I-Que Help Guide

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

IPERS®
IOWA PUBLIC EMPLOYEES' RETIREMENT SYSTEM

2019

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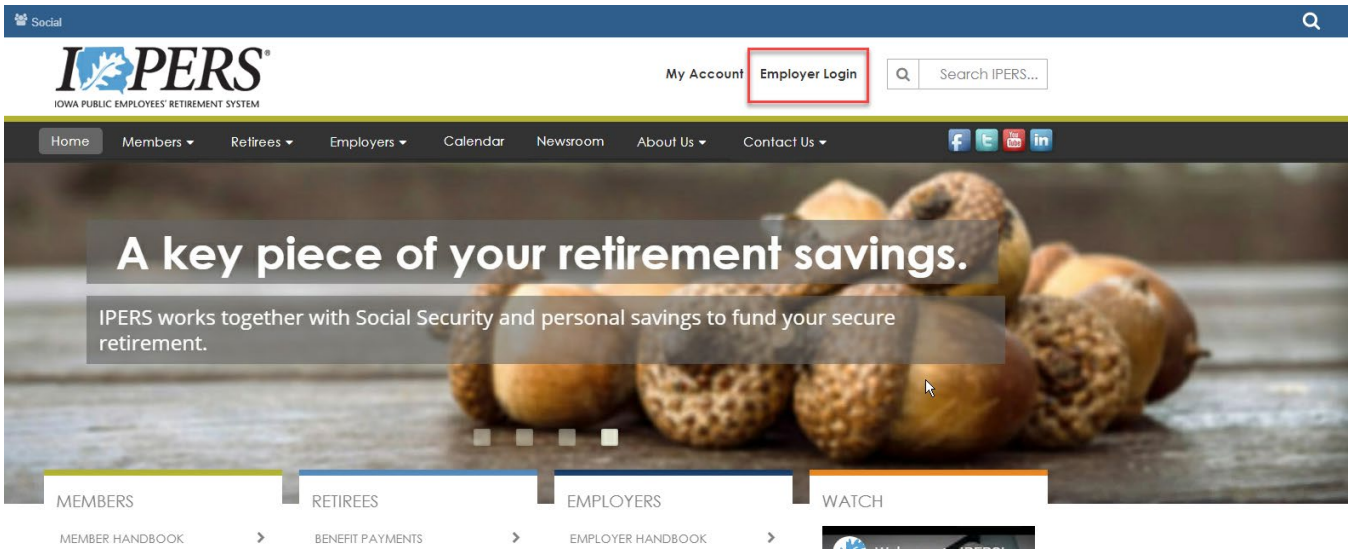
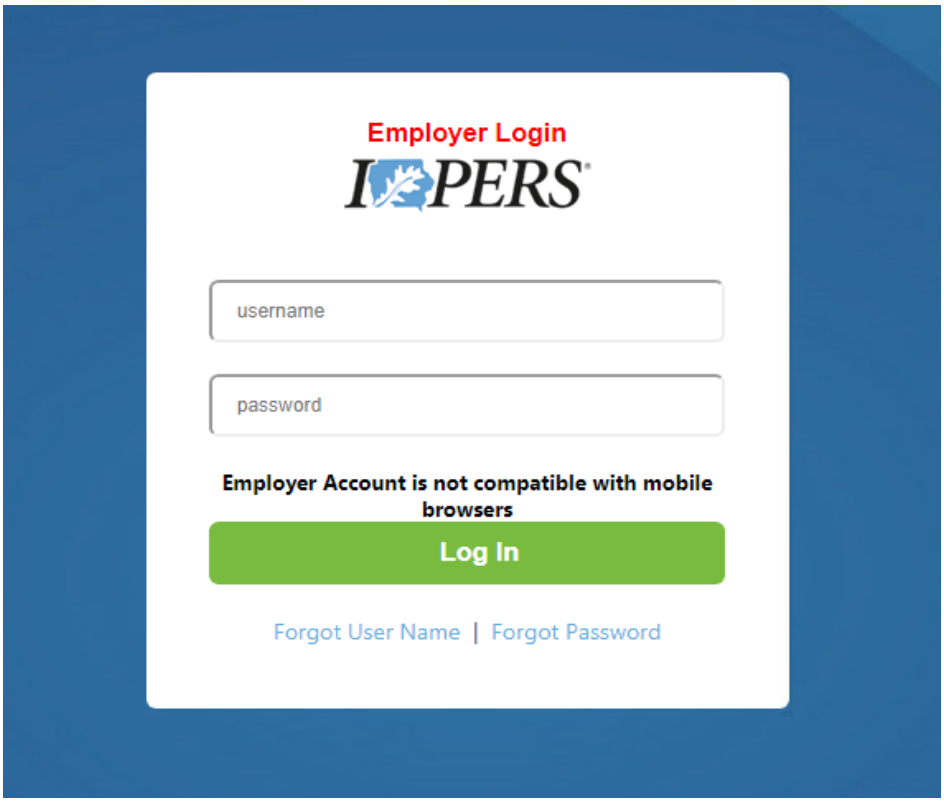
Log In

Go to www.ipers.org and select **Employer Login**.



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



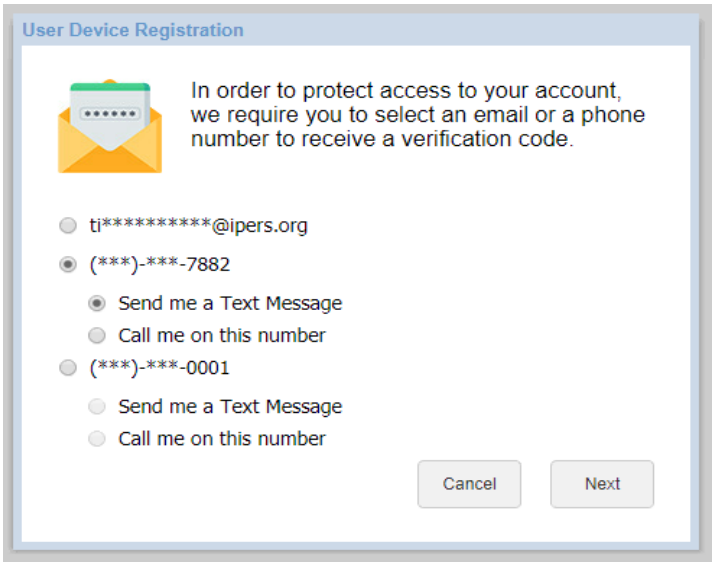
Your username is your 5-digit IPERS employer ID number, the first letter of your first name, and the first 6 letters of your last name (example: 99999TJOHNSO).

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

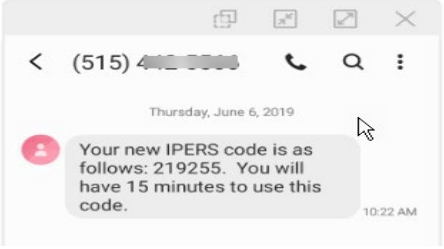
If you do not have a username or password, complete the *Employer Account Demographics* form and submit it to IPERS. The form is available on www.ipers.org under Employers>Forms.

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**

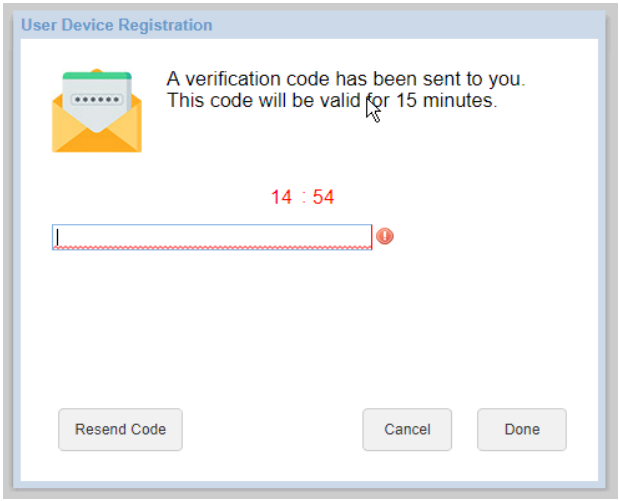


A unique six digit verification code will be provided to you based on this selection

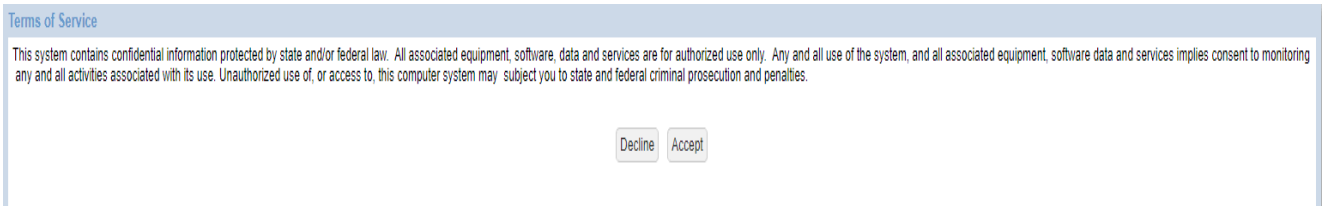
Example of text verification received.



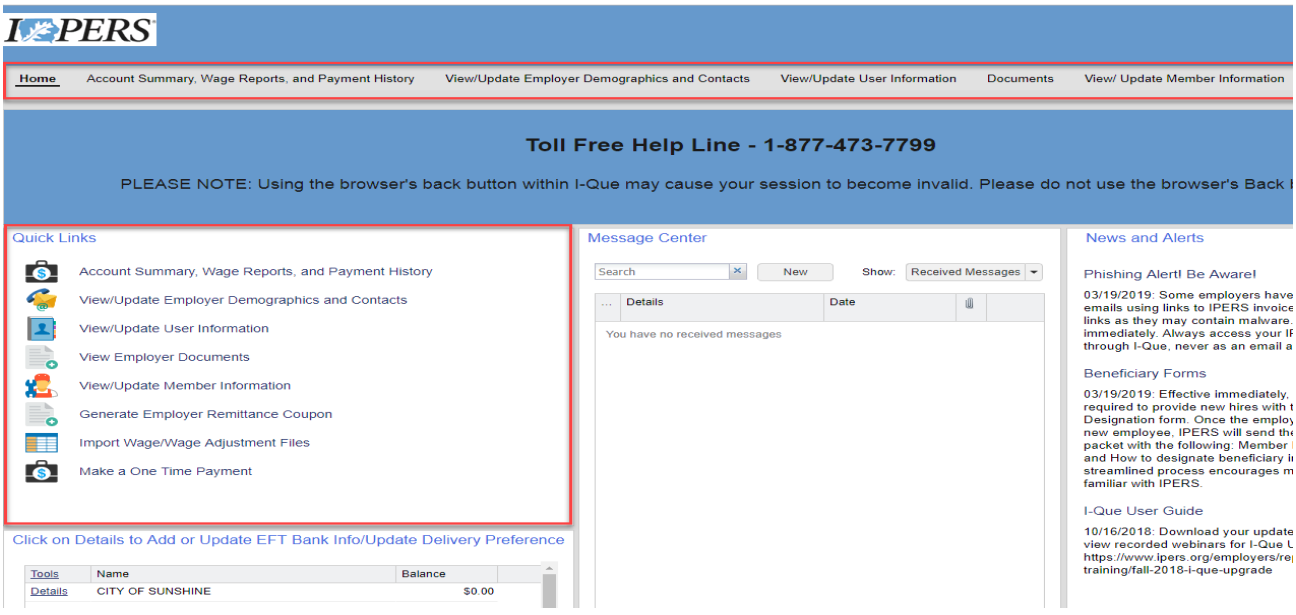
Enter the six digit number in the User Device Registration field within the allotted 15 minutes. Select Done



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

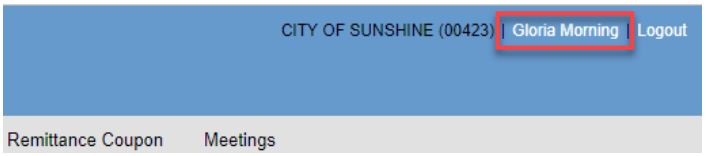


You will be on the I-Que home page. Quick links are across the top and along the left side of the page.

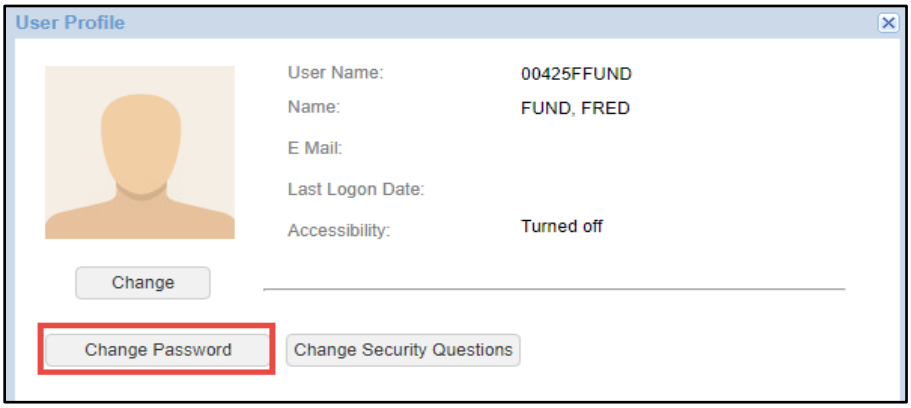


Change Your Password or Security Questions

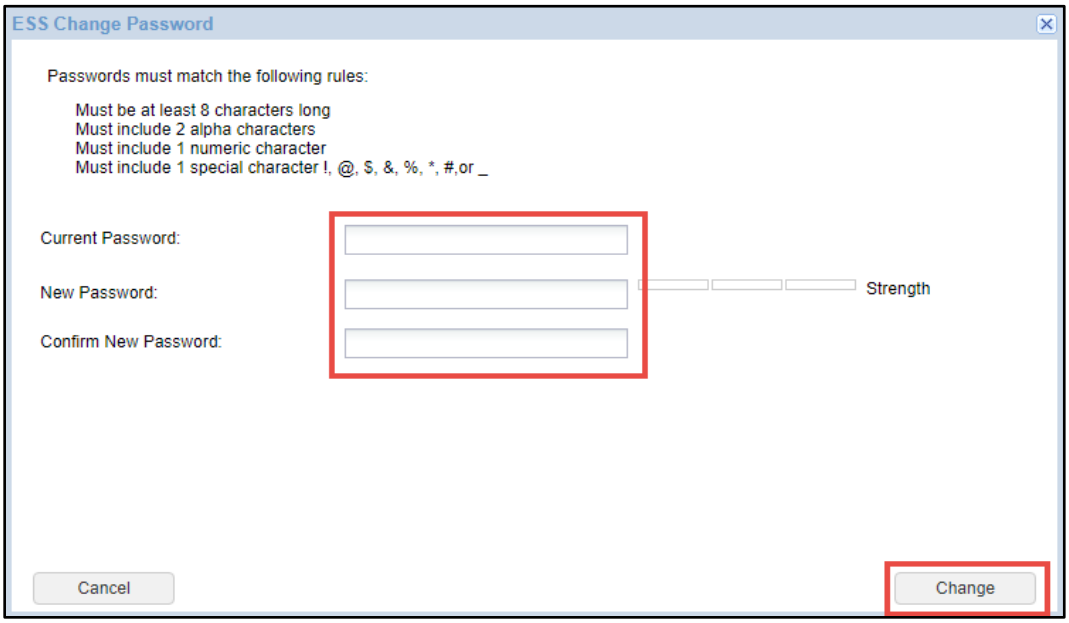
From any page, select your name in the top right corner of the page.



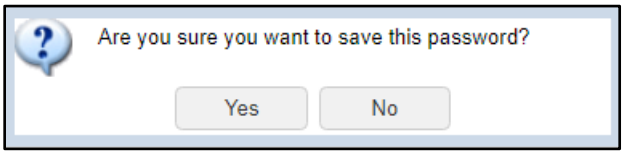
To change your password, select **Change Password**.

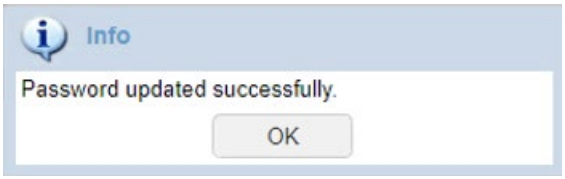


To change your password, fill in the text fields and select **Change**. The strength of your password will be measured. Stronger passwords are more secure.

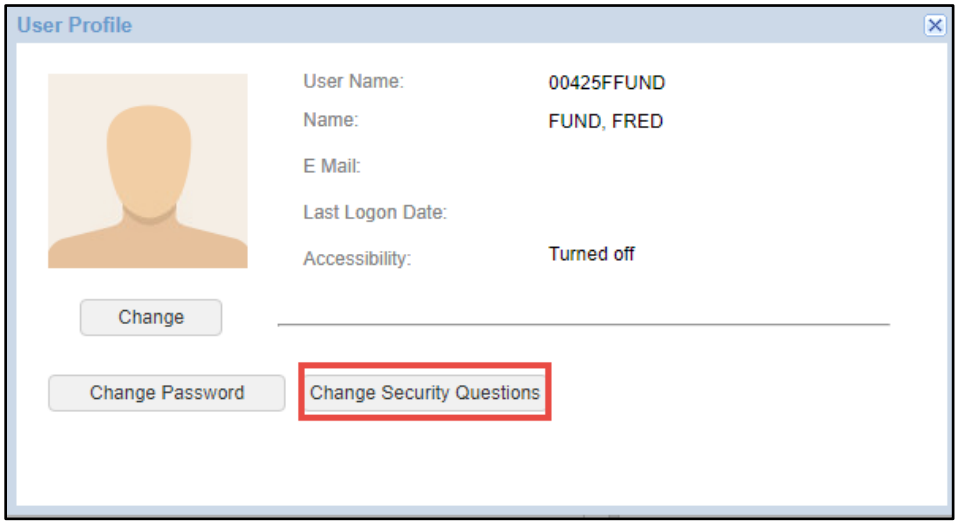


Follow the prompts to save your new password.

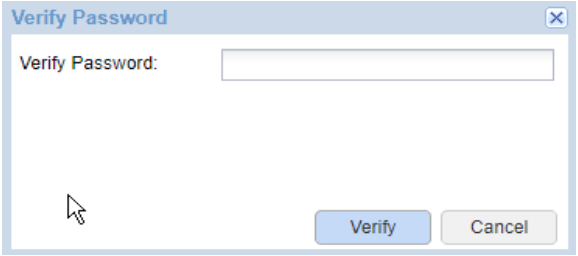




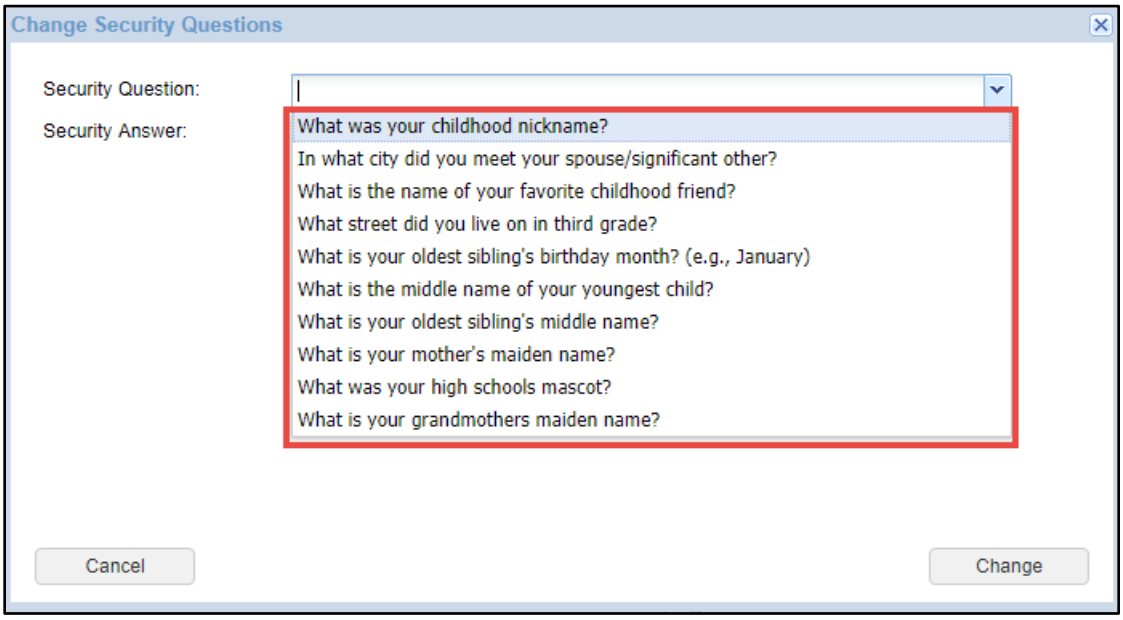
To update your security questions, select **Change Security Questions**.



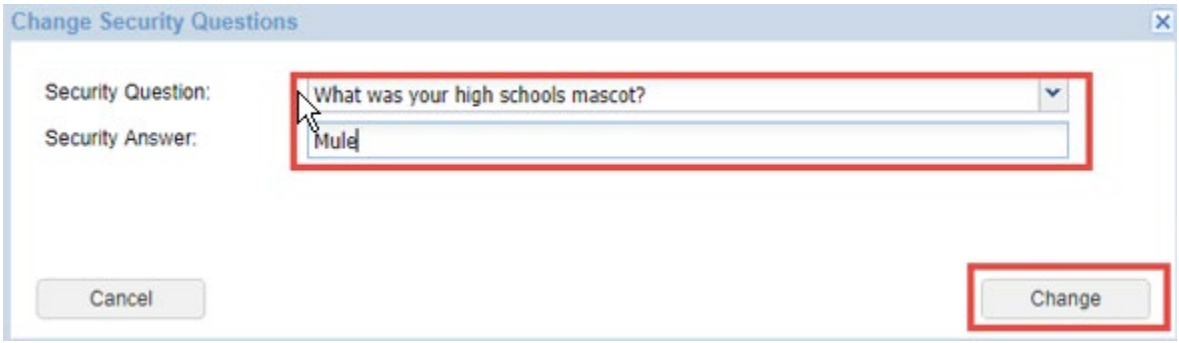
Enter your password. Select Verify.



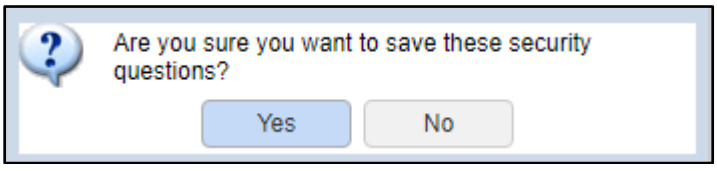
Select a security question from the drop-down menu.

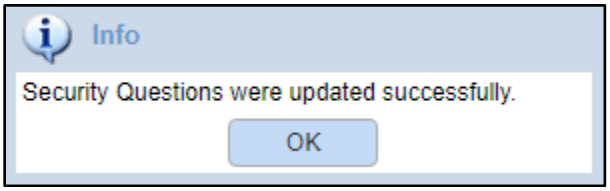


Fill in the answer and select **Change**.



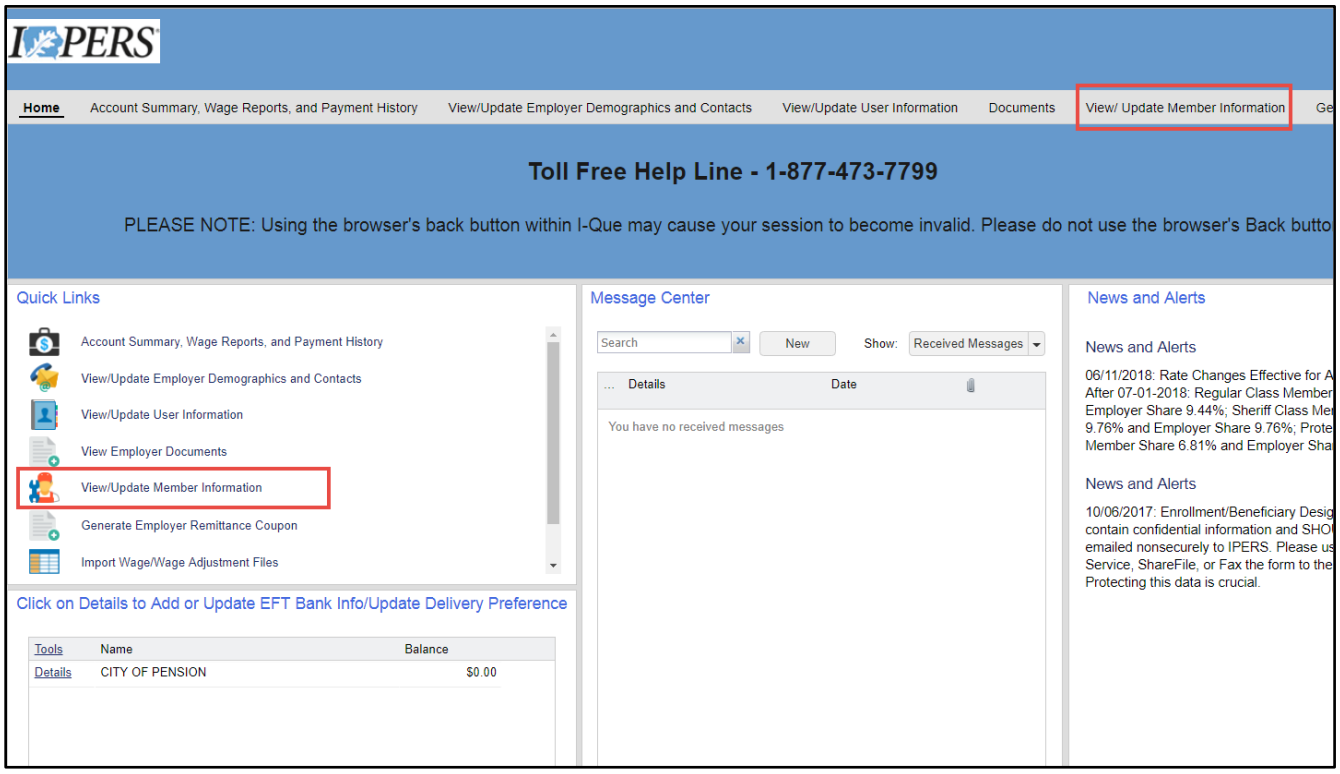
Follow the prompts to save your new security question.



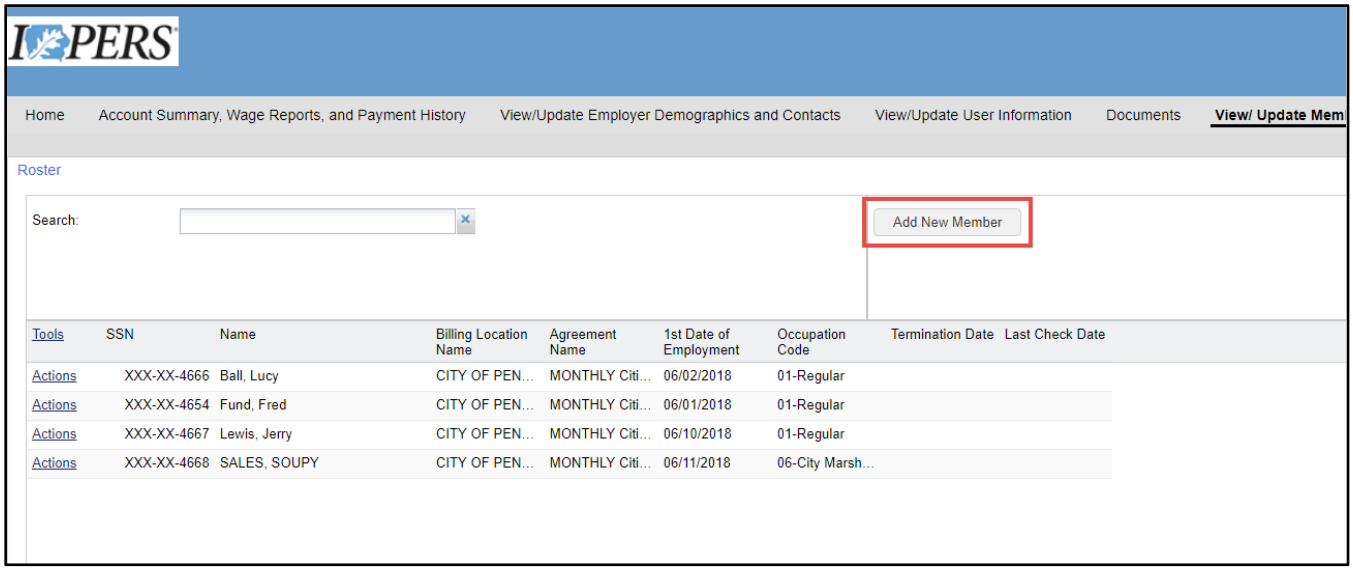


Add a New Member/Employee

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



Select **Add New Member**.

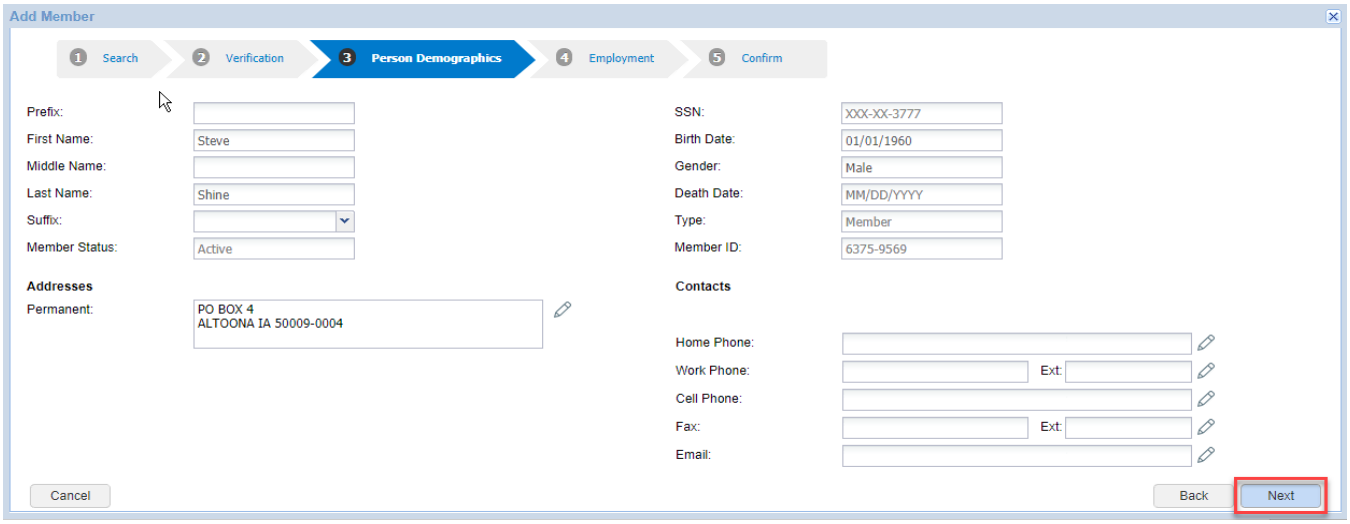


The **Add Member** window will open. Enter the new employee's Social Security number (SSN) and select **Search**.

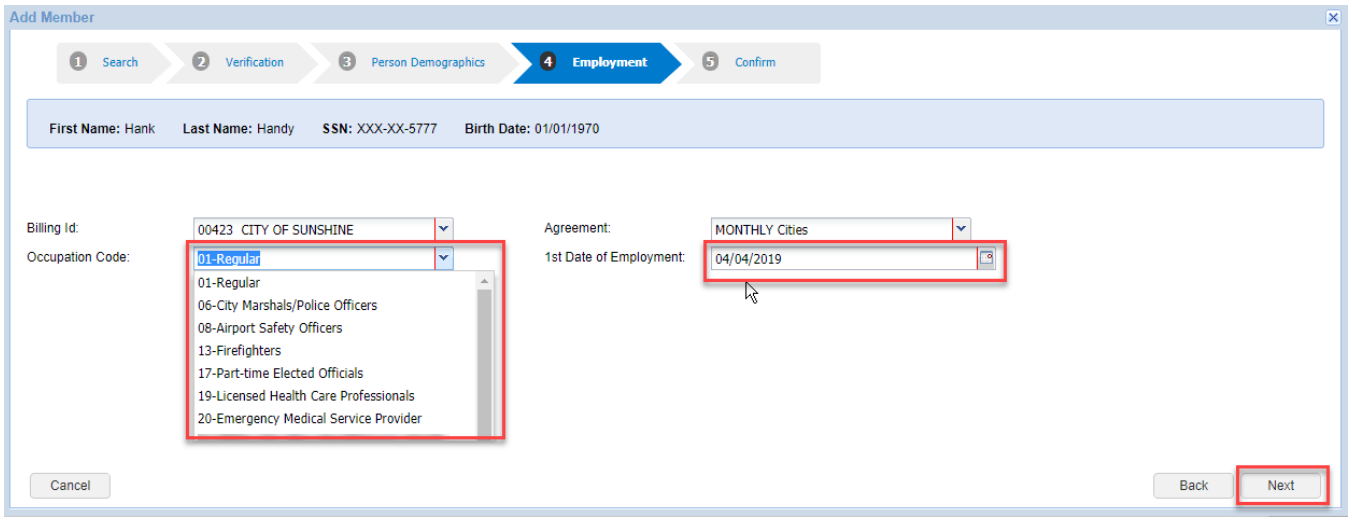
IMPORTANT: Make sure to enter the SSN accurately. From this point on, the first 5 digits of the SSN will **not** be displayed.

