does not work, click Ctrl-P for a print screen.



The "Doc-Out" window displays a "Payment Summary" document. The document header includes the "I-PERS" logo. The summary contains the following information:

**Payment Summary**

Transaction Id: 120747324  
Date: Aug, 23 2018  
Employer ID: 00425  
Employer Name: CITY OF PENSION  
Payment Amount: \$ 6,350.47  
Bank Name: US BANK  
Bank Routing Number: XXXXX2983  
Bank Account Number: XXXXX2102

The window has a "Print" button highlighted with a red box in the top left corner. The top right corner contains a close icon. The window also features a toolbar with navigation and zoom controls.

Your payment will be reflected on the Account Summary page as long as you did not schedule this payment with a future date.

**Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon

Account

Billing Location Name: 00425 CITY OF PENSION

Trans Type: All

Status: All

Report Status: All

Upload File File History

Make an EFT Payment EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance	Remaining Balance	
Details	120747324	08/23/2018	08/23/2018	JBURKE	Payment	Dep Dt 08/23/2018-Chk# -Tr# 120747324	Open	Released	(\$6,350.47)	(\$6,350.47)	
Actions	120747322	08/23/2018	08/23/2018	JBURKE	Wage Adj.	Wage Adjustment	Open	Released	\$148.80	\$148.80	
Actions	120747298	08/23/2018	08/23/2018	JBURKE	Wage Report	WAGE REPORT AUGUST 2018	Open	Initial	\$0.00	\$0.00	
Actions	120747297	08/23/2018	08/23/2018	JBURKE	Wage Report	WAGE REPORT JULY 2018	Open	Released	\$4,470.78	\$4,470.78	
Actions	120747296	08/23/2018	08/23/2018	JBURKE	Wage Report	WAGE REPORT JUNE 2018	Open	Released	\$1,730.89	\$1,730.89	
										(\$0.00)	\$0.00

To view your scheduled payments or see your EFT payment History - select **EFT Payment History**.

**Account Summary, Wage Reports, and Payment History** View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon

Account

Billing Location Name: 00423 CITY OF SUNSHINE

Trans Type: All

Status: All

Report Status: All

Upload File File History

Make an EFT Payment EFT Payment History

Tools	Trans #	Create Date	Release Date	User Released	Type	Description	Status	Report Status	Original Balance
Details	120803372	06/04/2019			Payment	Dep Dt 06/04/2019-Chk# -Tr# 120803372	Open		(\$4,706.05)

Select **Scheduled Payments** or **EFT History**. Then select **View** to see the payment detail.

**Payment History**

Close

Scheduled Payments EFT History

As Of: Last 60 Days

	Payor Code	Description	Payment Request Date	Payment Amount	Period From Date	Period To Date	Payment Request Status
View ...	00423	January, Febr...	06/04/2019	\$4,706.05	06/04/2019	06/04/2019	Issued

If you need to print the details, go to the top right hand corner of the View Payment screen, select the box to maximize the screen, select **Ctrl-P** to print the screen for your records. Then select the “x” to close out of the screen.

View Payment

One Time Payment

Pay By:	Transactions	Fund:	Employer Contributions
Payment Amount:	\$4,706.05	Bank Name:	US BANK
Payment Date:	06/04/2019	Bank Account Type:	Checking
Description:	January, February, and March 2019 Payments	Bank Routing Number:	071001041
		Bank Account Number:	XXXX1333

Selected Transactions

Select **Close** to return to the Account Summary screen.

Payment History

Close

Scheduled Payments
EFT History

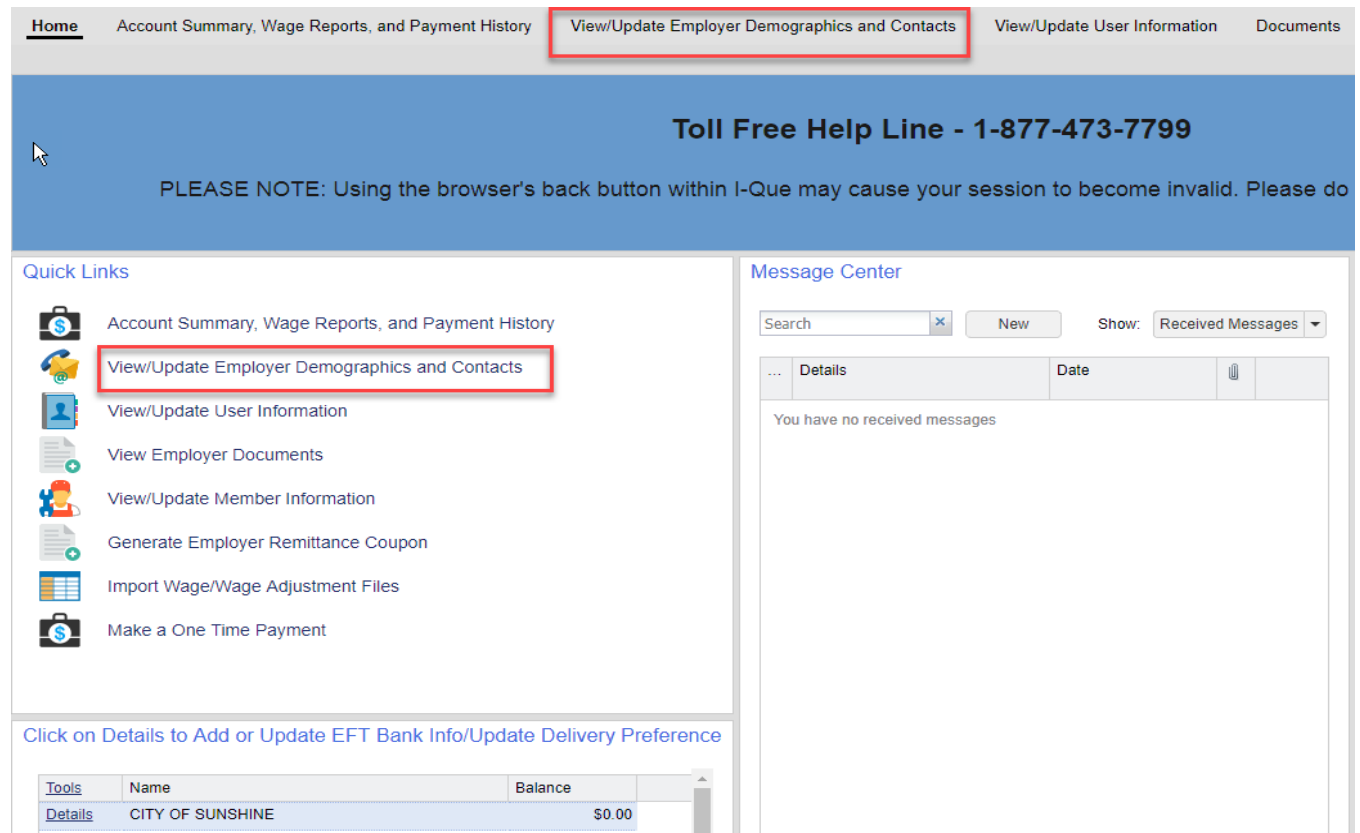
As Of:

Last 60 Days

	Payor Code	Description	Payment Request Date	Payment Amount	Period From Date	Period To Date	Payment Request Status
<a href="#">View ...</a>	00423	January, Febr...	06/04/2019	\$4,706.05	06/04/2019	06/04/2019	Issued

# View or Update Employer Information

On the I-Que home page, select **View/Update Employer Demographics and Contacts**.



**Home** Account Summary, Wage Reports, and Payment History **View/Update Employer Demographics and Contacts** View/Update User Information Documents

**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do

**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts**
- View/Update User Information
- View Employer Documents
- View/Update Member Information
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files
- Make a One Time Payment

**Message Center**

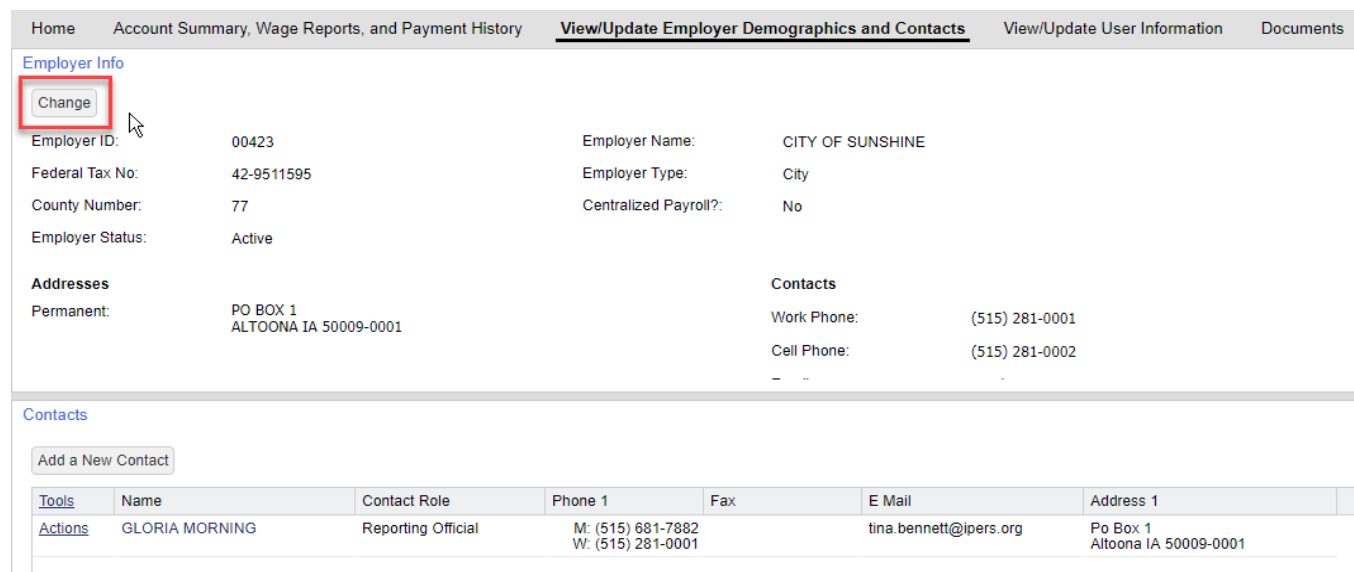
Search [x] New Show: Received Messages

...	Details	Date	
You have no received messages			

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
<a href="#">Details</a>	CITY OF SUNSHINE	\$0.00

To update Employer Info, select **Change**.



**Home** Account Summary, Wage Reports, and Payment History **View/Update Employer Demographics and Contacts** View/Update User Information Documents

**Employer Info**

**Change**

Employer ID: 00423 Employer Name: CITY OF SUNSHINE  
 Federal Tax No: 42-9511595 Employer Type: City  
 County Number: 77 Centralized Payroll?: No  
 Employer Status: Active

**Addresses**  
 Permanent: PO BOX 1  
 ALTOONA IA 50009-0001

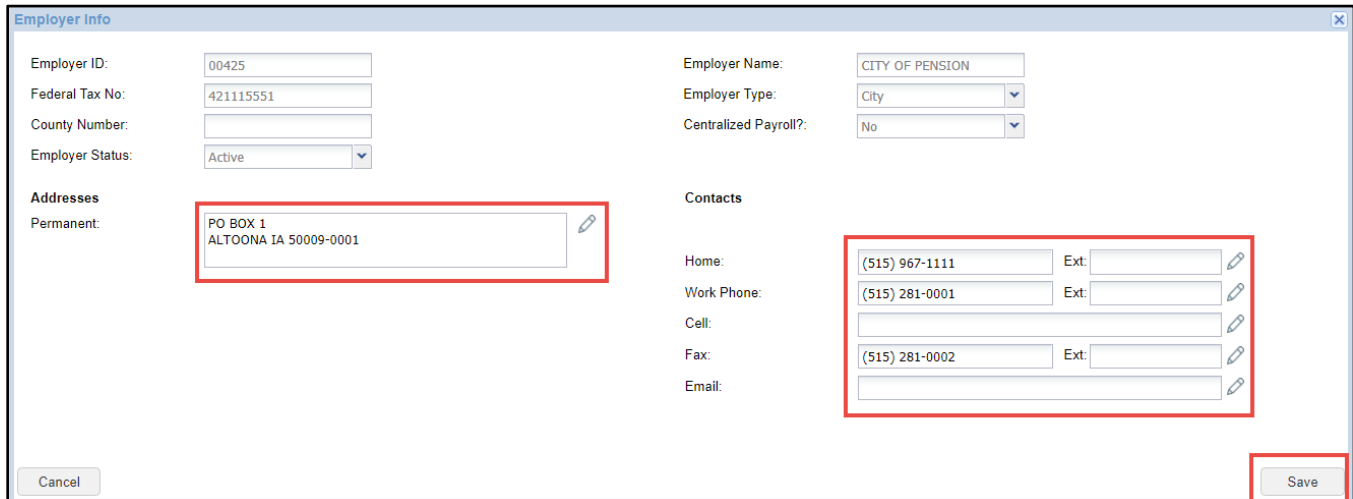
**Contacts**  
 Work Phone: (515) 281-0001  
 Cell Phone: (515) 281-0002

**Contacts**

Add a New Contact

Tools	Name	Contact Role	Phone 1	Fax	E Mail	Address 1
<a href="#">Actions</a>	GLORIA MORNING	Reporting Official	M: (515) 681-7882 W: (515) 281-0001		tina.bennett@ipers.org	Po Box 1 Altoona IA 50009-0001

Update the information under **Addresses** or **Contacts**. Select **Save**.



The screenshot shows the 'Employer Info' form with several fields. The 'Addresses' section has a 'Permanent' address field containing 'PO BOX 1 ALTOONA IA 50009-0001', which is highlighted with a red box. The 'Contacts' section has four fields: 'Home' (515) 967-1111, 'Work Phone' (515) 281-0001, 'Cell', and 'Fax' (515) 281-0002. Each contact field has an 'Ext.' field and a pencil icon. The 'Save' button at the bottom right is highlighted with a red box.

Employer ID:	00425	Employer Name:	CITY OF PENSION
Federal Tax No:	421115551	Employer Type:	City
County Number:		Centralized Payroll?:	No
Employer Status:	Active		
<b>Addresses</b>		<b>Contacts</b>	
Permanent:	PO BOX 1 ALTOONA IA 50009-0001	Home:	(515) 967-1111 Ext:
		Work Phone:	(515) 281-0001 Ext:
		Cell:	
		Fax:	(515) 281-0002 Ext:
		Email:	

Cancel Save

The updated information will display. Select **Back** to make changes, or select **Confirm**.



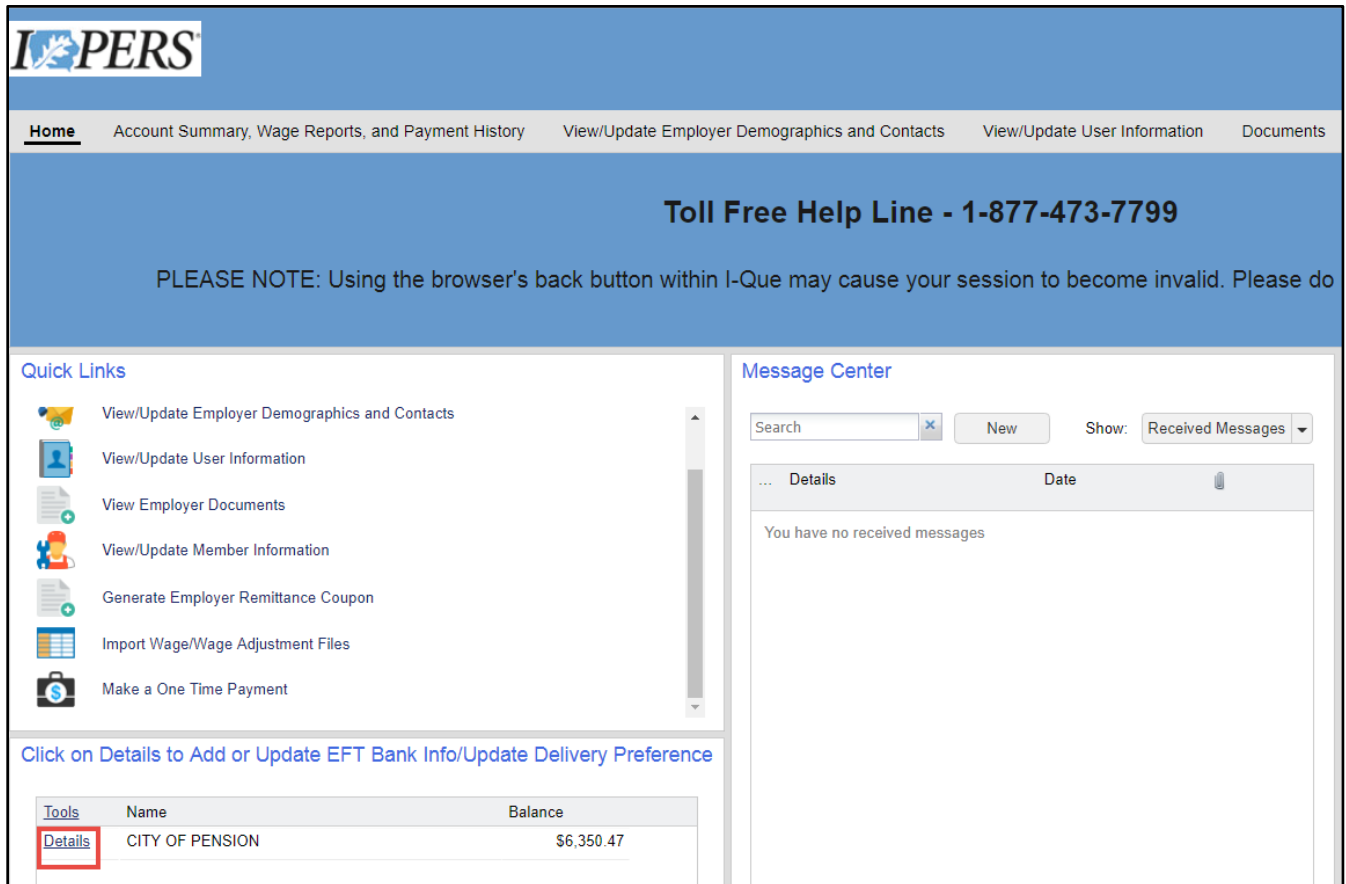
The screenshot shows the 'Employer Info' form with a confirmation message at the top: 'Please verify and click 'Confirm' to permanently save the changes.' The fields are the same as in the previous screenshot, but the 'Save' button is replaced by 'Back' and 'Confirm' buttons. The 'Confirm' button at the bottom right is highlighted with a red box.

