The **Contacts** area of the Gemini Employer Portal is located within **Employer Information** under the Demographics section. The active Contacts listed within the Employer Portal will be used for physical correspondence and communication between the employer and TRS. In addition, the Contacts area will be used to maintain users accounts for the Employer Portal. Use the following steps to navigate to the Contacts area of the Employer Portal.

Once you are signed into the Employer Portal, hover over **Employer Information**, move your cursor down and select **Contacts.**

Contacts –

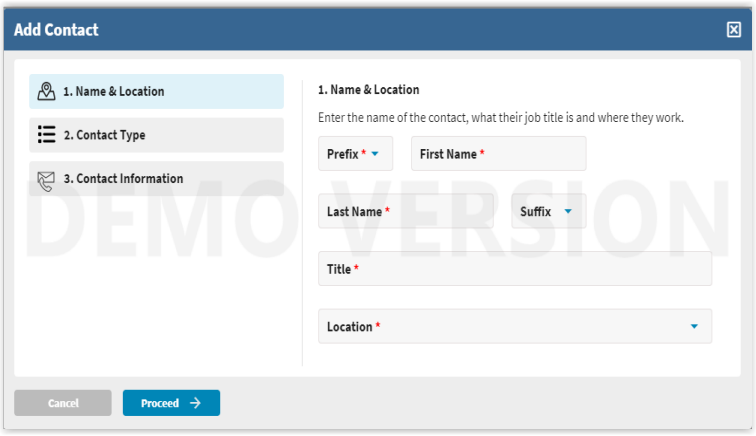
There are two (2) tables available on the Contacts screen: **Contacts** table and the **Contacts History** table *(image below)*. The Contacts table displays name, title, contact type, security role, phone number and email. The Contacts History table displays name, title, contact type, phone, email and inactive date.

Add a New Contact –

To add a new Contact in the Gemini Employer Portal, click the Add New Contact button at the top of the Contacts table. The **Add Contact** box will appear with a step-by-step wizard approach to complete the task. The next steps will assist with completing the Contact record.

Name & Location –

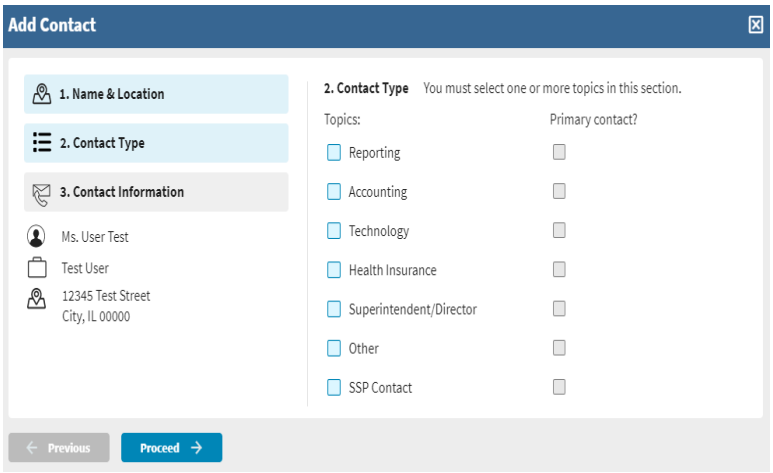
Complete the required fields: prefix, first name, last name, title and location using the new contact's information. Once the contact information has been entered, click Proceed →. To exit the wizard, click Cancel or the ☒ button.



Your data will not be saved if you exit the wizard.