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.

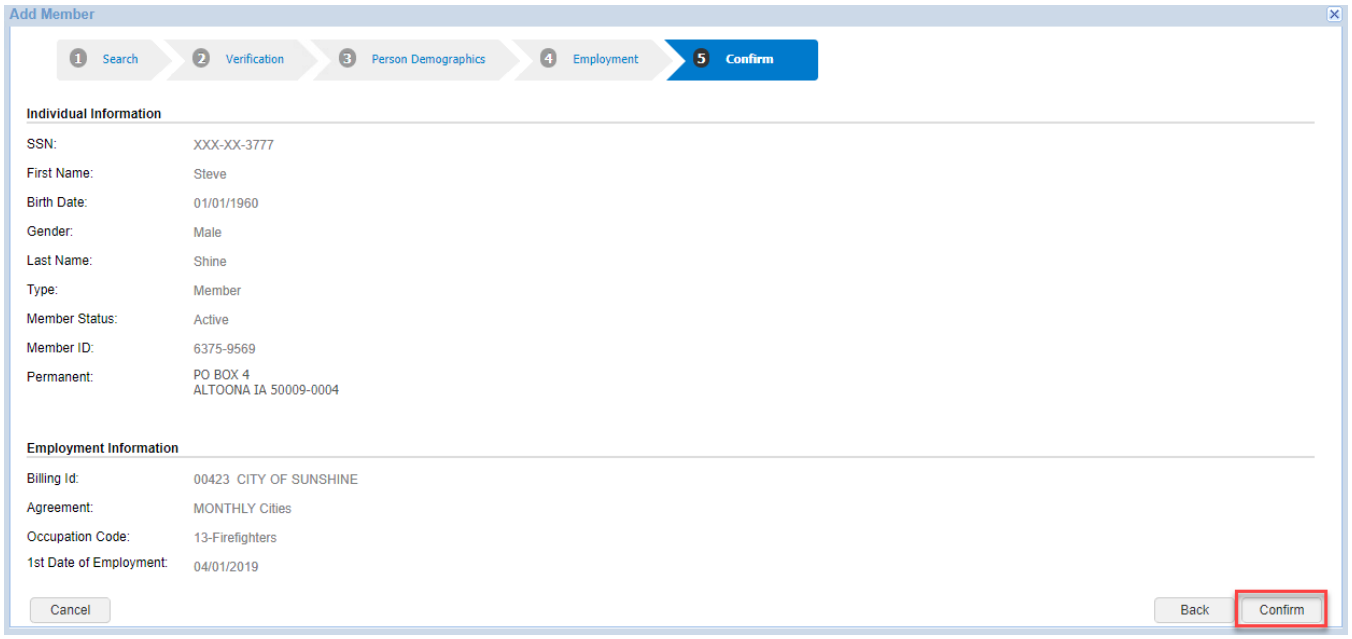
Make any updates to the information about the person, select **Next**.



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

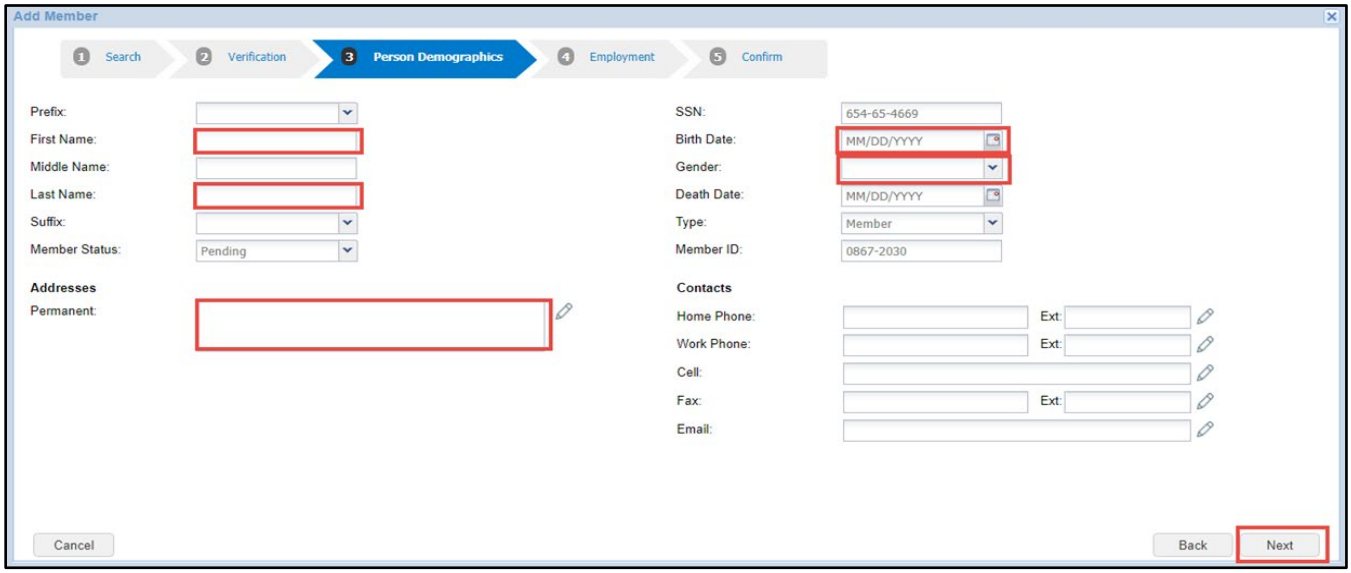


Verify the information is correct. If not, select **Back** to re-enter information. When correct, select **Confirm**.

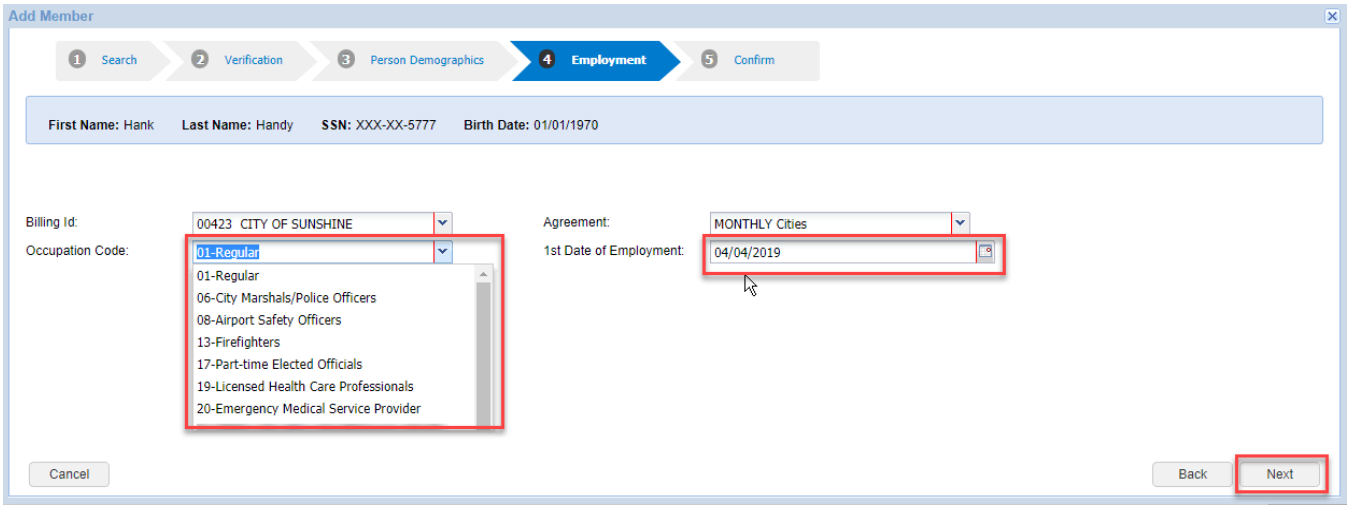


If member is not found, select **New Member** at the bottom of the window.

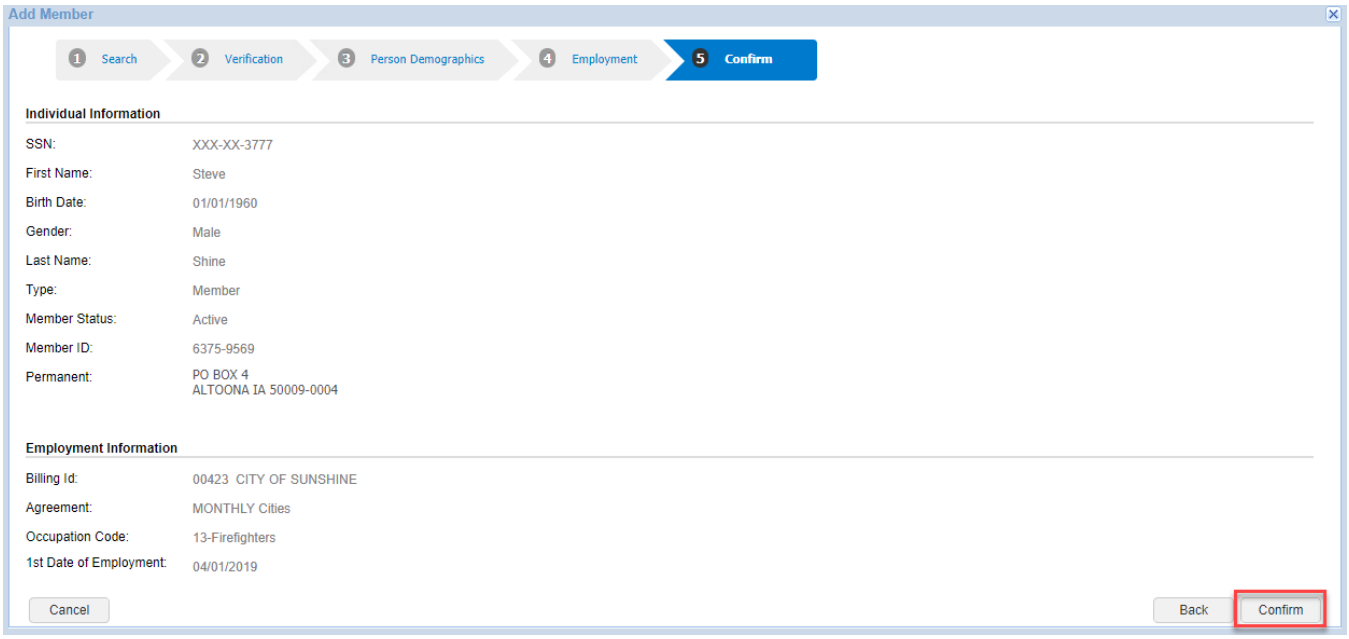
Fill in the information about the person, and select **Next**.



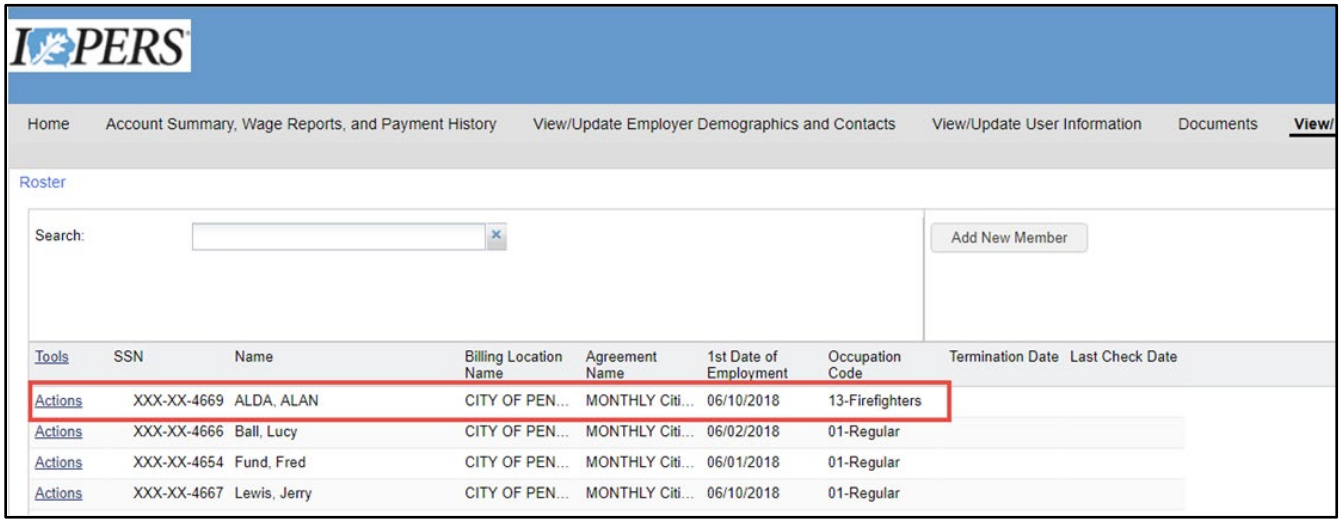
From the drop-down menu, select the **Occupation Code** and enter the **1st Date of Employment**. Select **Next**.



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



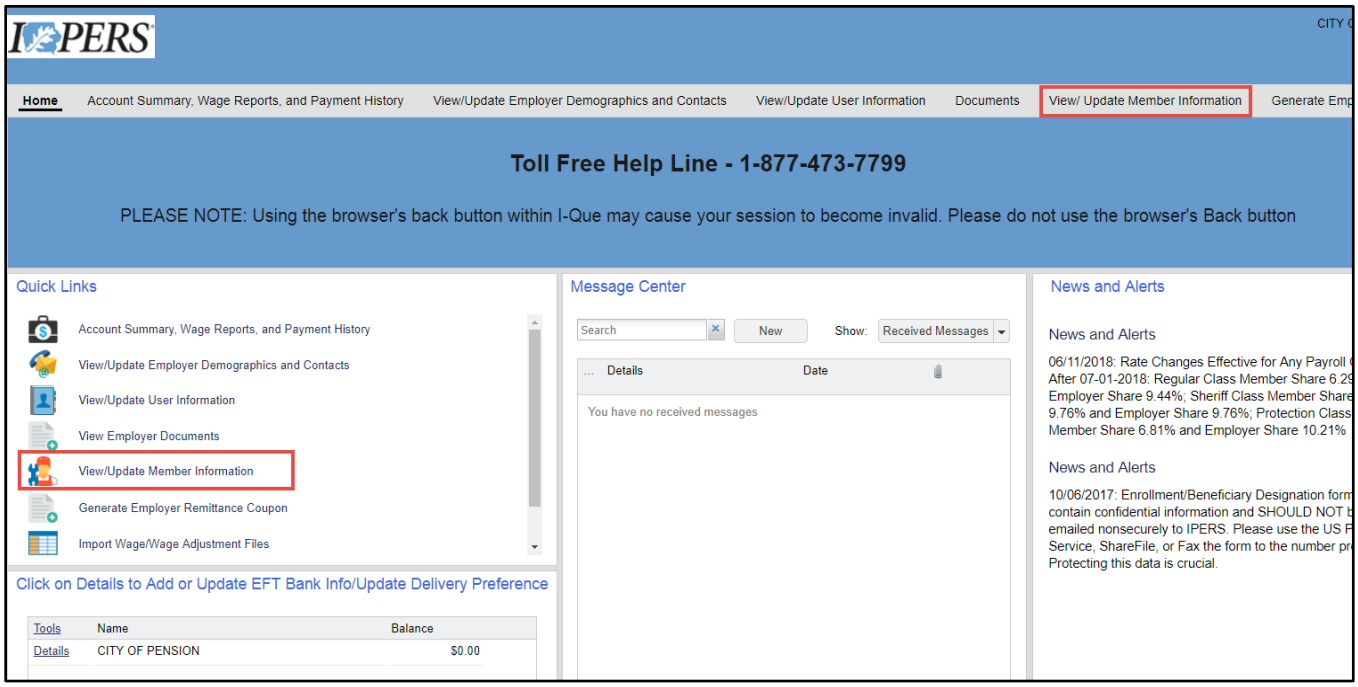
You will automatically return to the roster and the new member will be displayed.



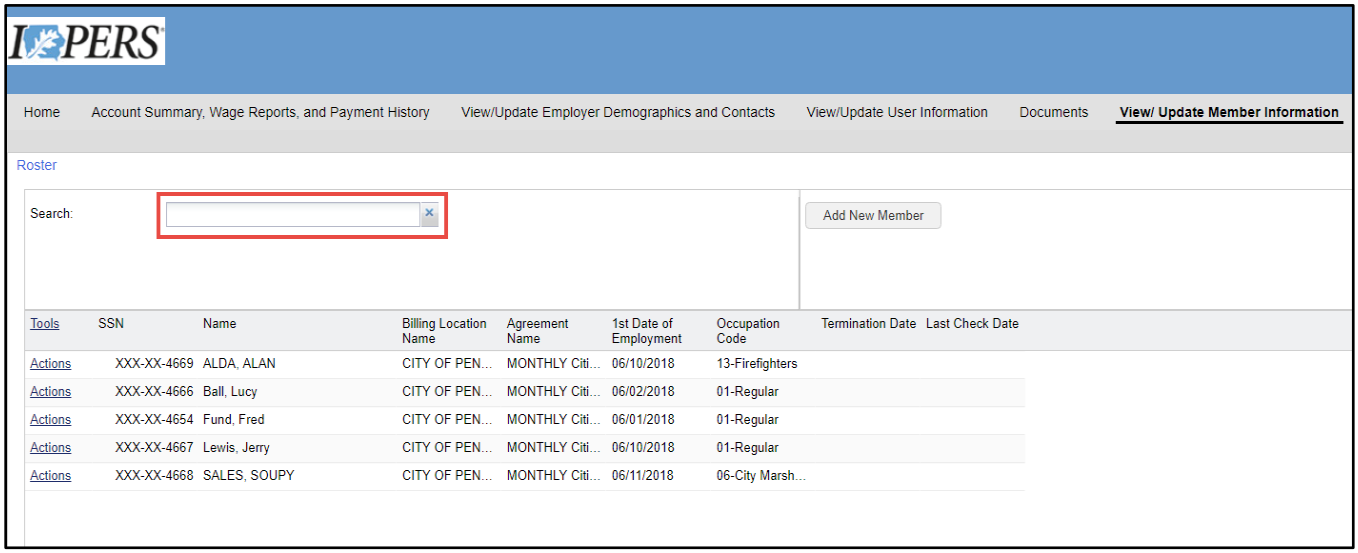
IMPORTANT: If a terminated employee is rehired, start a new employment record with the new hire date. The previous employment record should include the termination and last check dates.

Update an Existing Member

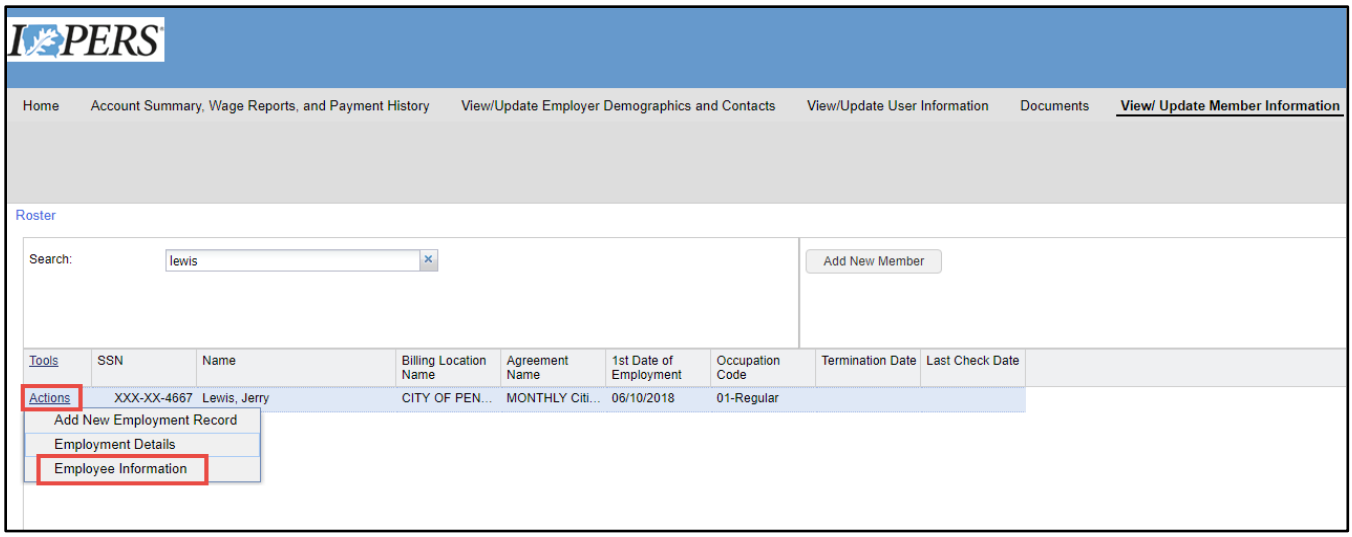
On the I-Que home page, select **View/Update Member Information**.



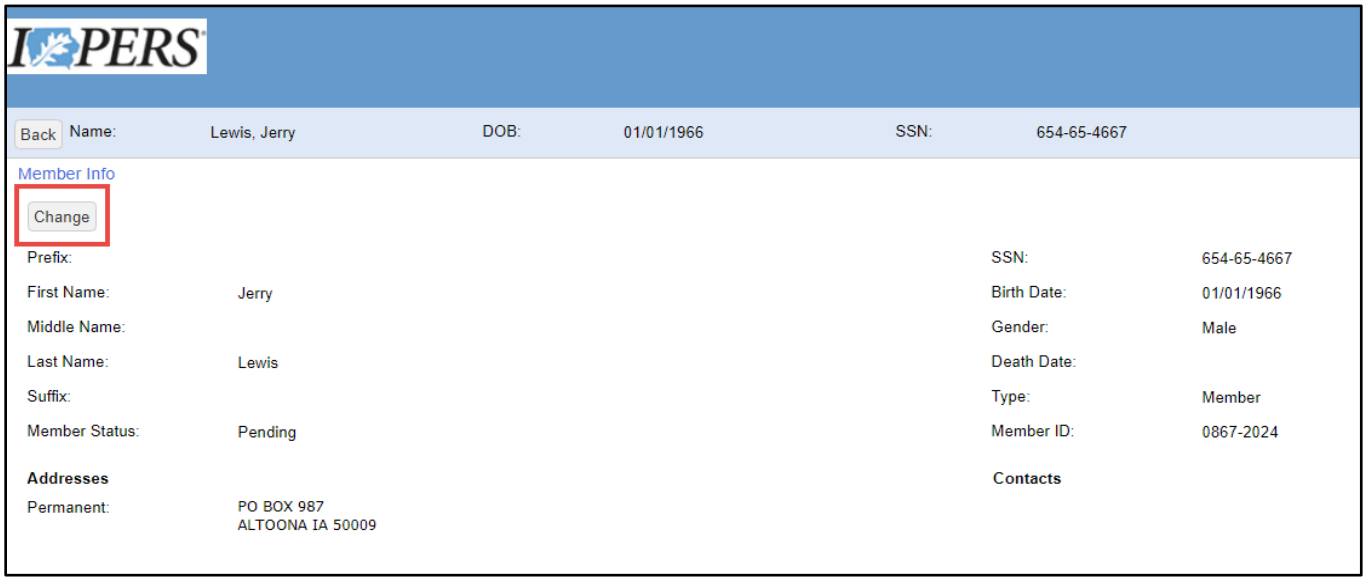
In the **Search** field, enter the employee's SSN or last name. As you type, I-Que will begin displaying member records with that information. *** Don't hit enter, the screen will go blank.



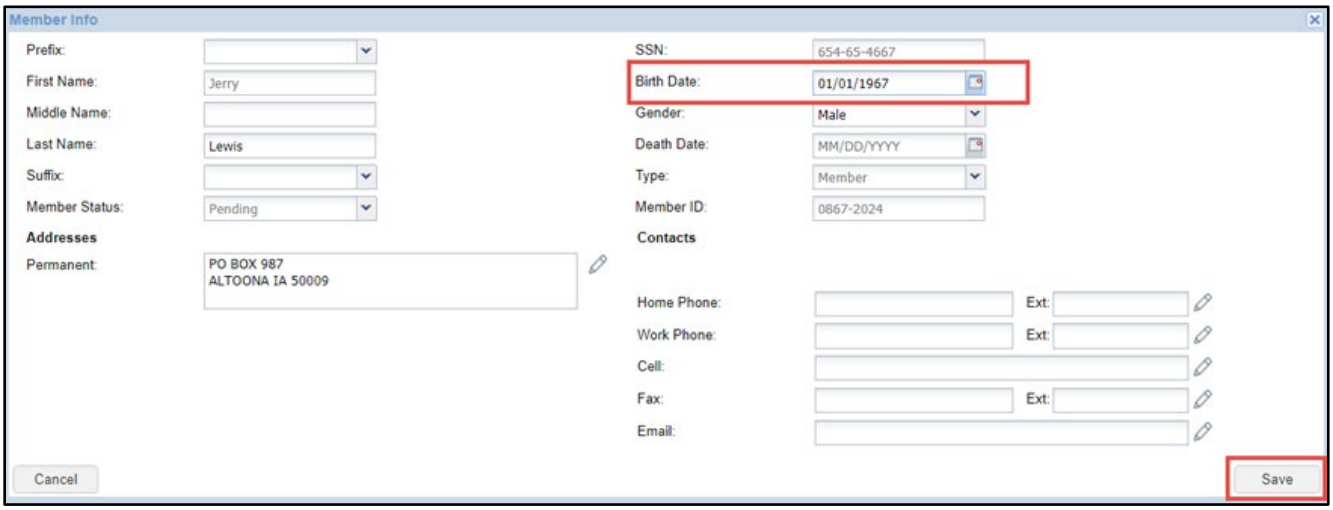
Select **Actions**. In this example, the employee's date of birth will be corrected. Select **Employee Information**.



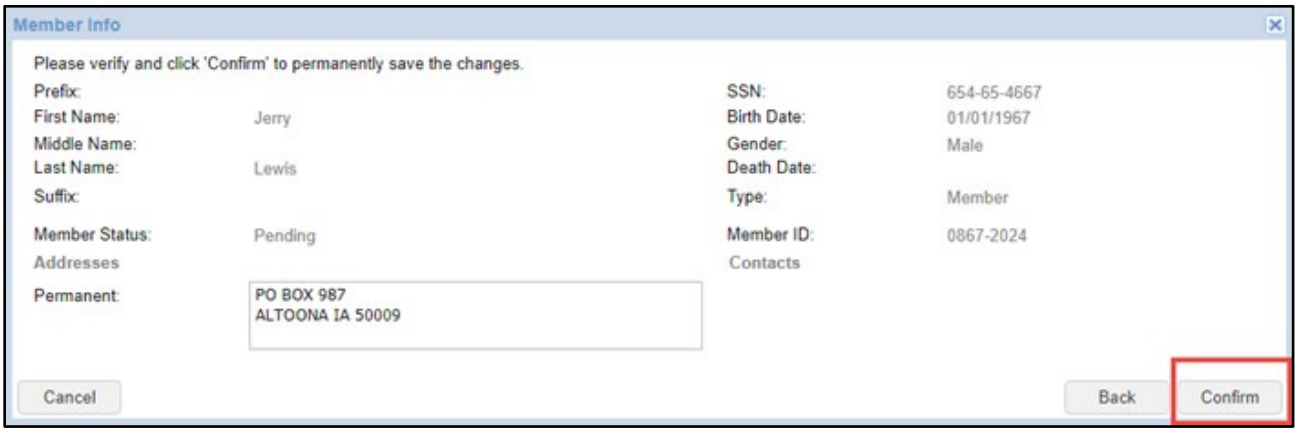
Select **Change**.



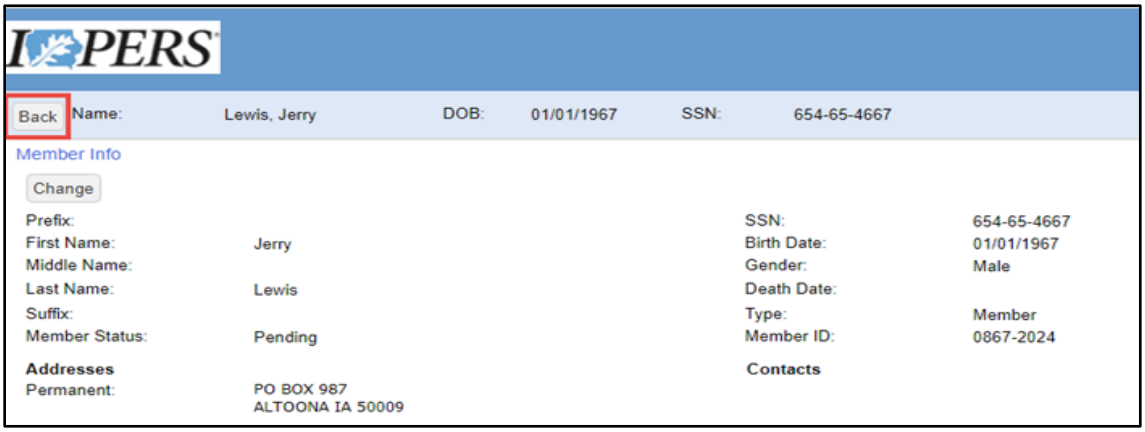
Update the necessary information. Select **Save.** (Middle/Last Name, DOB, Gender, Address or Phone/Email)



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

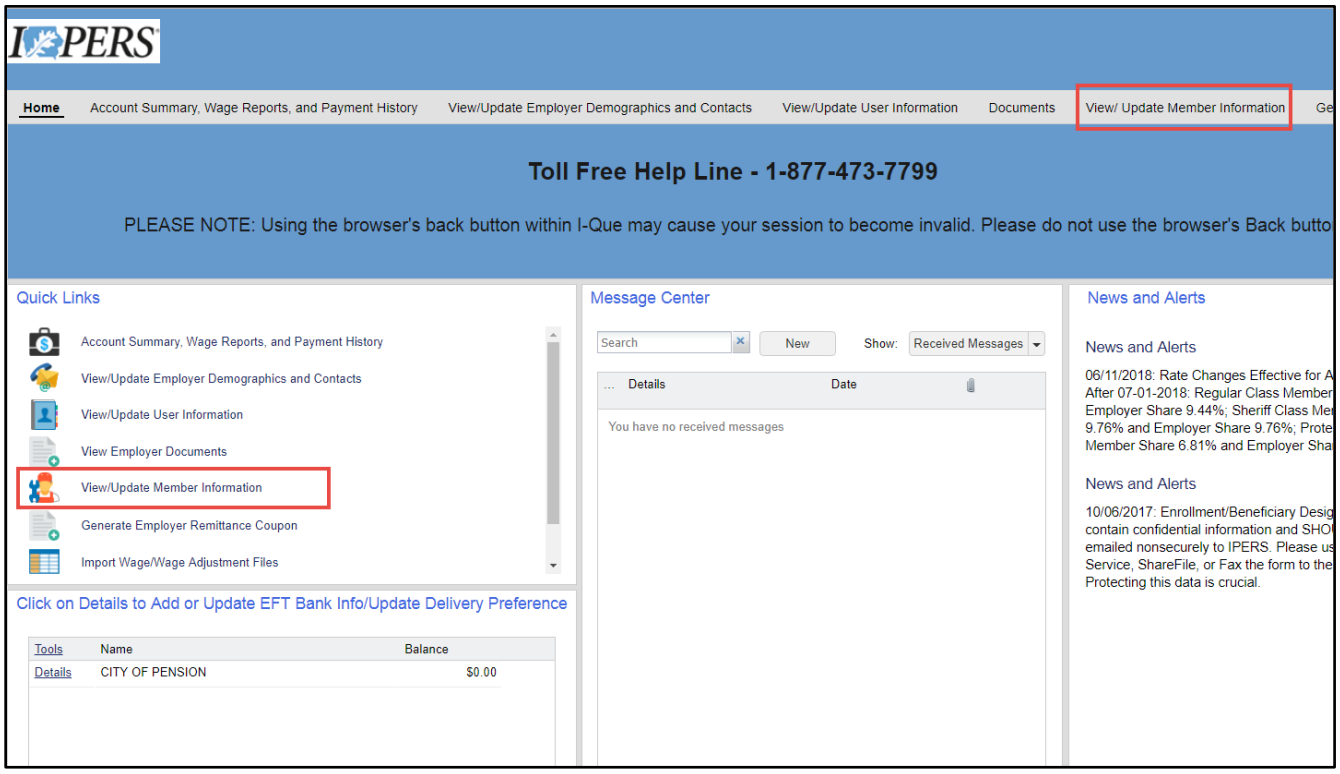


To return to the roster, select **Back**.