Please verify and click 'Confirm' to permanently save the changes.			
Employer ID:	00425	Employer Name:	CITY OF PENSION
Federal Tax No:	42-1115551	Employer Type:	City
County Number:		Centralized Payroll?:	No
Employer Status:	Active		
<b>Addresses</b>		<b>Contacts</b>	
Permanent:	PO BOX 2 ALTOONA IA 50009-0002	Home:	(515) 967-1111
		Work Phone:	(515) 281-0001
		Fax:	(515) 281-0002

Cancel Back Confirm

## View or Update Delivery Preference

On the I-Que home page, select **Details**.



The screenshot shows the I-PERS I-Que home page. At the top is the I-PERS logo. Below it is a navigation bar with links: Home, Account Summary, Wage Reports, and Payment History, View/Update Employer Demographics and Contacts, View/Update User Information, and Documents. A large blue banner displays the Toll Free Help Line - 1-877-473-7799 and a note: PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not. Below the banner are two main sections: Quick Links and Message Center. The Quick Links section lists various actions like View/Update Employer Demographics and Contacts, View/Update User Information, View Employer Documents, View/Update Member Information, Generate Employer Remittance Coupon, Import Wage/Wage Adjustment Files, and Make a One Time Payment. The Message Center shows a search bar, a 'New' button, and a 'Show:' dropdown set to 'Received Messages'. Below the Message Center is a table with columns 'Tools', 'Name', and 'Balance'. The table has one row: 'Details' (highlighted with a red box), 'CITY OF PENSION', and '\$6,350.47'. Below the table is a link: Click on Details to Add or Update EFT Bank Info/Update Delivery Preference.

**Quick Links**

- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files
- Make a One Time Payment

**Message Center**

Search [ ] [X] New Show: Received Messages [v]

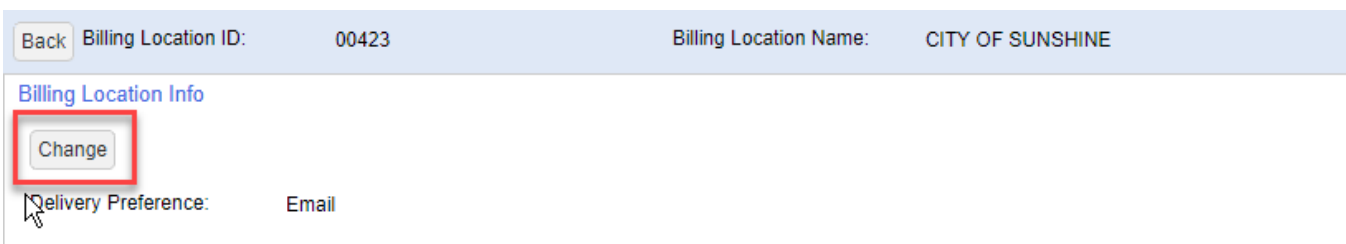
... Details Date [ ]

You have no received messages

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
<b>Details</b>	CITY OF PENSION	\$6,350.47

Select **Change**.



The screenshot shows the Billing Location Info page. At the top is a header bar with a 'Back' button, Billing Location ID: 00423, Billing Location Name: CITY OF SUNSHINE. Below the header bar is the title 'Billing Location Info'. Below the title is a 'Change' button (highlighted with a red box). Below the 'Change' button is the text 'Delivery Preference: Email'.

Back Billing Location ID: 00423 Billing Location Name: CITY OF SUNSHINE

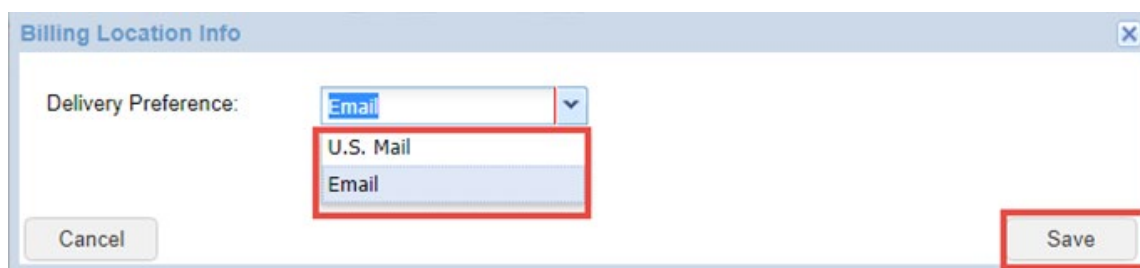
**Billing Location Info**

**Change**

Delivery Preference: Email



Select your delivery preference using the drop-down menu. Select **Save**.

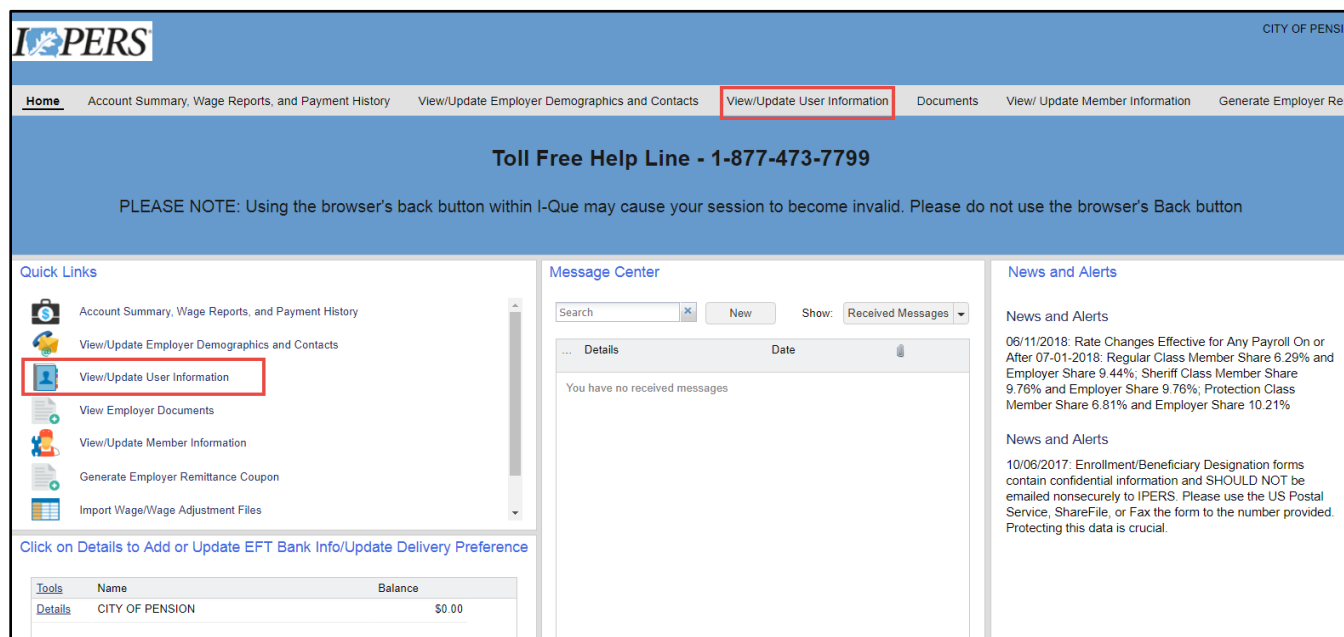


The image shows a dialog box titled "Billing Location Info" with a close button (X) in the top right corner. Inside the dialog, there is a label "Delivery Preference:" followed by a drop-down menu. The drop-down menu is open, showing three options: "Email", "U.S. Mail", and "Email". The first "Email" option is highlighted. Below the drop-down menu, there are two buttons: "Cancel" on the left and "Save" on the right. The "Save" button is highlighted with a red rectangle.

**IMPORTANT:** To set your delivery preference to **Email**, you must first provide an email address to I-Que under the Employer Demographics information.

## Add a New I-Que User

On the home page, select **View/Update User Information**.



**Home** Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts **View/Update User Information** Documents View/ Update Member Information Generate Employer Rem

**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not use the browser's Back button

**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information**
- View Employer Documents
- View/Update Member Information
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files

**Message Center**

Search [x] New Show: Received Messages

**Details** Date

You have no received messages

**News and Alerts**

**News and Alerts**

06/11/2018: Rate Changes Effective for Any Payroll On or After 07-01-2018: Regular Class Member Share 6.29% and Employer Share 9.44%, Sheriff Class Member Share 9.76% and Employer Share 9.76%, Protection Class Member Share 6.81% and Employer Share 10.21%

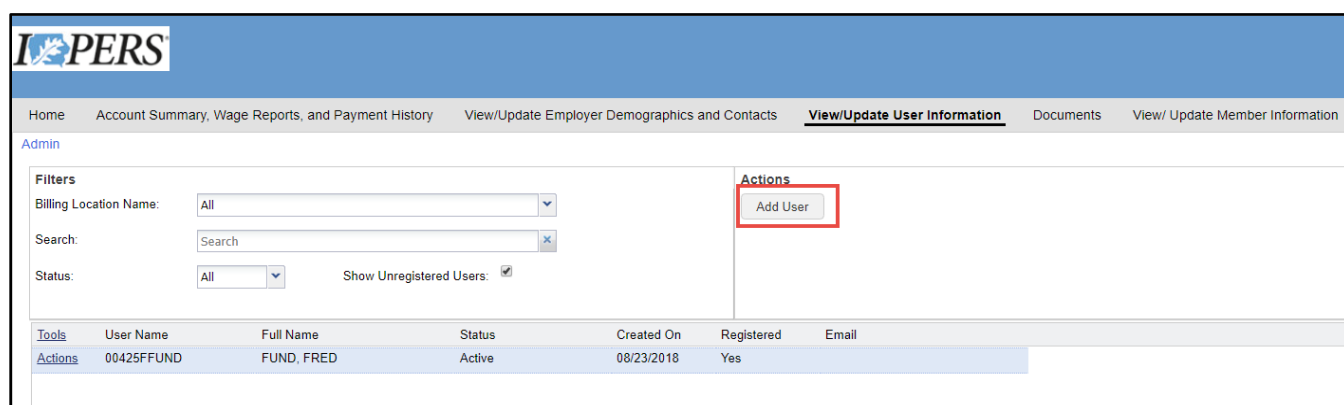
**News and Alerts**

10/06/2017: Enrollment/Beneficiary Designation forms contain confidential information and SHOULD NOT be emailed nonsecurely to IPERS. Please use the US Postal Service, ShareFile, or Fax the form to the number provided. Protecting this data is crucial.

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
Details	CITY OF PENSION	\$0.00

Select **Add User**.



**Home** Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts **View/Update User Information** Documents View/ Update Member Information

**Admin**

**Filters**

Billing Location Name: All

Search: Search

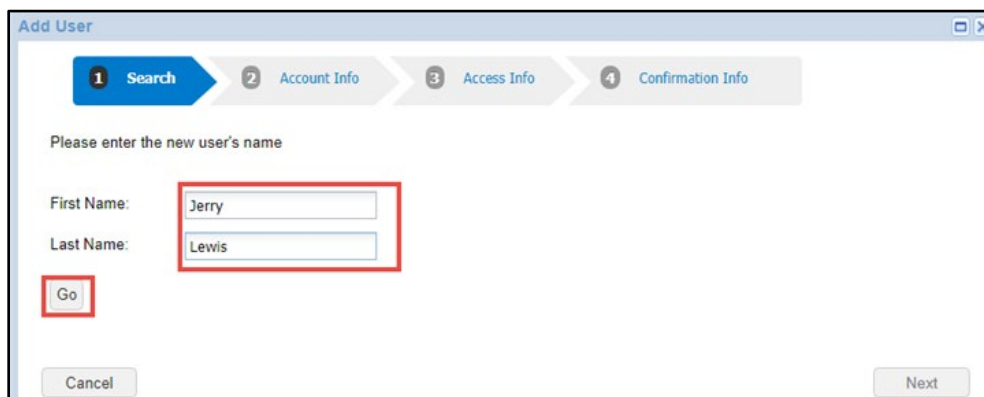
Status: All Show Unregistered Users: ☒

**Actions**

**Add User**

Tools	User Name	Full Name	Status	Created On	Registered	Email
<b>Actions</b>	00425FFUND	FUND, FRED	Active	08/23/2018	Yes	

The **Add User** window will appear. Enter the First and Last Name of the new user. Select **Go**.



**Add User**

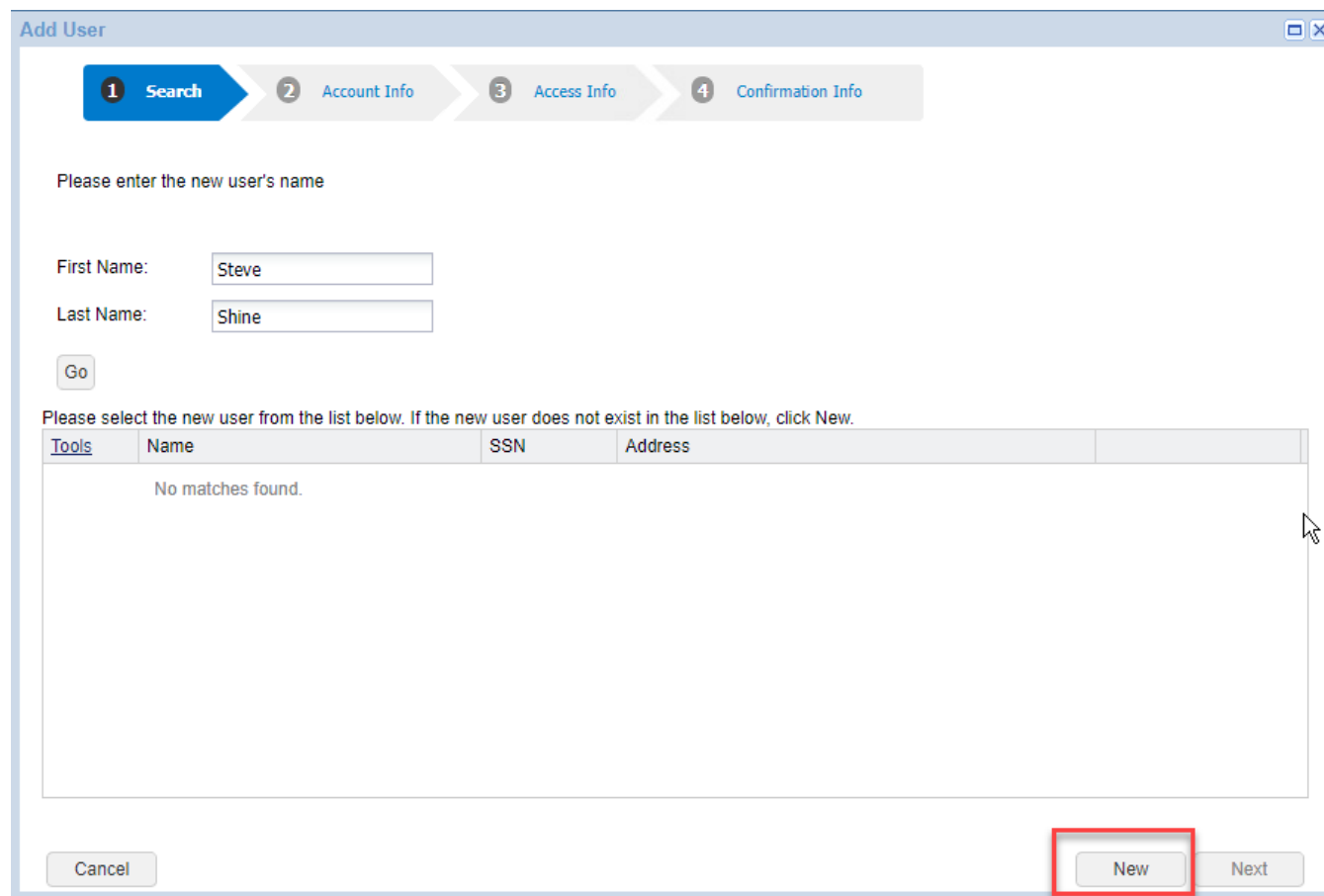
1 Search 2 Account Info 3 Access Info 4 Confirmation Info

Please enter the new user's name

First Name:

Last Name:

If I-Que does not find a match, select **New**.