Note: If you do not see the correct location available, one will need to be added. *Refer to the Employer Portal – Location Procedures for additional guidance.*

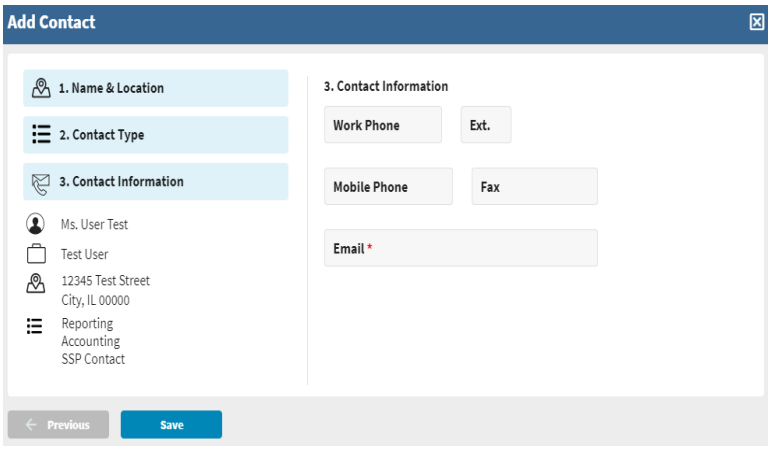
Contact Type –



There are seven (7) Contact Types for the Gemini Employer Portal. Choose **at least one** of the Contact Types listed. You may choose to select the Primary Contact box to the right of each Contact Type if the new contact should be the first point of contact for that contact type topic. Make your selection based on the new contact's responsibilities within your organization. Once the contact type(s) have been selected, click Proceed →. To return to the Name & Location screen, click ← Previous.

Note: For additional information regarding contact types and designating a primary contact, *refer to the Contact Type and Primary Contacts section below.*

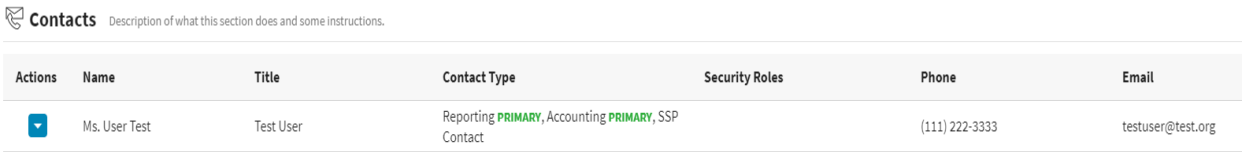
Contact Information -



Enter at least one (1) phone number: work phone, ext., and/or a mobile phone, fax number and an email for the new contact. Once the contact information has been entered, click Save. To return to the Contact Types screen, click ← Previous.

Note: Contacts who will require user access to the Employer Portal must have a valid email provided to receive the registration and authentication emails for the Portal.

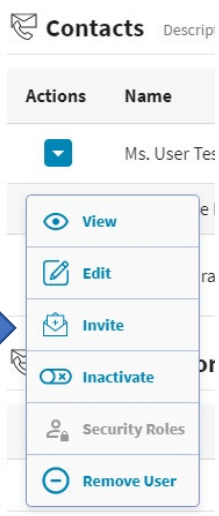
You will be returned to the **Contacts** screen and the newly added contact will be listed in the Contacts table *(image below)*.



Note: If a contact needs user access to the Gemini Employer Portal, proceed to the **Send an Invite** section to complete the set-up process.

Send an Invite –

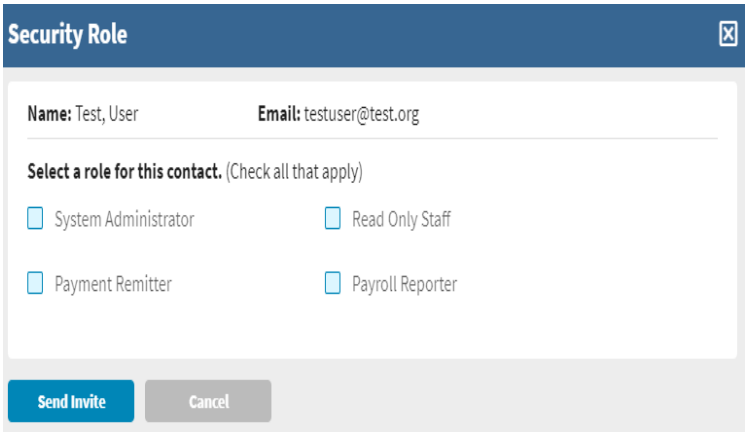
Once the employer has successfully added a Contact in the Gemini Employer Portal, the next step will be to send an **Invite** to the contact if the contact will need user access to the Employer Portal. The invite allows the new contact to complete the account registration process for the Employer Portal. *The new Contact will only have to complete the account registration process once as long as the user maintains an active status for the Portal.*