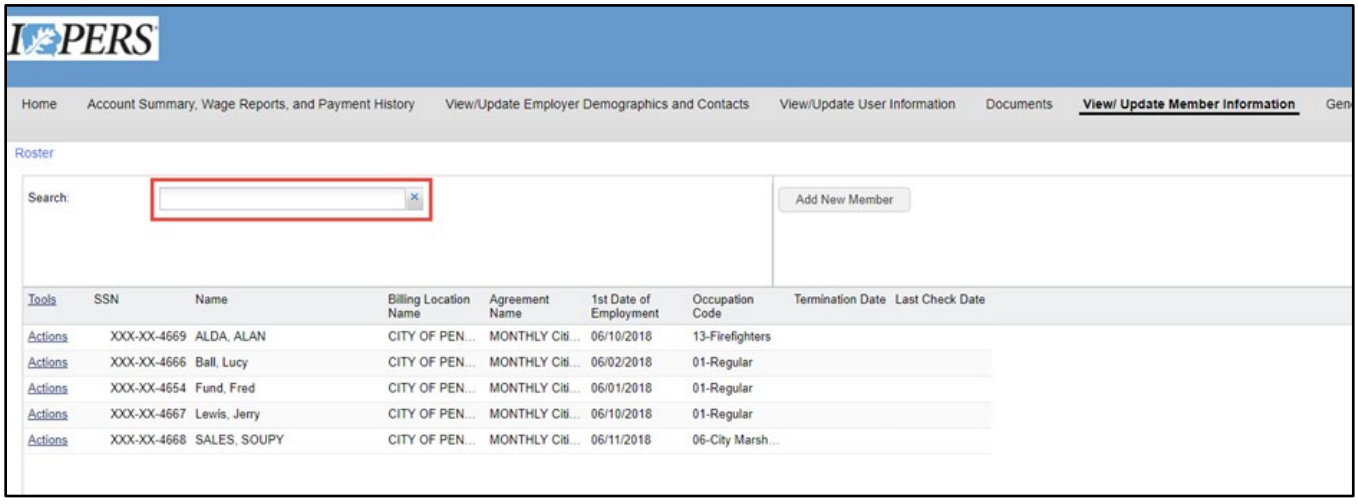


Update Member Employment Records

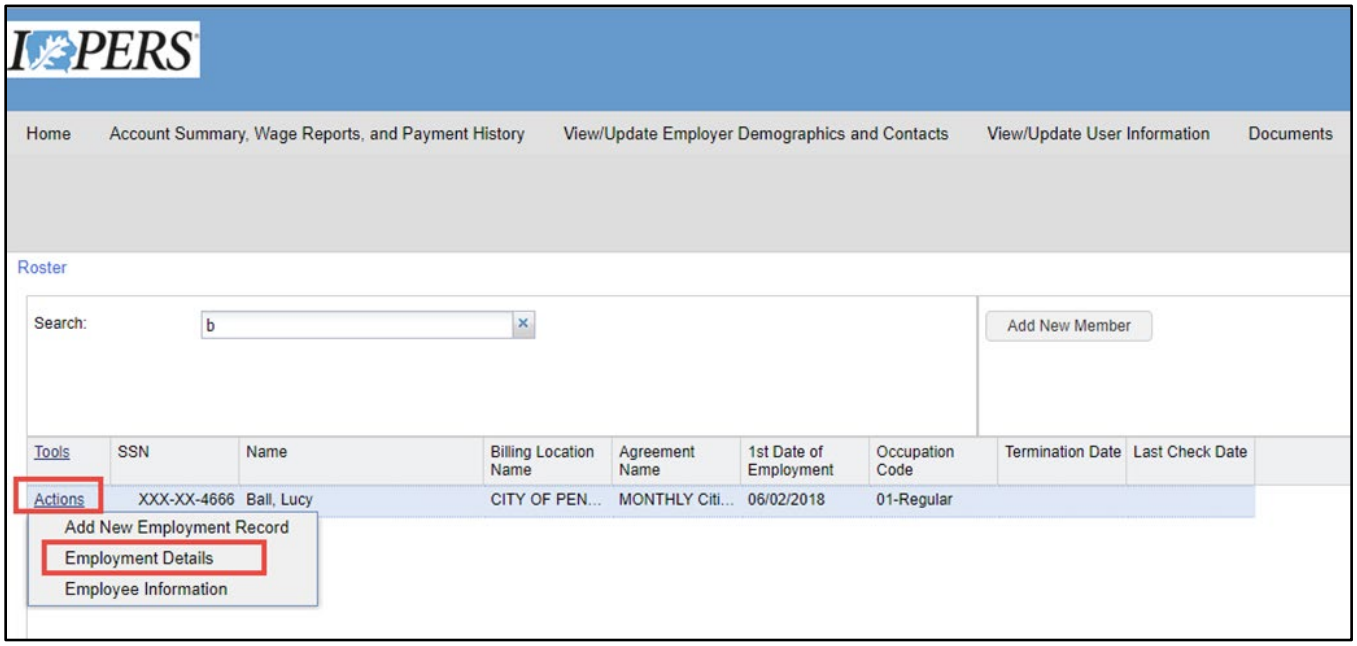
On the I-Que home page, select **View/Update Member Information**.



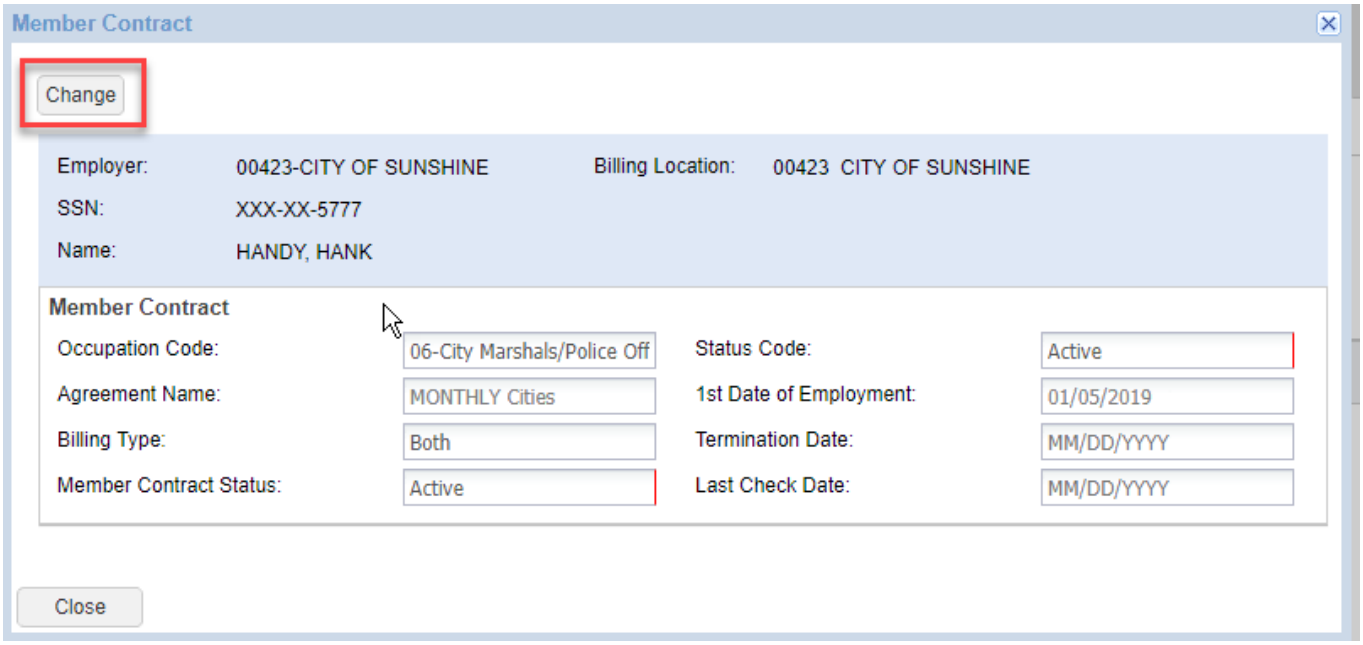
In the **Search** field, enter the employee's SSN or last name. As you type, I-Que will begin displaying member records with that information. *** Don't hit enter, the screen will go blank.



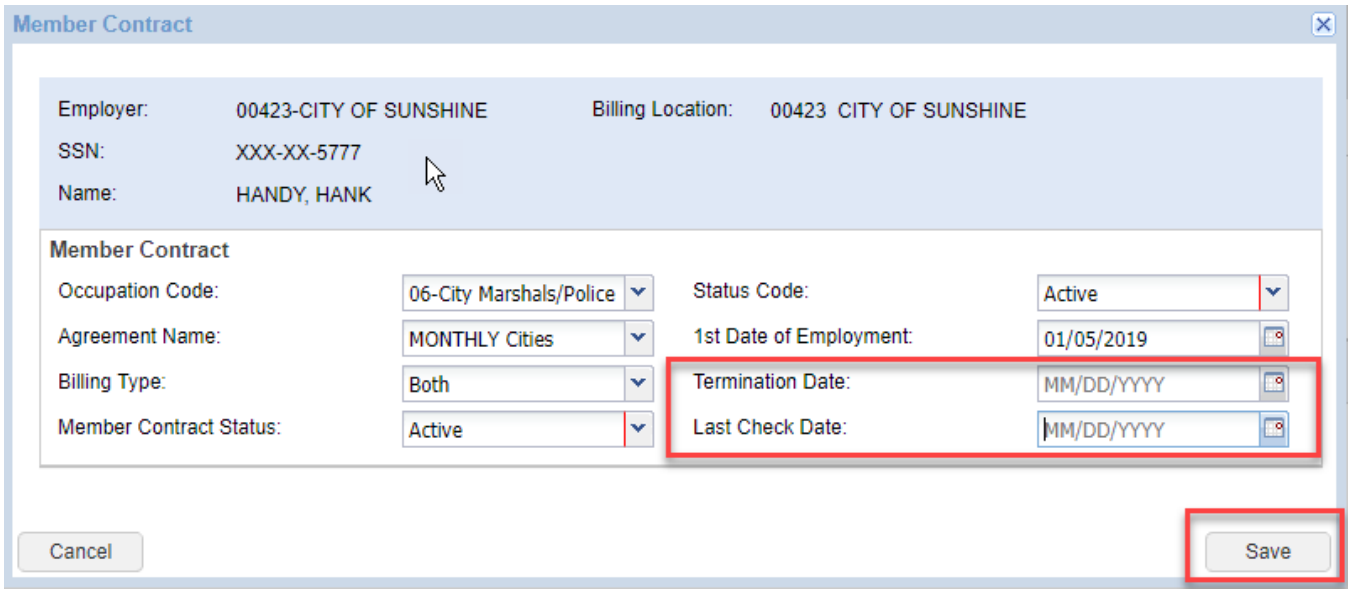
Select **Actions.** In this example, the member's termination and last check dates will be added. Select **Employment Details**.



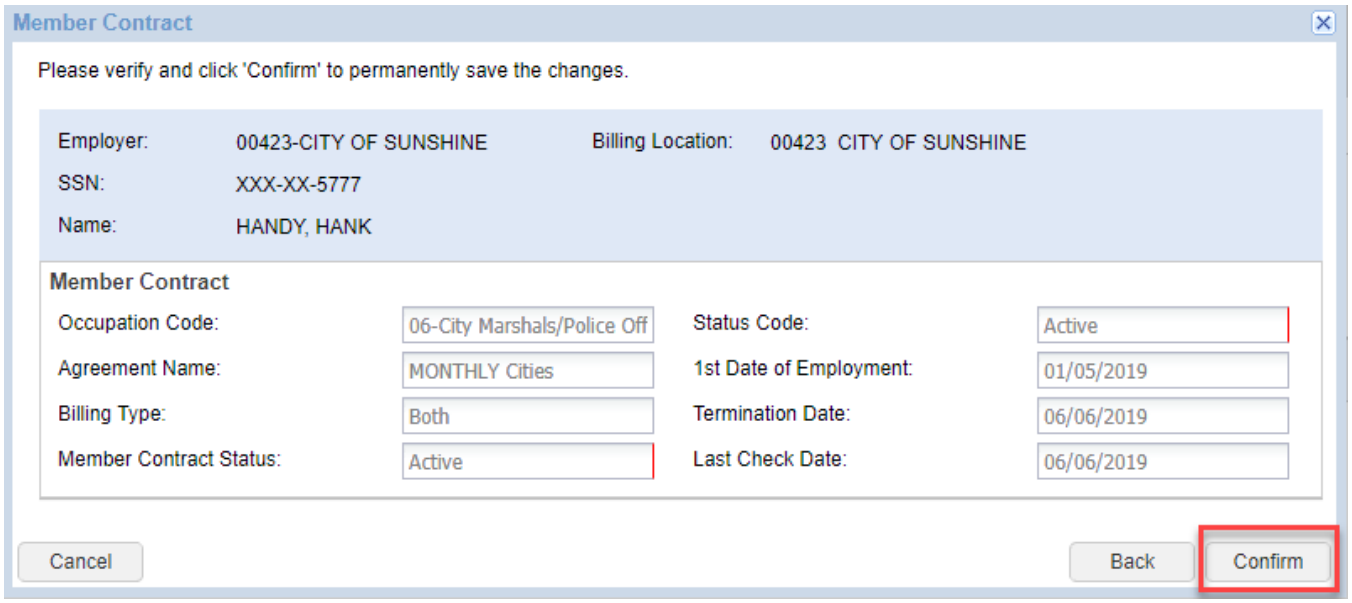
Select **Change**.



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**.



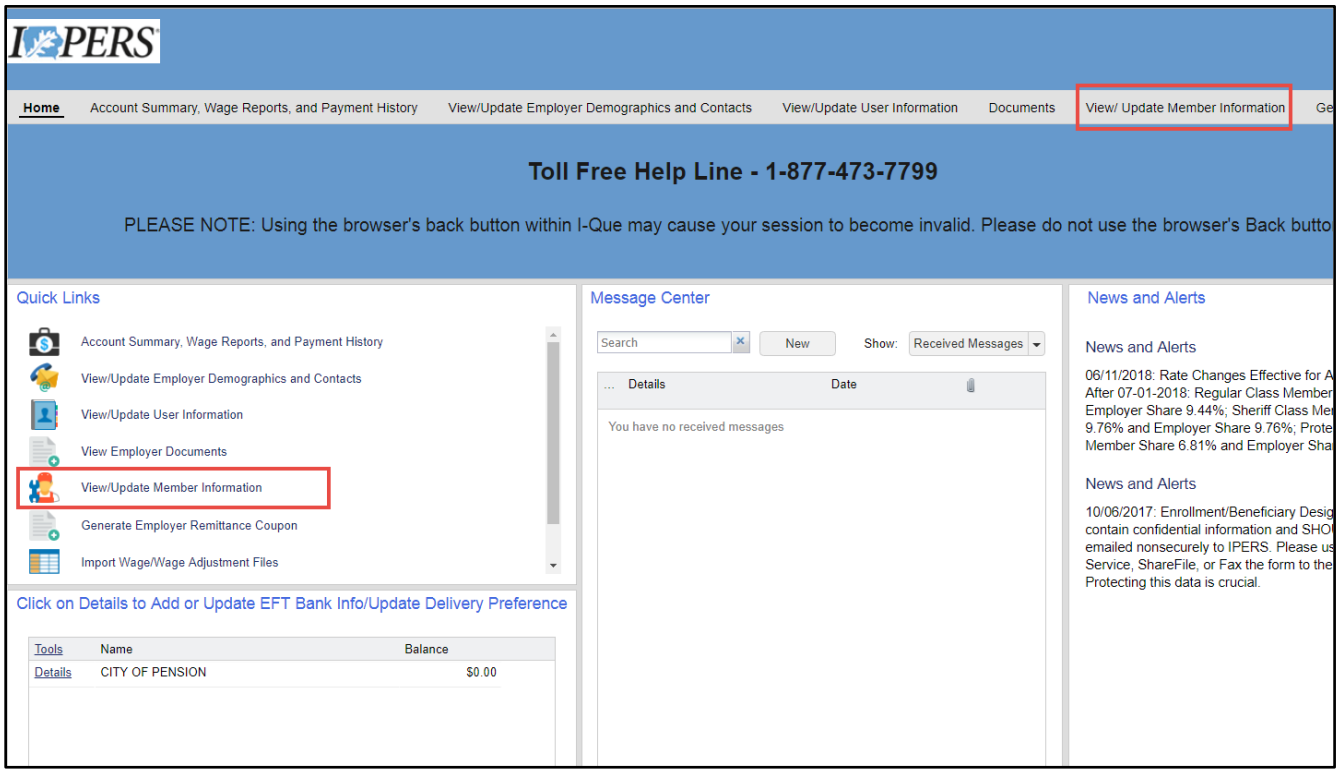
Select **Confirm.**



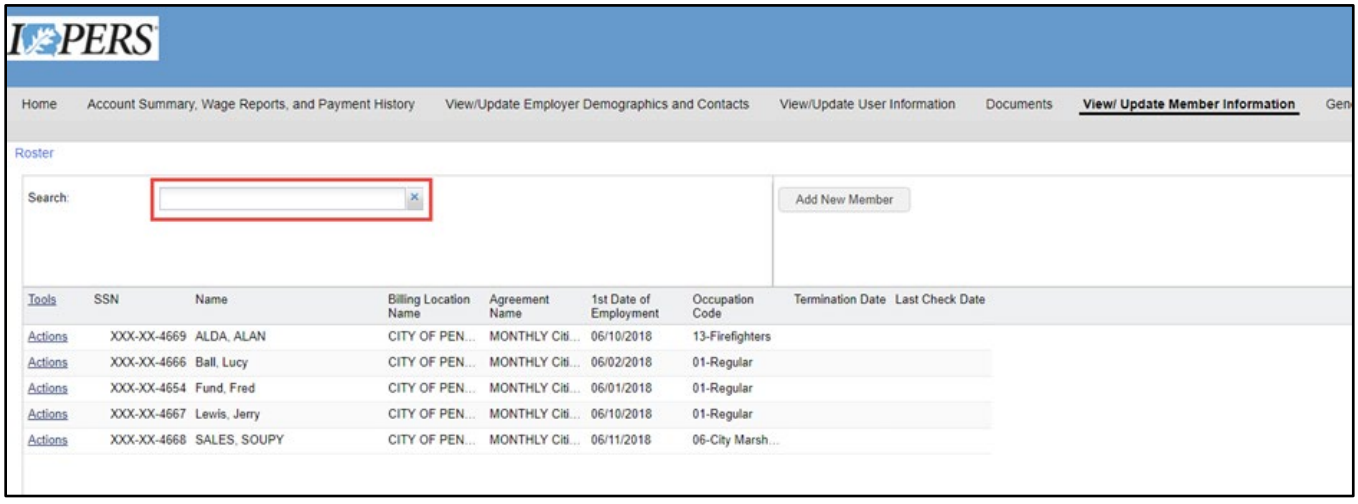
IMPORTANT: Always create a new employment record if the member is rehired. IPERS will not allow you to remove the termination and last check date from an employee's record if that period of employment has been used in a benefit payment.

Add a New Employment Record

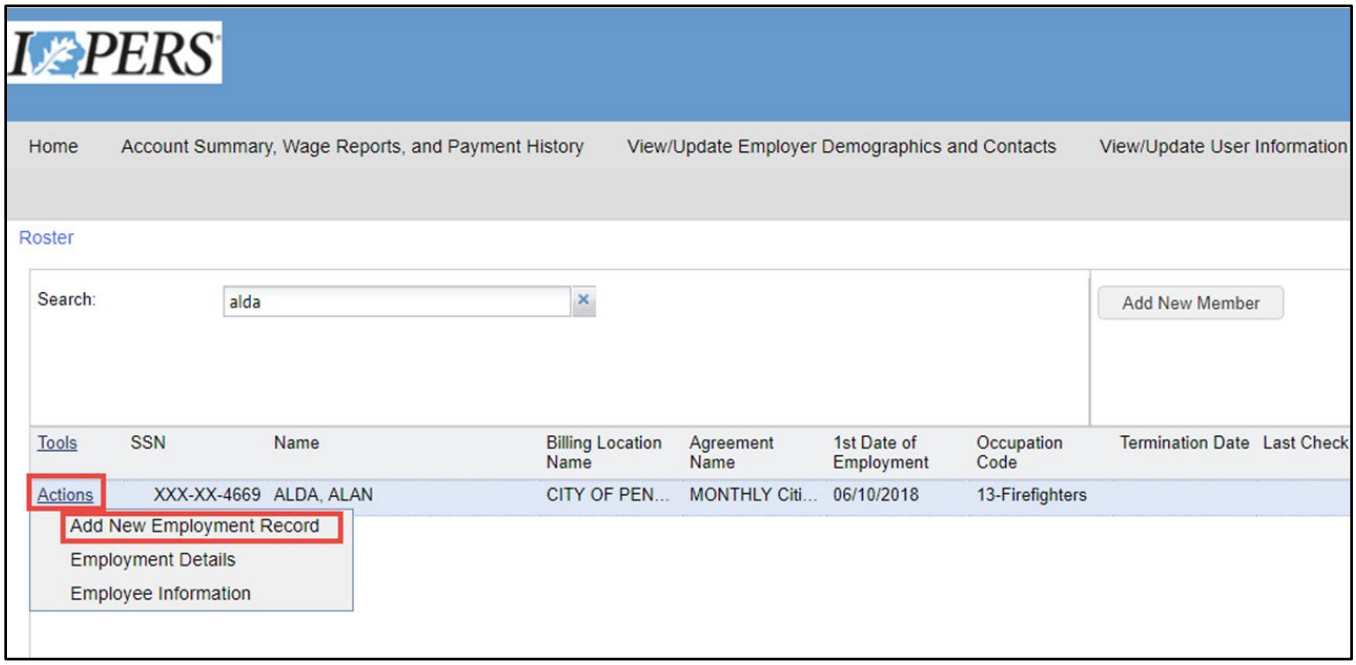
On the I-Que home page, select **View/Update Member Information**.



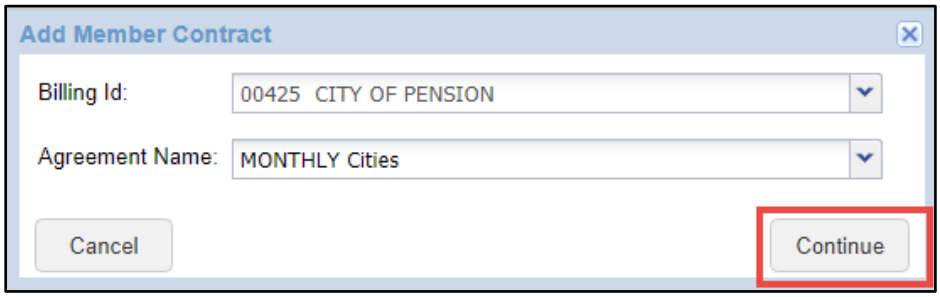
In the **Search** field, enter the employee's SSN or last name. As you type, I-Que will begin displaying member records with that information. *** Don't hit enter, the screen will go blank.



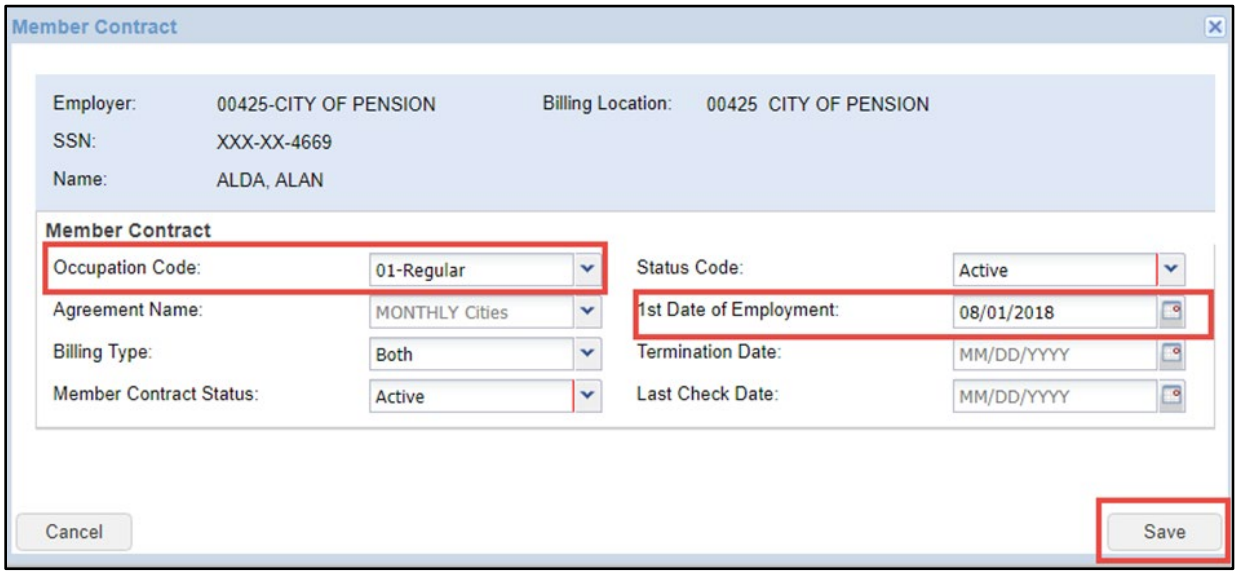
Select **Actions**. In this example, a new employment record will be added for this member. Select **Add New Employment Record**.



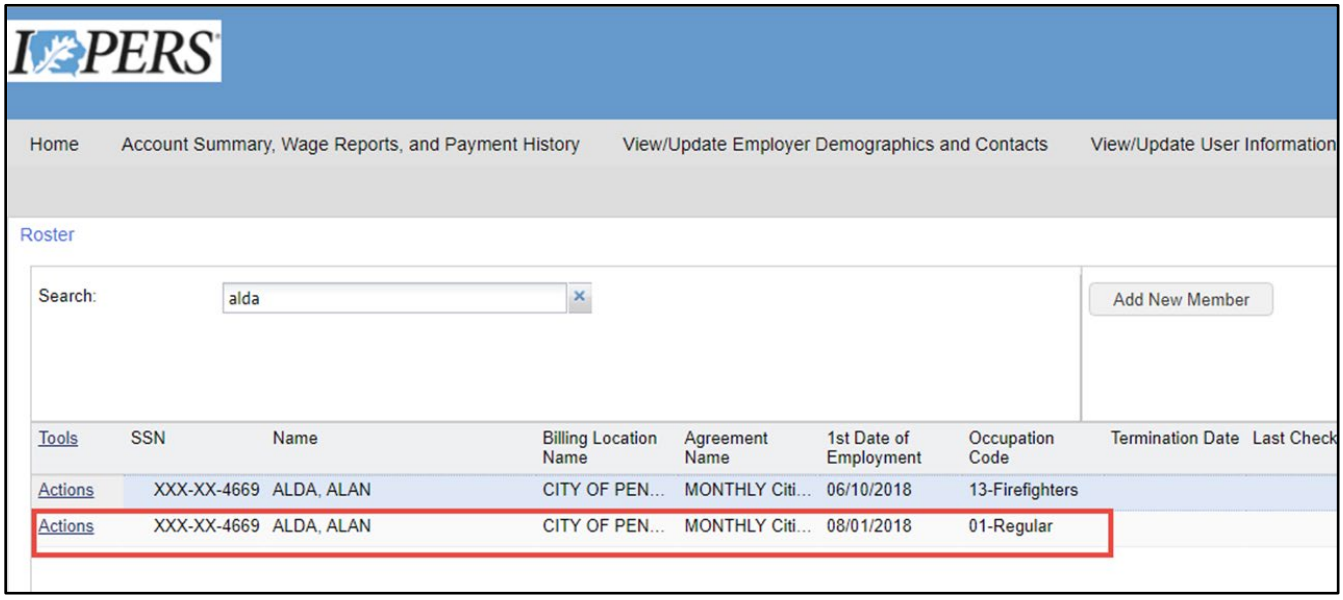
Select **Continue**.



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

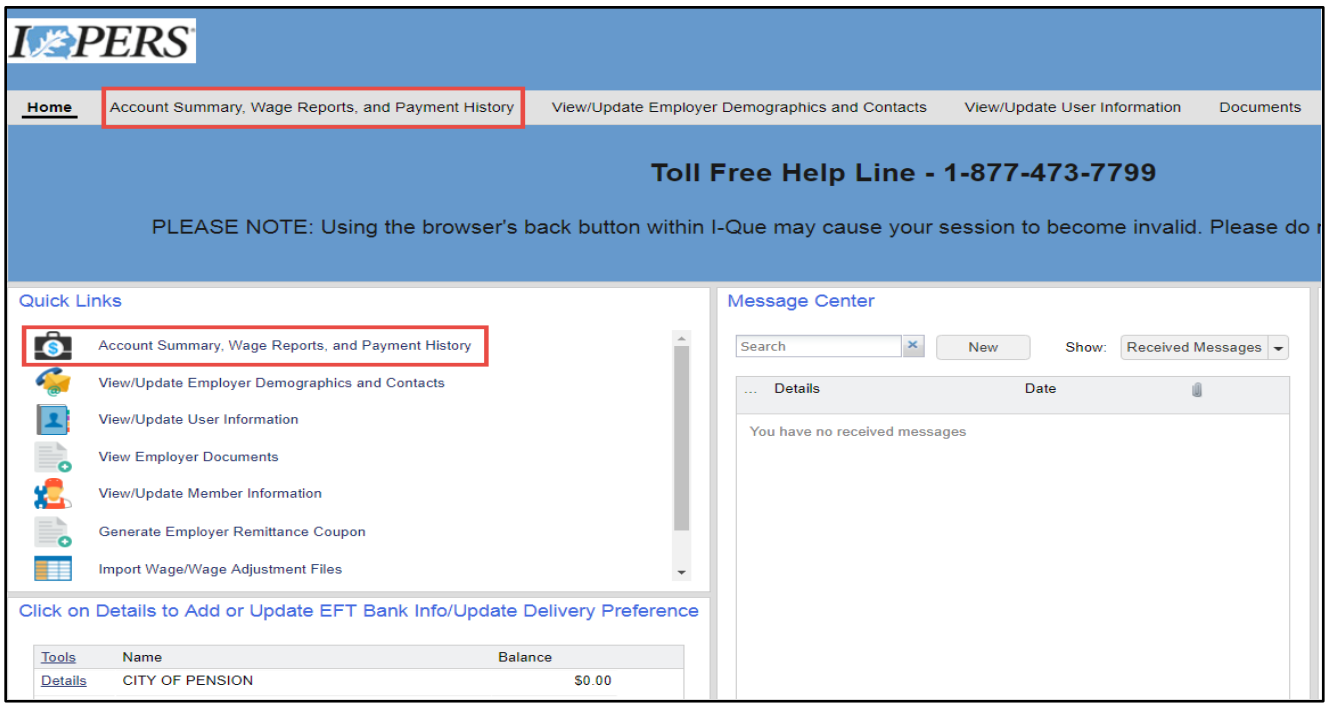


Your employment roster will display and the new employment record will be included in it.