**Add User**

1 Search 2 Account Info 3 Access Info 4 Confirmation Info

Please enter the new user's name

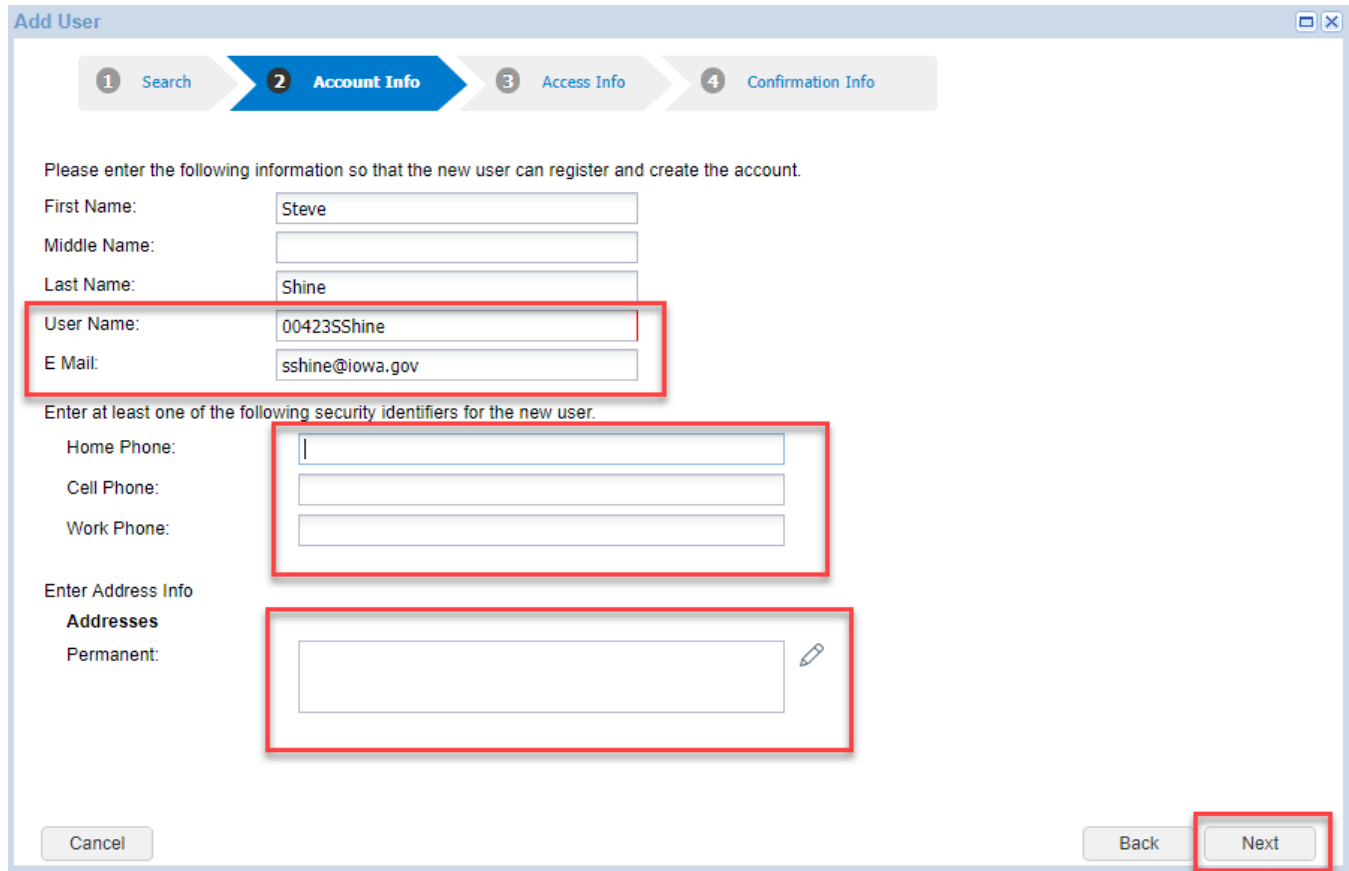
First Name:

Last Name:

Please select the new user from the list below. If the new user does not exist in the list below, click New.

<a href="#">Tools</a>	Name	SSN	Address
No matches found.			

In the **User Name** field, *enter the 5-digit employer number, first letter of first name and first 6 of last name*. Enter the **user's email address**. Enter one of the **security identifiers** and the **user's address**. Select **Next**.



**Add User**

1 Search 2 **Account Info** 3 Access Info 4 Confirmation Info

Please enter the following information so that the new user can register and create the account.

First Name: Steve  
Middle Name:   
Last Name: Shine  
**User Name: 00423SShine**  
**E Mail: sshine@iowa.gov**

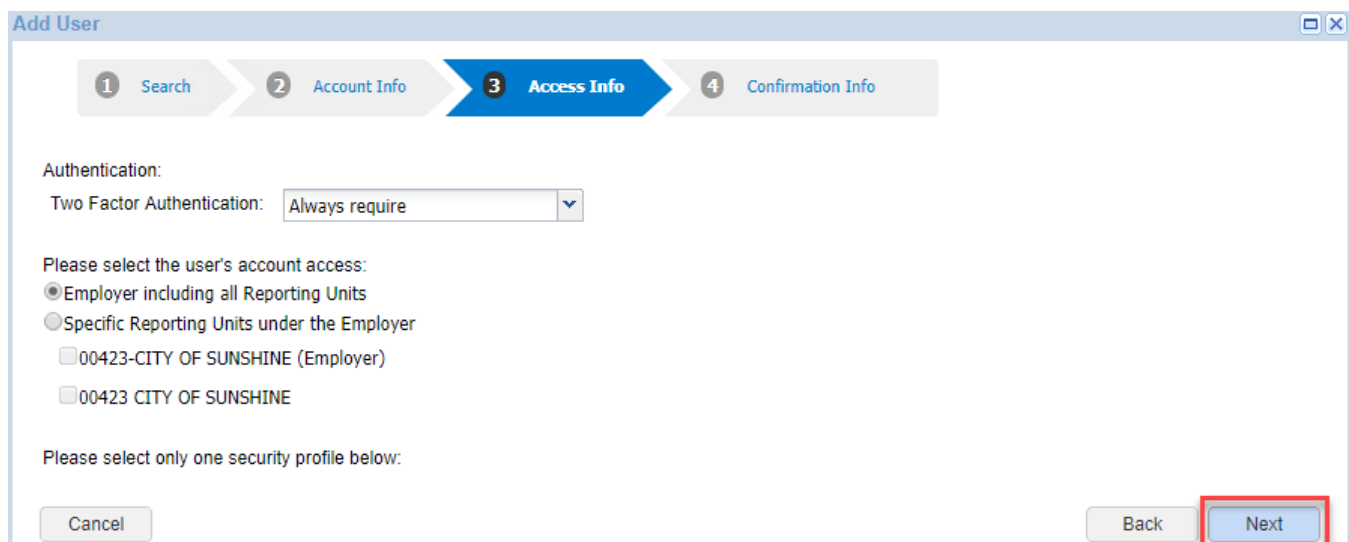
Enter at least one of the following security identifiers for the new user.

Home Phone:   
Cell Phone:   
Work Phone:

Enter Address Info  
**Addresses**  
Permanent:

Cancel Back **Next**

Select **Next**.



**Add User**

1 Search 2 Account Info 3 **Access Info** 4 Confirmation Info

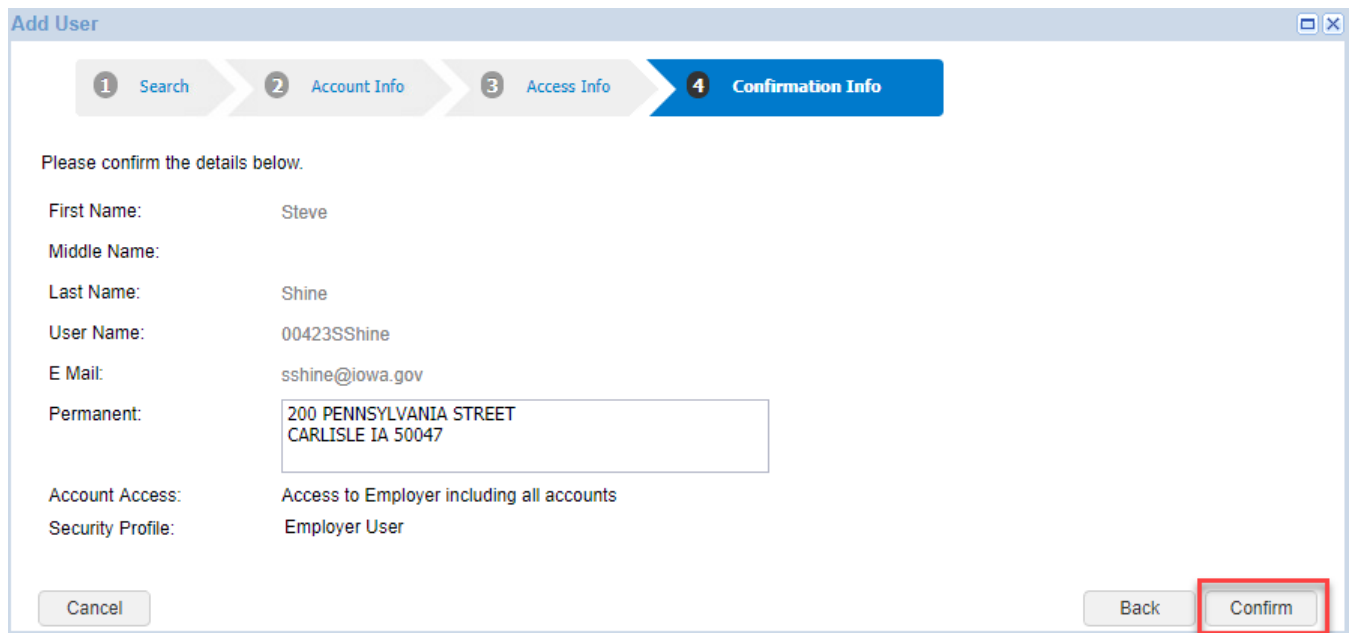
Authentication:  
Two Factor Authentication: Always require

Please select the user's account access:  
☒ Employer including all Reporting Units  
☐ Specific Reporting Units under the Employer  
☐ 00423-CITY OF SUNSHINE (Employer)  
☐ 00423 CITY OF SUNSHINE

Please select only one security profile below:

Cancel Back **Next**

If everything is correct, select **Confirm**.

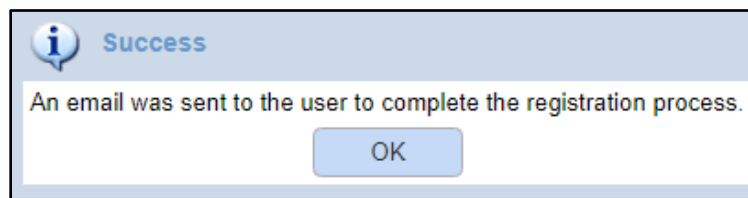


The 'Add User' window shows a four-step process: 1 Search, 2 Account Info, 3 Access Info, and 4 Confirmation Info. The Confirmation Info step is active. It displays the following details for confirmation:

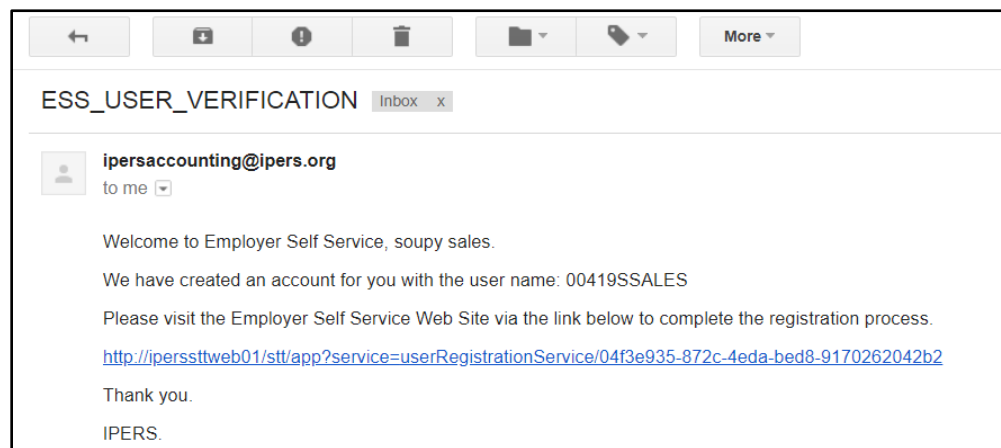
- First Name: Steve
- Middle Name:
- Last Name: Shine
- User Name: 00423SShine
- E Mail: sshine@iowa.gov
- Permanent: 200 PENNSYLVANIA STREET, CARLISLE IA 50047
- Account Access: Access to Employer including all accounts
- Security Profile: Employer User

At the bottom right, the 'Confirm' button is highlighted with a red box.

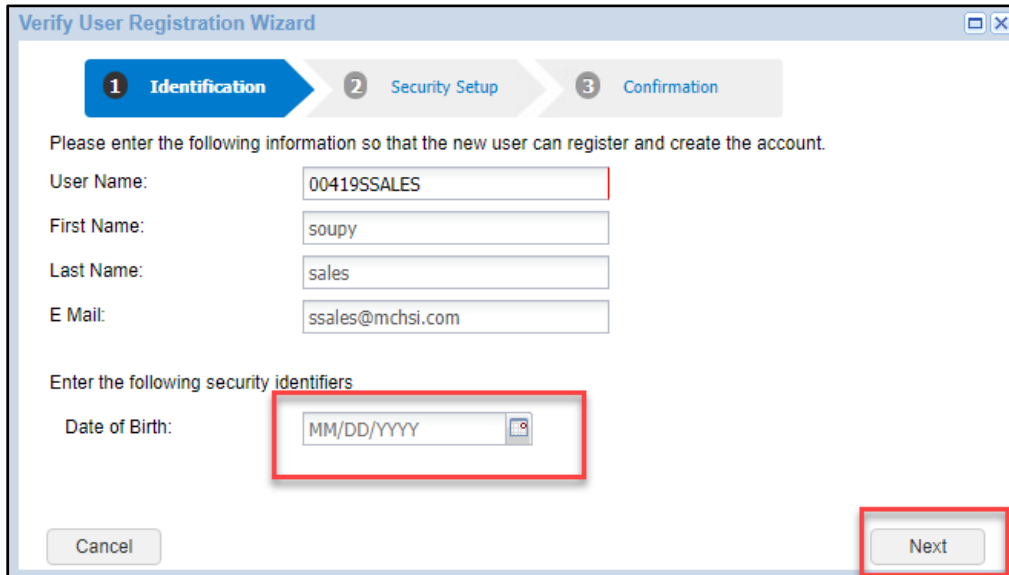
A message will appear stating that the user must complete the registration process via email. Select **OK**.



The new user must complete the registration process using the link contained in the email.

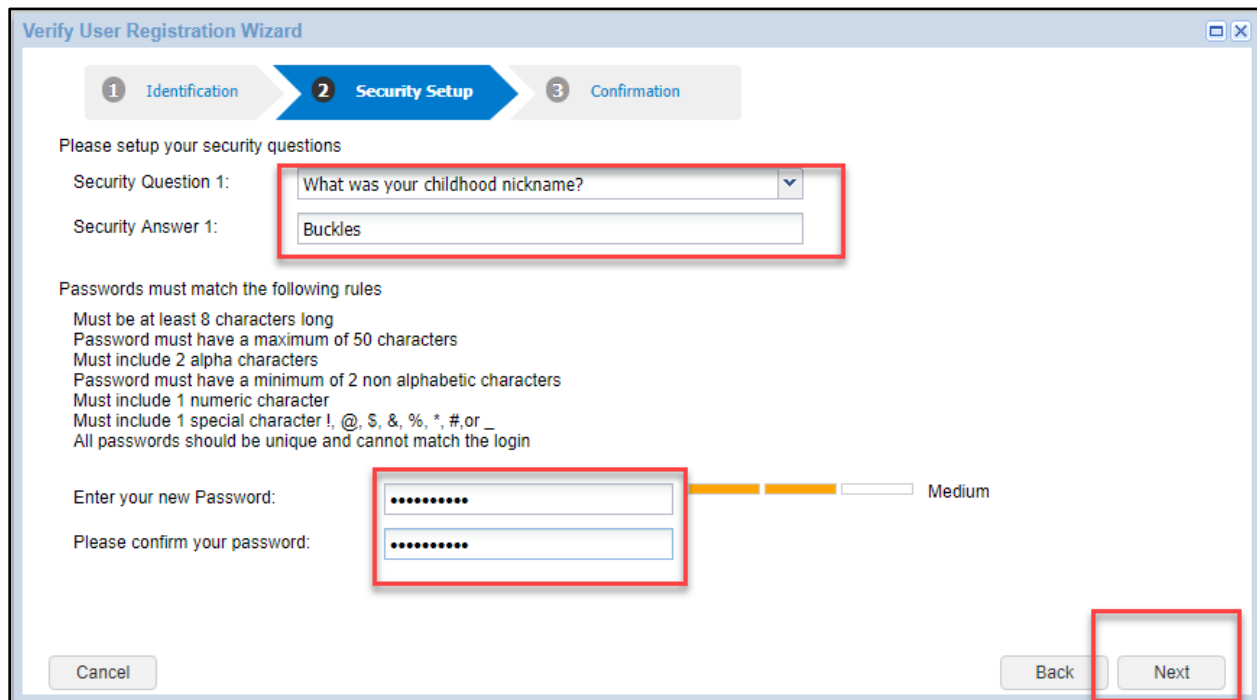


The **Verify User Registration Wizard** opens. The new user must enter the requested security identifier. Select **Next**.