Note: If a Contact who was previously **Inactivated** or had their Portal access updated to **Remove User** should need access to the Portal, they will need to be re-invited using the **Send an Invite** set-up process. The invited Contact will have to complete the account registration and authentication process.

To send the **Invite**, click the **Action** button left of the contact's name in the Contact table and select **Invite** from the menu.

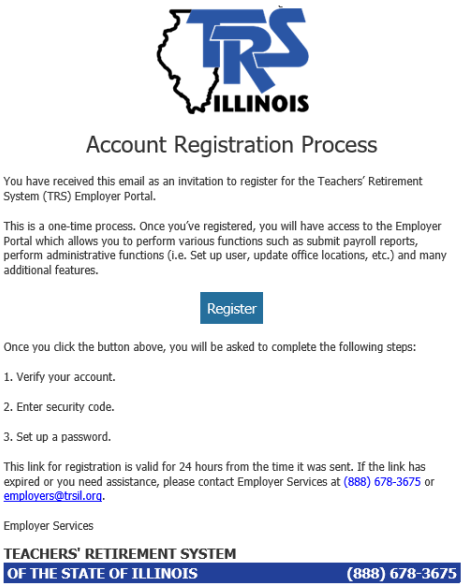
A **Security Role** box will pop-up *(image right)* prompting the user to the select the appropriate role(s) for the contact that is being invited. At least one (1) security role must be assigned to the new user. Once you have made your selection of the contact's security role(s), click Send Invite. Click the Cancel button or the ☒ to close the pop-up window.



Note: For additional information regarding security roles, *refer to the Security Roles section below.*

Account Registration Email –

Upon successful invitation, the newly invited Contact will receive an email from TRS prompting the recipient to complete the Account Registration Process. This process will only need to be completed once. The image on the right is an example of the registration email message. The email recipient should follow the instructions within the email message and click the Register button to complete the registration. *Refer to the Employer Portal – User Registration Procedures for additional guidance.*



Account Registration Process

You have received this email as an invitation to register for the Teachers' Retirement System (TRS) Employer Portal.

This is a one-time process. Once you've registered, you will have access to the Employer Portal which allows you to perform various functions such as submit payroll reports, perform administrative functions (i.e. Set up user, update office locations, etc.) and many additional features.

Register

Once you click the button above, you will be asked to complete the following steps:

1. Verify your account.
2. Enter security code.
3. Set up a password.

This link for registration is valid for 24 hours from the time it was sent. If the link has expired or you need assistance, please contact Employer Services at (888) 678-3675 or employers@trsil.org.

Employer Services

TEACHERS' RETIREMENT SYSTEM
OF THE STATE OF ILLINOIS (888) 678-3675

Note: The registration email is only valid for 24 hours from the time the Invite was sent.

Maintenance of the Employer Contacts –

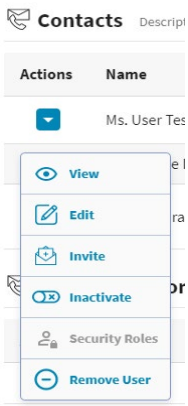
The **Contacts** area of the Employer Portal should be maintained and updated on a regular basis or as needed. Proper maintenance is essential to safeguard both the organization and TRS.

Employer contacts who no longer work for the organization should be **Inactivated** from the contact list. On the other hand, contacts who have user access to the Gemini Employer Portal, but the user access is no longer required, should be updated using the **Remove User** option.

In the event a new employee is replacing an existing active contact, do not update the existing contact's profile with the new employee's information. You should first inactivate the existing contact and then add the new employee as a Contact using the steps provided in the Add a New Contact section above.