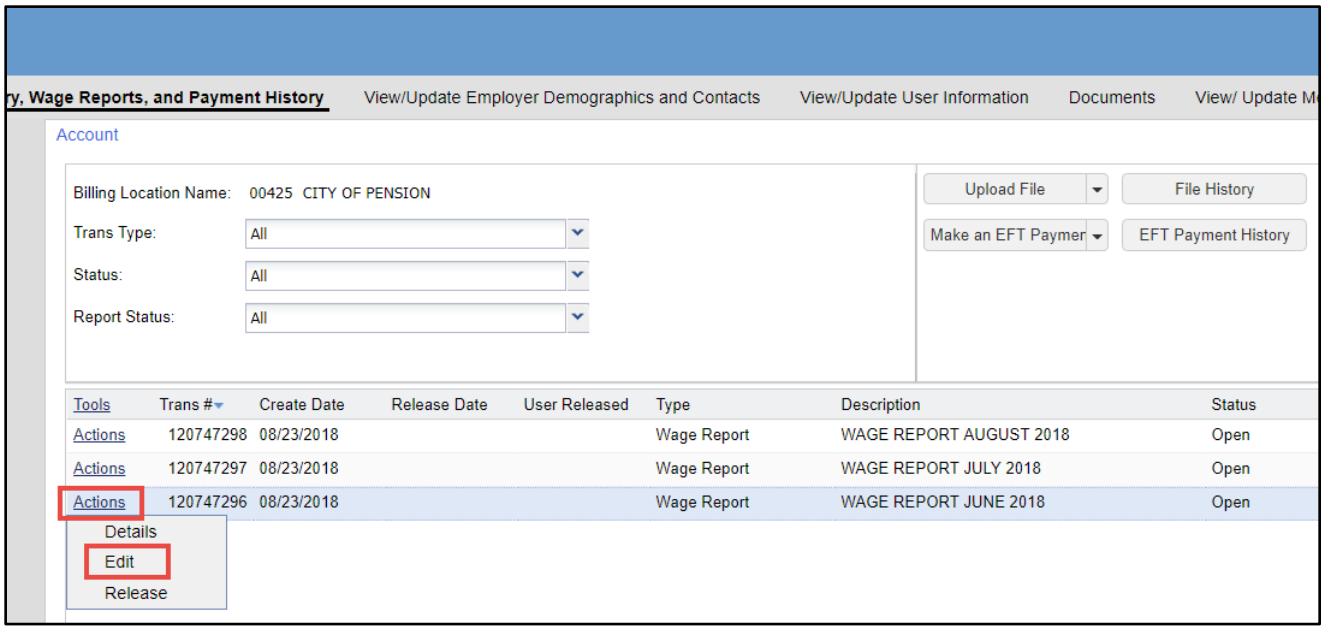
Submit a Manual Wage Report

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



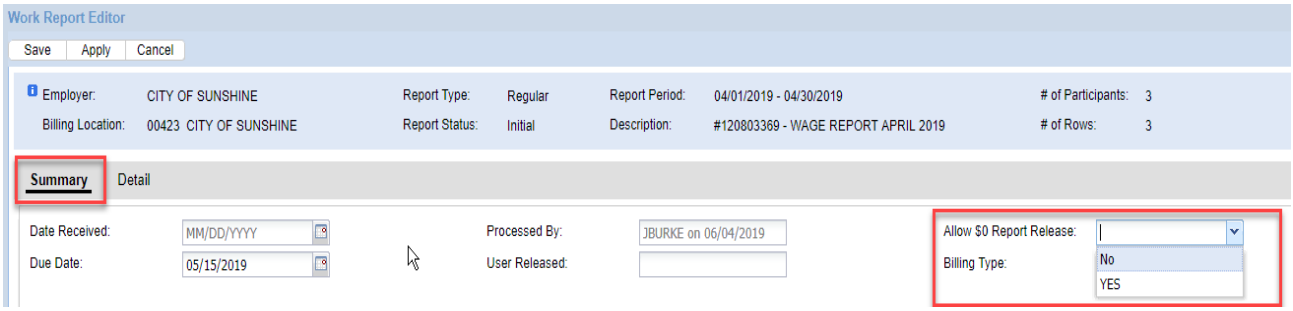
Find the wage report to be completed, click on the line and make sure it is highlighted.

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

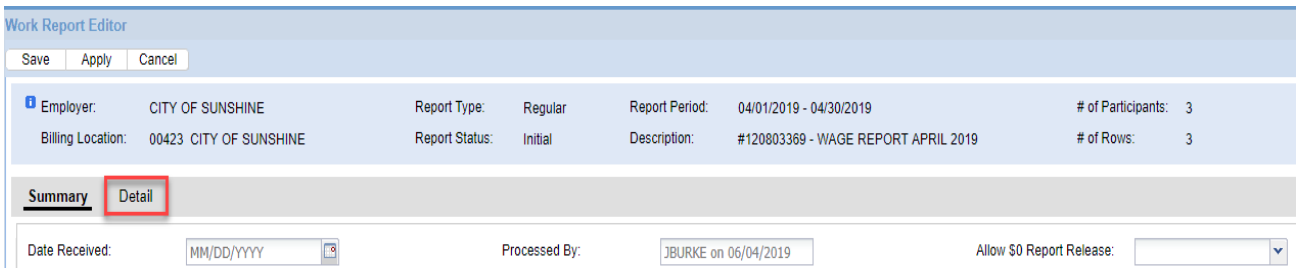


If you are releasing a Zero Wage Report, use the drop down arrow to select **Yes** on the Wage Report Editor Summary screen.

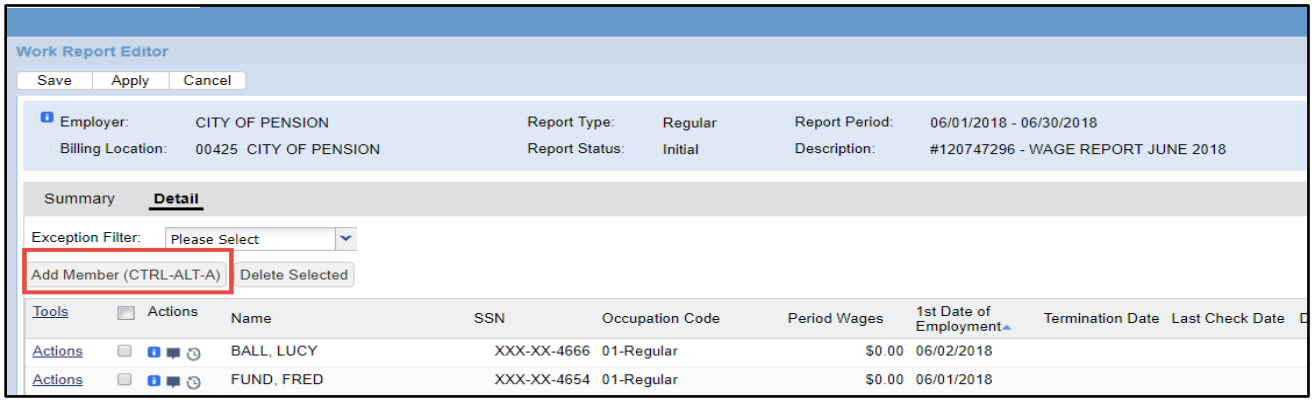
If not, go to the next step.



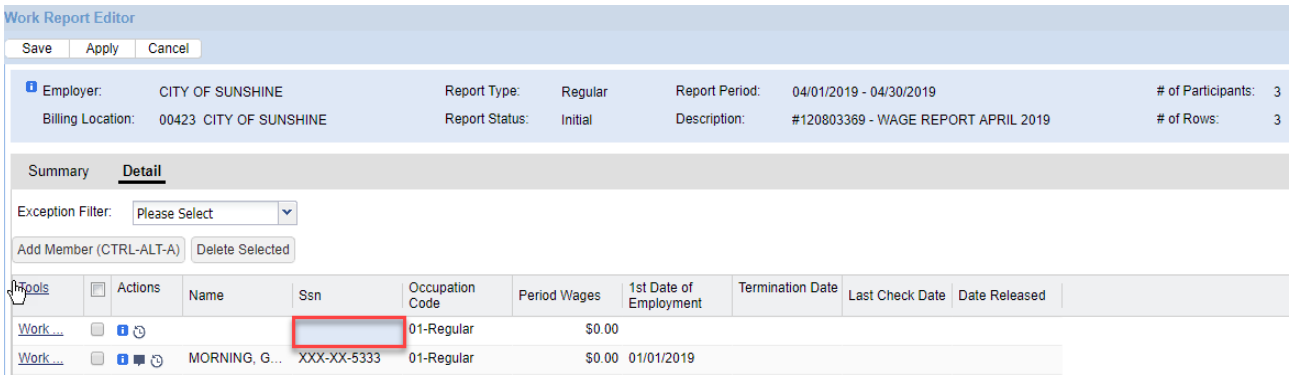
Select **Detail** to see all current members on your active roster and enter their IPERS-covered wages.



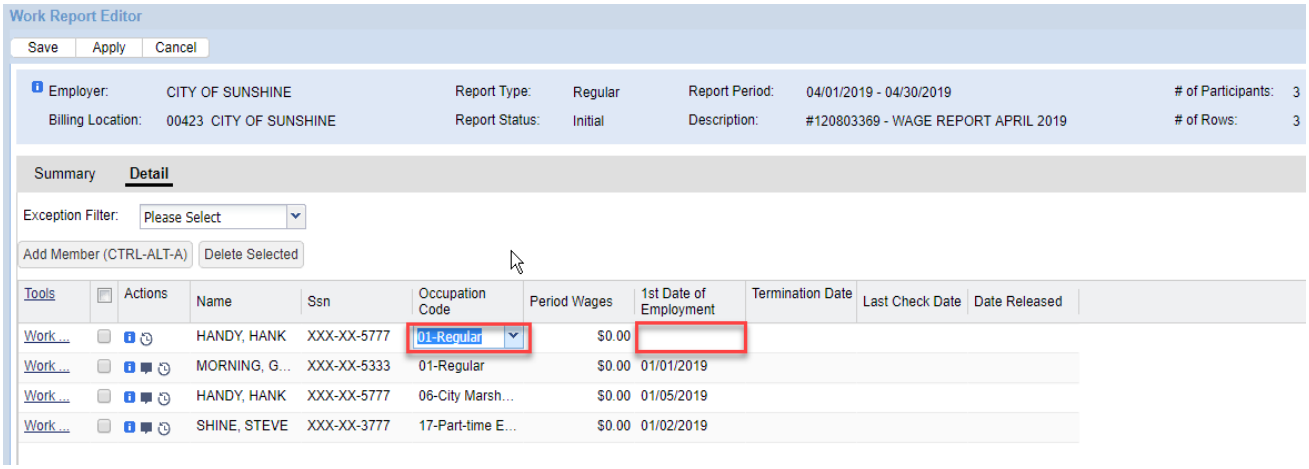
Your roster will be displayed. If you have added any new employees to I-Que (under View/Update Member Information), select **Add Member (CTRL-ALT-A)** to add them to this wage report.
**If no new members to add, go to the bottom of page 24.



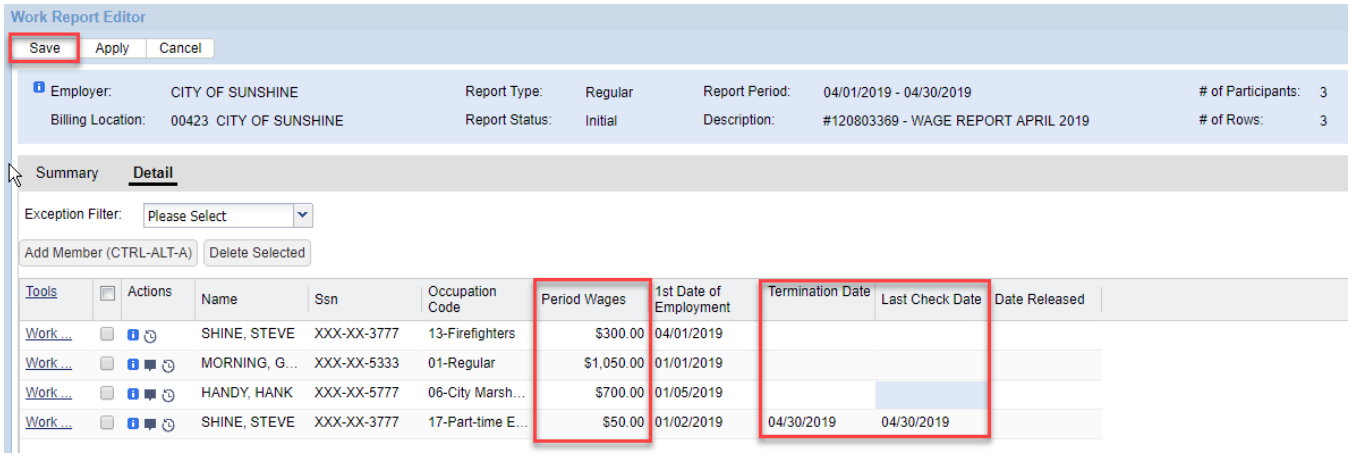
Enter the employee's SSN by clicking in the SSN field. Click Enter or hit the Tab key and the employee's name will autofill if you have already added them to the roster in I-Que.



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



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.**

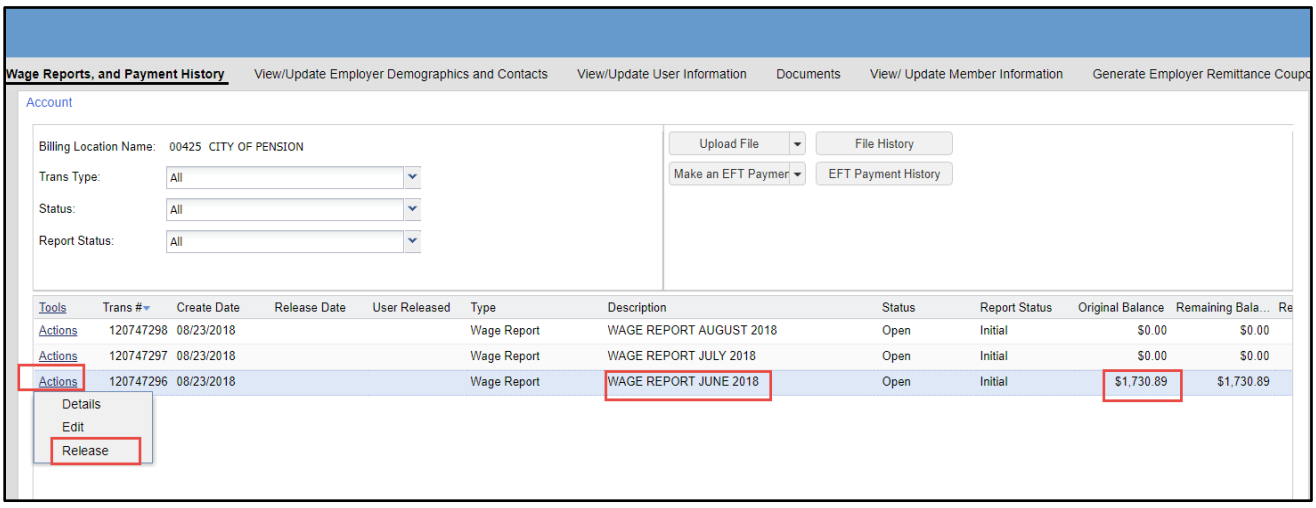


****Note**, if an employee had no wages, leave $0.00 in the **Period Wages** field or delete the record.

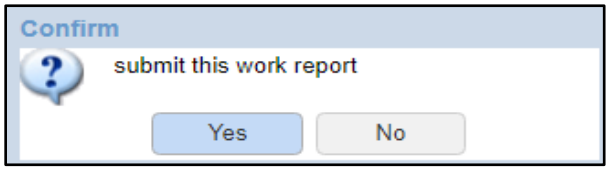
The **Account Summary** screen will display. The amount owed for this wage report shows under the **Original Balance** column. If the amount owed is different than expected, go back and check the period wages for each employee, making corrections where necessary.

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.



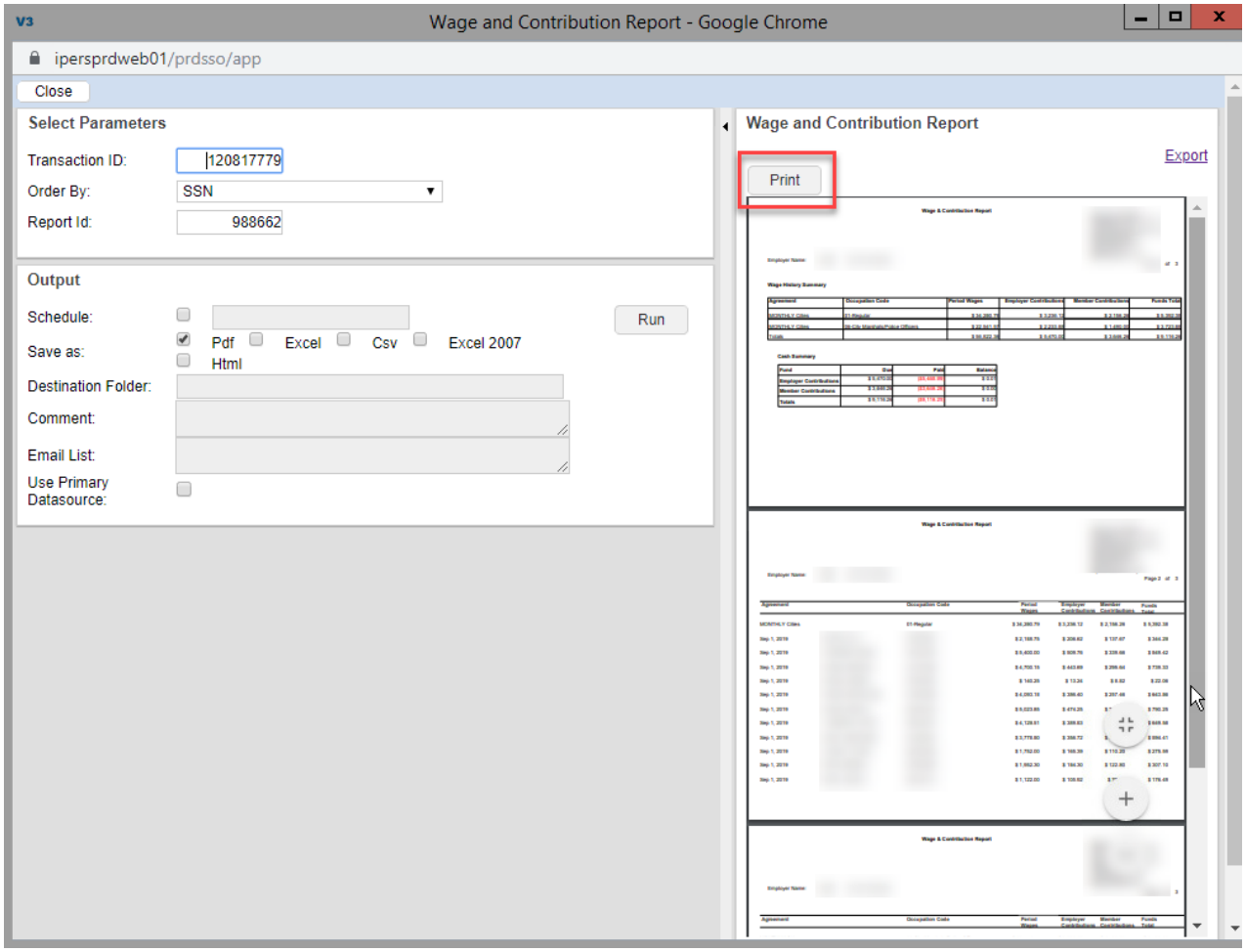
Follow the prompts to submit the wage report.



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

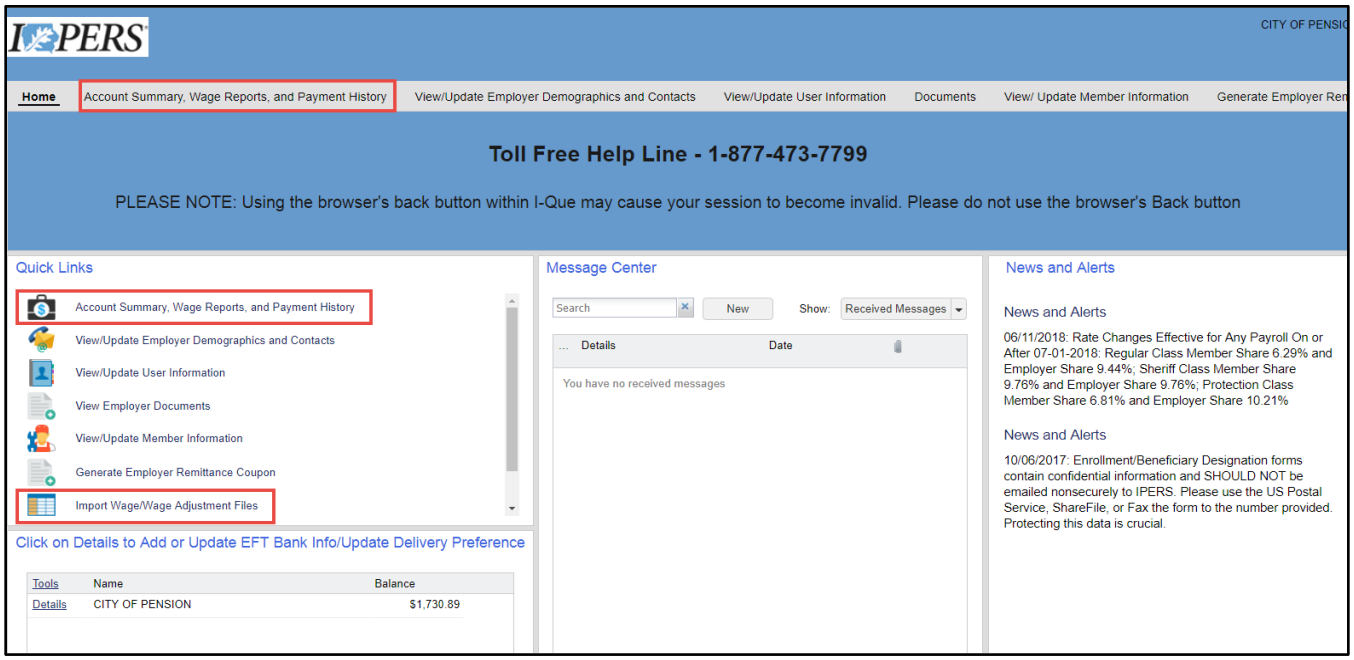
To view and print the Wage & Contribution Report for the wage report recently submitted, **Highlight** the row for the appropriate wage report ex. *Wage Report March 2019*. Select **Tools, Reports, and Wage and Contribution Report.**

Select **Print** and when finished, select **Close** to return to **Account Summary** screen.

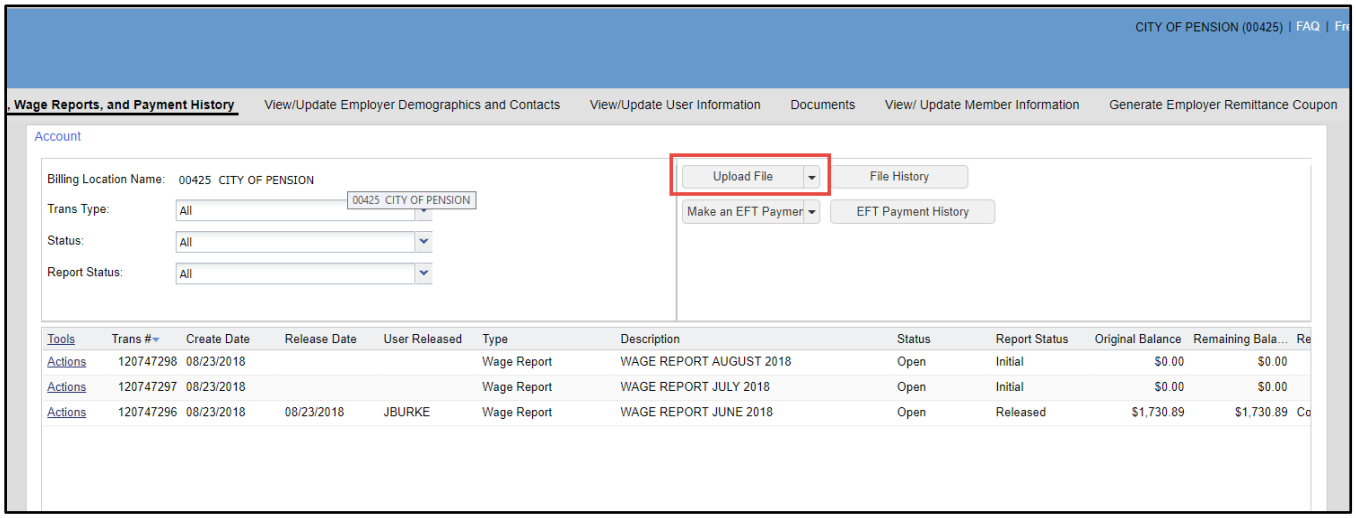


Import a Wage Report

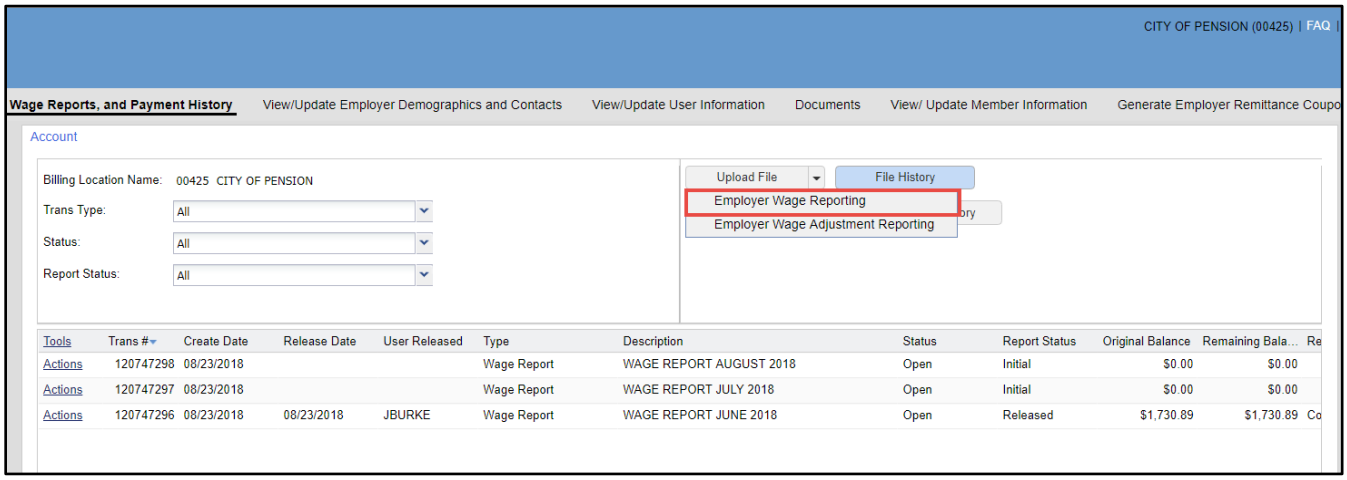
On the I-Que home page, select **Account Summary, Wage Reports, and Payment History** or **Import Wage/Wage Adjustment Files**.



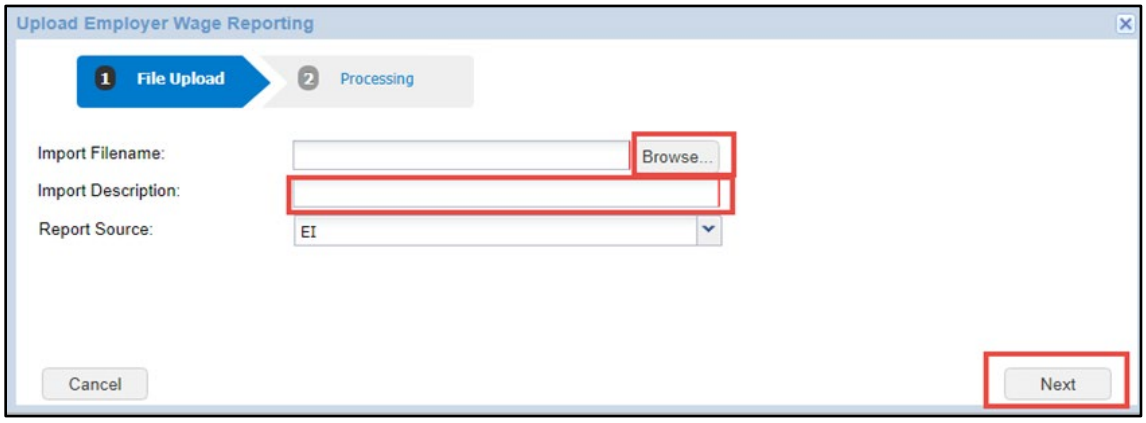
Select **Upload File**.



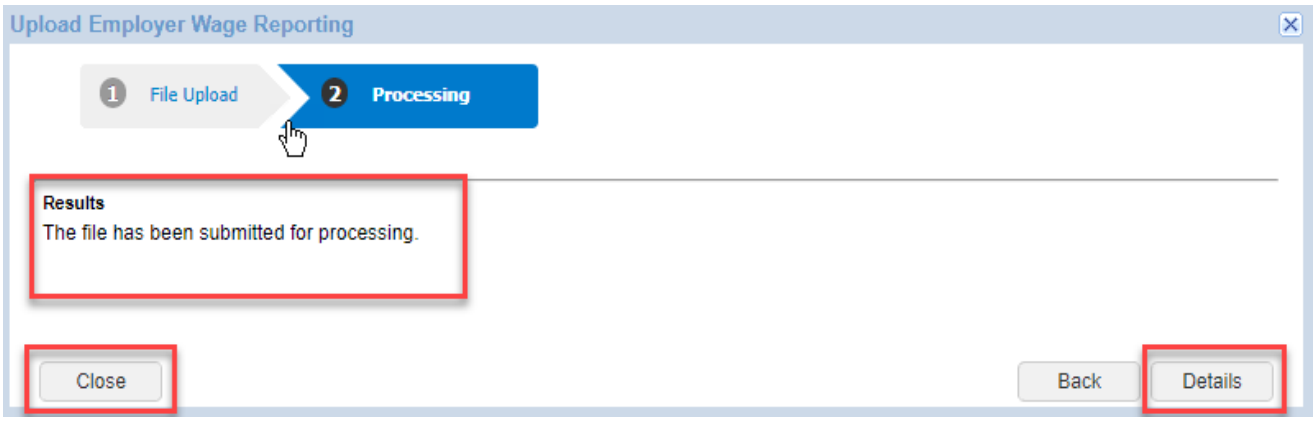
Select **Employer Wage Reporting** from the drop down.



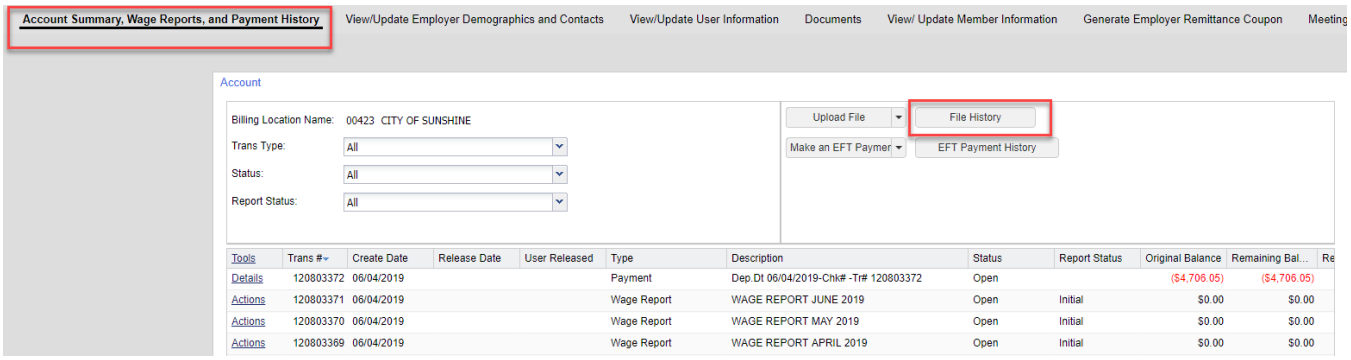
Select **Browse** to find your wage report import file. Fill in the **Import Description**. Select **Next**.



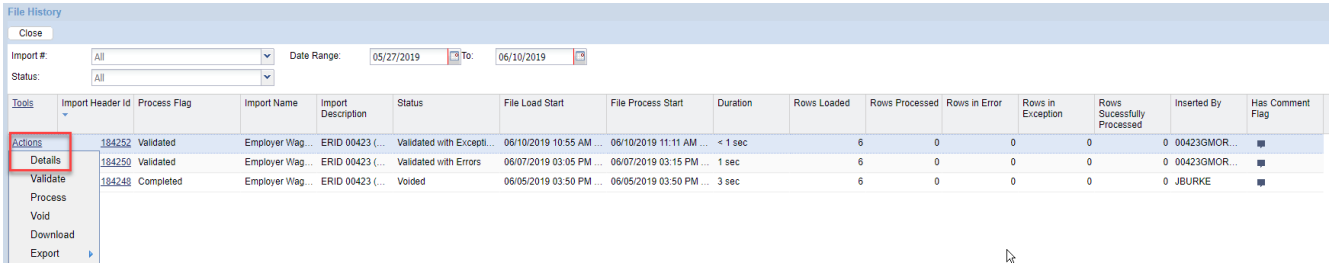
To validate the file, select **Details or Close**. If you select **Details** go to bottom of page 29.