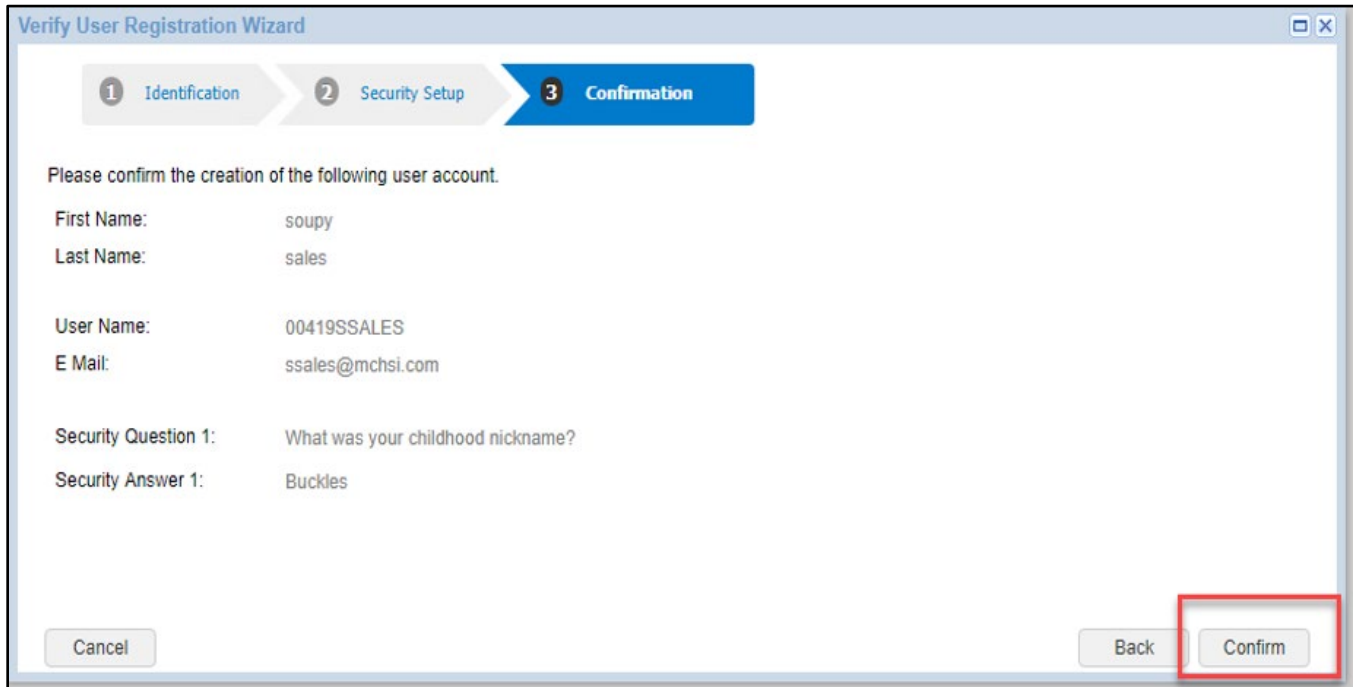
The screenshot shows the 'Verify User Registration Wizard' window, specifically the 'Identification' step (Step 1 of 3). The progress bar at the top shows '1 Identification' in blue, '2 Security Setup' in grey, and '3 Confirmation' in grey. The instructions state: 'Please enter the following information so that the new user can register and create the account.' The form contains the following fields: 'User Name:' with the value '00419SSALES', 'First Name:' with 'soupy', 'Last Name:' with 'sales', and 'E Mail:' with 'ssales@mchsi.com'. Below these, it says 'Enter the following security identifiers' and has a 'Date of Birth:' field with a placeholder 'MM/DD/YYYY' and a calendar icon. At the bottom, there are 'Cancel' and 'Next' buttons. The 'Next' button is highlighted with a red box.

The new user must choose a security question, provide an answer to the question, and set a new password. Select **Next**.



The screenshot shows the 'Verify User Registration Wizard' window, specifically the 'Security Setup' step (Step 2 of 3). The progress bar at the top shows '1 Identification' in grey, '2 Security Setup' in blue, and '3 Confirmation' in grey. The instructions state: 'Please setup your security questions'. The form contains the following fields: 'Security Question 1:' with a dropdown menu showing 'What was your childhood nickname?', and 'Security Answer 1:' with the text 'Buckles'. Below these, it says 'Passwords must match the following rules' and lists several requirements: 'Must be at least 8 characters long', 'Password must have a maximum of 50 characters', 'Must include 2 alpha characters', 'Password must have a minimum of 2 non alphabetic characters', 'Must include 1 numeric character', 'Must include 1 special character !, @, \$, &, %, \*, #, or \_', and 'All passwords should be unique and cannot match the login'. There are two password fields: 'Enter your new Password:' and 'Please confirm your password:'. A strength indicator bar is shown next to the first password field, with a yellow bar and the text 'Medium'. At the bottom, there are 'Cancel', 'Back', and 'Next' buttons. The 'Next' button is highlighted with a red box.

Select **Confirm**. The new user now has access to I-Que.



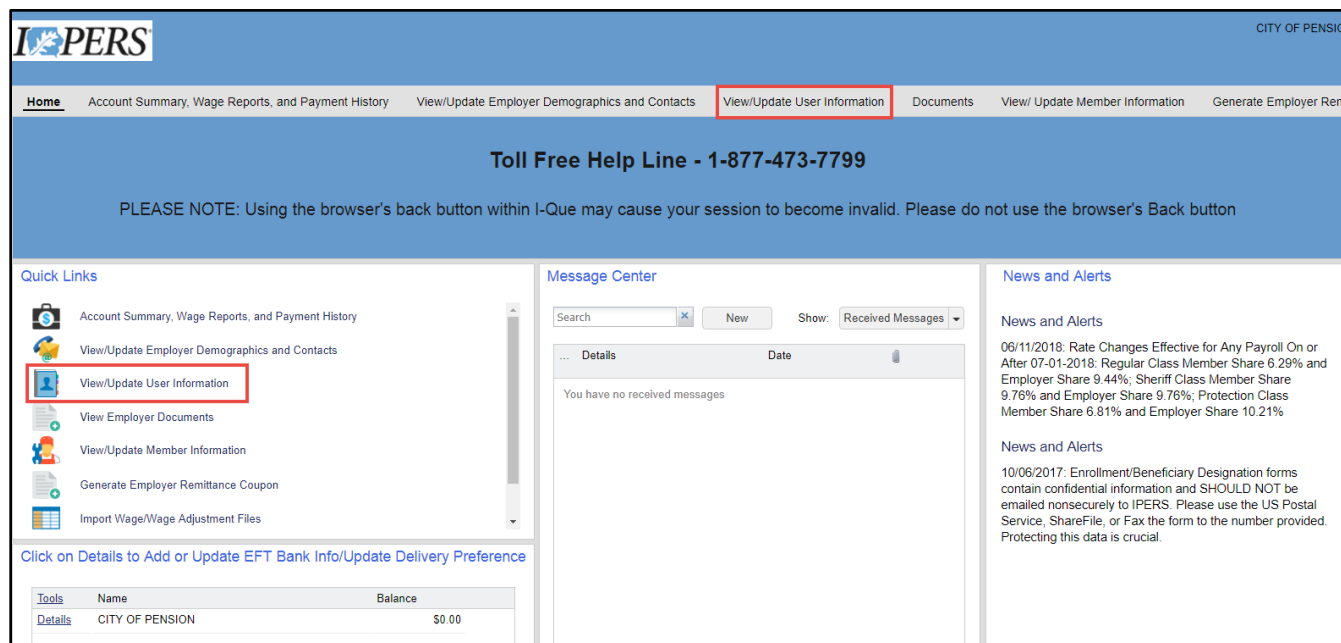
The image shows a 'Verify User Registration Wizard' window with three steps: 1 Identification, 2 Security Setup, and 3 Confirmation. The Confirmation step is active. It displays the following user account details for confirmation:

First Name:	soupy
Last Name:	sales
User Name:	00419SSALES
E Mail:	ssales@mchsi.com
Security Question 1:	What was your childhood nickname?
Security Answer 1:	Buckles

At the bottom, there are three buttons: 'Cancel', 'Back', and 'Confirm'. The 'Confirm' button is highlighted with a red rectangle.

# Deactivate an I-Que User

On the home page, select **View/Update User Information**.



**Home** Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts **View/Update User Information** Documents View/ Update Member Information Generate Employer Rem

**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not use the browser's Back button

**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information**
- View Employer Documents
- View/Update Member Information
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
Details	CITY OF PENSION	\$0.00

**Message Center**

Search [x] New Show: Received Messages

Details Date

You have no received messages

**News and Alerts**

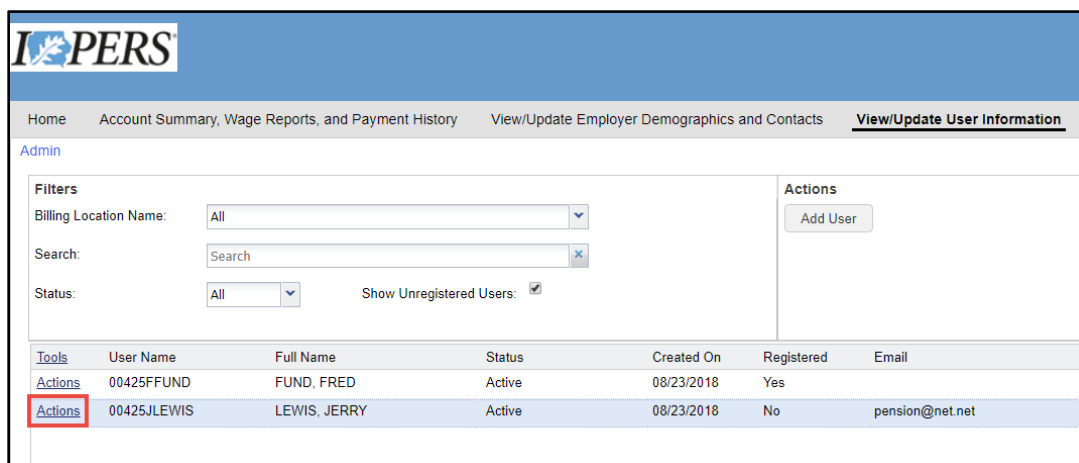
News and Alerts

06/11/2018: Rate Changes Effective for Any Payroll On or After 07-01-2018: Regular Class Member Share 6.29% and Employer Share 9.44%; Sheriff Class Member Share 9.76% and Employer Share 9.76%; Protection Class Member Share 6.81% and Employer Share 10.21%

News and Alerts

10/06/2017: Enrollment/Beneficiary Designation forms contain confidential information and SHOULD NOT be emailed nonsecurely to IPERS. Please use the US Postal Service, ShareFile, or Fax the form to the number provided. Protecting this data is crucial.

Find the user to deactivate. Click on that line and then select **Actions**.



**Home** Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts **View/Update User Information**

**Admin**

**Filters**

Billing Location Name: All

Search: Search

Status: All Show Unregistered Users: ☒

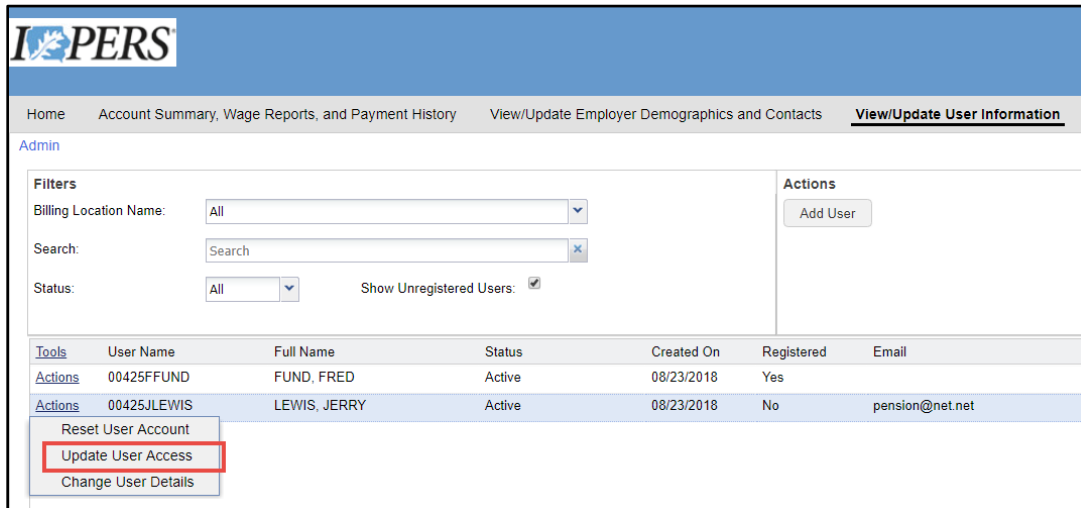
**Actions**

Add User

Tools	User Name	Full Name	Status	Created On	Registered	Email
Actions	00425FFUND	FUND, FRED	Active	08/23/2018	Yes	
<b>Actions</b>	00425JLEWIS	LEWIS, JERRY	Active	08/23/2018	No	pension@net.net



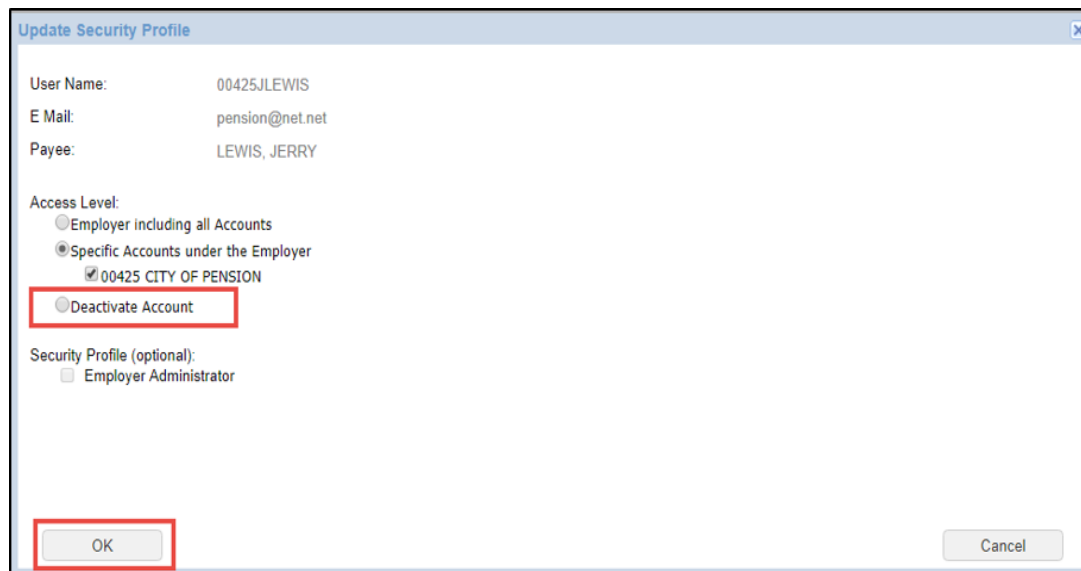
In the drop-down menu that appears, select **Update User Access**.



The screenshot shows the I-PERS Admin interface. The top navigation bar includes links for Home, Account Summary, Wage Reports, and Payment History, View/Update Employer Demographics and Contacts, and View/Update User Information. The 'Admin' section is active, displaying a list of users. The user '00425JLEWIS' is selected, and the 'Actions' dropdown menu is open, showing options: Reset User Account, Update User Access (highlighted), and Change User Details.

Tools	User Name	Full Name	Status	Created On	Registered	Email
Actions	00425FFUND	FUND, FRED	Active	08/23/2018	Yes	
Actions	00425JLEWIS	LEWIS, JERRY	Active	08/23/2018	No	pension@net.net

Select **Deactivate Account**. Select **OK**.



The screenshot shows the 'Update Security Profile' dialog box. The 'User Name' is 00425JLEWIS, 'E Mail' is pension@net.net, and 'Payee' is LEWIS, JERRY. Under 'Access Level', the 'Deactivate Account' radio button is selected. The 'OK' button is highlighted.