Contact Actions –

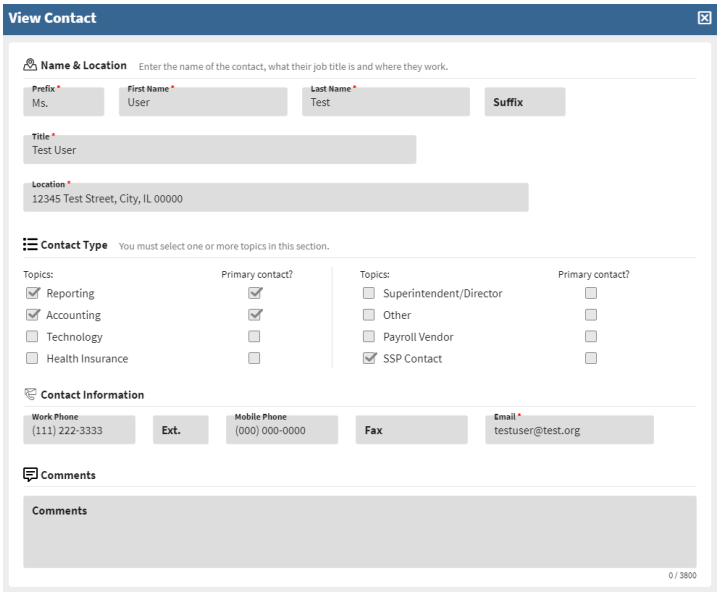
From the Contacts screen, you can View, Edit, Invite, Inactivate, update Security Roles and Remove a User. To complete an action, click on the **Action** button left of the employee's name.



Note: An Employer Portal user may not have access to the action items accessible from the Contacts screen based on the user's designated security role(s). Actions that are not accessible will be identified in gray font from the action menu.

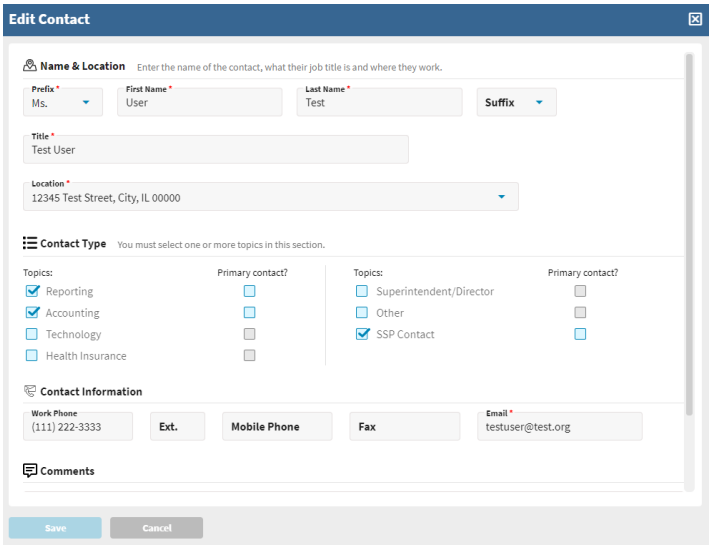
View a Contact –

To view an employee's contact profile, click the **Action** button left of the employee's name, then select **View**. The **View Contact** box *(image right)* will pop-up with the employee's contact profile; this is the employee's current information on file for the Gemini Employer Portal. To close the View Contact box, click the ☒ in the top right corner of the window.



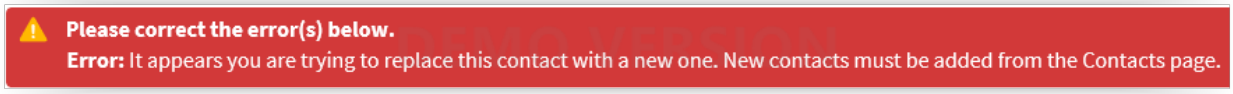
Edit a Contact –

To edit an employee's contact profile, click the **Action** button left of the employee's name, then select **Edit**. The **Edit Contact** box will pop-up *(image right)*; use this box to make your changes to the employee's contact profile. Once all edits have been made, select **Save**.