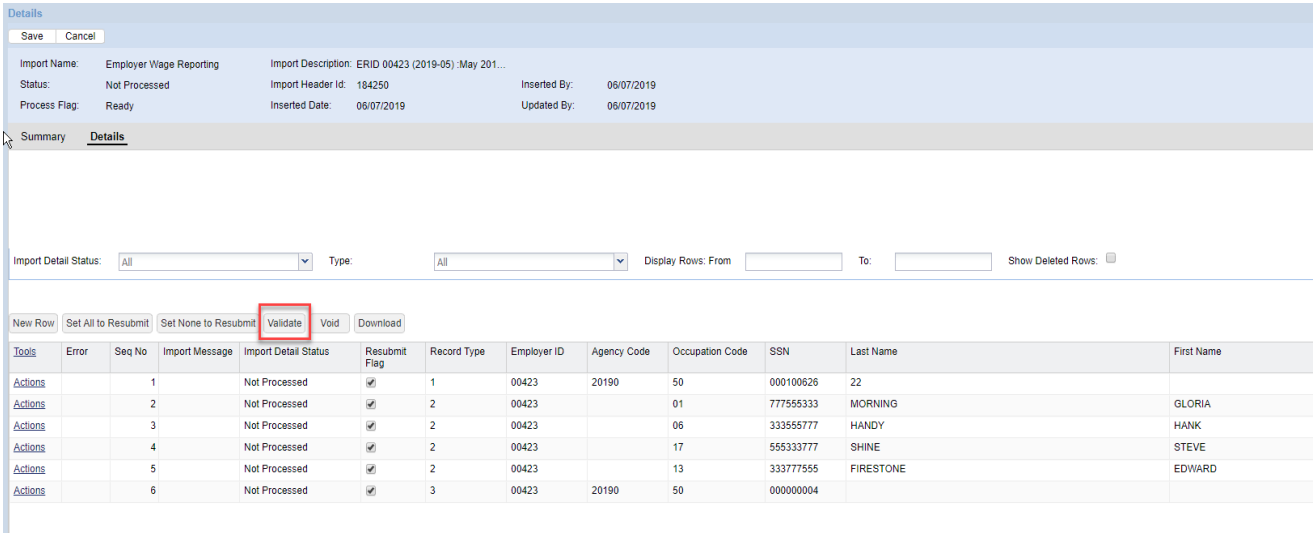
If you selected **Close**, you can find the imported file under File History on the Account Summary page.



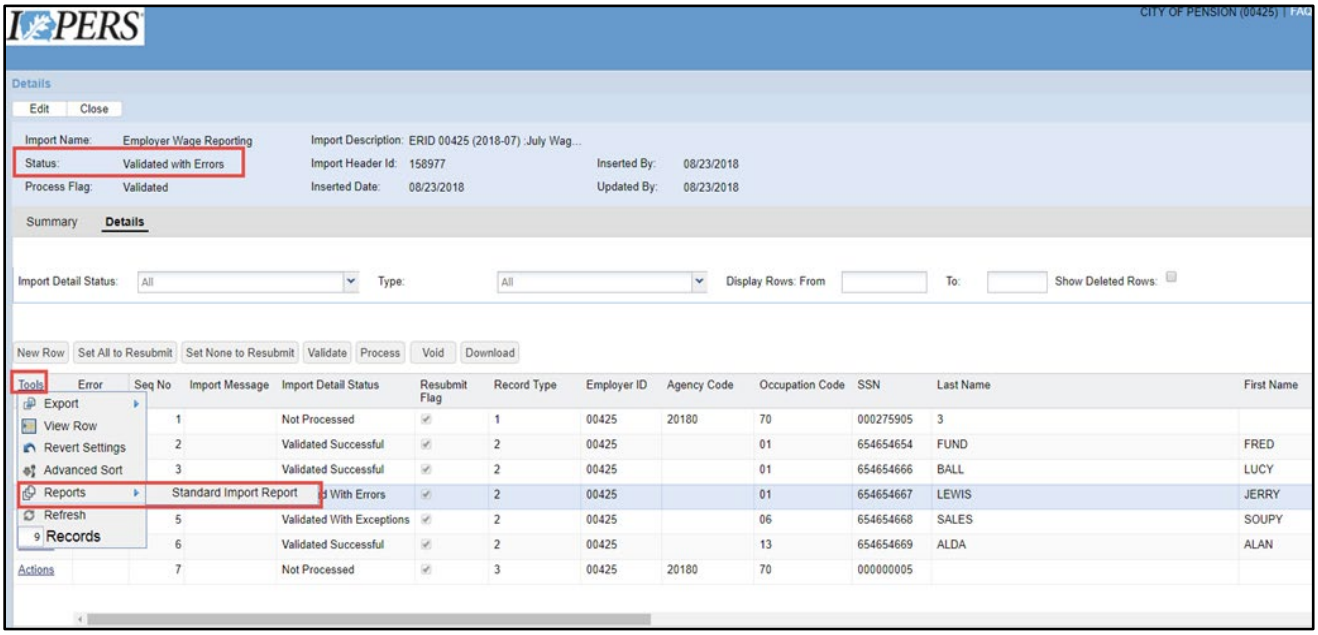
Select **Actions**, then **Details**



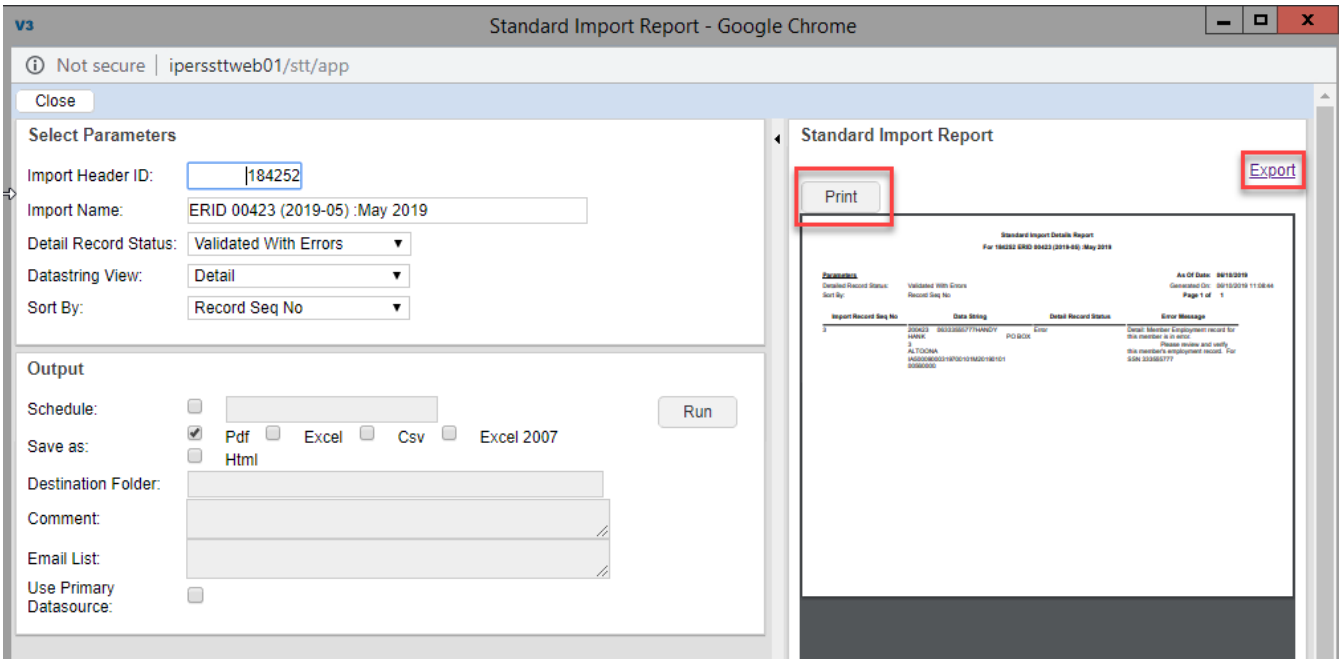
The following screen will display. Select **Validate**.



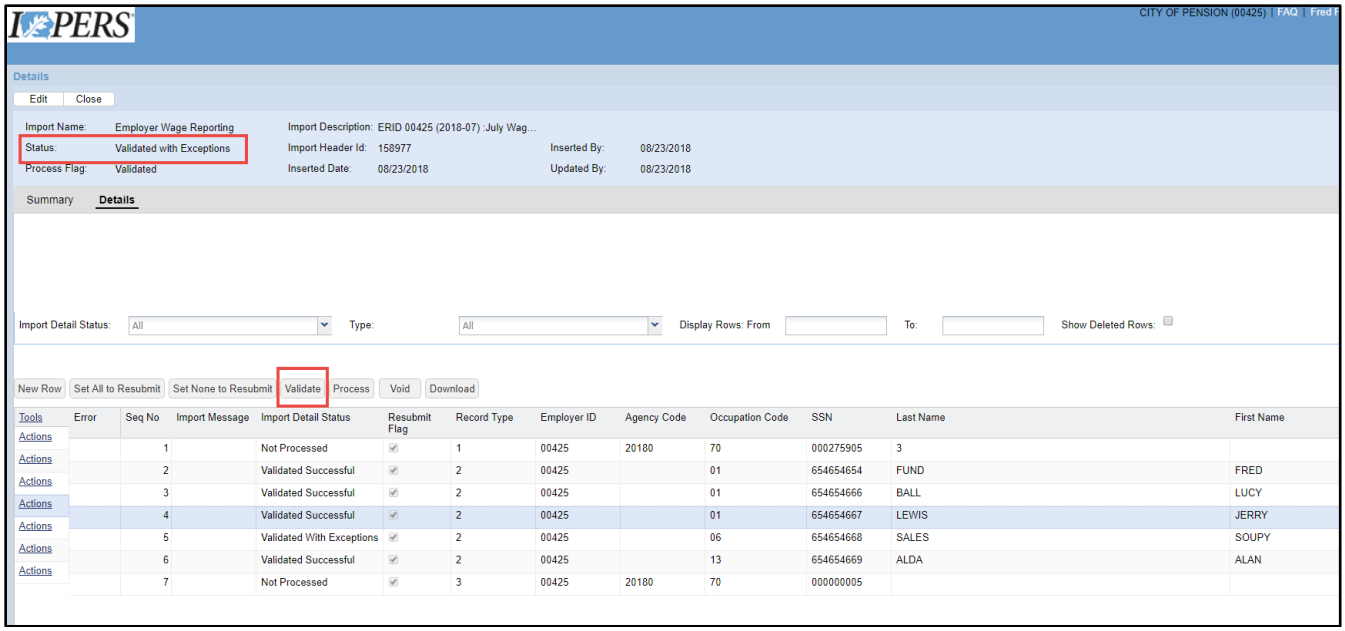
If the **Import Detail Status** is **Validated With Errors**, click on one of the lines in the file details, then select **Tools.** Under the Tools drop-down menu, select **Reports,** then **Standard Import Report**.



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

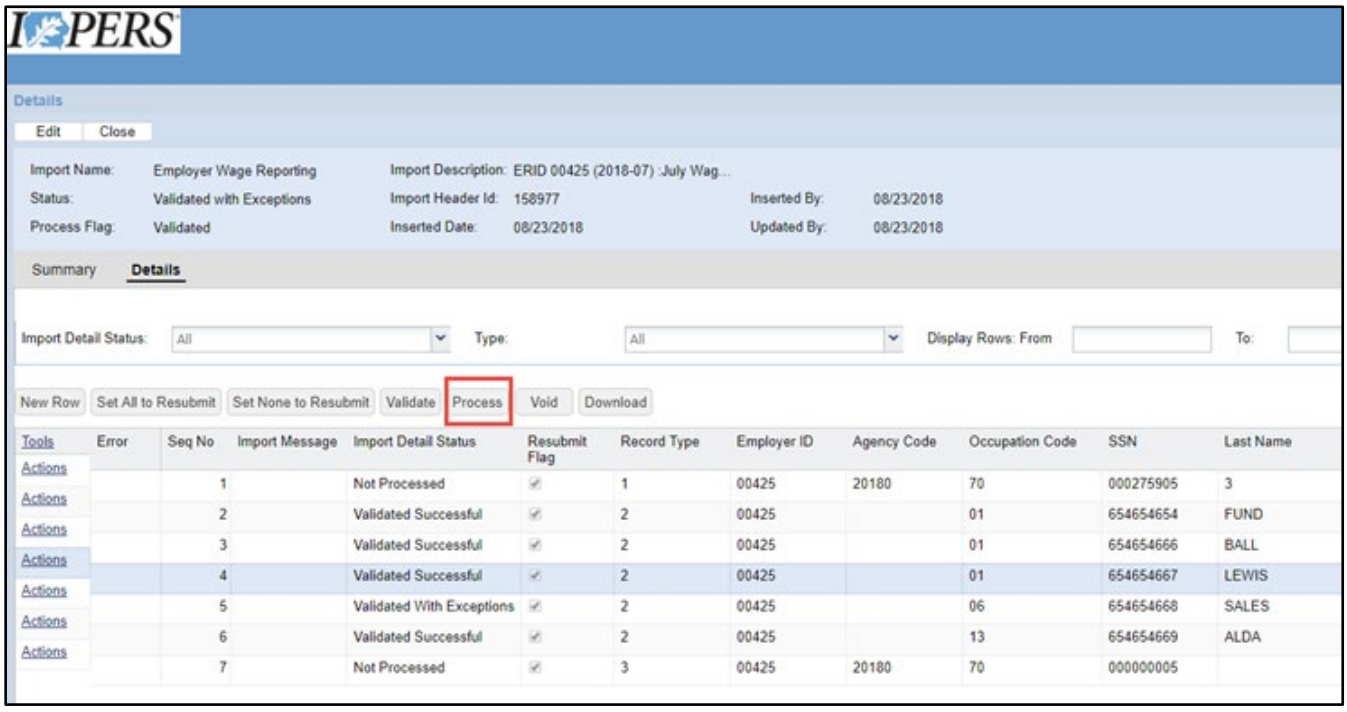


Correct the errors on the Standard Import Report either in the member's account or on the Details screen shown below. Select **Validate,** to re-validate your file. When all errors are fixed the **Import Detail Status** will be **Validated with Exceptions** or **Validated Successful.** Please note, it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



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		

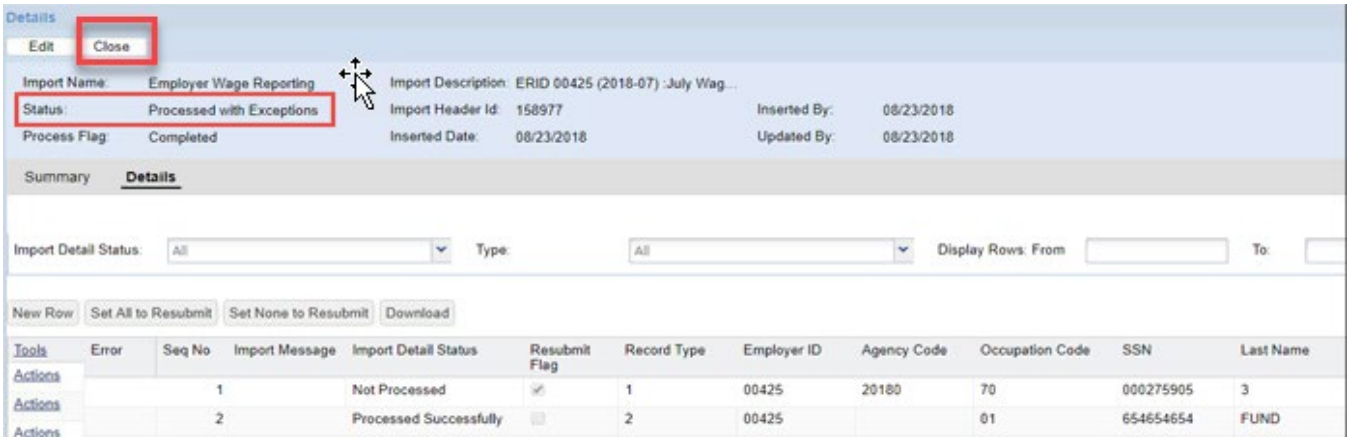
Once the imported file is **Validated with Exceptions** or **Validated Successful**, select **Process**.



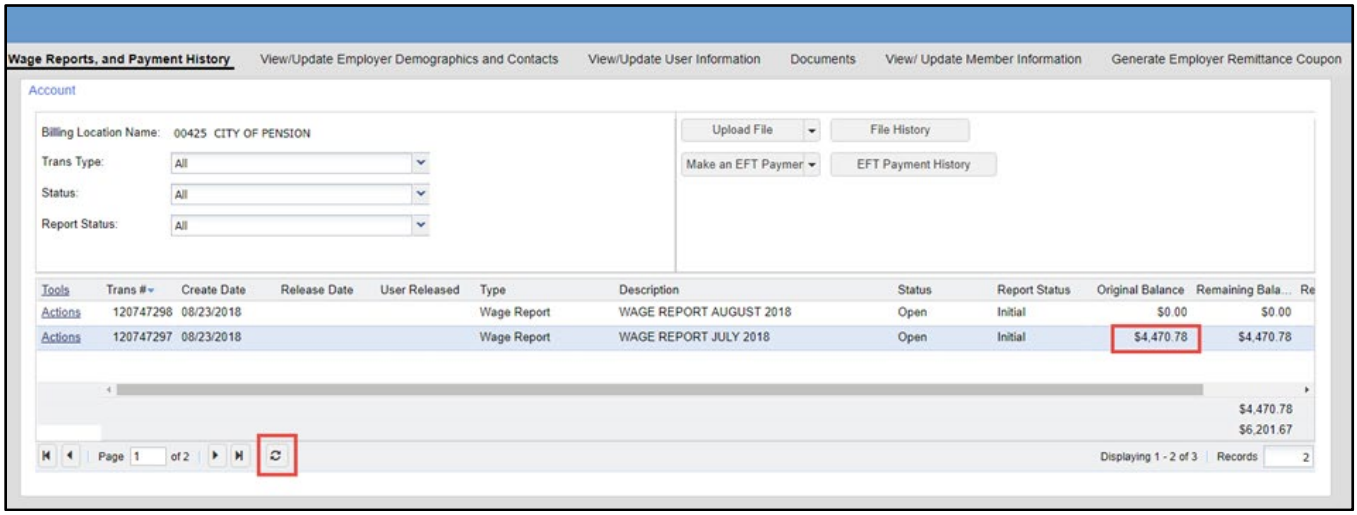
Tools	Error	Seq No	Import Message	Import Detail Status	Resubmit Flag	Record Type	Employer ID	Agency Code	Occupation Code	SSN	Last Name
Actions		1		Not Processed	☑	1	00425	20180	70	000275905	3
Actions		2		Validated Successful	☑	2	00425		01	654654654	FUND
Actions		3		Validated Successful	☑	2	00425		01	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**.

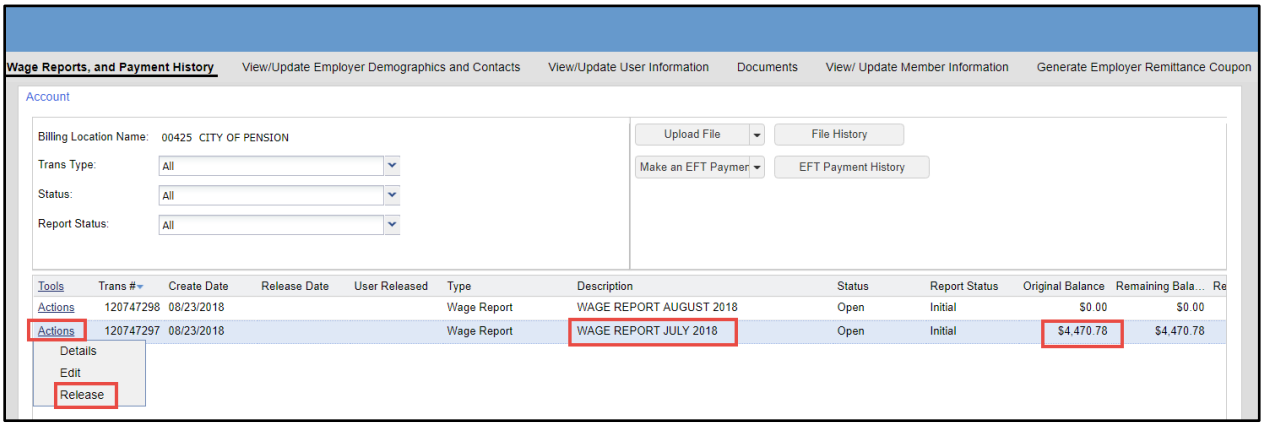
The status of your imported file should now be **Processed with Exceptions** or **Processed Successfully**. Select **Close**.



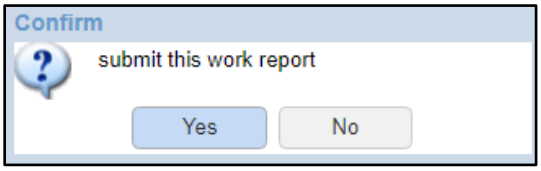
To see the amount due from this imported wage report, select the **Refresh** icon at the bottom of the page.



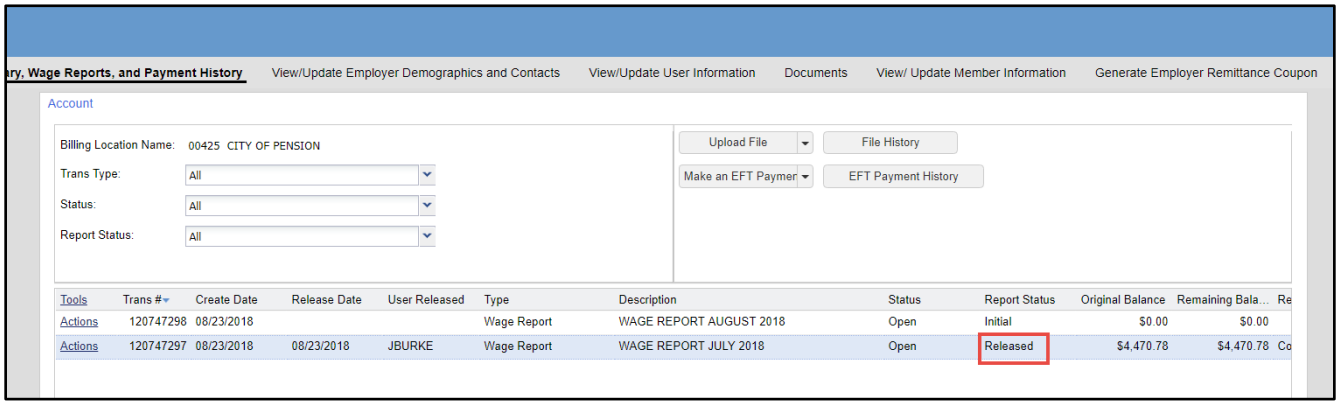
Verify the amount owed. If it is accurate, release the wage report by selecting **Actions** and Release button under the appropriate wage report.



Follow the prompts to submit the report.

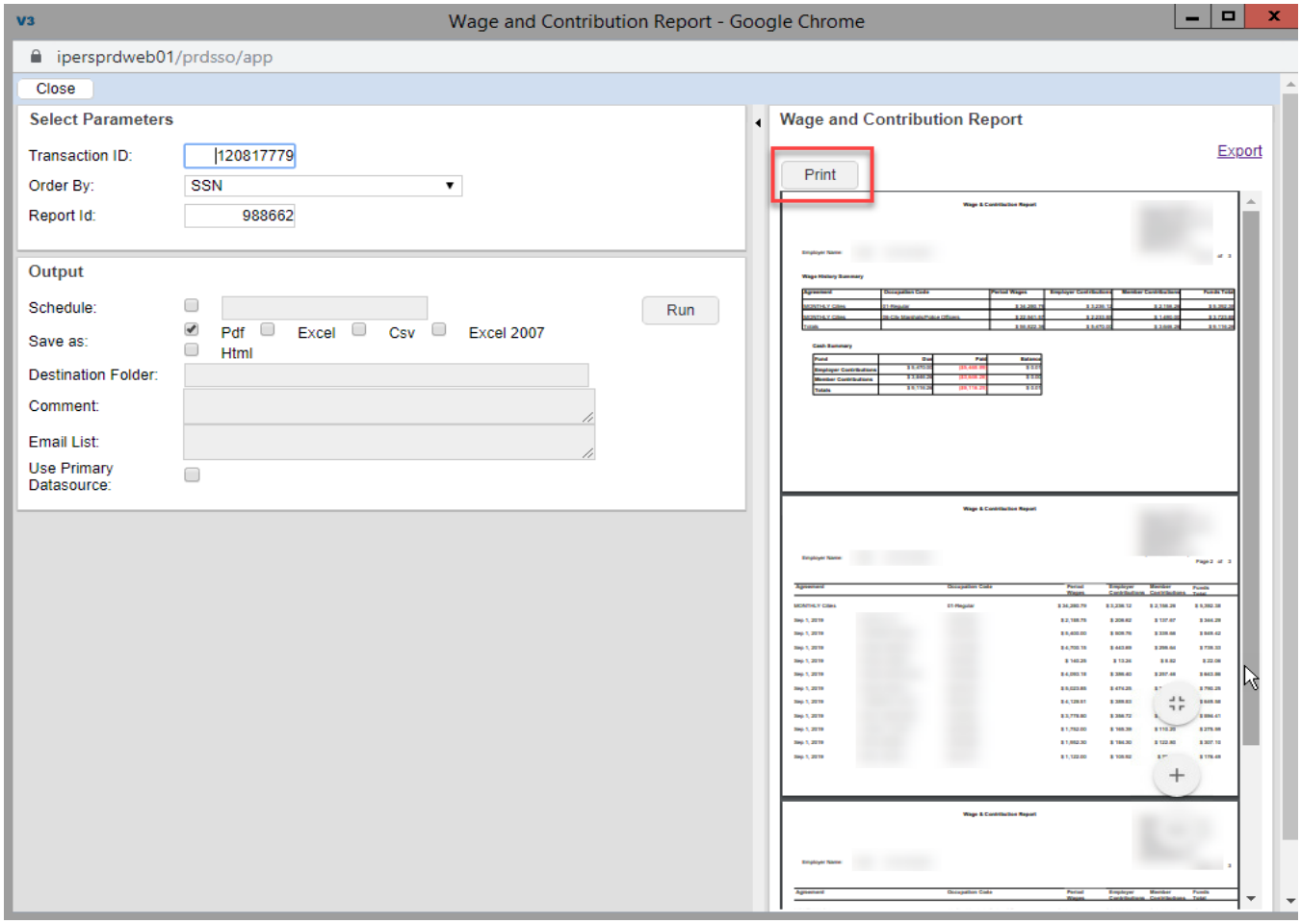


Confirm the file's **Report Status** is **Released**. You may need to refresh the screen to see updated status.



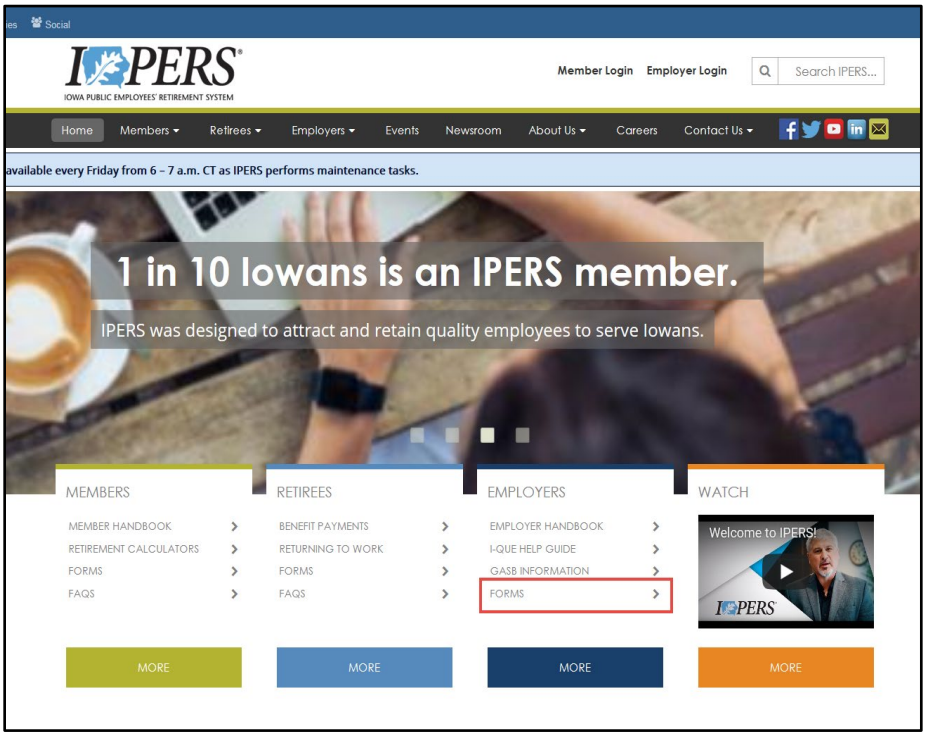
To view and print a Wage & Contribution Report for the wage report recently submitted, **highlight** the row for the appropriate wage report ex Wage Report March 2019. Select **Tools, Reports, and Wage and Contribution Report.**

Select **Print** and when finished, select **Close** to return to **Account Summary** screen.

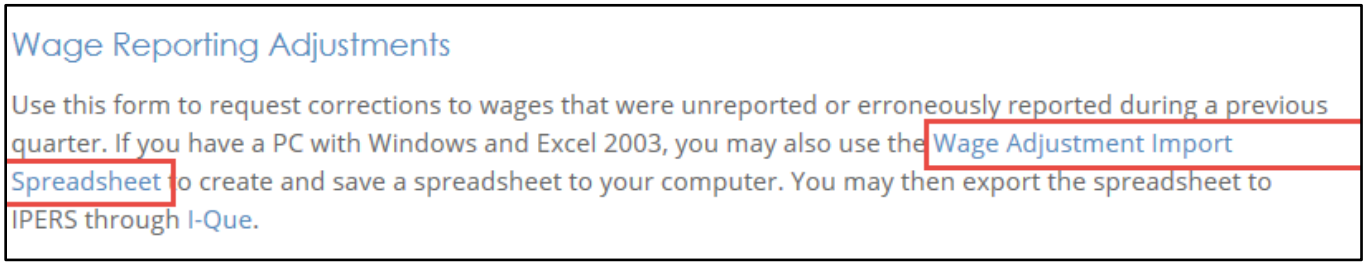


Import a Wage Adjustment

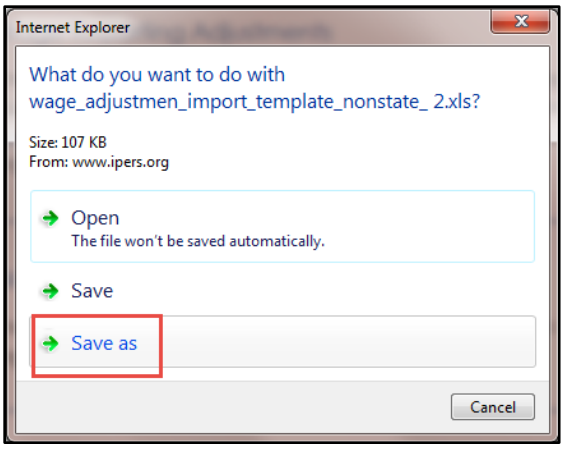
Go to www.ipers.org and select **Forms** under the **Employers** quick links.



