NORTH Dakota | Retirement and Investment
Be Legendary.™

# Employer Self Service

# Lab Activity

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# 1. Employer Self Service

The Employer Self-Service (ESS) Portal is for employers participating in ND TFFR benefit programs. The ESS Portal is a secure site for Organizations to provide agency information, employee details, and Payroll data in the form of Employer Reporting. From the ESS Portal Dashboard, the designated Organization contact may access secure messages, enrollment and payroll summaries, unpaid invoices, and any recently generated forms or publications. The ESS Portal is designed so that Employers can view high-level Employee and Organization information from the Dashboard and use the side navigation panels.

Employer reporting consists of multiple functionalities that work together in the ESS Portal to report various information sent to ND TFFR from an Organization.

Roles involved in this process:

- TBD

## 1.1 In this lab, you will learn to:

- Navigate and view the ESS Homepage, Dashboard and Message Board Notification
- Navigate and view organization profile, details and create contact information.
- Navigate and view Employee Information and submit a salary verification record.
- Manually Add New Employment Event
- Manually Create and Maintain Summary, Header, and Detail Records
- View and pay invoices
- How to use the Employer Model Calculator and create a model election.

## 1.2 View Homepage

- **Role: Organization Contact**

*For training purposes, you will pretend to be the Organization Contact and log into the Employer Self-Service Portal. View the homepage screen to answer the following questions.*

(1) On the Homepage screen, there are six panels/sections. List three.

______________________________________________________

______________________________________________________

(2) If you want to see if there a new messages, you can find this information under what panel/section?

______________________________________________________

(3) What is a quick way for you to navigate to the Enrollment Lookup screen and create a new record?

______________________________________________________

(4) If you wish to return to the Homepage screen, what button do you click?

______________________________________________________

## 1.3 View Message Board Notifications

- **Role: Organization Contact**

*In this lab scenario, you will navigate to the Message Board Notification Maintenance screen, view a notification record, and answer the questions.*

(1) Navigate to the main menu icon and then select Message Board under the Events and Messages main menu.

- ESS displays the Message Board Notification Maintenance screen

(2) Within the Message Board Notifications panel, locate the record with the Notification ID provided on your datasheet.

(3) Click the Subject hyperlink.

- ESS displays the Notification Detail panel and updates the Message Read Date to the current date.

(4) In the Notification Detail panel, answer the following questions:

- What is Notification Type? ________________________________________
- What is the Message? ___________________________________________

  ______________________________________________________________

(5) To remove the Message Read Date field, you will click the checkbox next to the record. What button will you click?

## 1.4 View Organization Details and Organization Profile

- **Role: Organization Contact**

*In this lab scenario, you will view the information on the Organization Details and Organization Profile screens to answer the following questions.*

(1) Navigate to the main menu icon, Under the Organization Information menu, select Organization Details.

- ESS displays the Organization Details screen.

(2) In the Organization Details section, if I want to know the Organization Code for the Reporting Organization, what section can I find that under?

______________________________________________________

(3) What section can you find the Primary Contact Email? What is it for this organization?

______________________________________________________________

(4) What is the name of the Reporting Organization?

______________________________________________________________

(5) If you wish to see information regarding the Organization's contacts, where can you find this information?

______________________________________________________________

(6) Navigate to the main menu icon. Under the Organization Information menu, select Organization Profile.

- ESS displays the Organization Profile screen.

(7) What is the Secondary Phone Number? Are you able to edit it?

______________________________________________________________

## 1.5 Create and Maintain Organization Contact Information

- **Role: Organization Contact**

*In this lab scenario, you will add a new Organization Contact to the Organization record.*

(1) Navigate to the main menu icon and then select Organization Contacts under the Organization main menu.

- ESS displays the Organization Contacts screen.

(2) Click the Create New Contact button.

(3) Select Active from the Status dropdown menu.

(4) Enter the following information in the fields:

- First Name: User’s Choice
- Last Name: User’s Choice
- Primary Email Address: User’s Choice
- Primary Phone Number: User’s Choice

(5) Click the Save button.

(10) In the Contact Roles, click the checkbox next to any of the options except Primary Contact (User’s Choice). **NOTE:** You cannot select Primary Contact since only one user is able to have this role at a time.

(11) Under the Communication Preference panel, click the New button.

- ESS displays the Communication Preference pop-up window.

(12) Select Mailing from the Communication Category dropdown menu.

(13) Select an option (User’s Choice) from the Communication Category dropdown menu.

(14) Click the Finish button.

- ESS closes the Communication Preferences pop-up window and saves the record within the Communication Preferences grid.