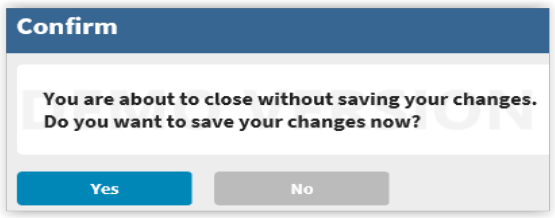
Edit Contact Error Warnings –

If changes are made to the first name, last name, **and** email address for any active contact, you will receive the error message below.



This error message is to notify the user that an active contact profile cannot be edited from one employee's name and email to another. The correct process is to inactivate the current active contact and create a new contact. To exit from the **Edit Contact** box without saving any changes, click the **Cancel** button or the ☒ to close the pop-up window.

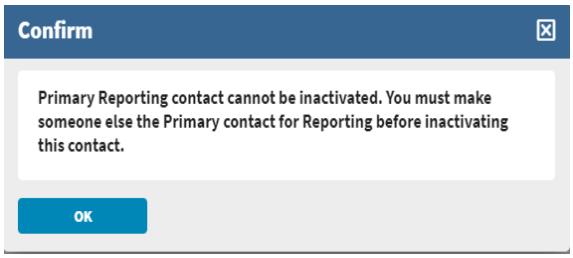
A **Confirm** box will appear, select Yes to save the changes entered on the edit contact screen. Select No and the employee's contact profile will remain unchanged in the active contacts list.



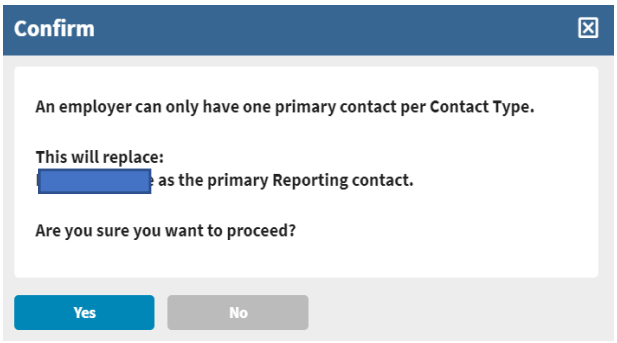
Inactivate a Contact –

Active contacts who no longer work for the employer should be inactivated from the contact list. Locate the active contact record, click the **Action** button left of the employee's name, then select **Inactivate**.

If the contact selected for inactivation is the Primary Reporting Contact, you will receive the warning message *(image right)* stating that someone else must be updated as the Primary Reporting Contact prior to inactivating the contact. Click OK or ☒ to be returned to the Contacts screen.



Locate another active contact to update as the Primary Reporting Contact. Refer to the Edit a Contact section above to update the contact type as the Primary Reporting Contact. You will receive a Confirm box *(image right)* asking if you want to replace the Primary Reporting contact. To continue select Yes, or to cancel the change click No.

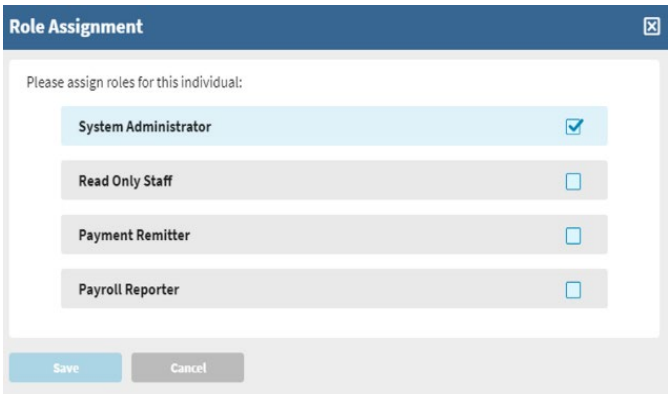


From the Contacts screen, you can now select the contact you wish to inactivate. The **Confirm** box will appear *(image right)*. Select Yes to inactivate the employer contact. Select No to keep the contact as active.