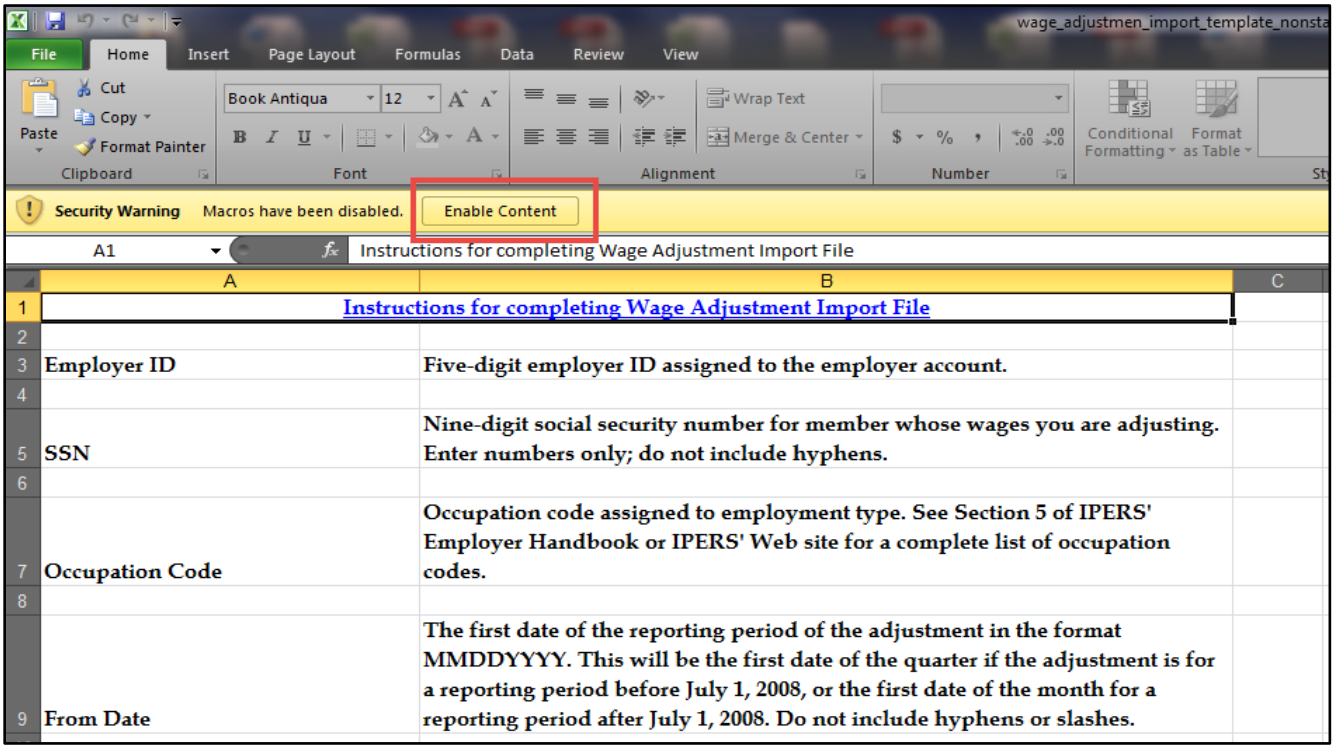
Scroll to the bottom of the Employer Forms webpage. Under Wage Reporting Adjustments, select **Wage Adjustment Import Spreadsheet**.



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

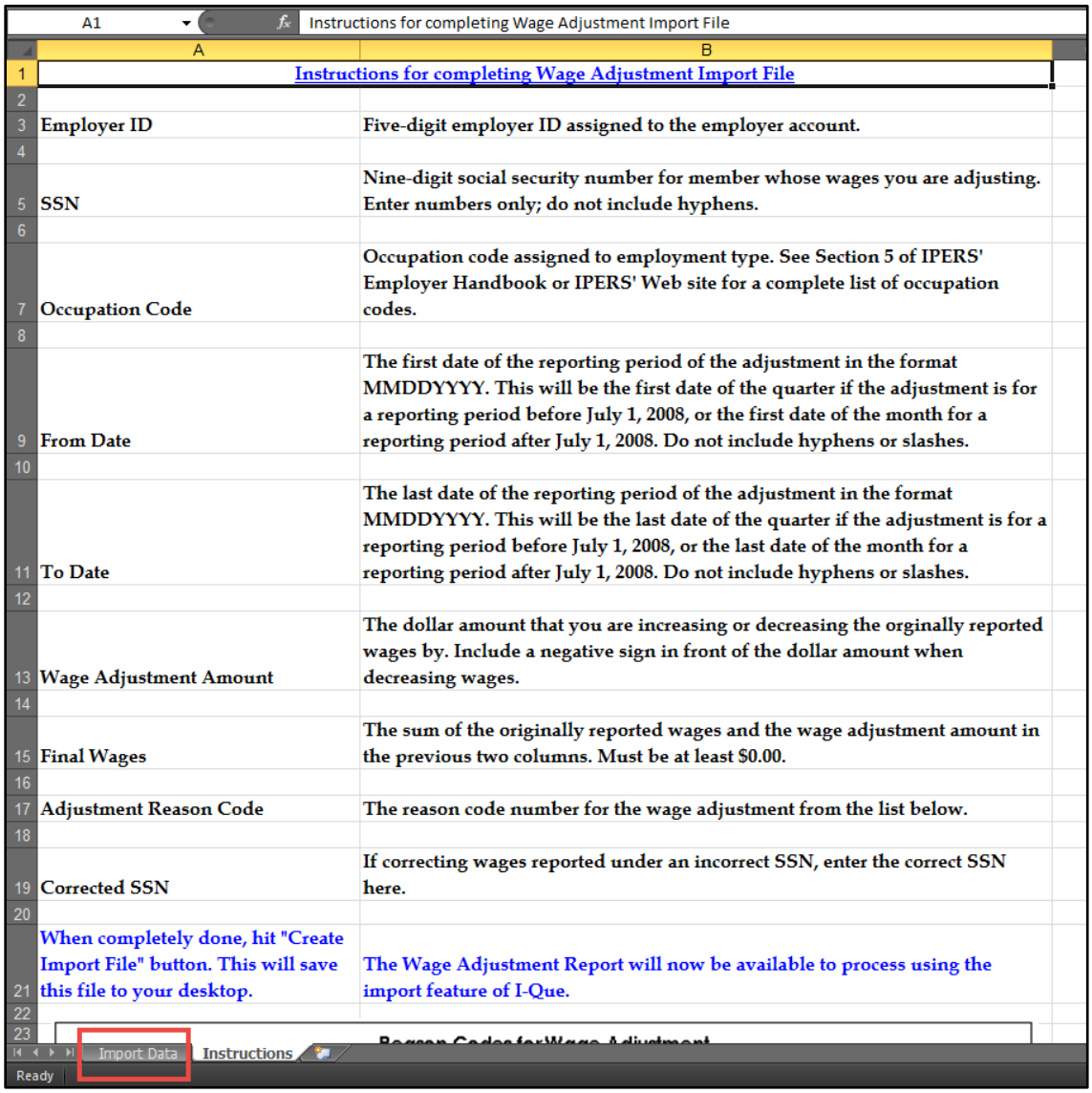


Close the website version of the spreadsheet. Open the spreadsheet saved on your computer. It will open to the instructions sheet with a Security Warning stating, "*Macros have been disabled.*" Select **Enable Content**.



	A	B	C
1	Instructions for completing Wage Adjustment Import File		
2			
3	Employer ID	Five-digit employer ID assigned to the employer account.	
4			
5	SSN	Nine-digit social security number for member whose wages you are adjusting. Enter numbers only; do not include hyphens.	
6			
7	Occupation Code	Occupation code assigned to employment type. See Section 5 of IPERS' Employer Handbook or IPERS' Web site for a complete list of occupation codes.	
8			
9	From Date	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.	

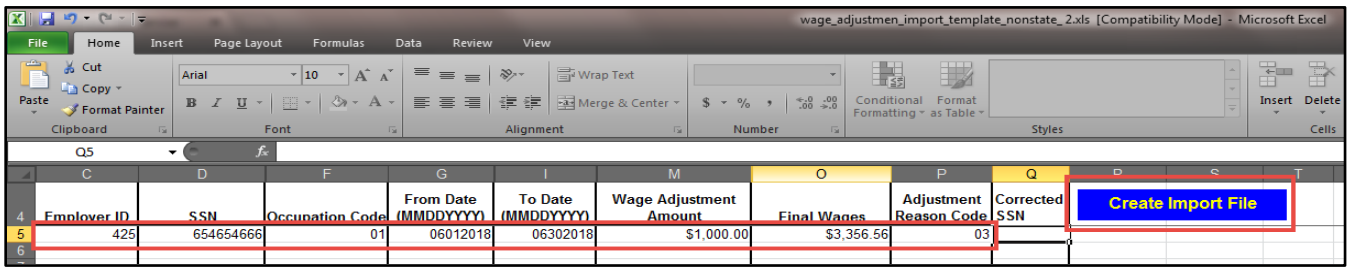
Select the **Import Data** tab to add information about your wage adjustment.



	A	B
1	Instructions for completing Wage Adjustment Import File	
3	Employer ID	Five-digit employer ID assigned to the employer account.
5	SSN	Nine-digit social security number for member whose wages you are adjusting. Enter numbers only; do not include hyphens.
7	Occupation Code	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	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	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	The dollar amount that you are increasing or decreasing the orginally reported wages by. Include a negative sign in front of the dollar amount when decreasing wages.
15	Final Wages	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	The reason code number for the wage adjustment from the list below.
19	Corrected SSN	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.	The Wage Adjustment Report will now be available to process using the import feature of I-Que.

Import Data | Instructions | Ready

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.

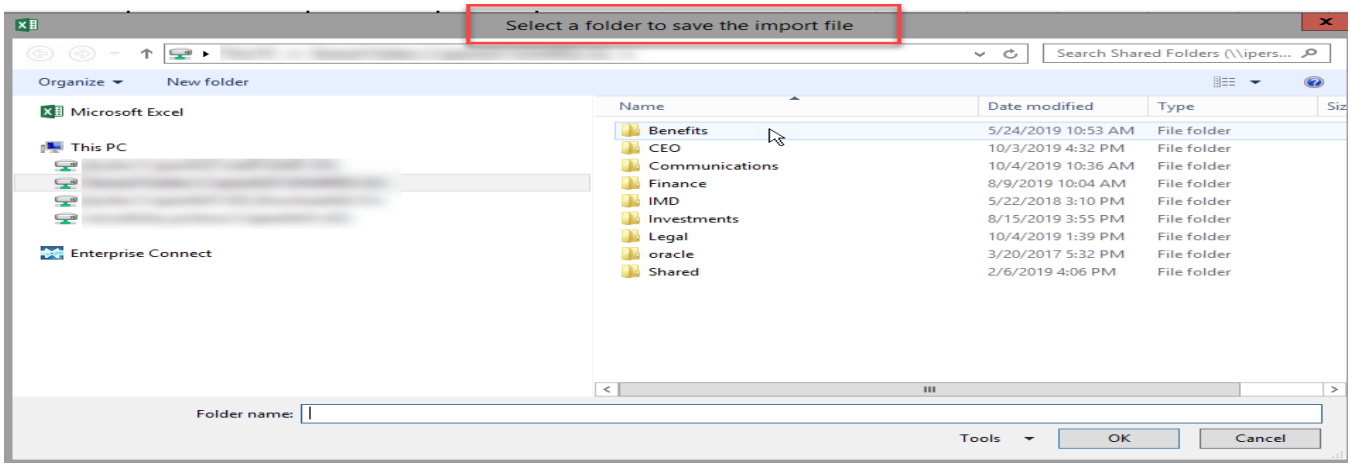


wage_adjustmen_import_template_nonstate_2.xls [Compatibility Mode] - Microsoft Excel

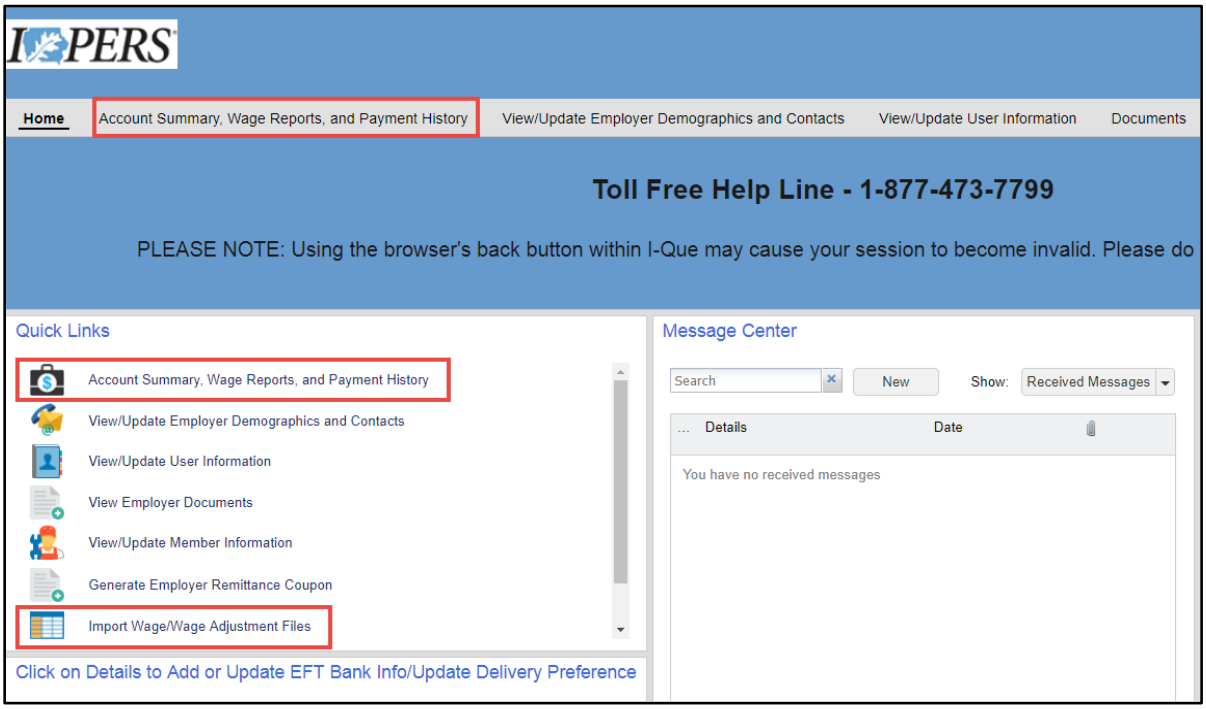
Employer ID	SSN	Occupation Code	From Date (MMDDYYYY)	To Date (MMDDYYYY)	Wage Adjustment Amount	Final Wages	Adjustment Reason Code	Corrected SSN
425	654654666	01	06012018	06302018	$1,000.00	$3,356.56	03	

Create Import File

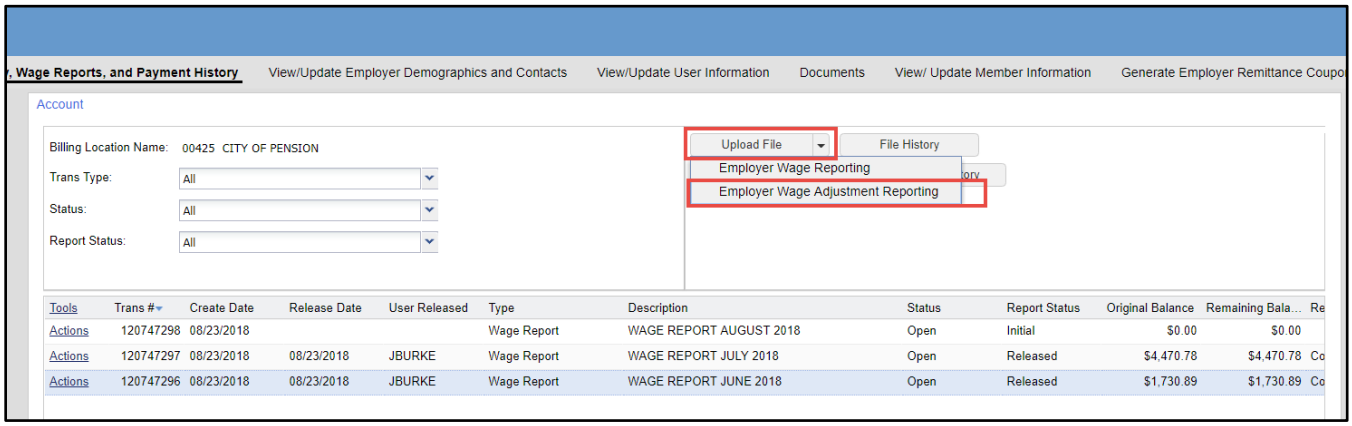
Chose where you wish to save this file and then Select **OK** and close the Wage Adjustment Import Spreadsheet.



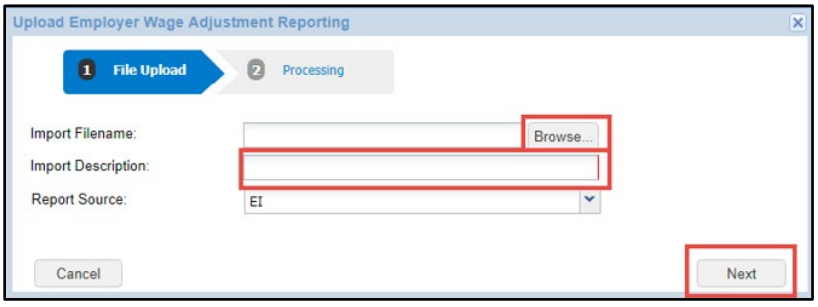
Now that you have created your wage adjustment import file, log in to I-Que. On the I-Que home page, select **Import Wage/Wage Adjustment Files** or **Account Summary, Wage Reports, and Payment History**.



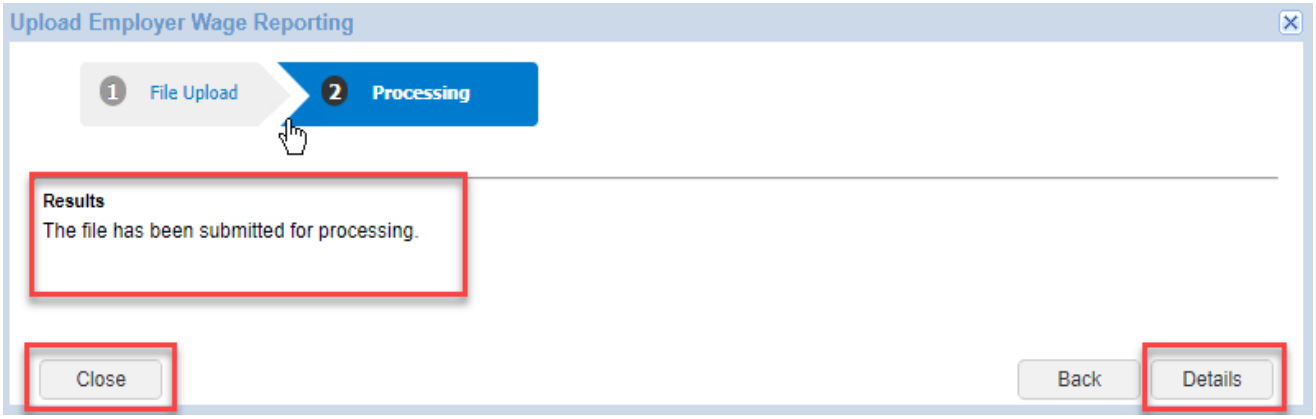
Select **Upload File**. In the drop-down menu, select **Employer Wage Adjustment Reporting**.



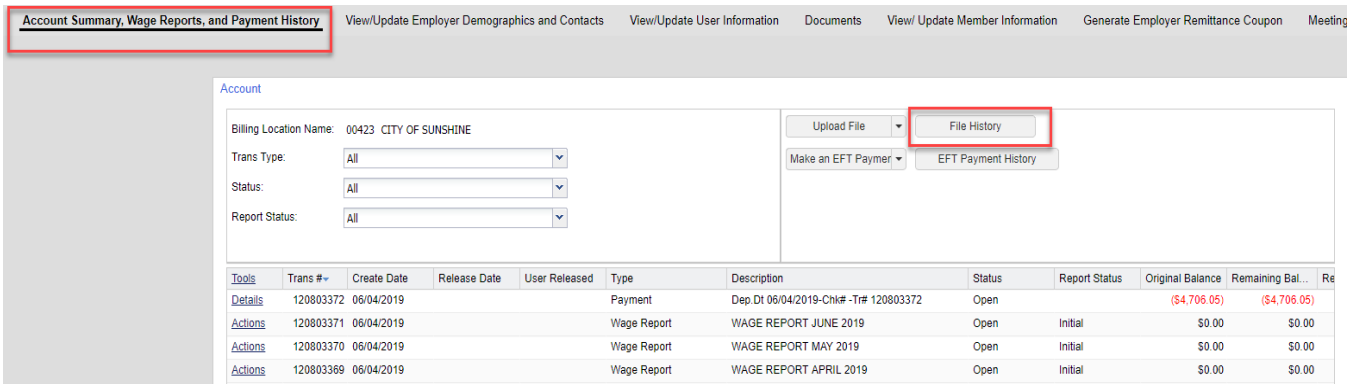
Select **Browse** to locate your wage adjustment import file. Add an **Import Description**. Select **Next**.



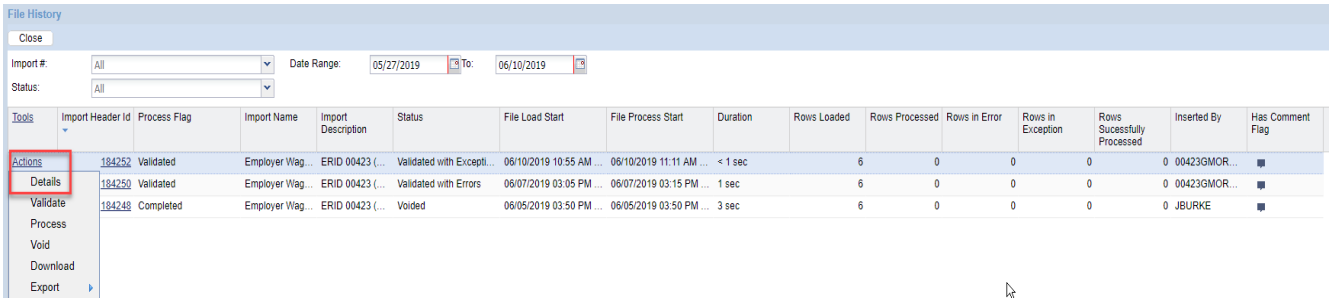
A message will appear indicating that the file has been submitted. To validate the Wage Adjustment Import file, select **Details**. Otherwise, select **Close**. If you selected **Details** go to bottom of page 40.



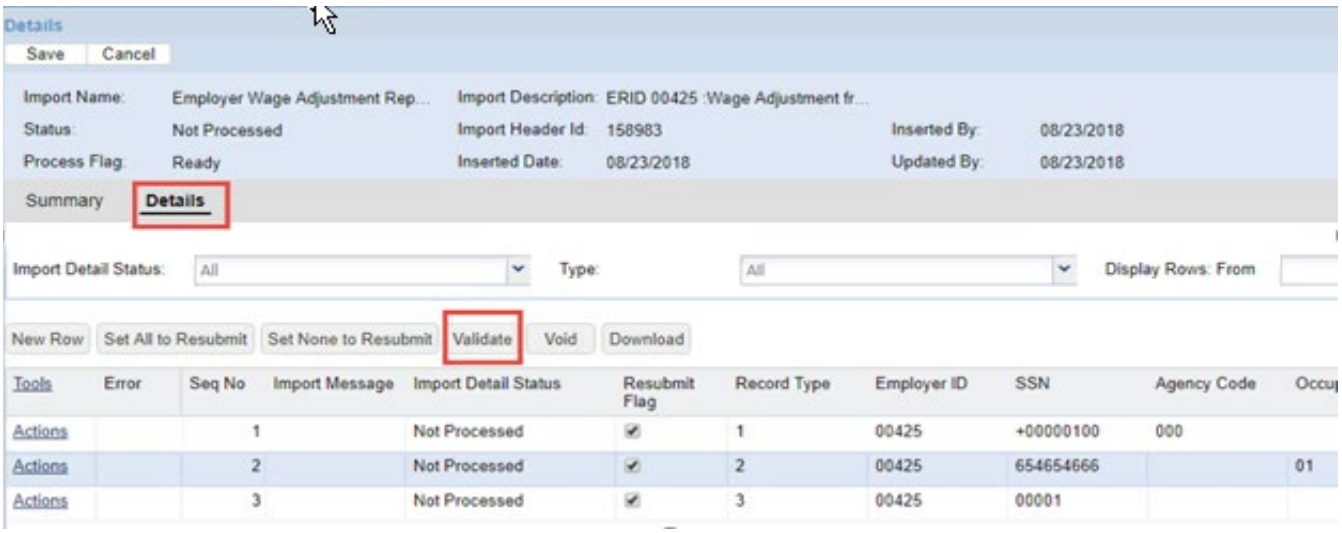
If you selected **Close**, you can find the imported file under File History on the Account Summary page.



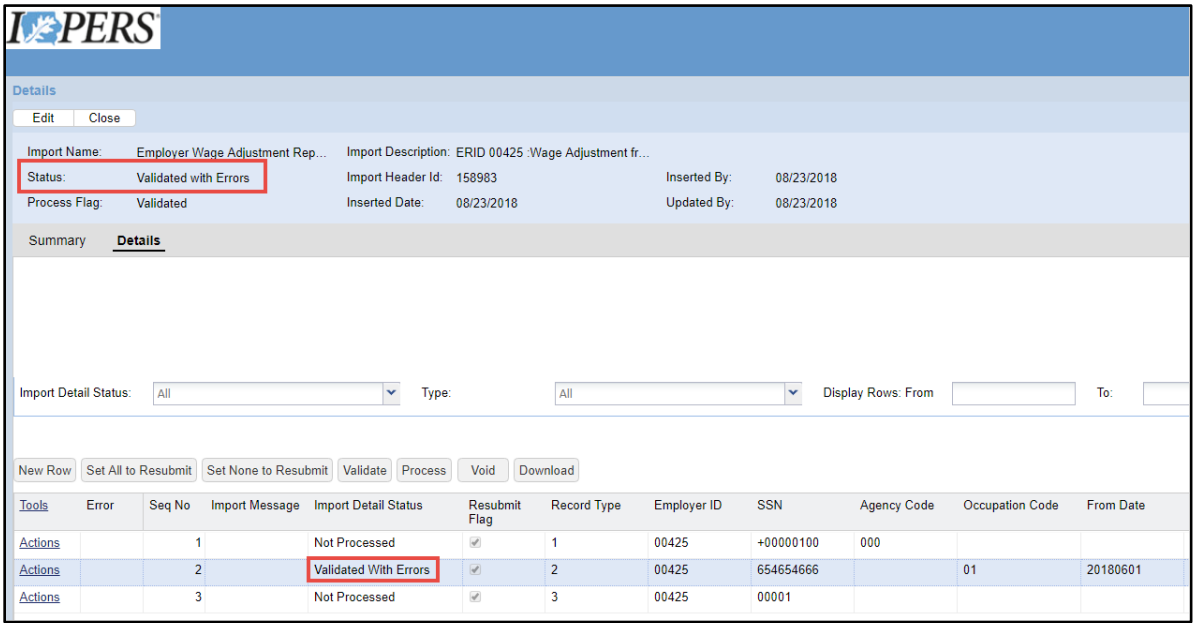
Locate the Wage Adjustment Import file, select **Actions**, then **Details**



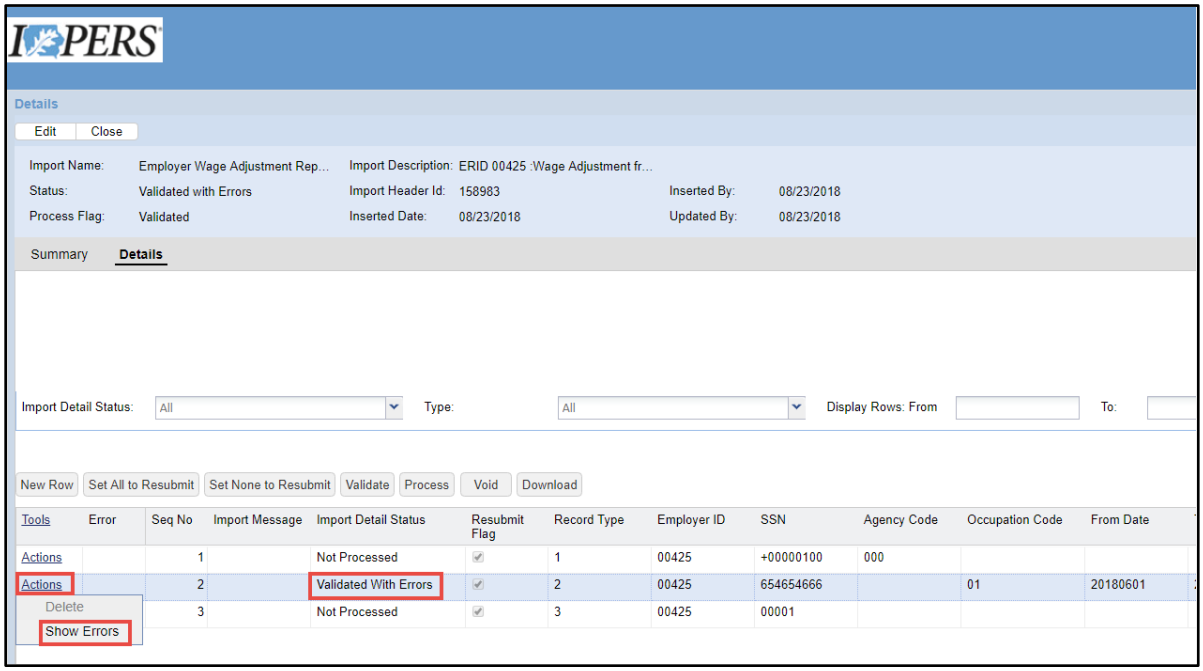
From the **Details** tab, select **Validate**.



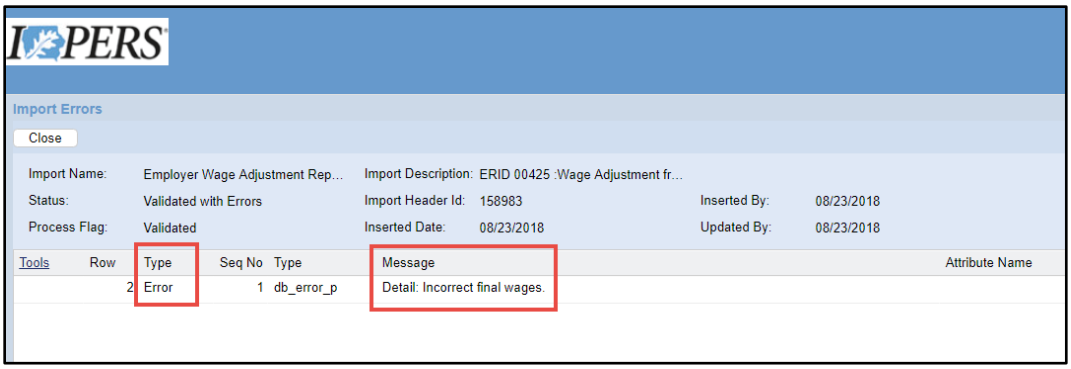
Check the **Status** or **Import Detail Status** of the file. If it contains errors, you must correct them before processing the adjustment.



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

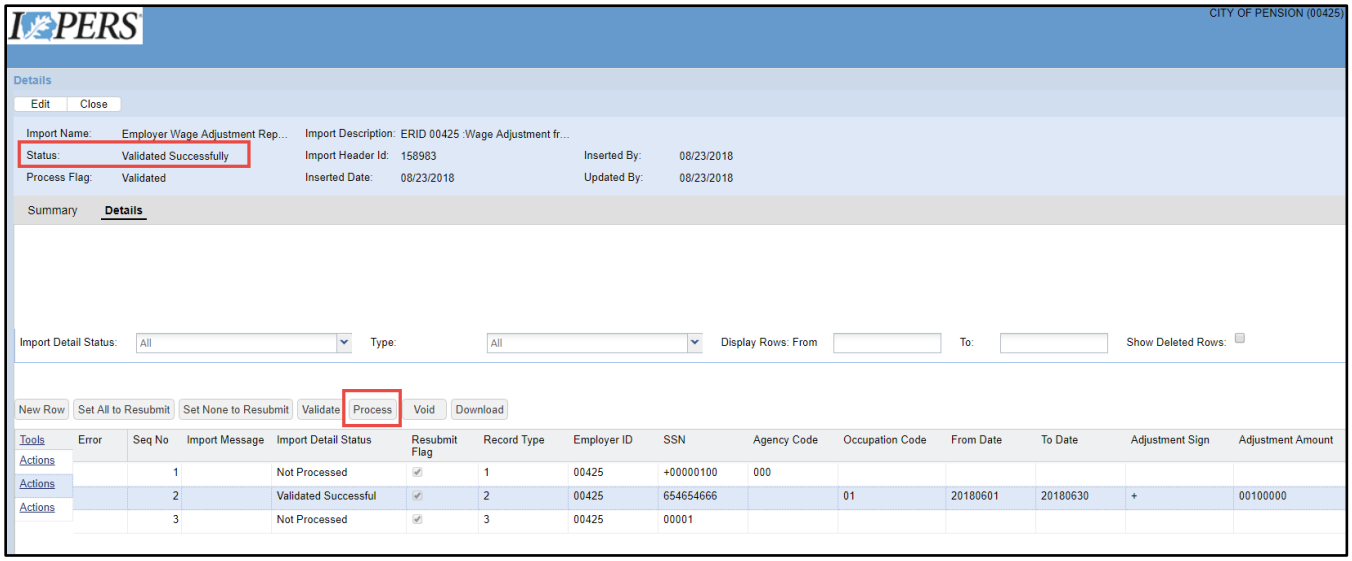


Research to correct errors or contact IPERS ERAM at 1-877-473-7799.