## 1.6 View Employee Information

- **Role: Organization Contact.**

*In this lab scenario, you will search for an employee and view their information.*

(1) Navigate to the main menu icon and then select Employee Search under the Employees main menu.

- ESS displays the Employee Lookup screen.

(2) In the Search Criteria panel, enter the Date of Birth provided on your datasheet.

(3) Click the Search button.

(4) Within the Search Results panel, locate the appropriate record, and then click the Person ID hyperlink.

- ESS displays the Employee Maintenance screen.

(5) If you needed to find the employee's current Person Employment ID, where would you find it?

______________________________________________________________

(6) What panel is the employee's Primary Phone Number located in?

______________________________________________________________

(7) What is the employee's Employment Start Date?

______________________________________________________________

## 1.7 Submit Salary Verification

- **Role: Organization Contact**

*In this lab scenario, as the Organization Contact, you will create and submit a salary verification for an employee.*

(1) Under the I Want To panel, click the Submit Salary Card Verification tile.

(2) In the Search Criteria panel, enter the Date of Birth provided on your datasheet.

(3) Click the Search button.

- ESS displays the Employee Lookup screen.

(4) Click the Person ID hyperlink.

- ESS displays the Employee Maintenance screen.

(5) Under the Employee Earning Verification panel, click the New button.

- ESS displays the Employee Earnings Verification Maintenance screen.

(6) In the Earnings Verification Details panel, enter the following:

- Number of Payments: 4
- Estimated Number of Compensated Hours: 700
- Estimated Last Day Worked: 12/31/2024

(7) Within the grid, in the Pay Code 1, enter the following:

- Sept: 1,000
- Oct: 1,000
- Nov: 1,000
- Dec: 1,000

(8) Click the Save button.

- ESS displays the message: [All changes successfully saved.] and populates the Total Estimated Eligible Earnings for Fiscal Year.

(9) Click the Sumit button.

- ESS displays the message: [All changes successfully saved.] and the record as read-only.

**What Happens Next?**

ESS sends the Salary Verification Submission Acknowledgement to the member.

## 1.8 New Employee Enrollment

- **Role: Organization Contact**

*In this lab scenario, you will manually create a new employment enrollment record.*

(1) Navigate to the main menu icon and then select Enrollments under the Employees main menu.

- ESS displays the Enrollment Lookup screen.

(2) In the Search Results panel, click the New button.

- ESS launches the Enrollment Wizard and displays Step 1 – Enrollment Type.

(3) Select New Enrollment from the Enrollment Type dropdown menu.

(4) Click the Next button.

- ESS displays Step 2 – Employer Detail in the Enrollment Wizard.

(5) Select Jamestown School - 47001 from the Organization Name – Code dropdown menu.

- ESS displays the Organization Type and Organization Subtype within the grid.

(6) Click the Next button.

- ESS displays Step 3 – Employee SSN and Date of Birth in the Enrollment Wizard.

(7) Enter the following information:

- SSN: User’s Choice
- Date of Birth: User’s Choice

(8) Click the Next button.

- ESS displays Step 4- Employee Detail in the Enrollment Wizard.

(9) Enter or select the following information:

- First Name: User’s Choice
- Last Name: User’s Choice
- Gender dropdown: User's Choice
- Marital Status dropdown: User's Choice
- Primary Phone Number: User’s Choice
- Primary Phone Type dropdown: User’s Choice
- Enter the Primary Email: User’s Choice

(13) Click the Next button.

- ESS displays Step 5 – Employee Address in the Enrollment Wizard.

(14) Enter or select the following information:

- Address Line 1: User’s Choice
- City: User’s Choice
- State dropdown: User’s Choice
- Zip Code: User’s Choice

(15) Click the Next button.

- ESS displays Step 6 – Benefit Program Detail in the Enrollment Wizard.

(16) Select the following information:

- Benefit Program: Teacher’s

- Tier: Tier 2

(17) Click the Next button.

- ESS displays Step 7 – Employment Details in the Enrollment Wizard.

(18) Enter or select the following information:

- Employment Start Date: Today's Date
- Total Estimated Contracted Hours: 2000
- Total Estimated Eligible Earnings: 75,000
- Member of ND PERS dropdown: No

(19) Click the Next button.

- ESS displays Step 8 – Enrollment Summary in the Enrollment Wizard.

(20) Review the information in the Employment panel, the Demographic panel, the Communication panel.

(21) Click the checkbox next to "I certify that the information provided for this Employee is accurate and complies with the policies of the pension agency for participation in the Teachers' Fund for Retirement Benefit Program."

