

Pilot Group Training

April 29, 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**
- **Supplemental Savings Plan**
 - **Training and Implementation TBD**



Purpose of Pilot Group

- Open May and June
- Become familiar with look and feel in a Test environment
- Test Employer Portal end-to-end processes (day in life)
- Provide Feedback
- Report System Issues (bugs)



Training Expectations

- **Employer Portal Demo Videos**
- **Discussion for each video**
- **Gemini Resources for Employers**
- **Today is not intended to be comprehensive**



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**
- **Roles:**
 - **System Administrator**
 - **Payment Remitter**
 - **Payroll Reporter**
 - **Read Only Staff**



Contacts, Users, Registration and Authentication - Discussion

- TRS Codes at your Employer Web Access or Annual Report
- Invites to Technology Contacts
- Technology User invites other Contacts to be Users
- Technology User sets 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
- **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
- 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 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
- 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
- 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



Gemini Reporting Issues

- **Email Employer Services Department**
 - 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 by July 1)



Gemini Employer Reporting Resources

- trsil.org/employers/gemini
 - Employer Portal Videos
 - Employer Portal Procedures
 - Validation/Error Document
 - File Layout Instructions version 1.5
- Gemini Call Center – 888-678-3675, option 4
- Regular Pilot Group Open Forum Teams Meetings
 - Watch for Teams invitations



Questions and Answers

Thank you for your participation!