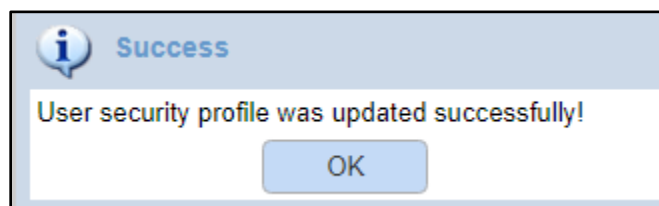
User Name: 00425JLEWIS  
E Mail: pension@net.net  
Payee: LEWIS, JERRY

Access Level:  
☐ Employer including all Accounts  
☒ Specific Accounts under the Employer  
☒ 00425 CITY OF PENSION  
☒ Deactivate Account

Security Profile (optional):  
☐ Employer Administrator

OK Cancel

This user has now been deactivated. Select **OK**.

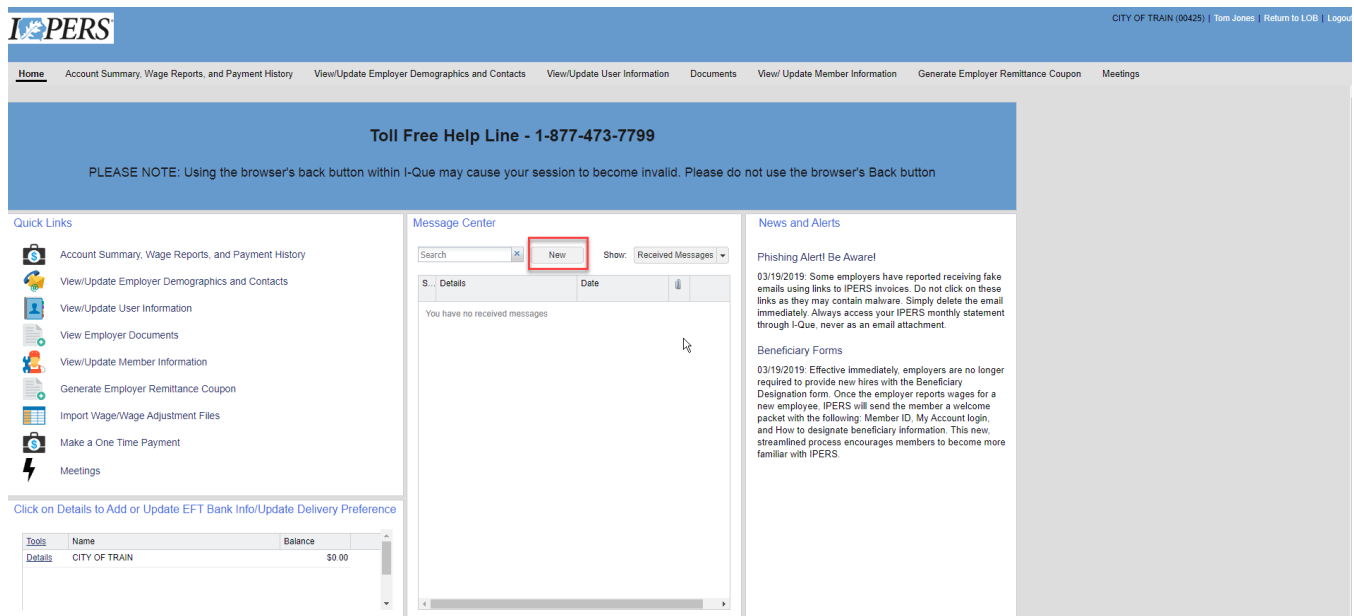


The screenshot shows a 'Success' message box with the text 'User security profile was updated successfully!' and an 'OK' button.

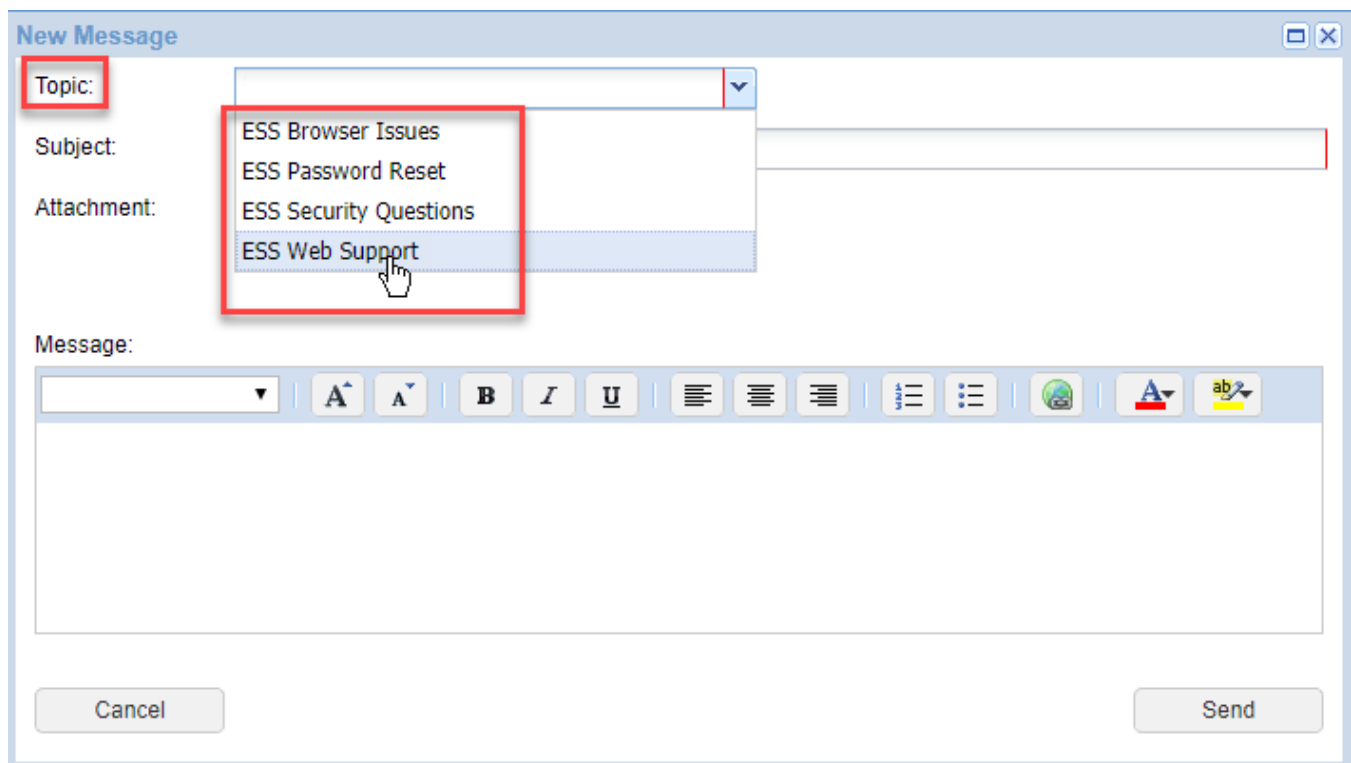
Success  
User security profile was updated successfully!  
OK

## Message Center

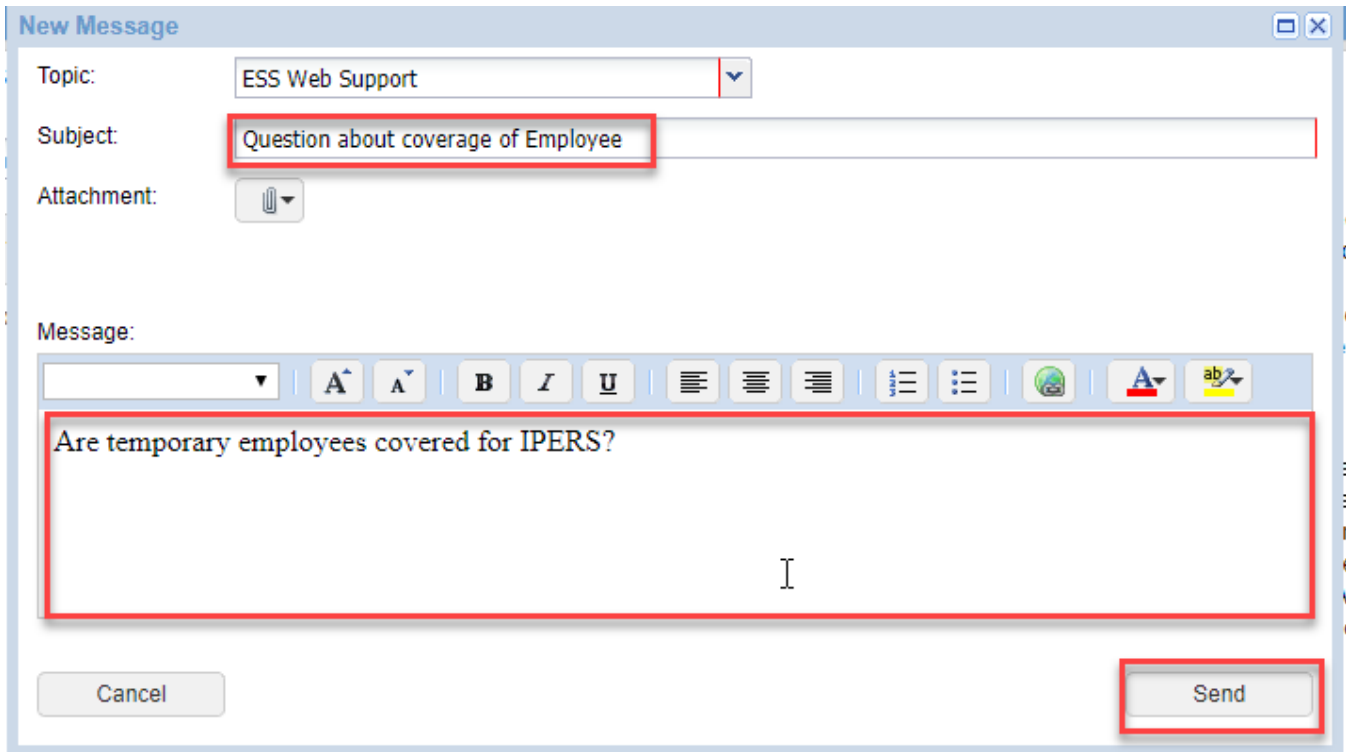
On the home page, under the Message Center, select the New button



Under the Topic drop down – select one of the choices that best describes your subject



Fill in the Subject line, type your message, and select the Send button



**New Message**

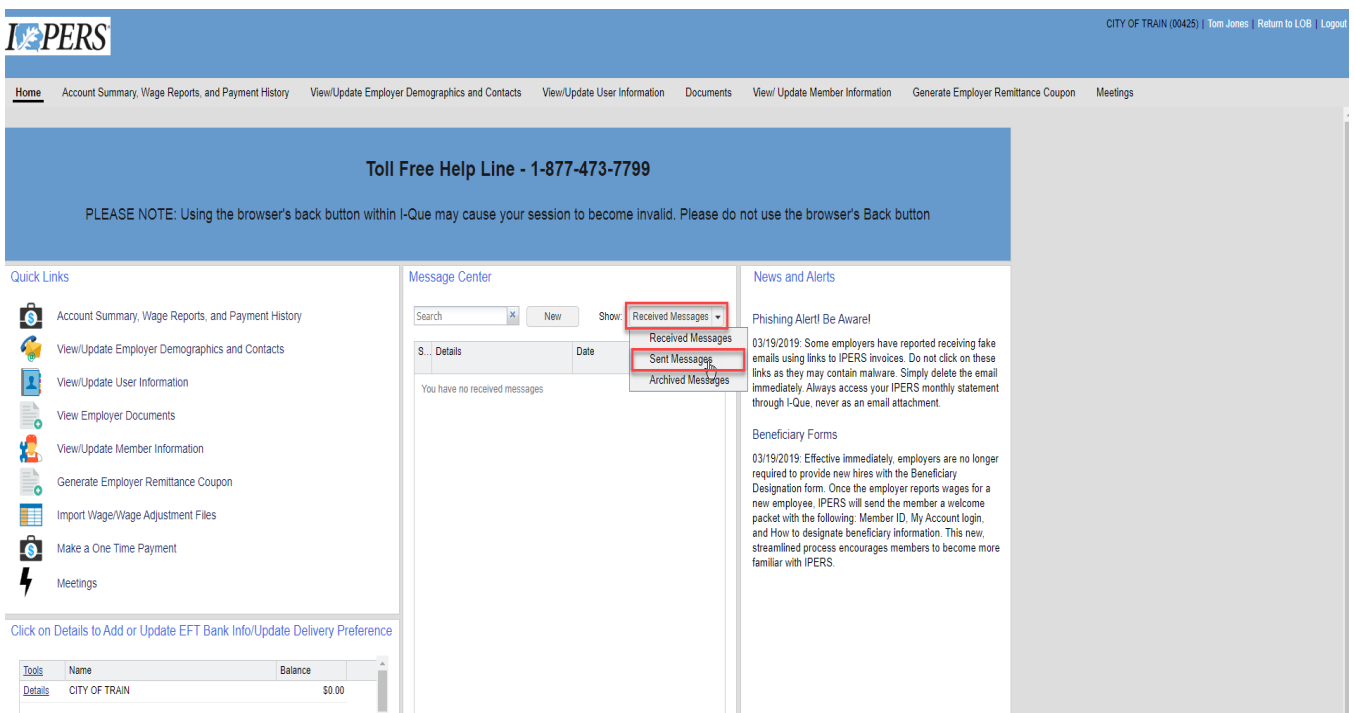
Topic:

Subject:

Attachment:

Message:

In order to see your sent message, change the drop down to Sent Messages



**I-PERS** CITY OF TRAIN (00425) | Tom Jones | Return to LOB | Logout

Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents View/Update Member Information Generate Employer Remittance Coupon Meetings

**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not use the browser's Back button

**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files
- Make a One Time Payment
- Meetings

**Message Center**

Search:  New Show: **Received Messages**

S. Details Date

You have no received messages

**News and Alerts**

**Phishing Alert! Be Aware!**

03/19/2019: Some employers have reported receiving fake emails using links to IPERS invoices. Do not click on these links as they may contain malware. Simply delete the email immediately. Always access your IPERS monthly statement through I-Que, never as an email attachment.

**Beneficiary Forms**

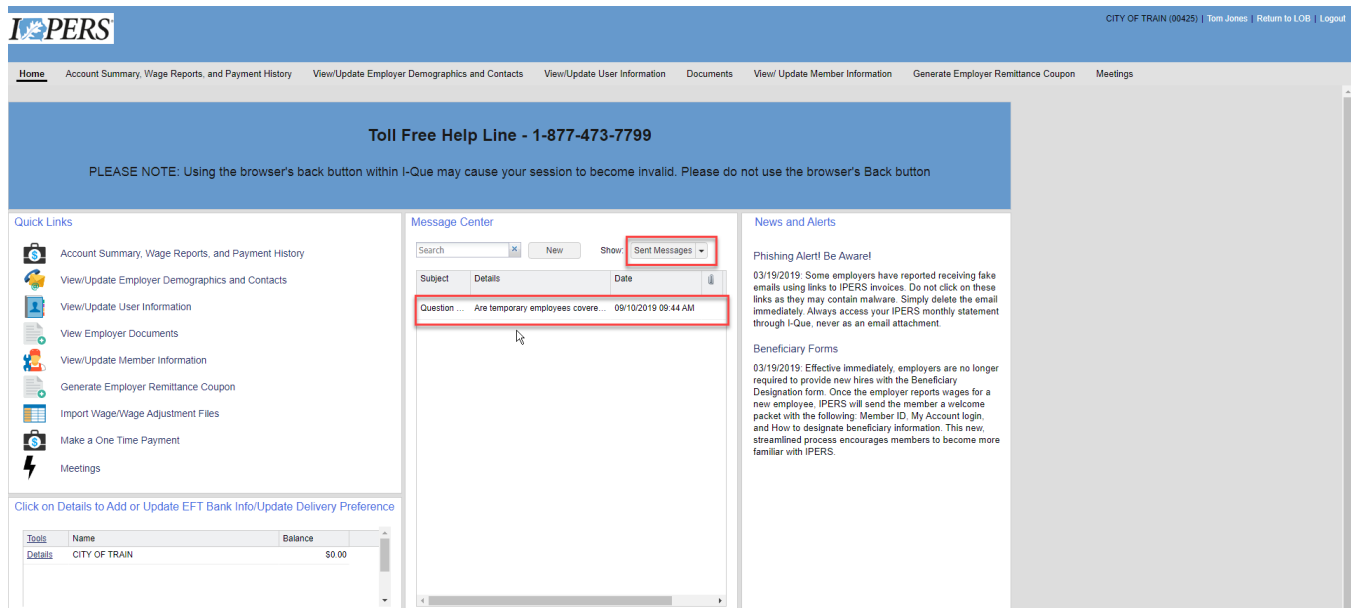
03/19/2019: Effective immediately, employers are no longer required to provide new hires with the Beneficiary Designation form. Once the employer reports wages for a new employee, IPERS will send the member a welcome packet with the following: Member ID, My Account login, and How to designate beneficiary information. This new, streamlined process encourages members to become more familiar with IPERS.