Employer contacts who are **Inactivated** will be moved to the Contacts History table**.** Active contacts who have Employer Portal user access will no longer have access to the Portal once they are **Inactivated**. Inactive Portal users will be moved to the Contacts History table.

Security Roles –

To edit an active contact's security role(s), click the Action button left of the employee's name, then select **Security Roles**. The **Role Assignment** box will pop-up *(image right)*; make your selection for the contact. When complete, select Save to save the changes to the security role(s). Click Cancel or the ☒ button to be returned to the Contacts screen.

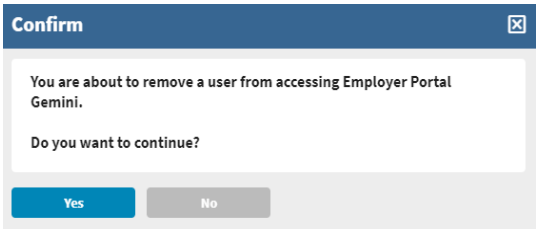


Note: Security Role designation is only necessary for contacts who have user access to the Gemini Employer Portal. Updating Security Roles will impact the user's access and permissions within the Portal.

Remove a User –

To remove a contact's user access to the Gemini Employer Portal, locate the contact you wish to update, click the Action button left of the employee's name, then select **Remove User**.

A **Confirm** box will appear *(image right)* notifying you that you are about to remove a user's access from the Gemini Employer Portal. To proceed, select Yes and the contact's user access to the Portal will be removed. To cancel, select No and the contact's user access to the Portal will remain unchanged.



Note: Removing a contact's user access to the Employer Portal will not impact the contact's active status as an employer contact. If you wish to remove the contact as an active employer contact, *refer to the Inactivate a Contact section above*.

Update a Contact's Email Address –

If an employer contact requires an update to his/her email address, follow one of the steps below to complete the update to the email address.

For active contacts who do not have user access to the Employer Portal, locate the contact you wish to update, click the **Action** button left of the employee's name, then select **Edit**. The **Edit Contact** box will pop-up; use this box to make your

changes to the employee's email address. Once all edits have been made, select Save.

For active contacts who have user access to the Employer Portal, locate the contact you wish to update, click the **Action** button left of the employee's name, then select **Remove User**. A **Confirm** box will appear notifying you that you are about to remove a user's access from the Gemini Employer Portal. To proceed, select Yes and the contact's user access to the Portal will be removed.

Note: Before completing the Remove User step above, make sure that the user is completely signed out of the Employer Portal.

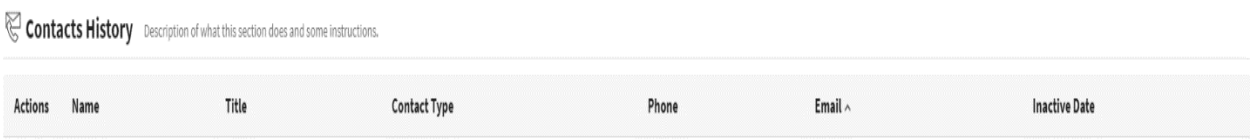
Once the contact's access to the Portal has been removed, from the Contact screen, click the **Action** button left of the employee's name, then select **Edit**. The **Edit Contact** box will pop-up; use this box to make your changes to the employee's email address. Once all edits have been made, select Save.

Now that the active contact has been updated with a new email address, they can be re-invited to register for the Employer Portal again using their newly updated email address. To send the **Invite**, click the **Action** button left of the contact's name and select **Invite** from the menu. A **Security Role** box will pop-up prompting the user to the select the appropriate role(s) for the contact that is being invited. Once you have made your selection of the contact's security role(s), click Send Invite. The registration email will be sent to the contact's new email address. *Refer to the Account Registration Email section above for further information.*

Note: If the contact has already edited his/her email address in the Employer Portal contact screen and is unable to sign into the Portal, complete the Remove User and Send Invite steps above.