(22) Enter your name in the Submitted By field.

(23) Click the Submit button.

- ESS closes the Enrollment Wizard and returns to the Enrollment Lookup screen.

**What Happens Next?**

Enrollment Status is Valid until the Submit and Post Enrollment Summary batch is run. Then Enrollment Status updates to 'Processed.'

## 1.9 View and Pay an Invoice

- **Role: Organization Contact**

(1) Navigate to the main menu icon and then select Invoice under the Finance main menu.

- ESS displays the Invoice Lookup screen.

(2) In the Search Criteria panel, enter the Invoice ID provided on your datasheet.

(3) Click the Search button.

(4) Locate the appropriate record and click the Invoice ID hyperlink.

- ESS displays the Invoice Maintenance screen.

(5) Within the Invoice Detail panel, view the Invoice Amount.

- What is it? ___________________________________

(6) Click the Pay Now button.

- ESS launches the Remittance Request Wizard and displays Step 1 – Select Invoice(s).

(7) View the Pay Amount for your invoice. ESS should populate the full amount. Make sure it is correct. **NOTE:** DO NOT fill in any other invoices. ESS displays all the open invoices for the organization. This data has been set up for other users to use to pay an invoice.

(8) Click the Next button.

- ESS displays Step 2 – Deposit / Remittance Details in the Remittance Request Wizard.

(9) In the Deposit / Remittance Details panel, select ACH Debit from the Deposit Type dropdown menu.

(10) Enter select the following information:

- Deposit Date: Tomorrow's Date
- Reference Number: User's Choice
- Bank dropdown: Select the top option

(11) Select an option from the Bank dropdown menu.

(13) Click the Next button.

- ESS displays Step 3 – Verify and Submit in the Remittance Request Wizard.

(14) Read the certification statement, then click the checkbox to acknowledge.

(15) Type your name in the Submitted By field.

(16) Click the Submit button.

- The ESS closes the Remittance Request Wizard.
- The ESS updates the status to 'Paid' or 'Closed.'[JH1]

**What Happens Next?**

The ESS allocates the amount indicated to the invoice. Payment is remitted to ND TFFR

## 1.10 Employer Model Calculator

- **Role: TBA**

(1) Navigate to the main menu icon and then select Employer Model Calculator under the Organization main menu.

- ESS displays the Employer Model Calculator Maintenance screen.

(2) Within the Organization Details panel, use the information to answer the following questions:

- What is the date for the Last Posted Payroll? ___________________________
- What is the Total Eligible Earnings? ___________________________________
- What is the Total Retirement Earnings? _______________________________

(3) Under the Model Projection panel, select an option (User's Choice) from the Model dropdown menu.

(4) Enter the ER Pickup % (User's Choice).

(5) Click the Project Model Data button.

**What Happens Next?**

ESS populates the Total Retirement Earnings and the Total Member Contribution Paid by ER fields.

## 1.11 Employer Model Election

- **Role: TBA**

(1) Navigate to the main menu icon and then select Organization Details under the Organization Information main menu.

- ESS displays the Organization Details screen.

(2) In the Other Details panel, select the Employer Model Election Details tab.

(3) What month and day does the Model become effective each fiscal year? **Hint**: Refer to the bolded statement at the top of the panel.

______________________________________________________________

(4) Click the New button.

- What happens? ____________________________________

(5) Select the Model Name dropdown menu.

- What options appear in the dropdown menu? ________________________

# 2. Answer Key

**Lab 1.2 View Homepage**

1. Invoices, Employer Payroll Reports, I Want To, To Do List, Messages and Opportunities, and My Service Requests

2. Messages and Opportunities

3. In the I Want To panel, click the Create an Enrollment tile.

4. Click the Home button.

**Lab 1:3 View Message Board Notifications**

1. Action Needed

2. Answer will vary.

**Lab 1.4 Organization Details and Profile**

2. Reporting Organization Details

3. Communication Information section; kristin.hunt@sagitec.com

4. Jamestown School

5. Other Details panel, Contacts tab

7. 555-555-5555; Yes

**Lab 1.6 View Employee Information**

5. In the grid under the Employment History panel.

6. Demographic Information panel

7. Answers will vary.

**Lab 1.9 View and Pay an Invoice**

6. Answers will vary

**Lab 1.10 Employer Model Calculator**

2. 05/31/2024; 420,000,000; 42,000.00

**Lab 1.11 Employer Model Election**

3. 07/01
4. Neospin adds a new line item to the grid.
5. Model 1, Model 2 – Partial, Model 2 – Full, Model 4