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
Details	CITY OF TRAIN	\$0.00

# I-Que Help Guide 2019 - Insert

All sent messages will be displayed



**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not use the browser's Back button

**Quick Links**

- Account Summary, Wage Reports, and Payment History
- View/Update Employer Demographics and Contacts
- View/Update User Information
- View Employer Documents
- View/Update Member Information
- Generate Employer Remittance Coupon
- Import Wage/Wage Adjustment Files
- Make a One Time Payment
- Meetings

**Message Center**

Search [x] New Show: **Sent Messages**

Subject	Details	Date
Question ...	Are temporary employees cover...	09/10/2019 09:44 AM

**News and Alerts**

**Phishing Alert! Be Aware!**

03/19/2019: Some employers have reported receiving fake emails using links to IPERS invoices. Do not click on these links as they may contain malware. Simply delete the email immediately. Always access your IPERS monthly statement through I-Que, never as an email attachment.

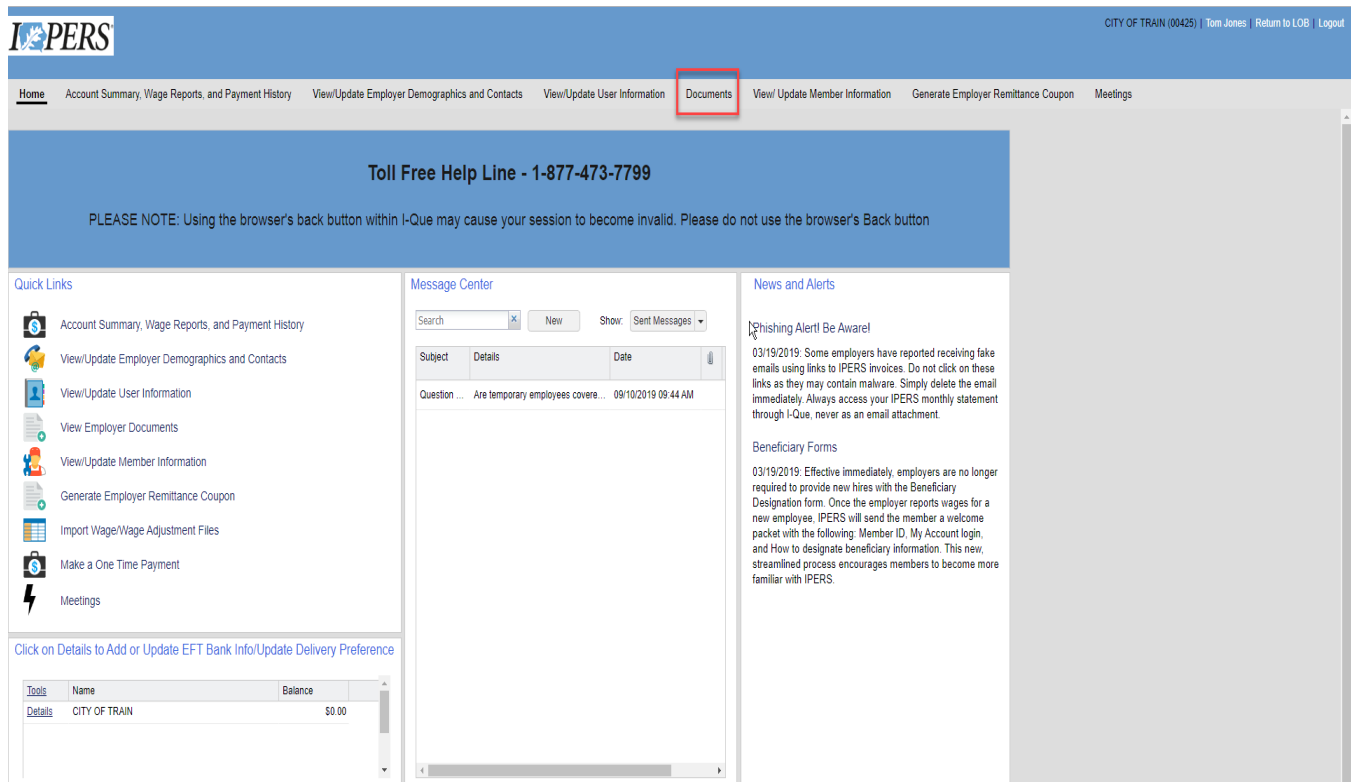
**Beneficiary Forms**

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Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
Details	CITY OF TRAIN	\$0.00

If you need to send IPERS a spreadsheet or other documents, you must first attach the document or spreadsheet to your documents in I-Que. Select the Documents tab on the Home page



**Toll Free Help Line - 1-877-473-7799**

PLEASE NOTE: Using the browser's back button within I-Que may cause your session to become invalid. Please do not use the browser's Back button

**Quick Links**

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- Meetings

**Message Center**

Search [x] New Show: **Sent Messages**

Subject	Details	Date
Question ...	Are temporary employees cover...	09/10/2019 09:44 AM

**News and Alerts**

**Phishing Alert! Be Aware!**

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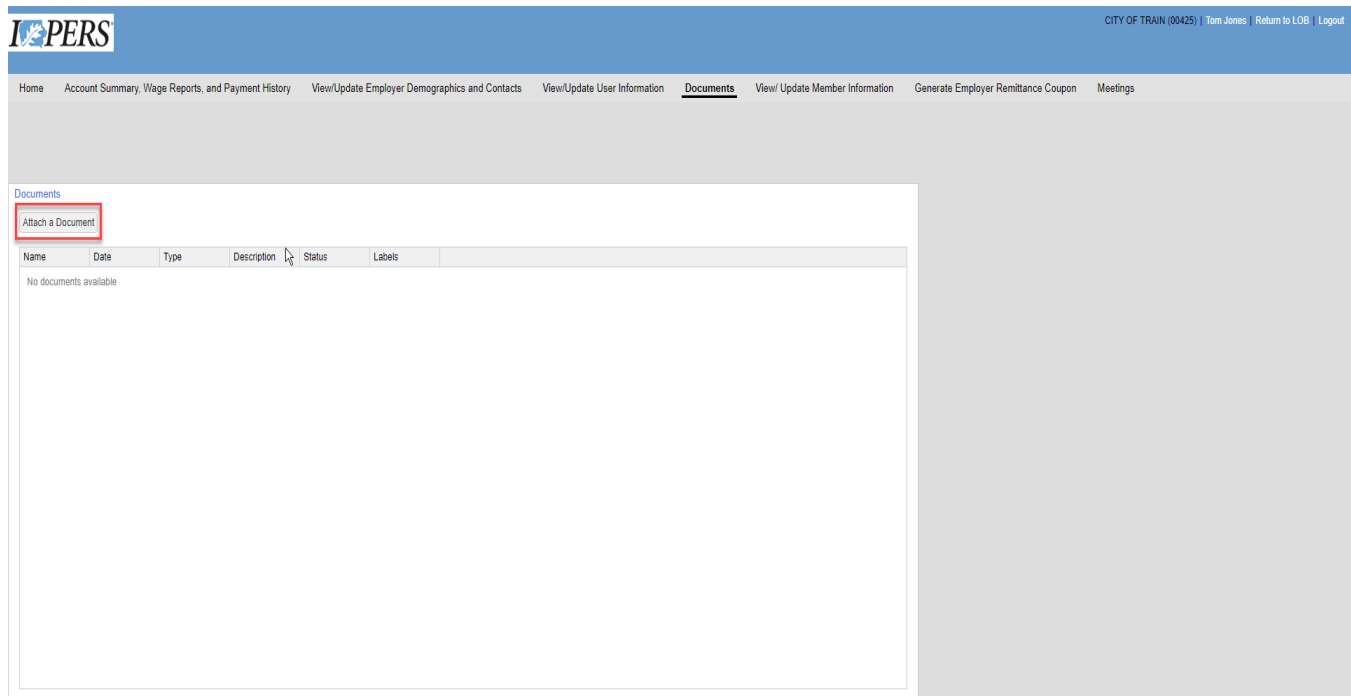
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Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

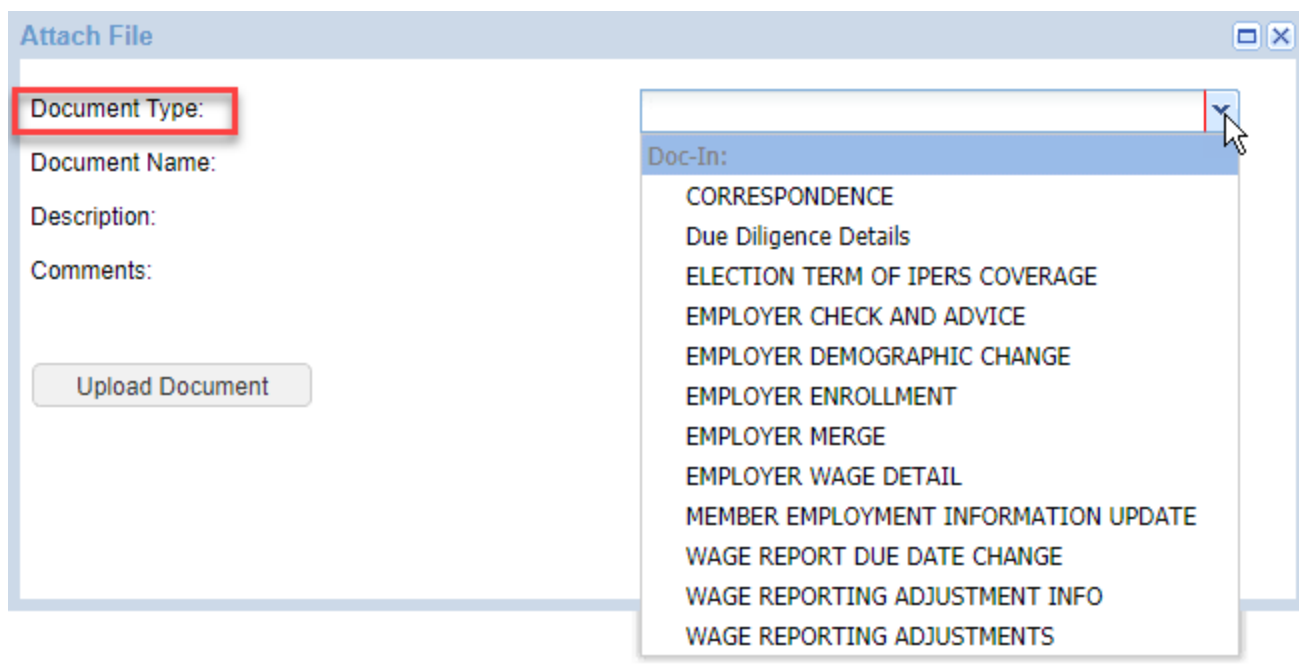
Tools	Name	Balance
Details	CITY OF TRAIN	\$0.00

Select Attach a Document to browse for your document or spreadsheet



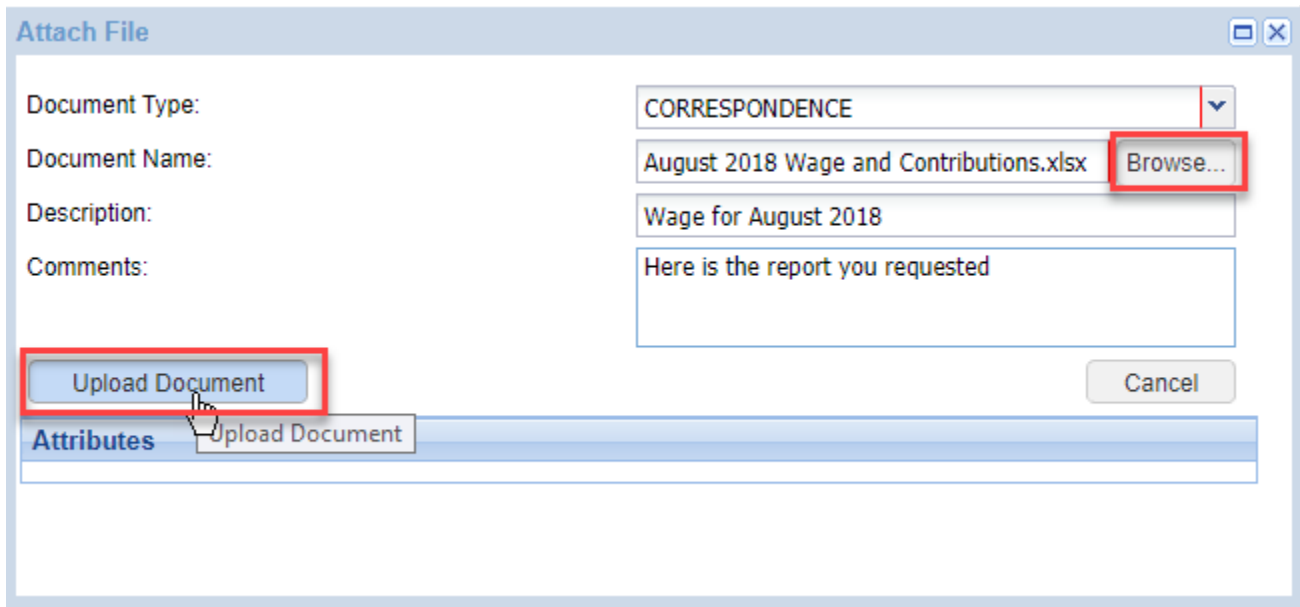
The screenshot shows the I-PERS web application interface. At the top, there is a navigation bar with the I-PERS logo on the left and user information (CITY OF TRAIN (00425) | Tom Jones | Return to LOB | Logout) on the right. Below the navigation bar, there is a menu with several options: Home, Account Summary, Wage Reports, and Payment History, View/Update Employer Demographics and Contacts, View/Update User Information, **Documents** (highlighted), View/ Update Member Information, Generate Employer Remittance Coupon, and Meetings. The main content area is titled "Documents" and contains a red box around the "Attach a Document" link. Below this link is a table with columns: Name, Date, Type, Description, Status, and Labels. The table is currently empty, displaying "No documents available".

Choose from the drop down the appropriate type of document you are attaching



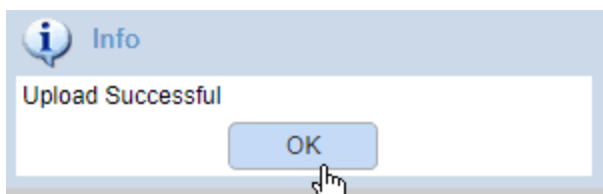
The screenshot shows the "Attach File" dialog box. It has a title bar with "Attach File" and standard window controls. The dialog contains several input fields: "Document Type:" (highlighted with a red box), "Document Name:", "Description:", and "Comments:". Below these fields is an "Upload Document" button. To the right of the input fields is a dropdown menu labeled "Doc-In:". The dropdown menu is open, showing a list of document types: CORRESPONDENCE, Due Diligence Details, ELECTION TERM OF IPERS COVERAGE, EMPLOYER CHECK AND ADVICE, EMPLOYER DEMOGRAPHIC CHANGE, EMPLOYER ENROLLMENT, EMPLOYER MERGE, EMPLOYER WAGE DETAIL, MEMBER EMPLOYMENT INFORMATION UPDATE, WAGE REPORT DUE DATE CHANGE, WAGE REPORTING ADJUSTMENT INFO, and WAGE REPORTING ADJUSTMENTS.

Select the Browse button to find the document or spreadsheet, fill in a brief description and any comments you wish to make. Then select Upload Document

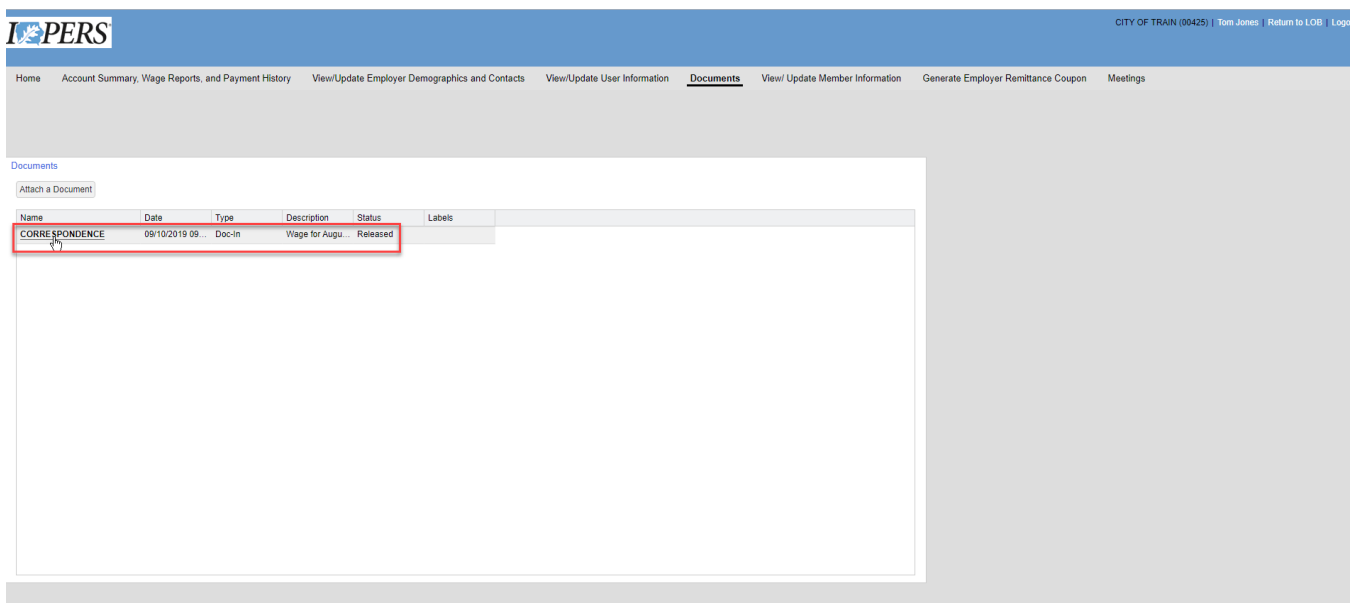


The 'Attach File' dialog box contains the following fields and controls:

- Document Type:** A dropdown menu with 'CORRESPONDENCE' selected.
- Document Name:** A text field containing 'August 2018 Wage and Contributions.xlsx' and a 'Browse...' button to its right.
- Description:** A text field containing 'Wage for August 2018'.
- Comments:** A text area containing 'Here is the report you requested'.
- Buttons:** 'Upload Document' (highlighted with a red box and a mouse cursor), 'Cancel', and a secondary 'Upload Document' button below the main one.
- Attributes:** A section header for a table below the main form.