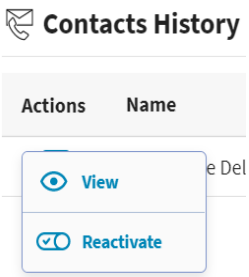
Contacts History –

The Contacts History table will display the employer's inactivated contacts. An inactive date will display the date that the contact was updated from an active contact to an inactive contact. An inactivated contact who previously had user access to the Gemini Employer Portal will no longer have access rights to the Portal effective the date their contact profile was inactivated.



Contacts History Actions –

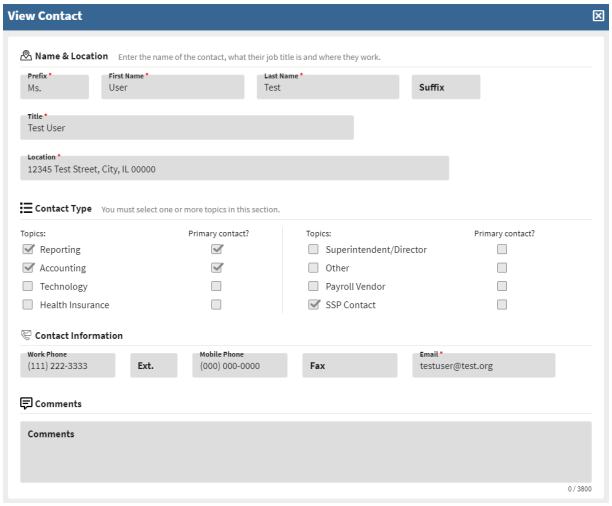
From the Contacts screen, you can View and/or Reactivate a contact listed in the Contacts History table. To complete an action, click on the **Action** button left of the employee's name.



Note: An Employer Portal user may not have access to the action items accessible from the Contacts screen based on the user's designated security role(s).

View a Contact –

To view an inactive contact profile, click the **Action** button left of the employee's name, then select **View**. The **View Contact** box will pop-up with the employee's contact profile *(image right)*. To close the View Contact box, click the in the top right corner of the window.



Reactivate a Contact –

Inactive contacts listed in the Contacts History table can be **reactivated** to an active contact status for the employer in the Gemini Employer Portal.

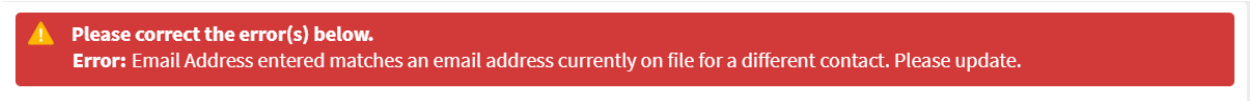
Locate the inactive user you wish to update and click the **Action** button left of the employee's name, then select **Reactivate**. The reactivated contact will be moved to the **Contacts** list as an active contact for the employer.

If the newly reactivated contact will need user access to the Gemini Employer Portal, they will need to have an Invite sent to them and they will need to complete the account registration and authentication process. *Refer to the Send an Invite and the Account Registration Email sections above.*

Reactivate Contact Error Warnings –

If the reactivated contact does not have a valid employer location, the **Edit Contact** box will appear, and the user must update the contact's location address. Once the location address has been updated on the Edit Contact box, select **Save** to save the location changes or select **Cancel** to return to the Contacts screen.

If the reactivated contact has an email address that is an exact match to an existing active contact, the user will receive an error message displayed below.



The reactivated contact will need to have their email address updated on the **Edit Contact** box. Once the email address has been updated, select Save to save the email changes. To close the Edit Contact box, click Cancel or the ⊠ button.