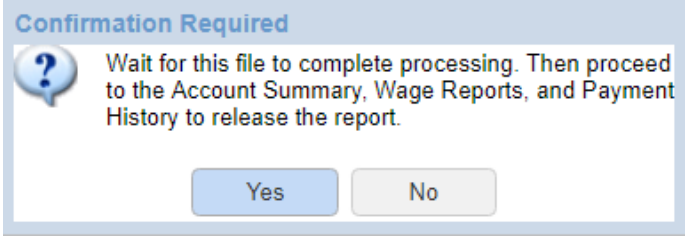


Once errors have been corrected, Re-validate your file. The file status should be **Validated Successfully**.

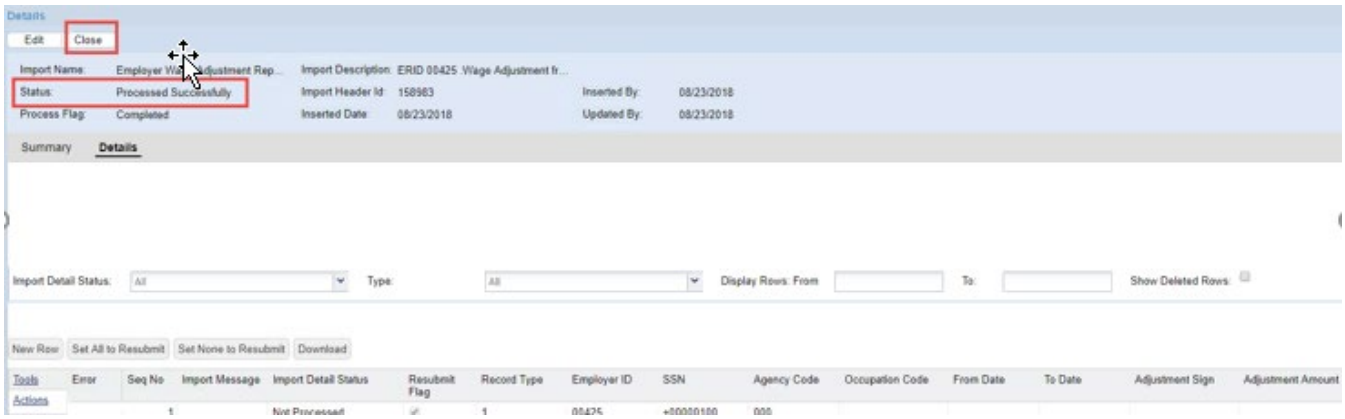
Select **Process**.



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

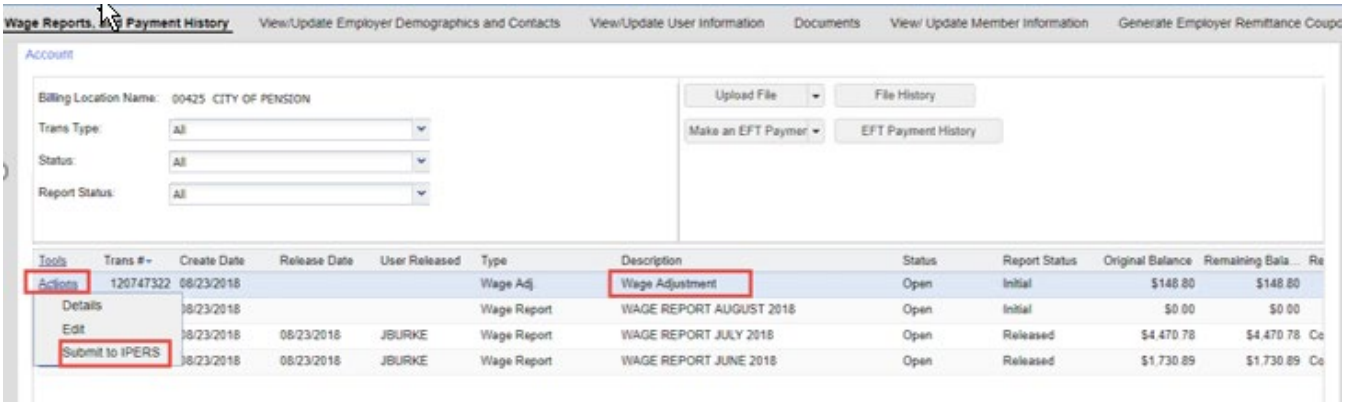


Status should be **Processed Successfully**. If so, select **Close**. Go to the **Account Summary, Wage Reports and Payment History** screen to submit the adjustment.

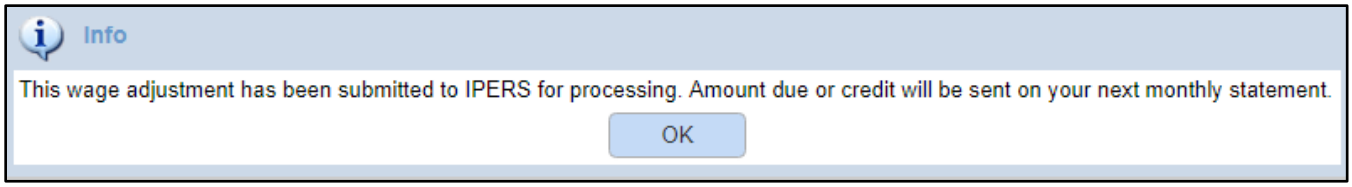


You will need to refresh the screen to see the wage adjustment amount. Make sure you have highlighted the correct wage adjustment to submit by clicking on the appropriate transaction.

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



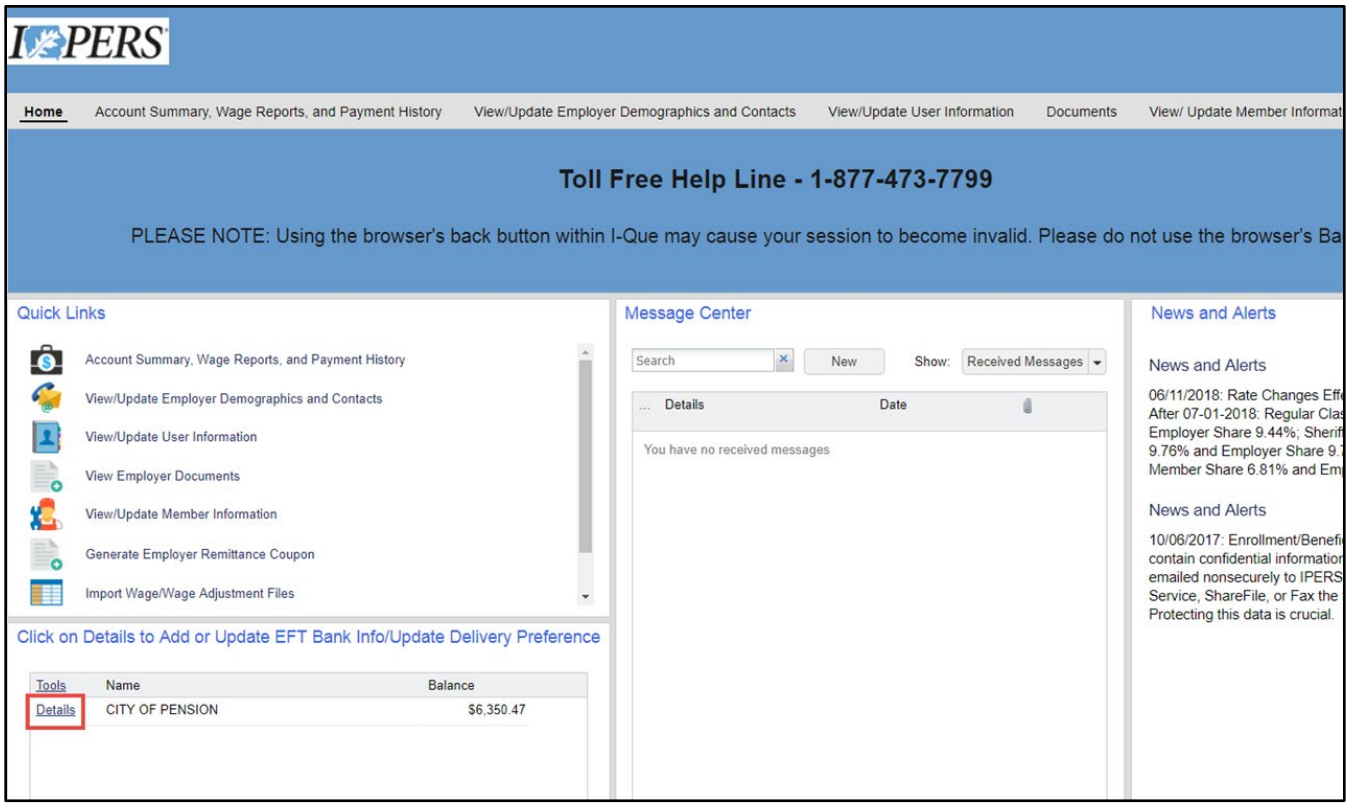
Follow the prompts to submit your file to IPERS.



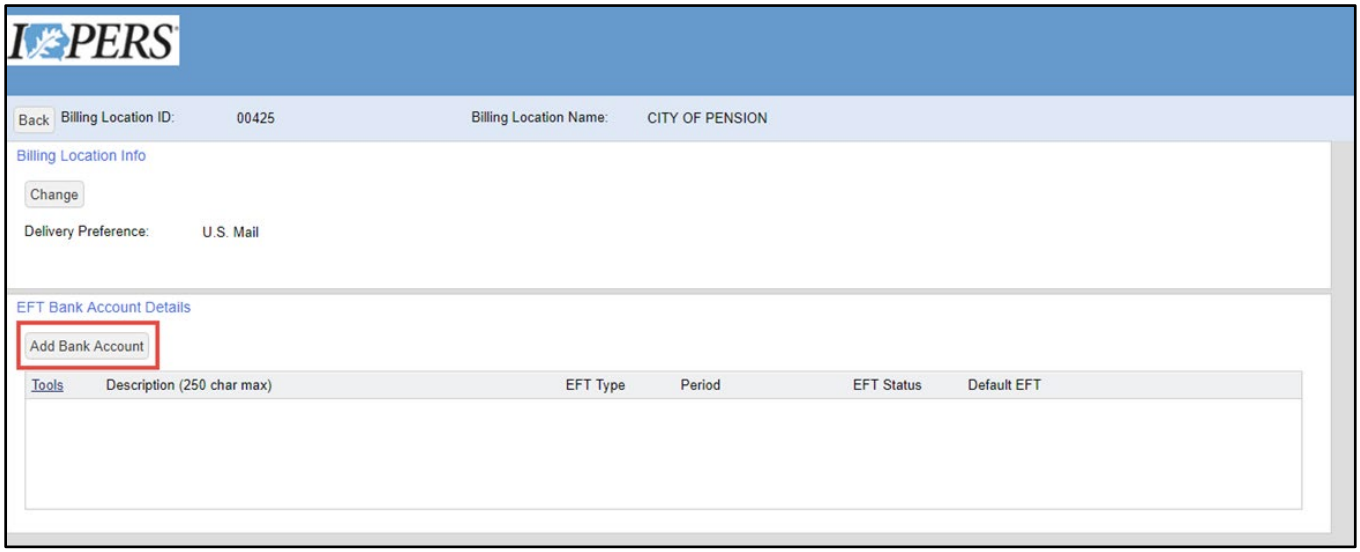
A workflow request will be submitted to IPERS and your adjustment should be released within 24 hours.

Add a Financial Institution

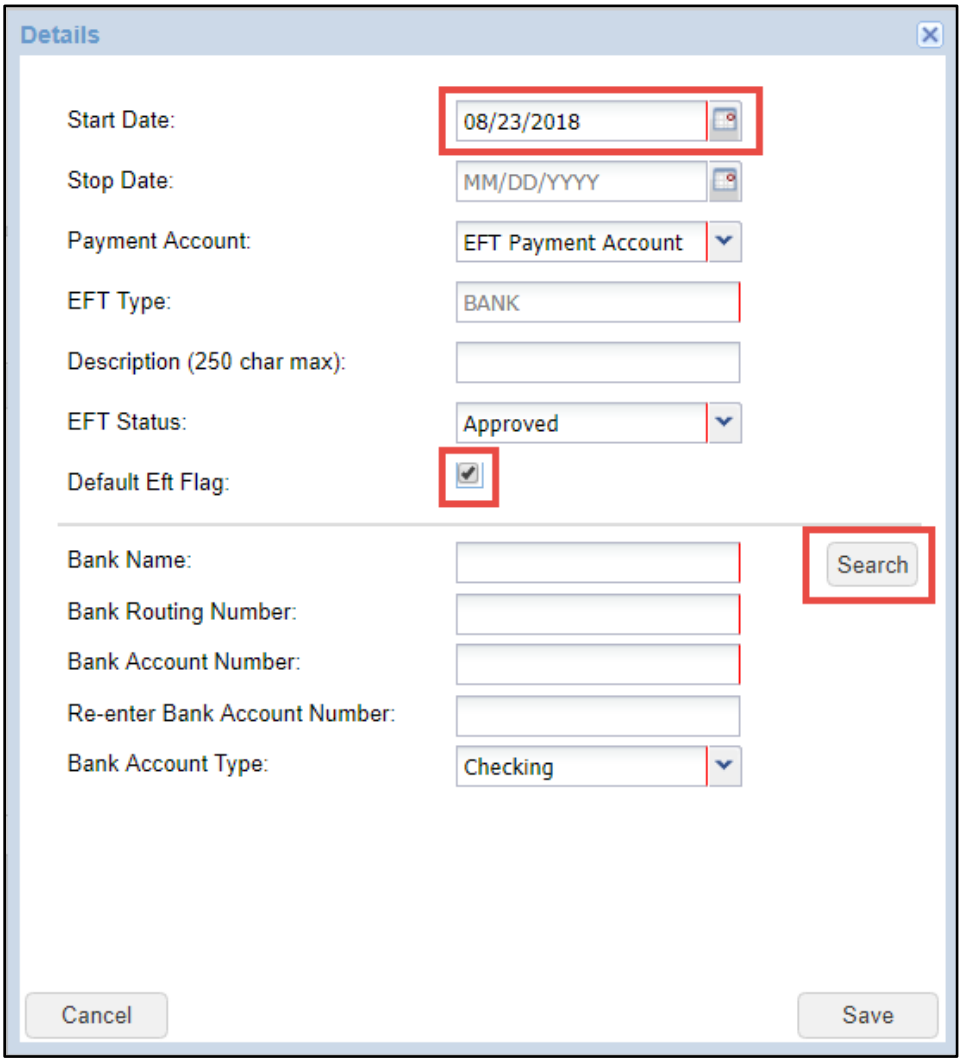
On the I-Que home page, select **Details**.



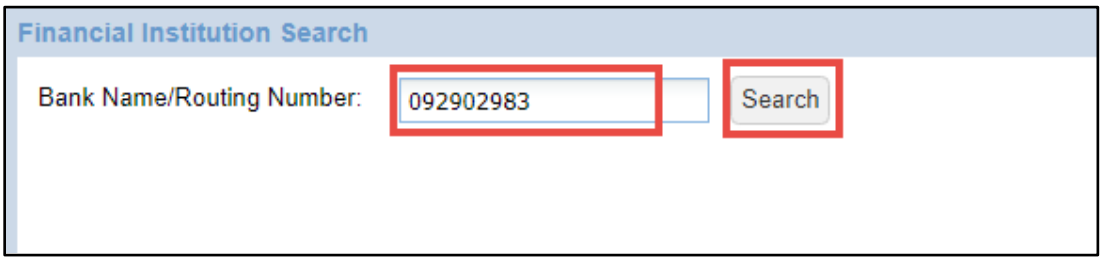
Select **Add Bank Account**.



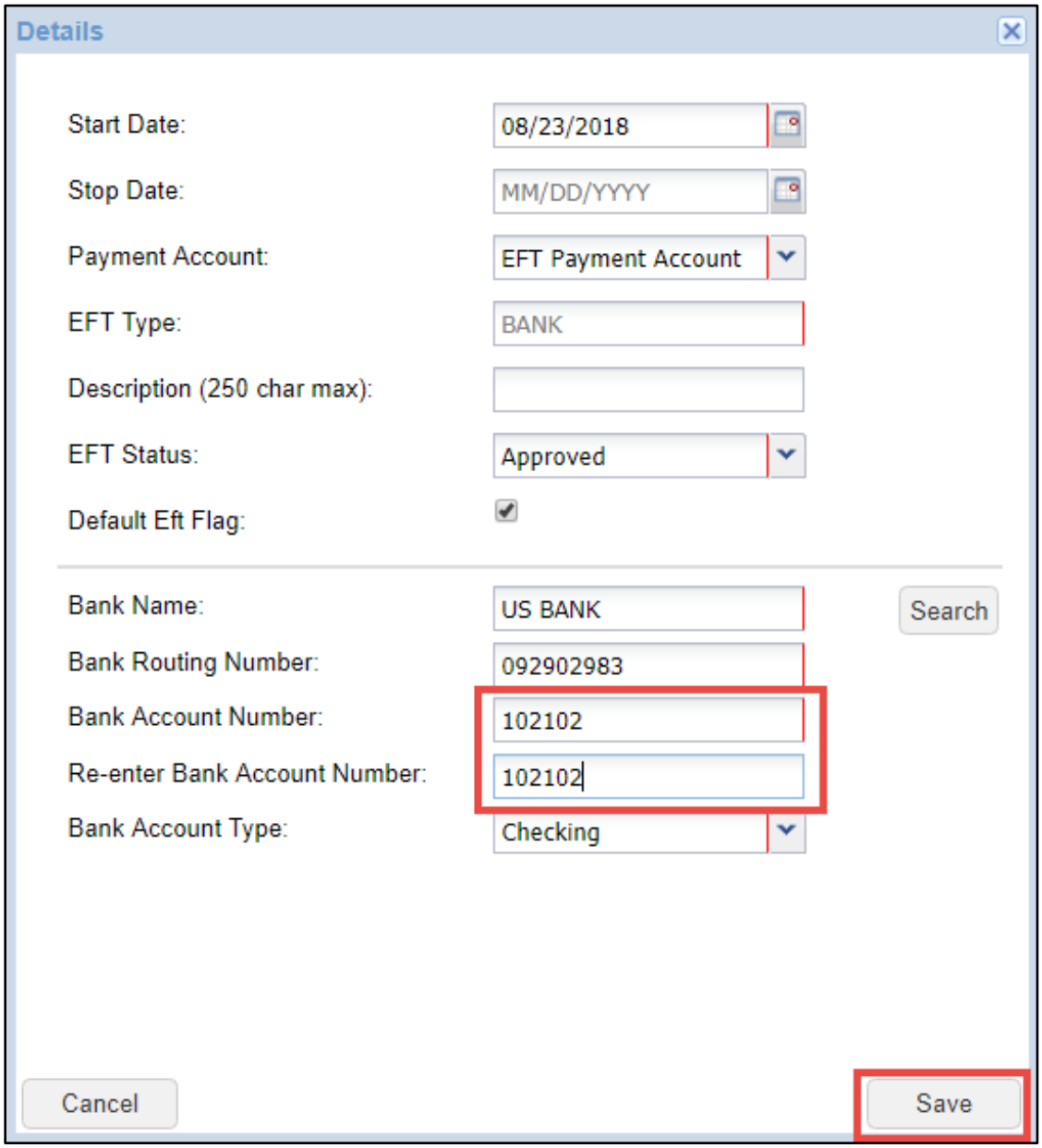
In the **Start Date** field, enter today's date. Leave the **Stop Date** field blank. Check the **Default Eft Flag** box to set this financial institution as the default EFT account for future payments. Select **Search**.



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

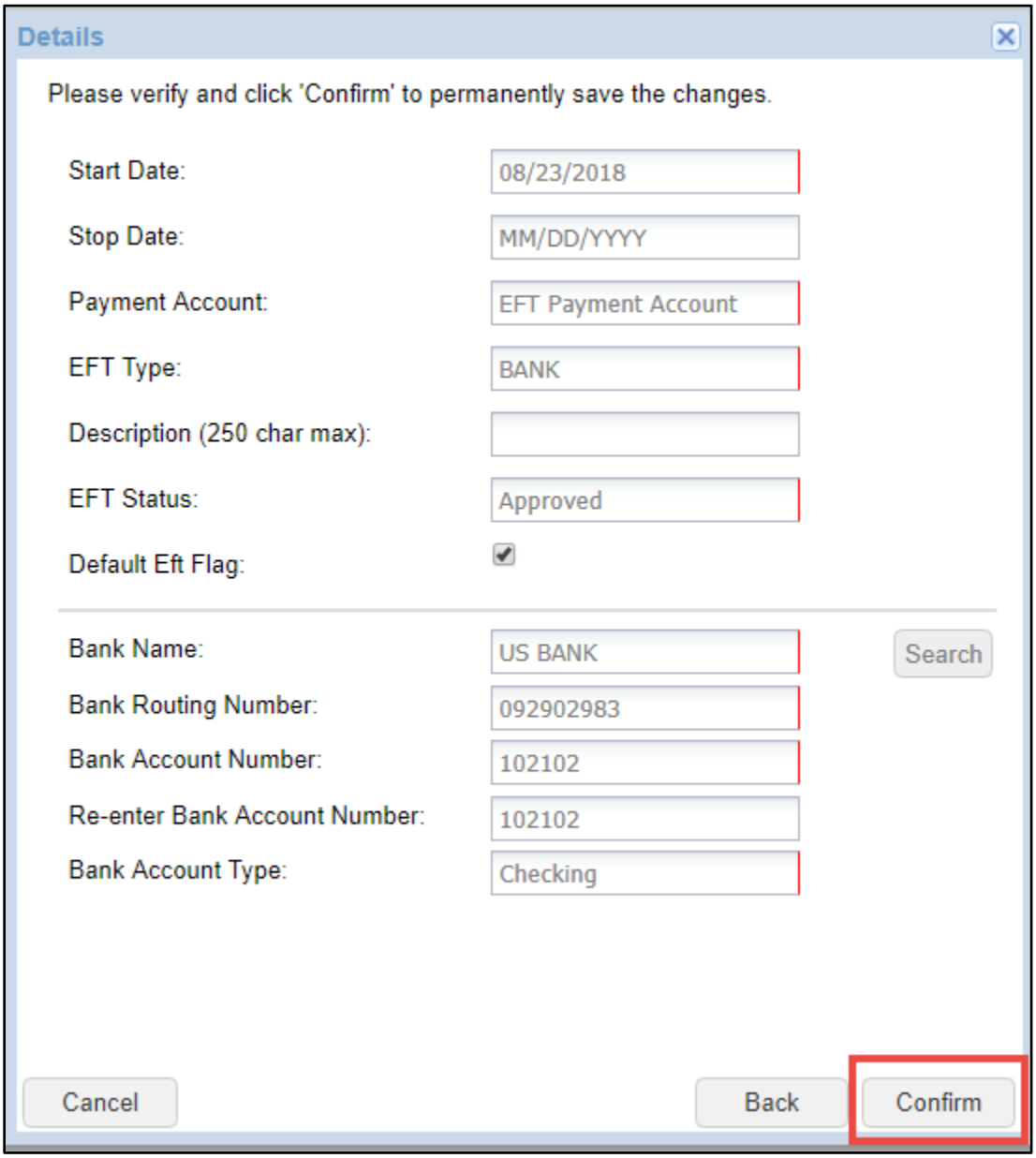


Enter Bank Account number as indicated. Re-enter to confirm. Select **Save**.

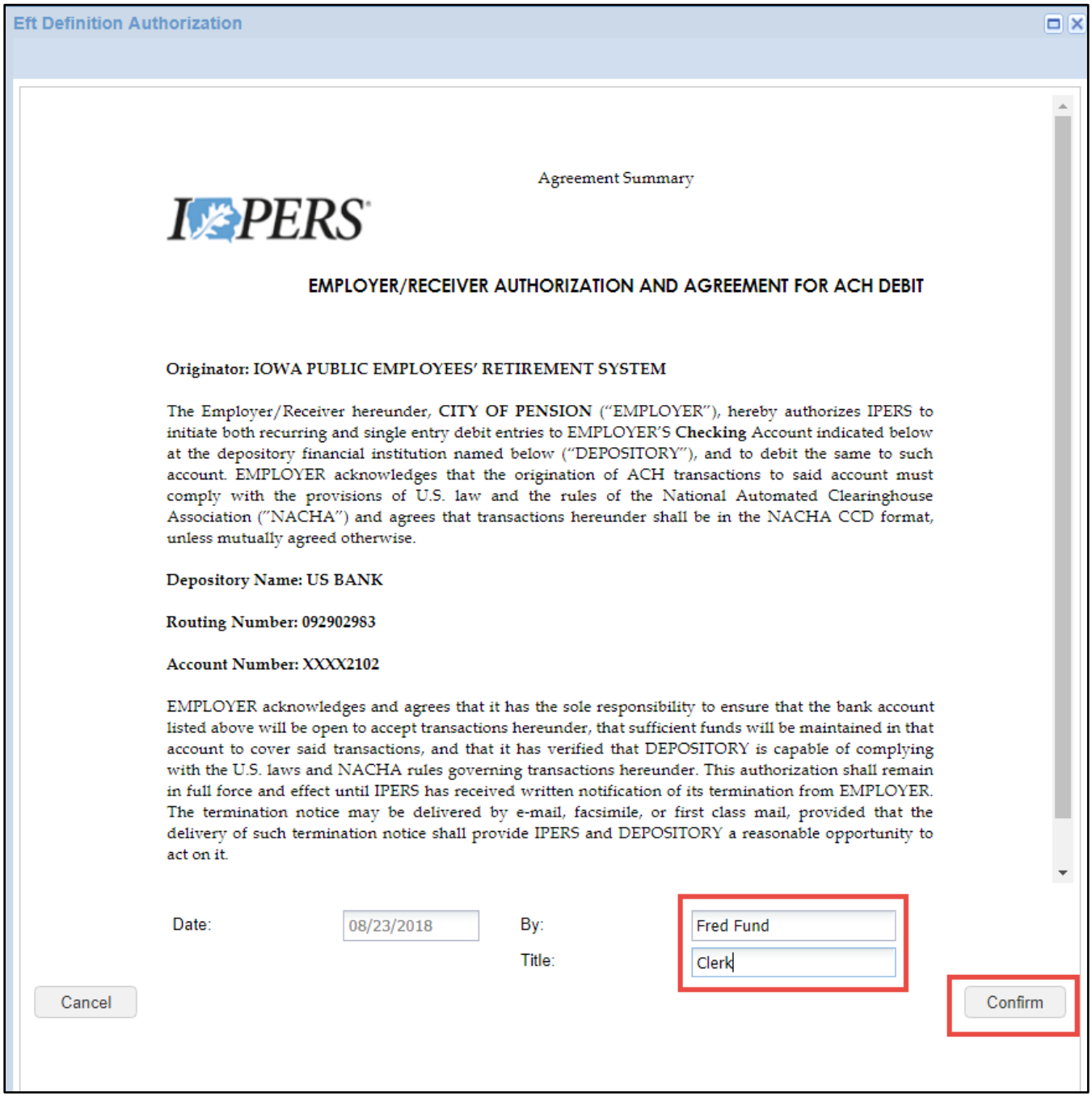


If necessary – use the drop down to change the Bank Account Type to Savings – then select Save.

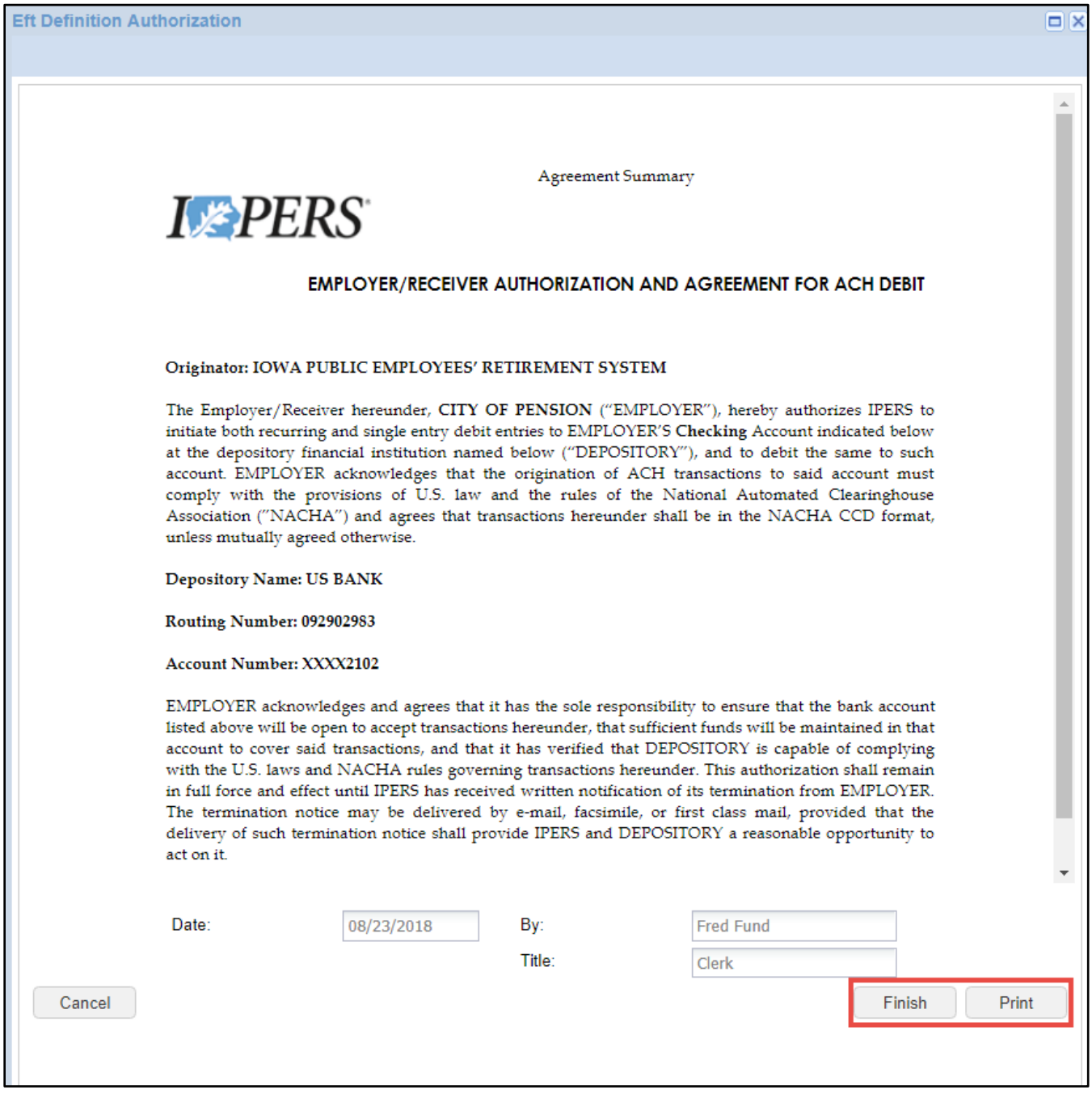
Review and select **Confirm** or **Back** to make any corrections.



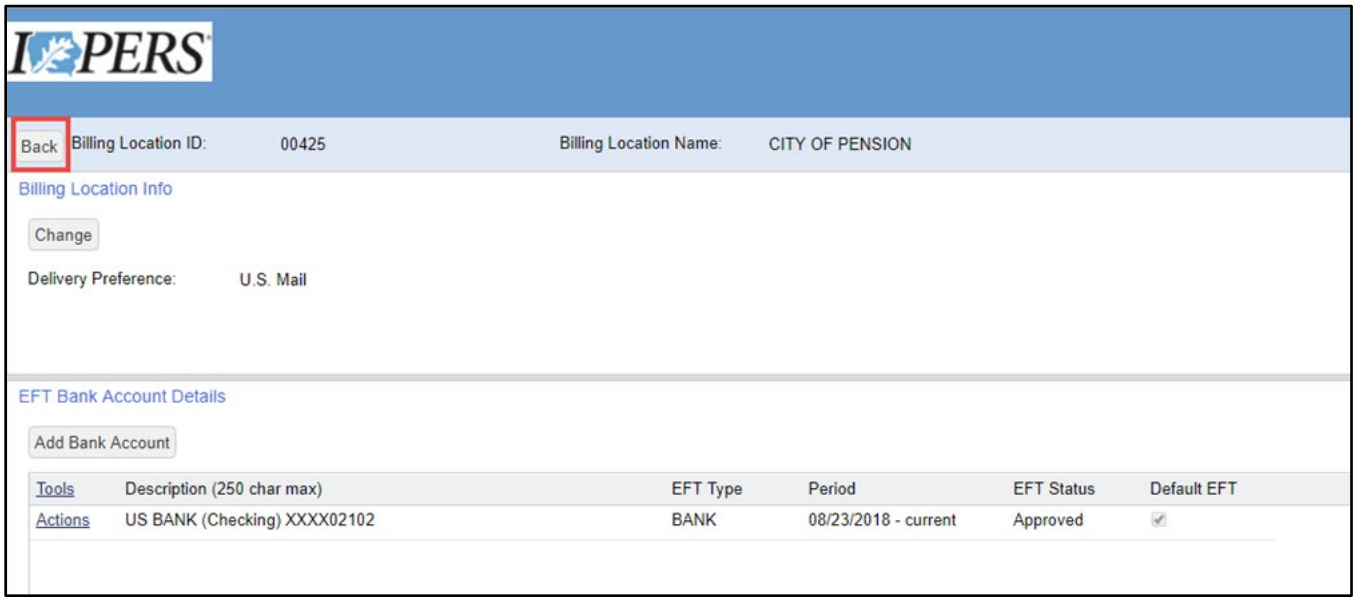
Complete the form by entering your name and title. Select **Confirm**.