This document is now stored in I-Que and can now be shared securely

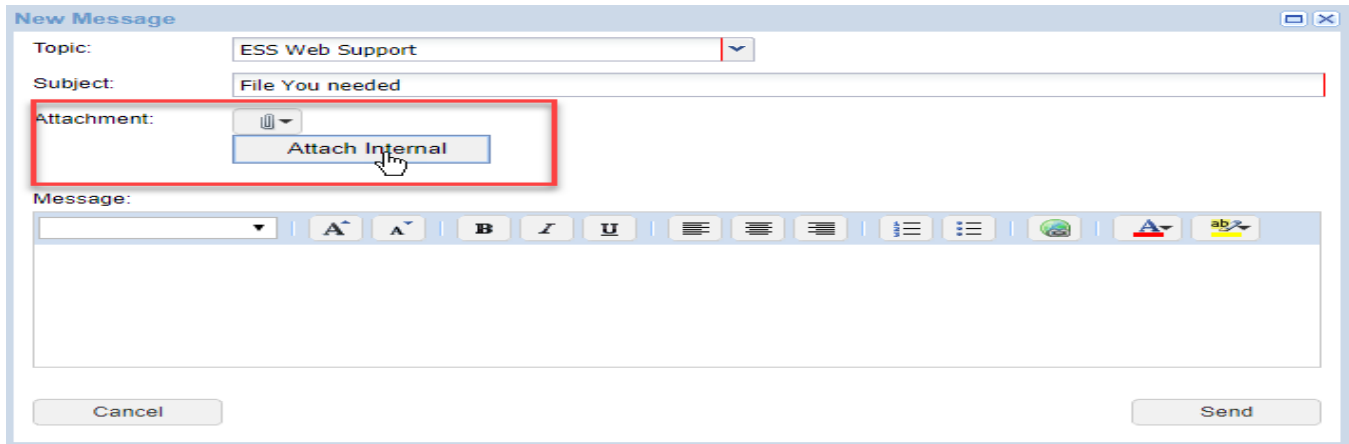


The I-PERS 'Documents' page shows a table of uploaded documents. The first row is highlighted with a red box:

Name	Date	Type	Description	Status	Labels
CORRESPONDENCE	09/10/2019 09...	Doc-In	Wage for Augu...	Released	

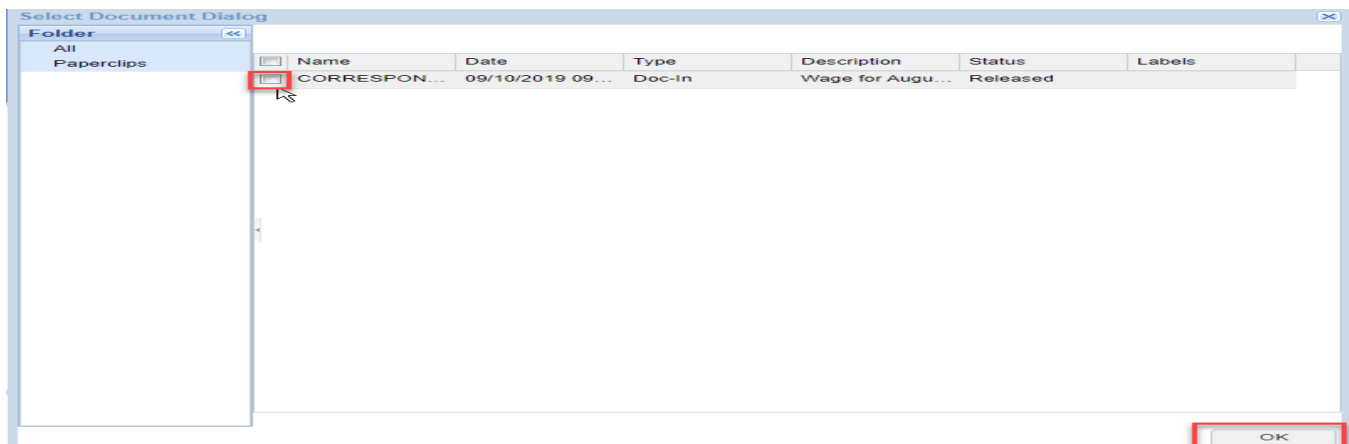
Below the table is a large empty box for document details.

Go back to the Home page and create a new message, you should be able to browse to find this newly added document by selecting Attach Internal



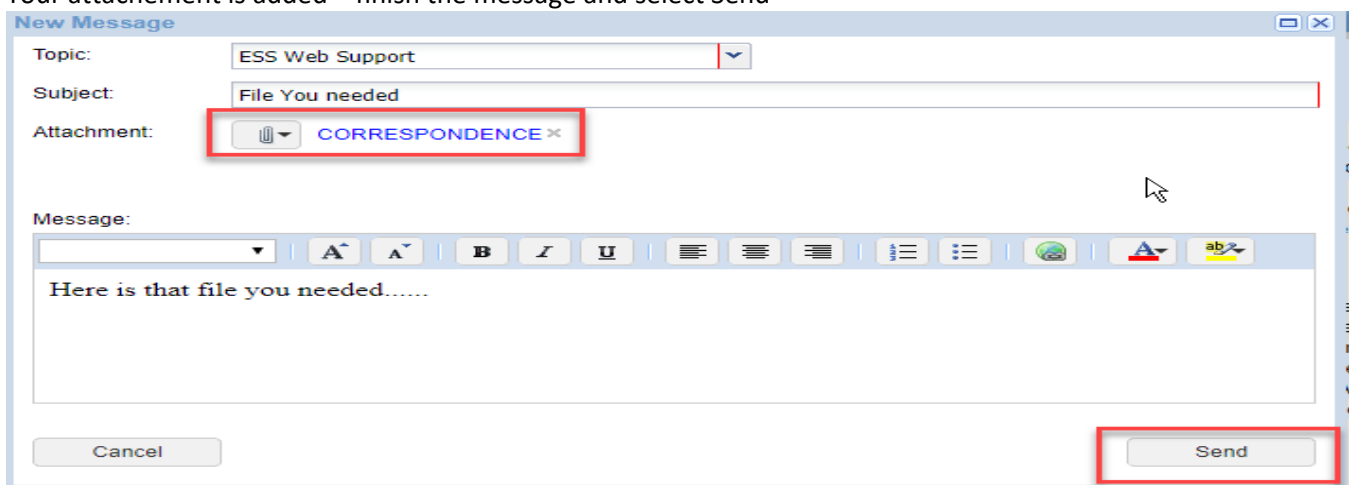
The "New Message" dialog box is shown. The "Topic" field is set to "ESS Web Support" and the "Subject" field is set to "File You needed". The "Attachment" section is highlighted with a red box, showing a file icon and the "Attach Internal" button. The "Message" field is empty. The "Cancel" and "Send" buttons are at the bottom.

This will take you to the Documents where you just saved the document you wish to share. Select the box next to the document and then the OK button




The "Select Document Dialog" box is shown. The "Folder" list on the left includes "All" and "Paperclips". The "Name" column is highlighted with a red box, showing a document named "CORRESPON...". The "Date" column shows "09/10/2019 09...". The "Type" column shows "Doc-In". The "Description" column shows "Wage for Augu...". The "Status" column shows "Released". The "OK" button is highlighted with a red box at the bottom right.

Your attachment is added – finish the message and select Send



The "New Message" dialog box is shown again. The "Topic" field is set to "ESS Web Support" and the "Subject" field is set to "File You needed". The "Attachment" section is highlighted with a red box, showing a file icon and the text "CORRESPONDENCE x". The "Message" field contains the text "Here is that file you needed.....". The "Cancel" and "Send" buttons are at the bottom, with the "Send" button highlighted by a red box.

Your message and attachment are now sent securely


CITY OF TRAIN (00425) | Tom Jones | Return to LOB | Logout

[Home](#) | 
 [Account Summary, Wage Reports, and Payment History](#) | 
 [View/Update Employer Demographics and Contacts](#) | 
 [View/Update User Information](#) | 
 [Documents](#) | 
 [View/ Update Member Information](#) | 
 [Generate Employer Remittance Coupon](#) | 
 [Meetings](#)

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[Click on Details to Add or Update EFT Bank Info/Update Delivery Preference](#)

Tools	Name	Balance
<a href="#">Details</a>	CITY OF TRAIN	\$0.00

#### Message Center

Show: **Sent Messages**

S...	Details	Date	
F...	Here is that file you needed.....	09/10/2019 10:37 AM	Move to
Q...	Are temporary employees covere...	09/10/2019 09:44 AM	Move to

#### News and Alerts

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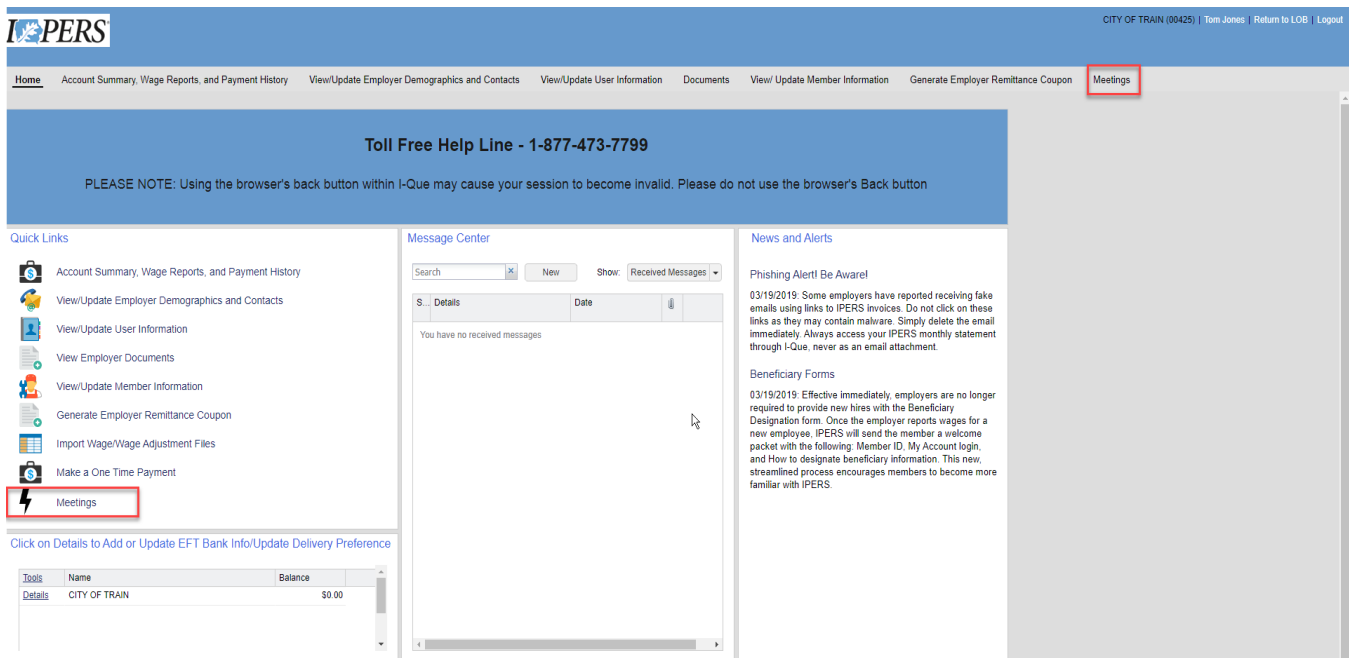
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# Training Registration

On the home page, select **Meetings**



**IPERS** CITY OF TRAIN (00425) | Tom Jones | Return to LOB | Logout

Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon **Meetings**

**Toll Free Help Line - 1-877-473-7799**

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- Meetings**

Click on Details to Add or Update EFT Bank Info/Update Delivery Preference

Tools	Name	Balance
Details	CITY OF TRAIN	\$0.00

**Message Center**

Search [X] New Show: Received Messages

S	Details	Date
You have no received messages		

**News and Alerts**

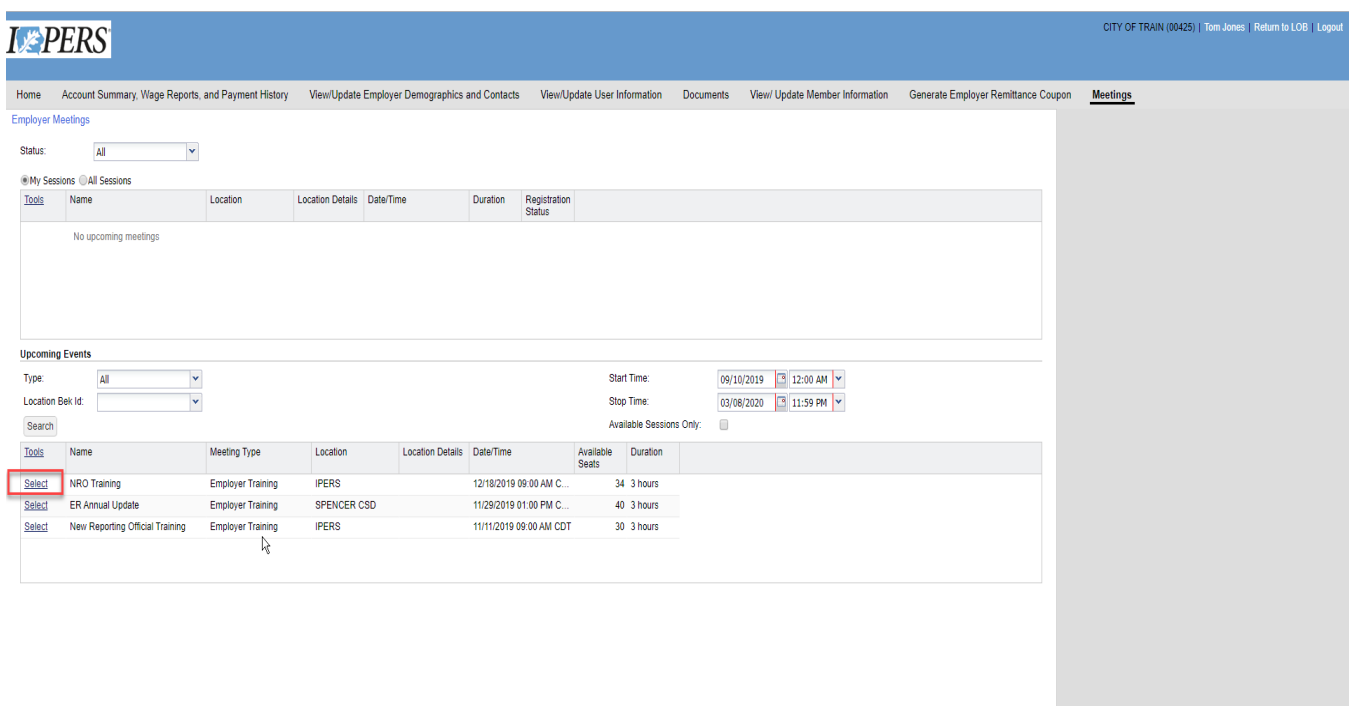
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Under the “Upcoming Events” click Select for the session you wish to attend



**IPERS** CITY OF TRAIN (00425) | Tom Jones | Return to LOB | Logout

Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon **Meetings**

**Employer Meetings**

Status: All

My Sessions All Sessions

Tools	Name	Location	Location Details	Date/Time	Duration	Registration Status
No upcoming meetings						