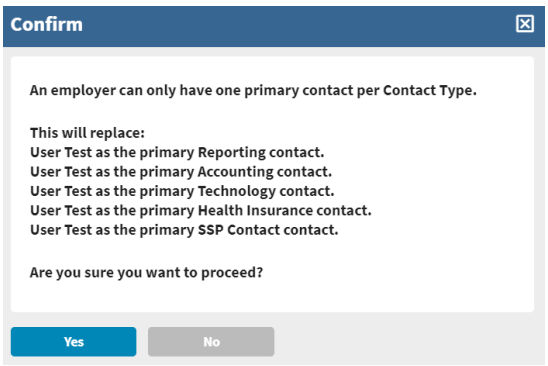
Contact Type and Primary Contacts –

There are seven (7) **Contact Types** – Reporting, Accounting, Technology, Health Insurance, Superintendent/Director, Other, and SSP Contact. Each active contact will be required to be assigned at least one (1) Contact Type. The employer should assign Contact Types that are associated with the employee's responsibilities within your organization. TRS will use these Contact Type designations when communicating with the employer.

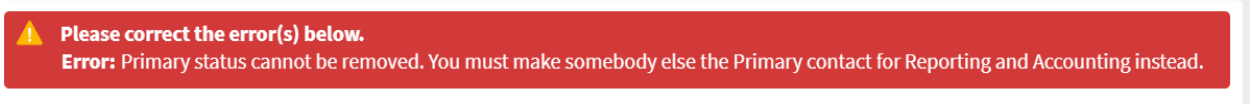
In addition to the assigned Contact Types for an employee's contact profile, employers can identify if the employee should be the designated **Primary** contact for that Contact Type by selecting the Primary contact checkbox. The Gemini system requires one (1) designated Primary contact for the Reporting Contact Type. This designation can be made upon initial set-up of the employee's contact profile or later by editing the contact. *Refer to the Edit a Contact section above for additional guidance.*

Employers can have multiple active contacts assigned with the same Contact Type. However, only one of the active contacts can be designated as the Primary contact for each Contact Type.

If a user attempts to designate more than one Primary contact for the same Contact Type, the following error message will appear *(image right)*. The user can select Yes to proceed and update the primary contact from one active contact profile to another active contact profile or the user can select No to revert the changes.



If a user attempts to remove a Primary contact designation from an active contact profile, the following error message will appear.



The user will need to update a different active contact profile as the Primary contact for the Contact Types listed in the error message. *See Edit a Contact section above for additional guidance.*

Security Roles –

The employer will have ability to assign and maintain user access accounts for the Gemini Employer Portal. An Employer Portal user will be required to be assigned at least one (1) Security Role. The assigned Security Role will designate the user's access and permissions within the Employer Portal.

There are four (4) **Security Roles** – System Administrator, Payment Remitter, Read Only Staff and Payroll Reporter. **Employer Portal users can be assigned more than one Security Role if the user will be performing various roles for the organization**. *For example, the payroll reporter can also be assigned as the payment remitter if the user is responsible for both the reporting and the payments in the Gemini Employer Portal.*

The employer should assign Security Roles that are associated with the employee's user accessibility within the Gemini Employer Portal. Each Security Role differs from one another and they will limit the tasks that can be performed within the Gemini Employer Portal. The roles are explained below with detail.

System Administrator – this security role will have limited access to the Gemini Employer Portal. The System Administrator will be responsible for the overall maintenance of the organization's Contacts and Employer Portal user accounts. There can be up to three (3) System Administrators assigned per employer.

Payment Remitter – this security role will have access to view contribution reports, enter and remit contribution payments, and maintain banking information in the Gemini Employer Portal.

Payroll Reporter – this security role will have the greatest access to the Gemini Employer Portal. The Payroll Reporter will be responsible for completing the contribution reporting process, as well as creating and maintaining payroll schedules, locations, sick leave, board paid TRS, and flex plan screens. TRS will require a series of tasks from the Payroll Reporter with the majority of these tasks being performed on an annual basis.

Read Only Staff – this security role will have access to view various screens and reports within the Employer Portal with read-only capabilities. However, there are no permissions to edit data for this security role.