

# Pilot Group Training

June, 2021



# Introductions

Grant Brauer

- Employer Services Manager

Chris Foster

- Business Analyst
- *Gemini Project Business Analyst*

Lisa Locki

- Employer Services Project Manager
- *Gemini Subject Matter Expert*



# Housekeeping

- **Computer Mic on Mute**
- **Scheduled 9:00 – 12:30**
- **Breaks**
- **Questions should be in Chat – Send Gemini Questions to everyone. Don't use as private chat.**
- **Supplemental Savings Plan**
  - **Training and Implementation TBD**



# Training Expectations

- **Employer Portal Demo Videos**
- **Discussion for each video**
- **Gemini Resources for Employers**
  - [trsil.org/employers/Gemini/Resources](https://trsil.org/employers/Gemini/Resources)
- **Today is not intended to be comprehensive**



# Training Expectations - Videos

- **Registration and Managing Contacts and User Roles**
- **Dashboard Navigation and Password Management**
- **Managing Employer Information Screens**
- **Payroll Schedules**
- **Reporting: File Upload**
- **Reporting: Data Entry (Replication)**
- **Adjustments and Adding Records to Report**
- **Invoices**



# Two Systems – One Database

- **Employer Portal (EP) & Line of Business (LOB)**
- **Both systems use same Database**
- **Most screens are identical**
- **LOB has additional functionality**
- **EP utilizes a “wizard” approach on certain screens**



# Contacts, Users, Registration and Authentication – What to watch

- **Contacts vs Users**
- **Multi-factor Authentication**
- **4 Roles for the Employer Portal:**
  - **System Administrator**
  - **Payment Remitter**
  - **Payroll Reporter**
  - **Read Only Staff**



# Contacts, Users, Registration and Authentication - Discussion

- Find your TRS Code at your Employer Web Access or Annual Report
- Invites to Technology Contacts last week of June
- Technology User must invite other Contacts to be Users
- Technology User also will set Roles for self and other Users



# Employer Dashboard, Menu, Bulletins, Reset Password – What to watch

- Navigation options
- Password Management
- Signing out



# Employer Dashboard, Menu, Bulletins, Reset Password – Discussion

- Menu items available based on your Role
- If menu item is disabled, check your Role
- Some disabled menu items are placeholders for future enhancements
- Create habit of using “Sign out” vs closing browser



# Employer Informational Screens – What to watch

- **Completion of Screens**
  - Locations
  - Banking
  - Sick Leave
  - Flexible Benefit Plan
  - Board Paid TRS
- **Comments Sections**



# Employer Informational Screens – Discussion

- **Make updates to these screens**
  - Locations (secondary location not required)
  - Contacts (first video)
- **Complete the following screens**
  - Banking\*
  - Sick Leave (add descriptive comments)
  - Flex Plan (required only if Employer has flex plan)
  - Board Paid TRS



# Employer Informational Screens – Discussion

- **Banking notes**

- Only Employer can complete screen
- Only Employer can edit screen
- Don't forget to click "Search" after entering routing number
- Banking information required prior to uploading payroll file
- Certification required for Electronic Funds Transfer process
- Select "All" or "Defined Benefit" on Retirement Plan dropdown



# Payroll Schedules – What to watch

- Required prior to payroll report submission
- Flexibility built into screen
- Accuracy is key
- Dates in Payroll Schedule must match Payroll File
- When Multiple Schedules are necessary
- When One Schedule would work



# Payroll Schedules – Discussion

- **Begin, End, Pay Dates must match File submitted**
- **All Pay Dates are usually known**
- **Pay Period Begin and End Dates – How to determine**
  - **Often Pay Periods (Begin and End Dates) are used for Substitutes or Hourly employees**
  - **Use those same Pay Periods for Contractuals**



# Upload Employer Reporting Process – What to watch

- Validation of data through extensive validations
- Load Errors (file format issues)
- Reporting Errors
- Federal Funds Reporting
- Employer Packet



# Upload Employer Reporting Process – Discussion

- **File Name Requirements on page 14, #23 of the File Layout version 1.5**
  - `yyyymmddXXXAAAAAAA_optional suffix`
- **Load Errors (file format issues)**
  - If File rejects, you will see link to error report
- **Reporting Errors**
  - Reporting errors will be displayed on Details screen
  - Error Severity levels: 1) **Fatal** 2) **Warning** 3) Info
- **Federal Funds Reporting**
  - Not tied to individual employees



# Replication Employer Reporting Process

## – What to watch

- Differs from File Upload
- Applicable to Employers that do not have File creation and upload option
- Terminated member notification
- Updates may be needed even if errors do not invoke



# Replication Employer Reporting Process – Discussion

- Process is same as Upload at the Replication Results Summary
- Any updates from the previous payroll need to be made
- As you edit and save new data, validation batch process runs again



# Adjustments, Add Record – What to watch

- More than one way to make adjustments
- Via Payroll File - preferred
- Adding records on Detail/Adjustment Screen
- Adjustments to dollar amounts are changes
- Employer Service staff can initiate adjustments  
(think Adjustment to Earnings)



# Adjustments, Add Record – Discussion

- Preferred way to make adjustments – through payroll
- Adjustment to Earnings (ATE) will continue for any adjustment pre-Gemini
- All online adjustments will be reflected on invoice section of Payments screen



# Invoices and Payments – What to watch

- Employer Portal Invoice section
- Detail of Invoices



# Invoices and Payments – Discussion

- Bills will still be sent for Employer costs
- Access to Bills through the Employer Web Access
- Payments made through Employer Portal
- Employer can determine remittances



# Gemini System Things to Know

- **Employer Portal User Timeouts due to Inactivity**
  - 20 Minutes
- **Emails Sent From**
  - TRSGeminiMessenger@trsil.org
- **Supported Browsers**
  - Chrome and Microsoft Edge
- **url for Employer Portal**
  - <https://employerportal.trsil.org/>



# Gemini Reporting Issues

- **Email Employer Services Department**
  - [employers@trsil.org](mailto:employers@trsil.org)
- **Include issue in detail**
  - Screen issue was discovered
  - Steps leading to issue
  - Screen Shots
  - Can you recreate issue?



# Employer Web Access

- Continue to use web access area for:
  - FY2020-21 Annual Report
  - Supplementary Reports/Sick Leave Certifications
  - View TRS Bills
  - Employee Lookup
  - View prior Annual Reports/Supplementary Reports/Sick Leave Certs
  - Secure Document Upload
  - Request report of Employee TRS Employment Begin Dates (available now)



# Gemini Employer Reporting Resources

- [trsil.org/employers/gemini/resources](https://trsil.org/employers/gemini/resources)
  - Employer Portal Videos
  - Employer Portal Procedures
  - Quick Reference Guide
  - Validation/Error Document
  - File Layout Instructions version 1.5
- Gemini Call Center – 888-678-3675, option 4
- Regular Open Forum virtual calls
  - Watch for meeting invitations



# *Questions and Answers*

Thank you for your participation!