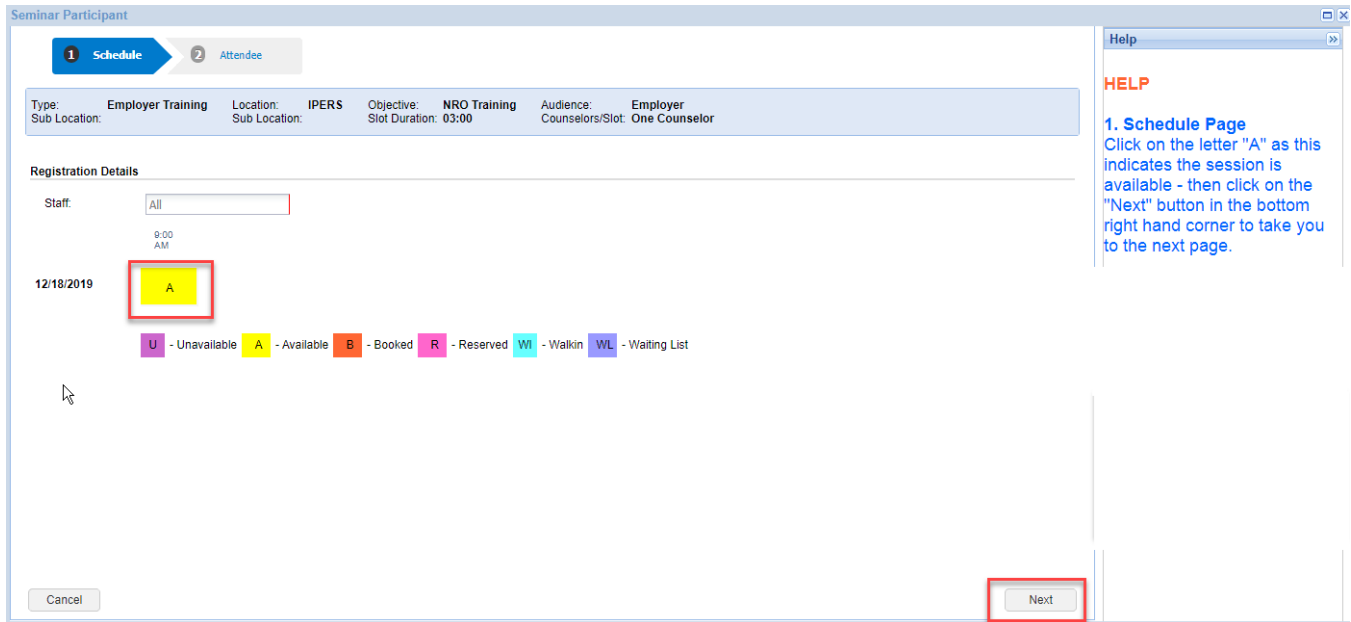
**Upcoming Events**

Type: All Start Time: 09/10/2019 12:00 AM Stop Time: 03/08/2020 11:59 PM Available Sessions Only: ☐

Location Bek Id: Search

Tools	Name	Meeting Type	Location	Location Details	Date/Time	Available Seats	Duration
<b>Select</b>	NRO Training	Employer Training	IPERS		12/18/2019 09:00 AM C...	34	3 hours
Select	ER Annual Update	Employer Training	SPENCER CSD		11/29/2019 01:00 PM C...	40	3 hours
Select	New Reporting Official Training	Employer Training	IPERS		11/11/2019 09:00 AM CDT	30	3 hours

Select the box with the “A” indicating that this session is still available then select the Next button



The screenshot shows the 'Seminar Participant' window with the 'Schedule' tab selected. The header bar displays session details: Type: Employer Training, Location: IPERS, Objective: NRO Training, Audience: Employer, and Sub Location: One Counselor. The Registration Details section shows a staff selection dropdown set to 'All' and a date/time selector for 12/18/2019 at 9:00 AM. A yellow box with the letter 'A' is highlighted, indicating the session is available. A legend below shows status codes: U (Unavailable), A (Available), B (Booked), R (Reserved), WI (Walkin), and WL (Waiting List). The 'Next' button is highlighted in the bottom right corner. A help sidebar on the right provides instructions for the Schedule Page.

**Seminar Participant**

**1 Schedule** **2 Attendee**

Type: **Employer Training** Location: **IPERS** Objective: **NRO Training** Audience: **Employer**  
Sub Location: Sub Location: Slot Duration: 03:00 Counselors/Slot: **One Counselor**

**Registration Details**

Staff:

9:00 AM

12/18/2019 **A**

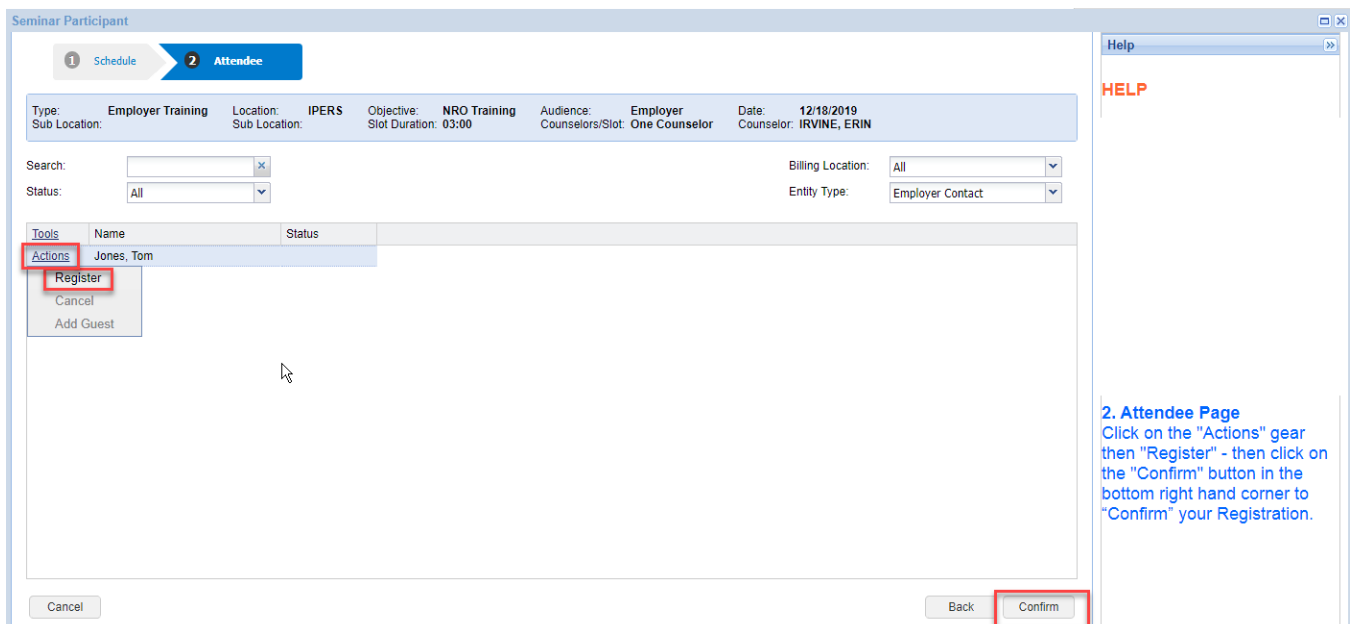
U - Unavailable A - Available B - Booked R - Reserved WI - Walkin WL - Waiting List

Cancel Next

**HELP**

**1. Schedule Page**  
Click on the letter "A" as this indicates the session is available - then click on the "Next" button in the bottom right hand corner to take you to the next page.

All current Contacts will show – choose the Actions link and Register for each contact that you wish to attend, then select the Confirm button. NOTE - if you are wanting to add an attendee that does not appear on this screen, please add them first as a Contact under the View/Update Employer Demographics and Contacts on the Home Screen.



The screenshot shows the 'Seminar Participant' window with the 'Attendee' tab selected. The header bar displays session details: Type: Employer Training, Location: IPERS, Objective: NRO Training, Audience: Employer, Date: 12/18/2019, and Sub Location: One Counselor. The Search and Status filters are set to 'All'. The Billing Location and Entity Type are also set to 'All'. A table lists attendees, with 'Jones, Tom' highlighted. The 'Actions' link is highlighted, and a dropdown menu shows 'Register', 'Cancel', and 'Add Guest'. The 'Confirm' button is highlighted in the bottom right corner. A help sidebar on the right provides instructions for the Attendee Page.

**Seminar Participant**

**1 Schedule** **2 Attendee**

Type: **Employer Training** Location: **IPERS** Objective: **NRO Training** Audience: **Employer** Date: **12/18/2019**  
Sub Location: Sub Location: Slot Duration: 03:00 Counselors/Slot: **One Counselor** Counselor: **IRVINE, ERIN**

Search:  x Billing Location:

Status:  Entity Type:

Tools	Name	Status
<b>Actions</b>	Jones, Tom	

Register  
Cancel  
Add Guest

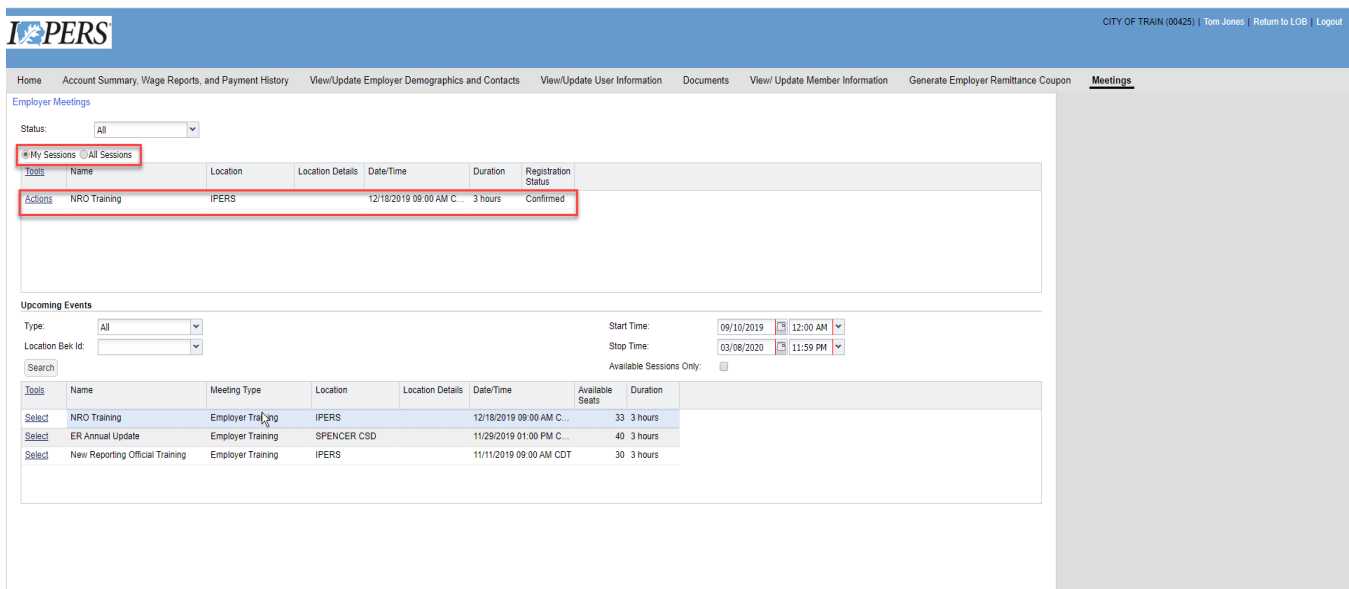
Cancel Back Confirm

**HELP**

**2. Attendee Page**  
Click on the "Actions" gear then "Register" - then click on the "Confirm" button in the bottom right hand corner to "Confirm" your Registration.

You will be returned to the training registration screen – you will be able to see that you are scheduled for this training session under My Sessions. You will receive a separate email from IPERS confirming your registration.

Note – if you scheduled multiple contacts to attend this session, you have to then select the All Sessions radio button to see all that are scheduled.



**IPERS** CITY OF TRAIN (00425) | Tom Jones | Return to LOB | Logout

Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon **Meetings**

**Employer Meetings**

Status: All

☒ My Sessions ☐ All Sessions

Tools	Name	Location	Location Details	Date/Time	Duration	Registration Status
Actions	NRO Training	IPERS		12/18/2019 09:00 AM C...	3 hours	Confirmed

**Upcoming Events**

Type: All

Location Bk Id:

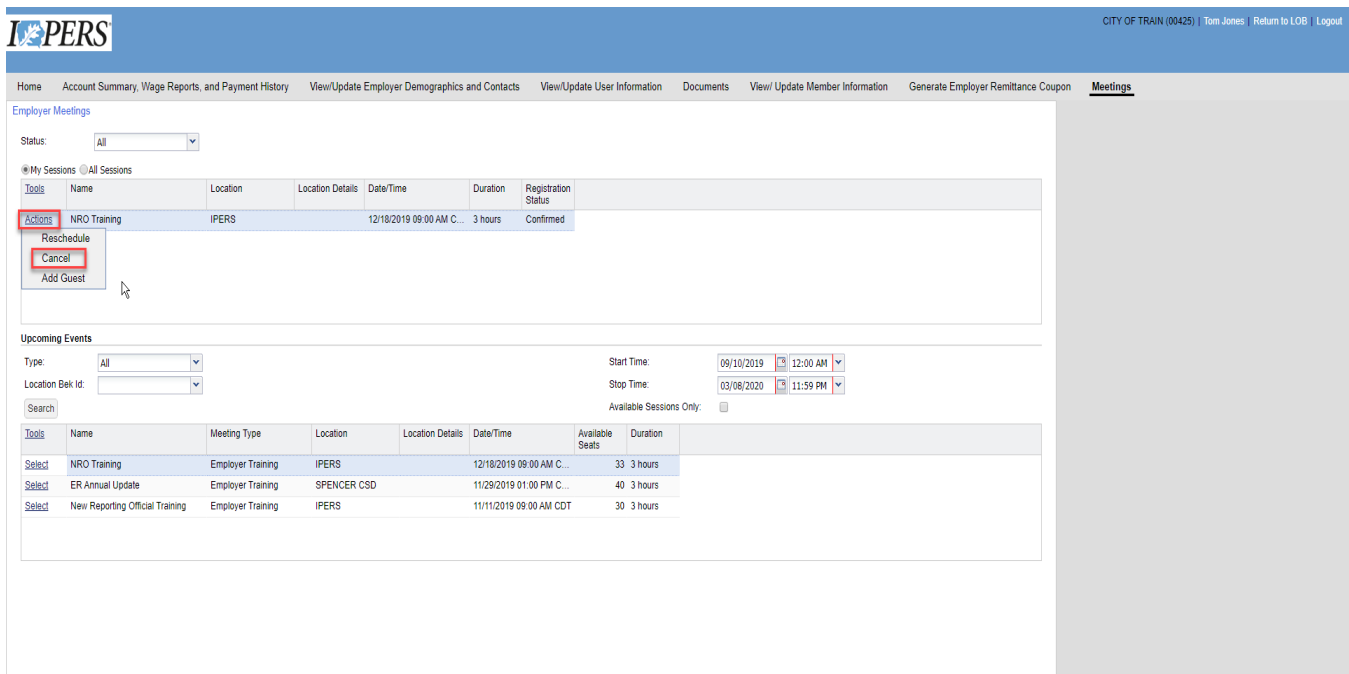
Start Time: 09/10/2019 12:00 AM

Stop Time: 03/08/2020 11:59 PM

Available Sessions Only: ☐

Tools	Name	Meeting Type	Location	Location Details	Date/Time	Available Seats	Duration
Select	NRO Training	Employer Training	IPERS		12/18/2019 09:00 AM C...	33	3 hours
Select	ER Annual Update	Employer Training	SPENCER CSD		11/29/2019 01:00 PM C...	40	3 hours
Select	New Reporting Official Training	Employer Training	IPERS		11/11/2019 09:00 AM CDT	30	3 hours

If you need to cancel your scheduled session – select the Action link under the My Sessions and then choose the Cancel option



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Home Account Summary, Wage Reports, and Payment History View/Update Employer Demographics and Contacts View/Update User Information Documents View/ Update Member Information Generate Employer Remittance Coupon **Meetings**

**Employer Meetings**

Status: All

☒ My Sessions ☐ All Sessions

Tools	Name	Location	Location Details	Date/Time	Duration	Registration Status
Actions	NRO Training	IPERS		12/18/2019 09:00 AM C...	3 hours	Confirmed

Reschedule  
Cancel  
Add Guest

**Upcoming Events**

Type: All

Location Bk Id:

Start Time: 09/10/2019 12:00 AM

Stop Time: 03/08/2020 11:59 PM

Available Sessions Only: ☐

Tools	Name	Meeting Type	Location	Location Details	Date/Time	Available Seats	Duration
Select	NRO Training	Employer Training	IPERS		12/18/2019 09:00 AM C...	33	3 hours
Select	ER Annual Update	Employer Training	SPENCER CSD		11/29/2019 01:00 PM C...	40	3 hours
Select	New Reporting Official Training	Employer Training	IPERS		11/11/2019 09:00 AM CDT	30	3 hours

Questions? *Contact us.*

[www.ipers.org](http://www.ipers.org)

**info@ipers.org**

**515-281-0020**

**1-800-622-3849** (toll-free)

Monday – Friday

7:30 a.m. – 5 p.m. Central Time

**Fax:** 515-281-0053



**MAILING ADDRESS**

Iowa Public Employees'  
Retirement System  
P.O. Box 9117  
Des Moines, IA 50306-9117

**OFFICE HOURS**

Monday – Friday  
8 a.m. – 4:30 p.m. Central Time  
7401 Register Drive  
Des Moines, IA 50321

**EMPLOYER HELPDESK**

**1-877-IPERS-99 (1-877-473-7799)**

Monday – Friday

8 a.m. – 4:30 p.m. CT

[employerrelations@ipers.org](mailto:employerrelations@ipers.org)  
[ipersaccounting@ipers.org](mailto:ipersaccounting@ipers.org)

**Fax:**

Employer Relations: 515-281-0053  
Accounting: 515-281-0055



*Working Today for Your Tomorrow*