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

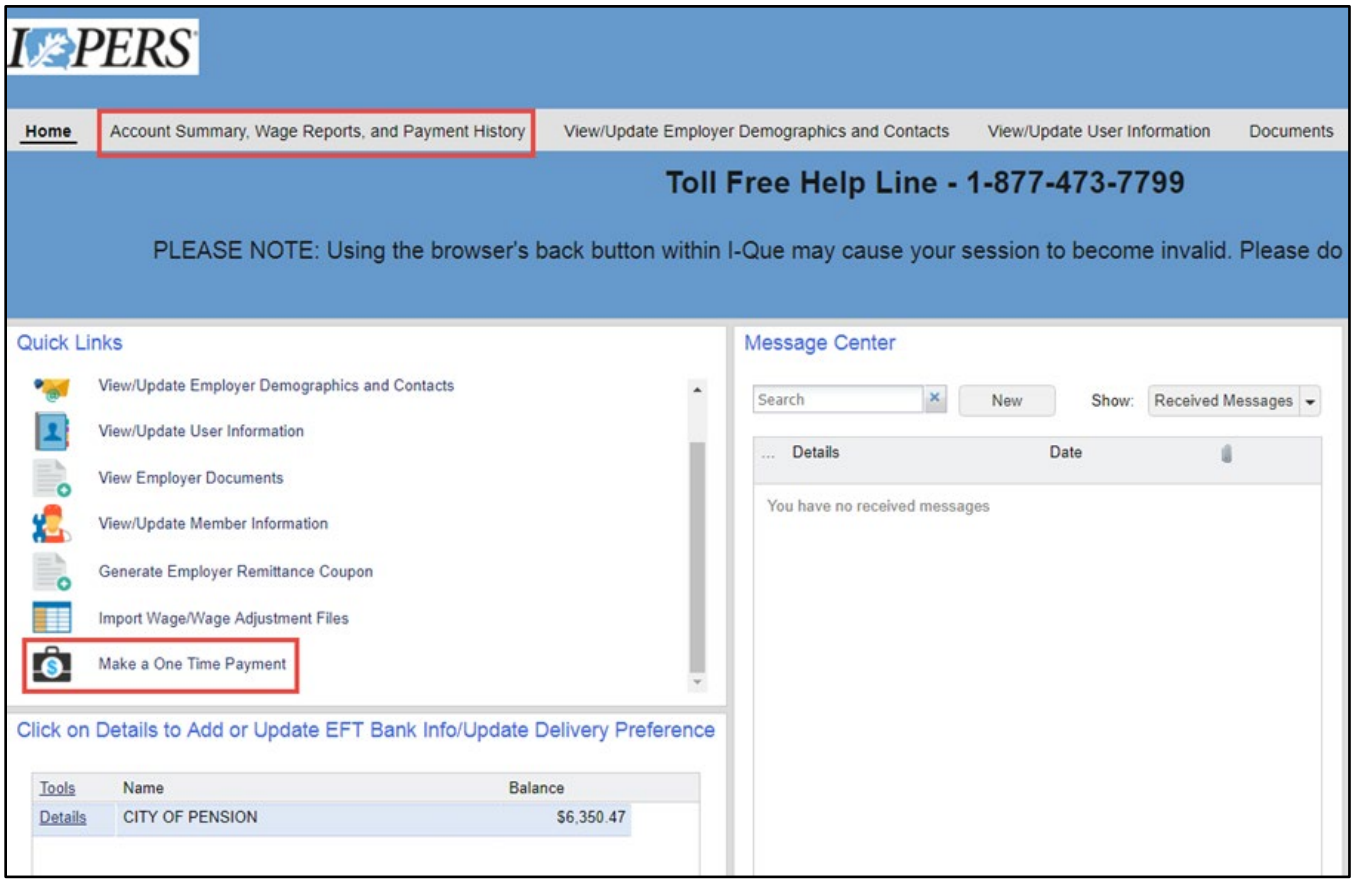


To return to the I-Que home page, select **Back**.

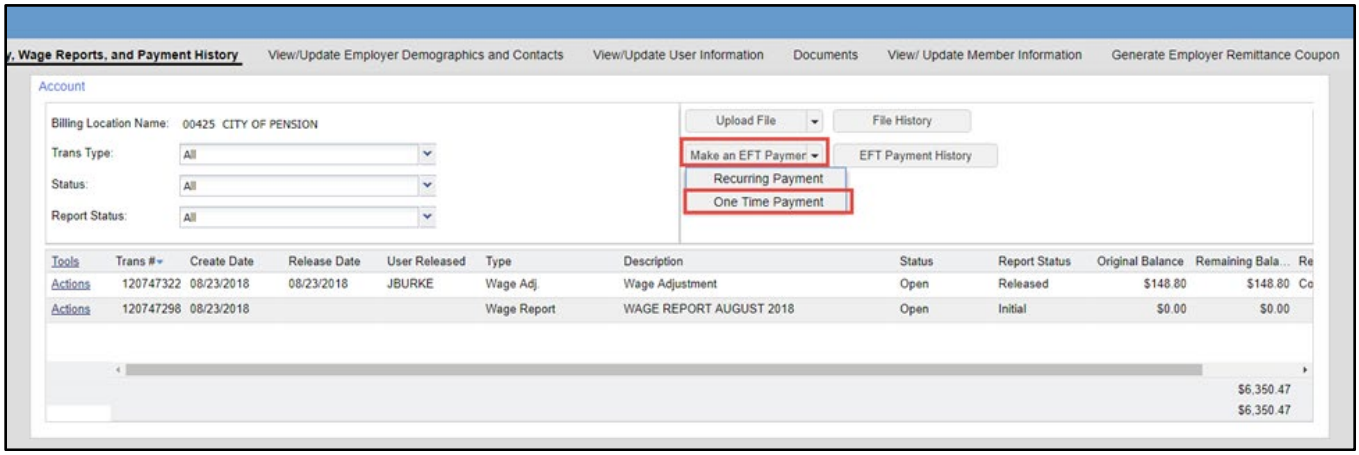


Make an Online EFT Payment

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



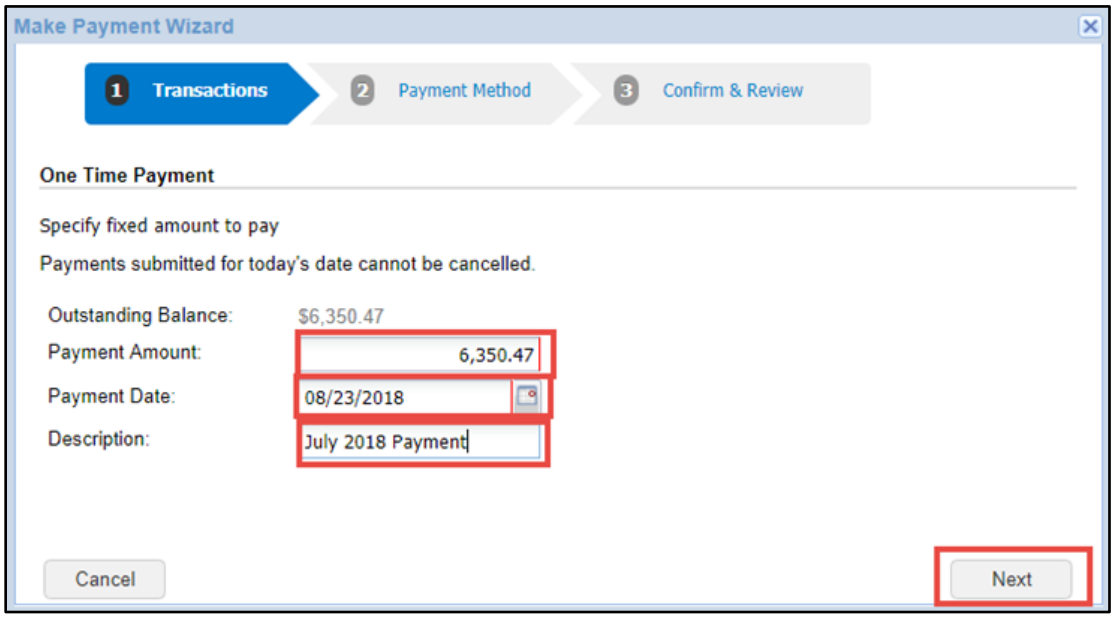
If you selected **Account Summary, Wage Reports, and Payment History** , select **Make an EFT Payment**.
If you selected **Make a One Time Payment** from the Home page, skip this step.



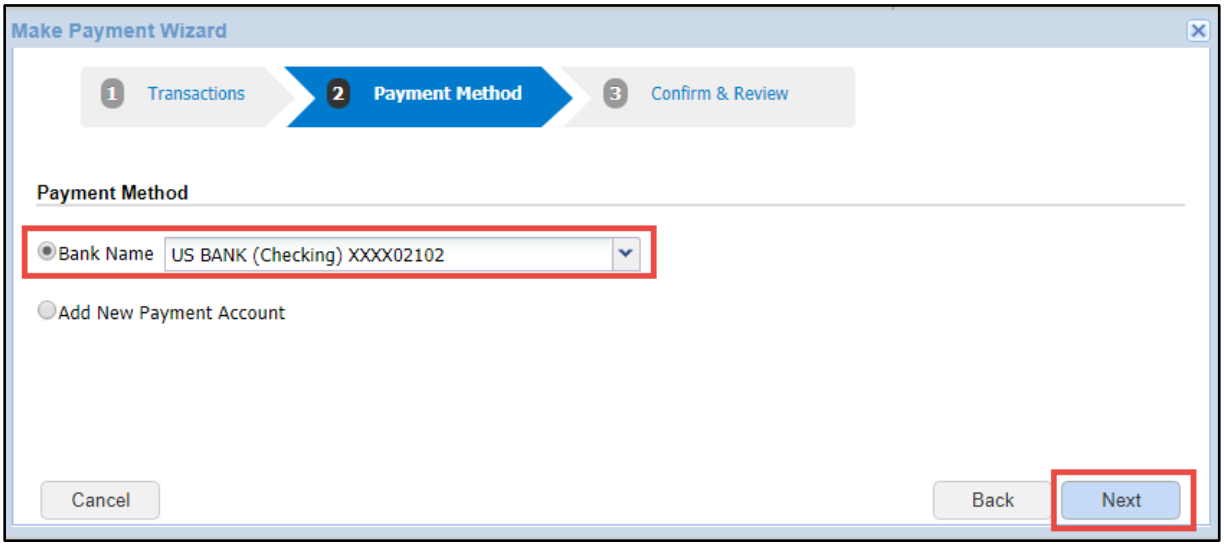
The **Make Payment Wizard** will open. Fill in the **Payment Amount**, **Payment Date**, and **Description**.

- 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.

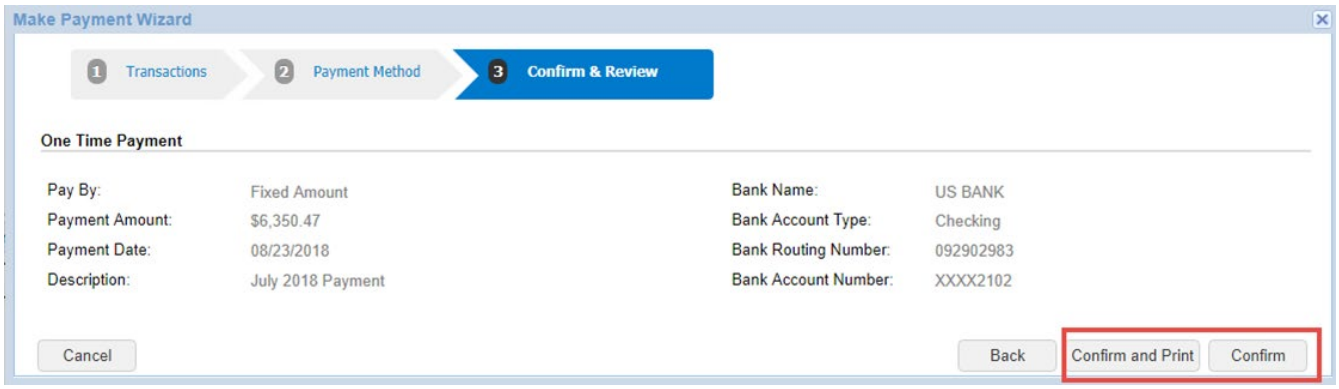
Select **Next**.



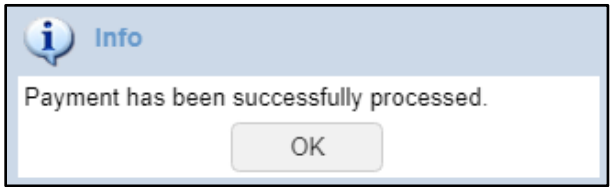
Select the account to make the payment from in the **Bank Name** field, or select **Add New Payment Account**. Select **Next**.



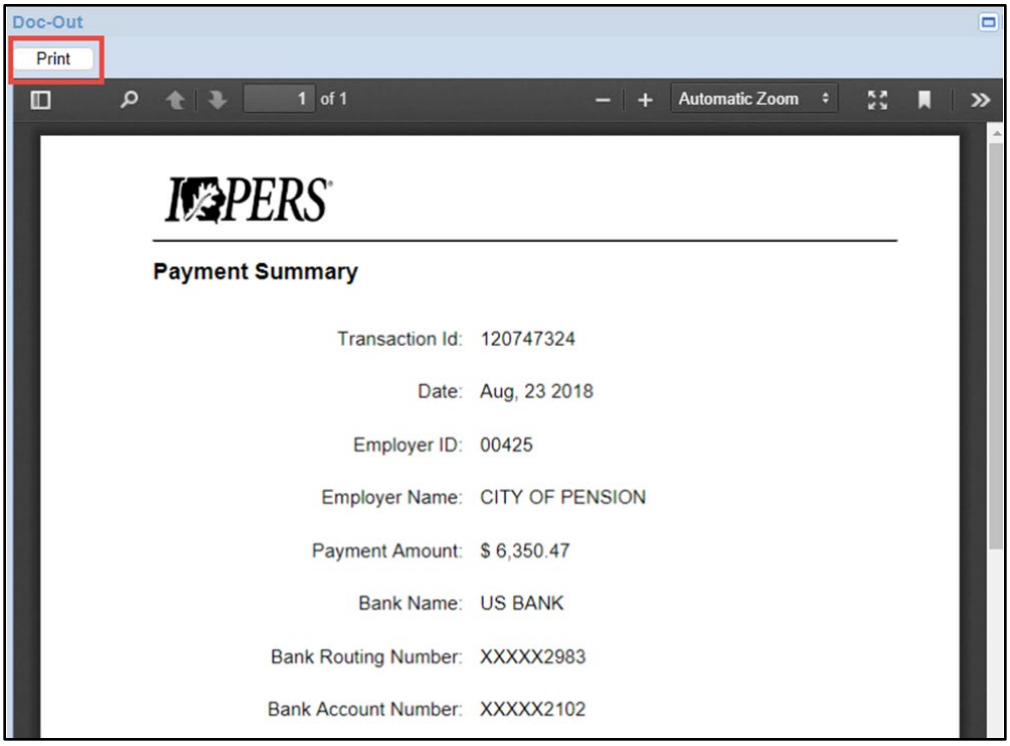
Select **Confirm** or **Confirm and Print**.



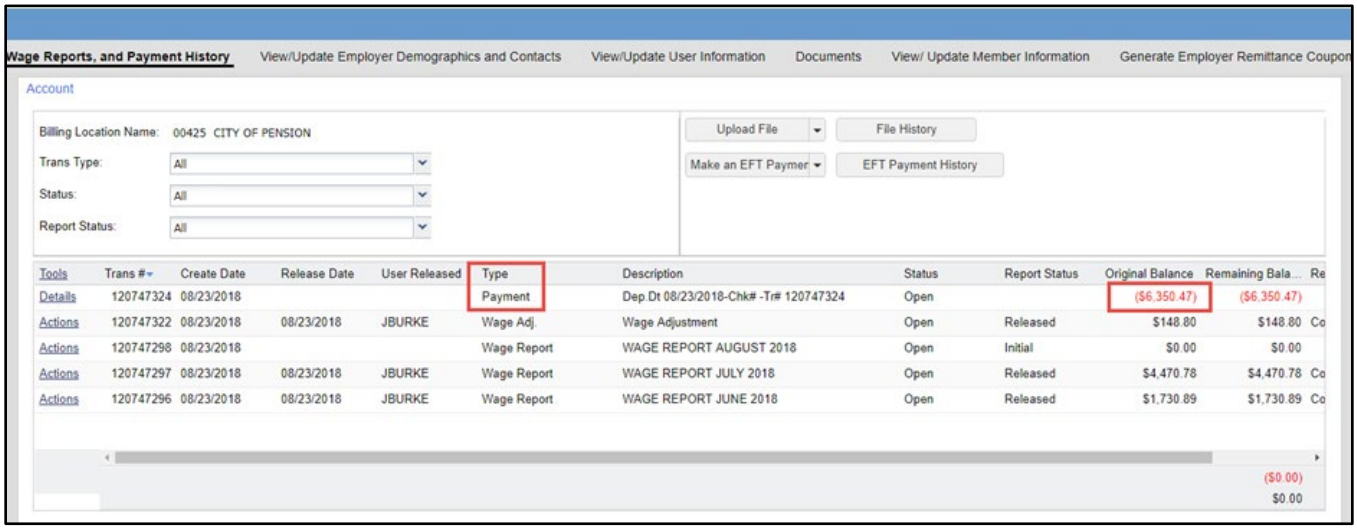
A confirmation message will display. Select **OK**.



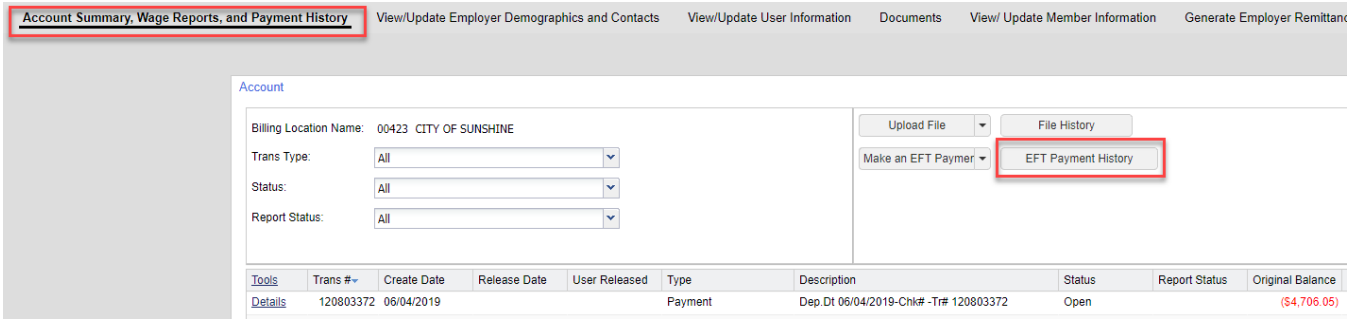
The **Payment Summary** will display. Select **Print** or close out of the Summary using the icon in the upper right corner of the window. If this print does not work, click Ctrl-P for a print screen.



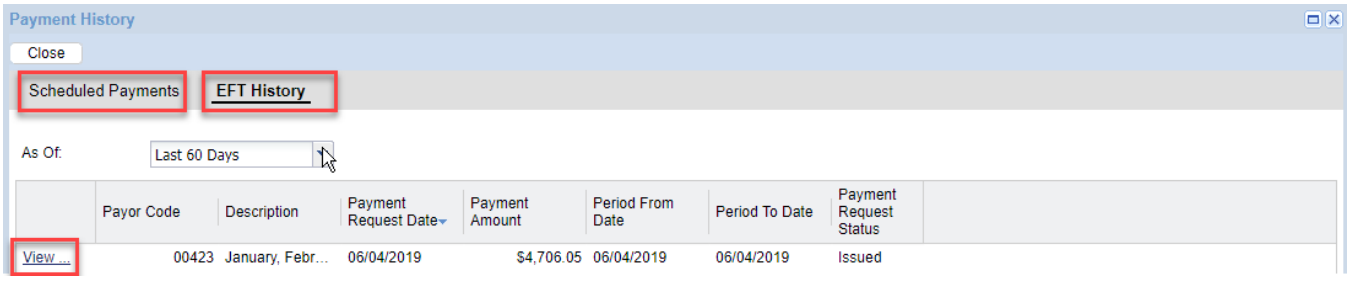
Your payment will be reflected on the Account Summary page as long as you did not schedule this payment with a future date.



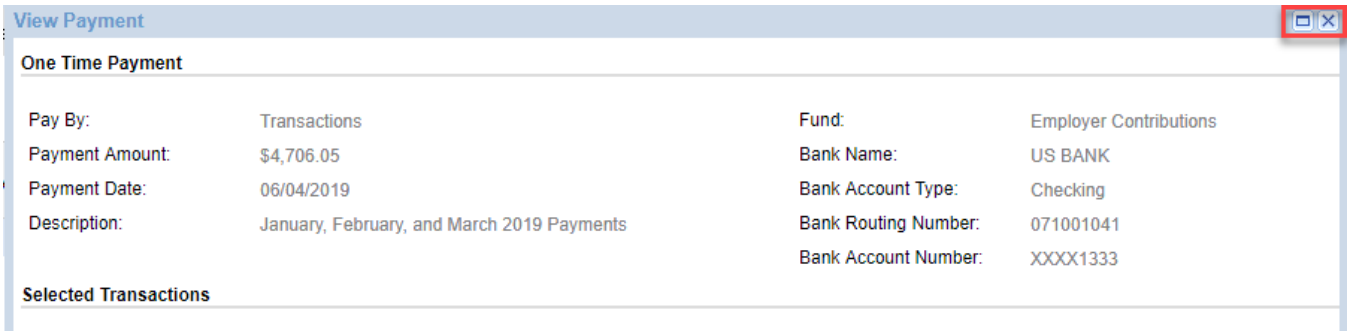
To view your scheduled payments or see your EFT payment History - select **EFT Payment History**.



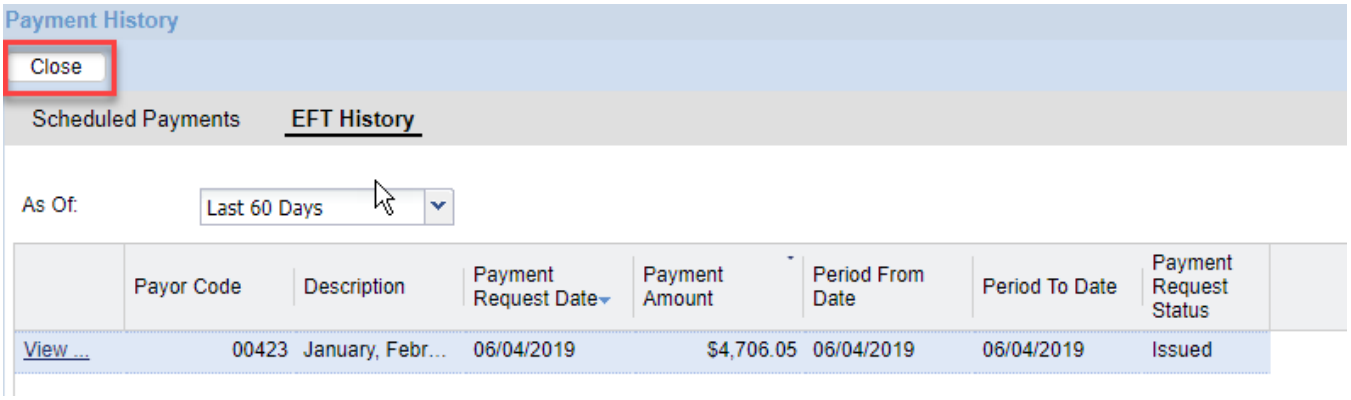
Select **Scheduled Payments** or **EFT History**. Then select **View** to see the payment detail.



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.

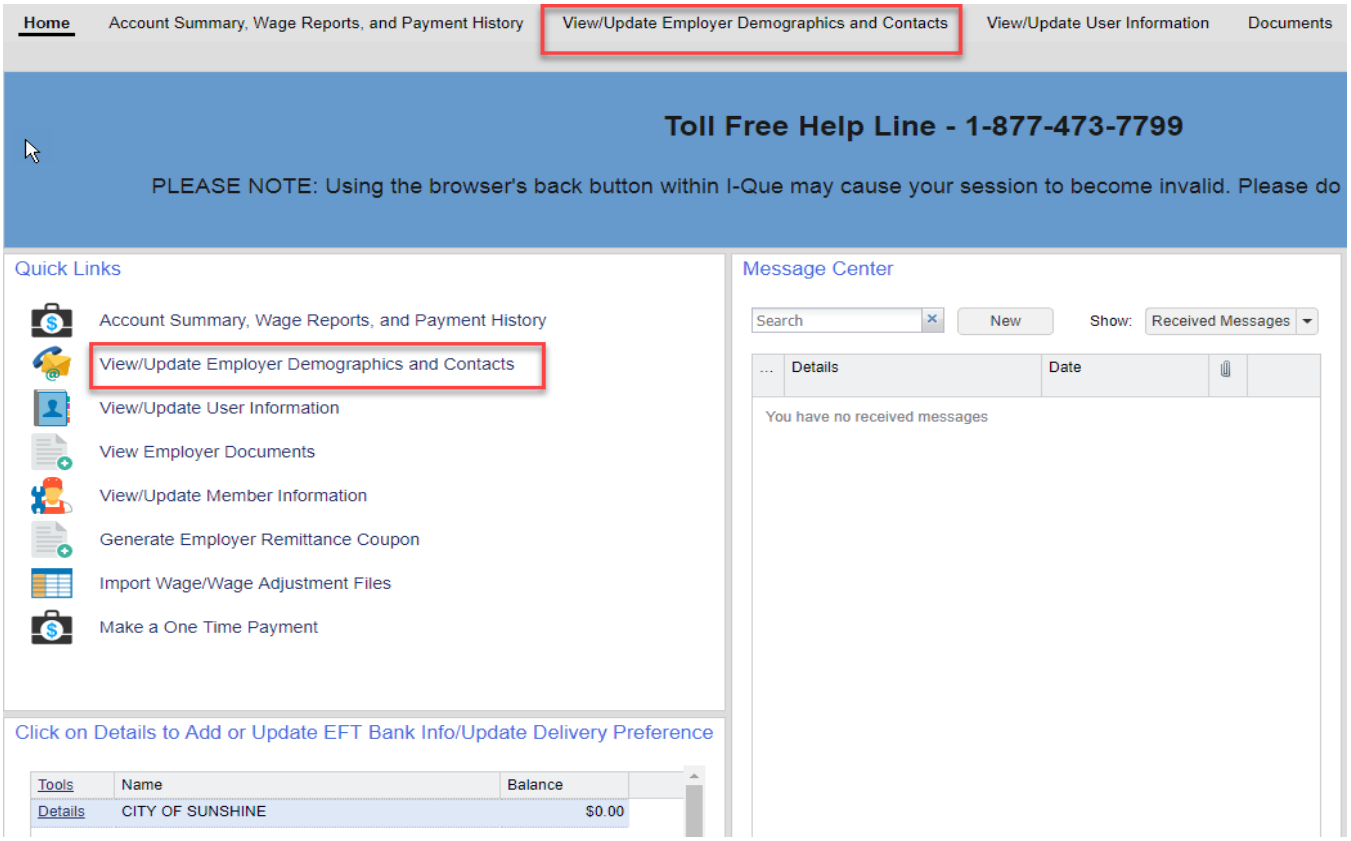


Select **Close** to return to the Account Summary screen.



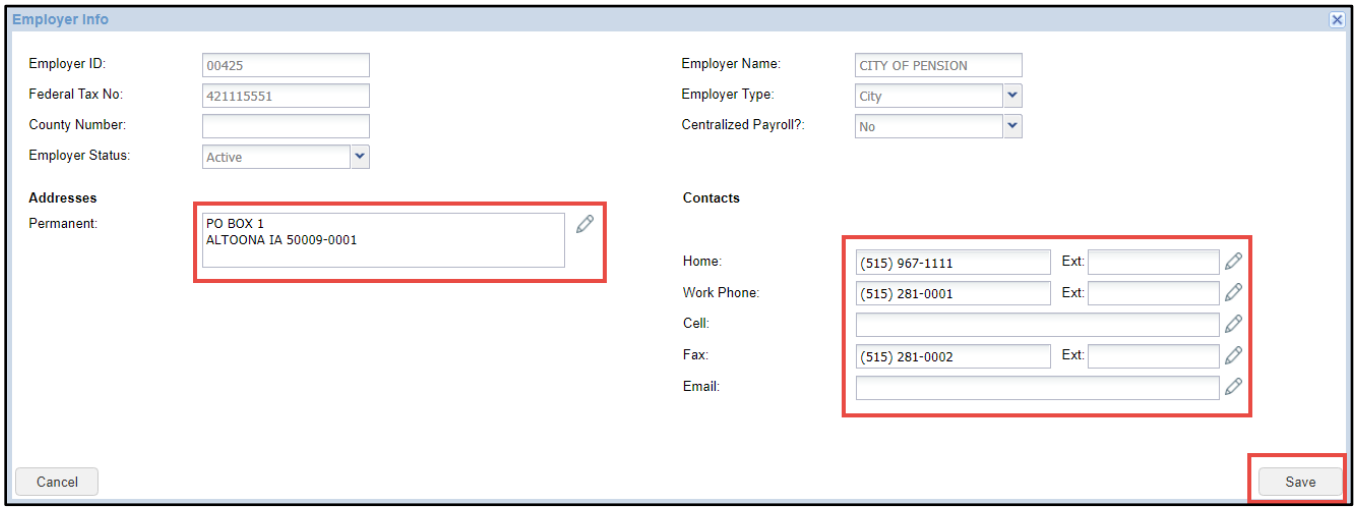
View or Update Employer Information

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

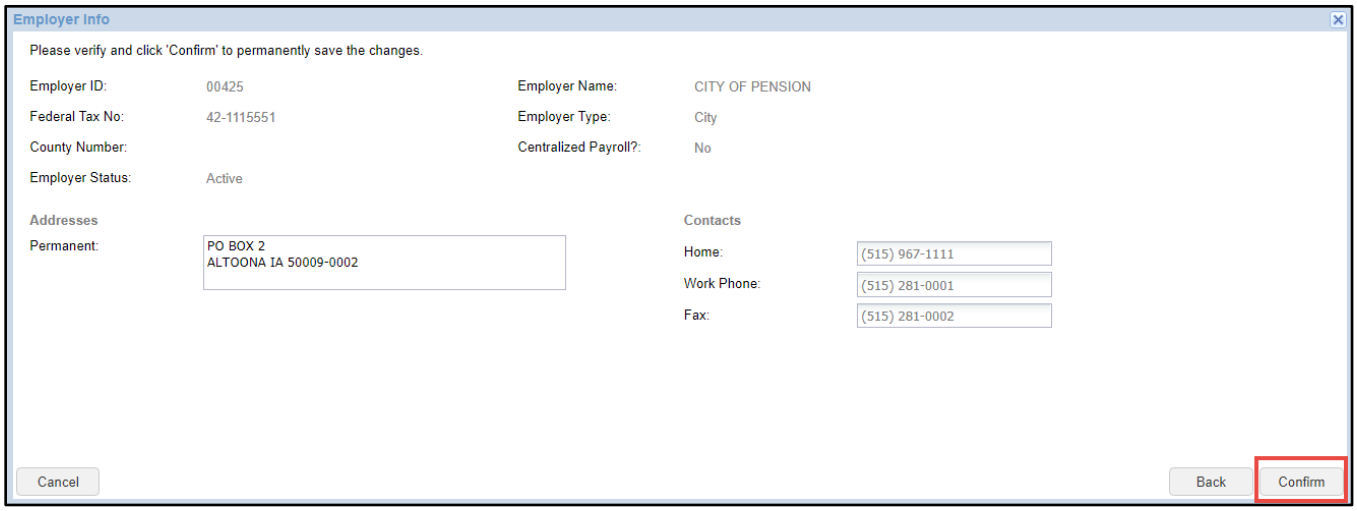


To update Employer Info, select **Change**.

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

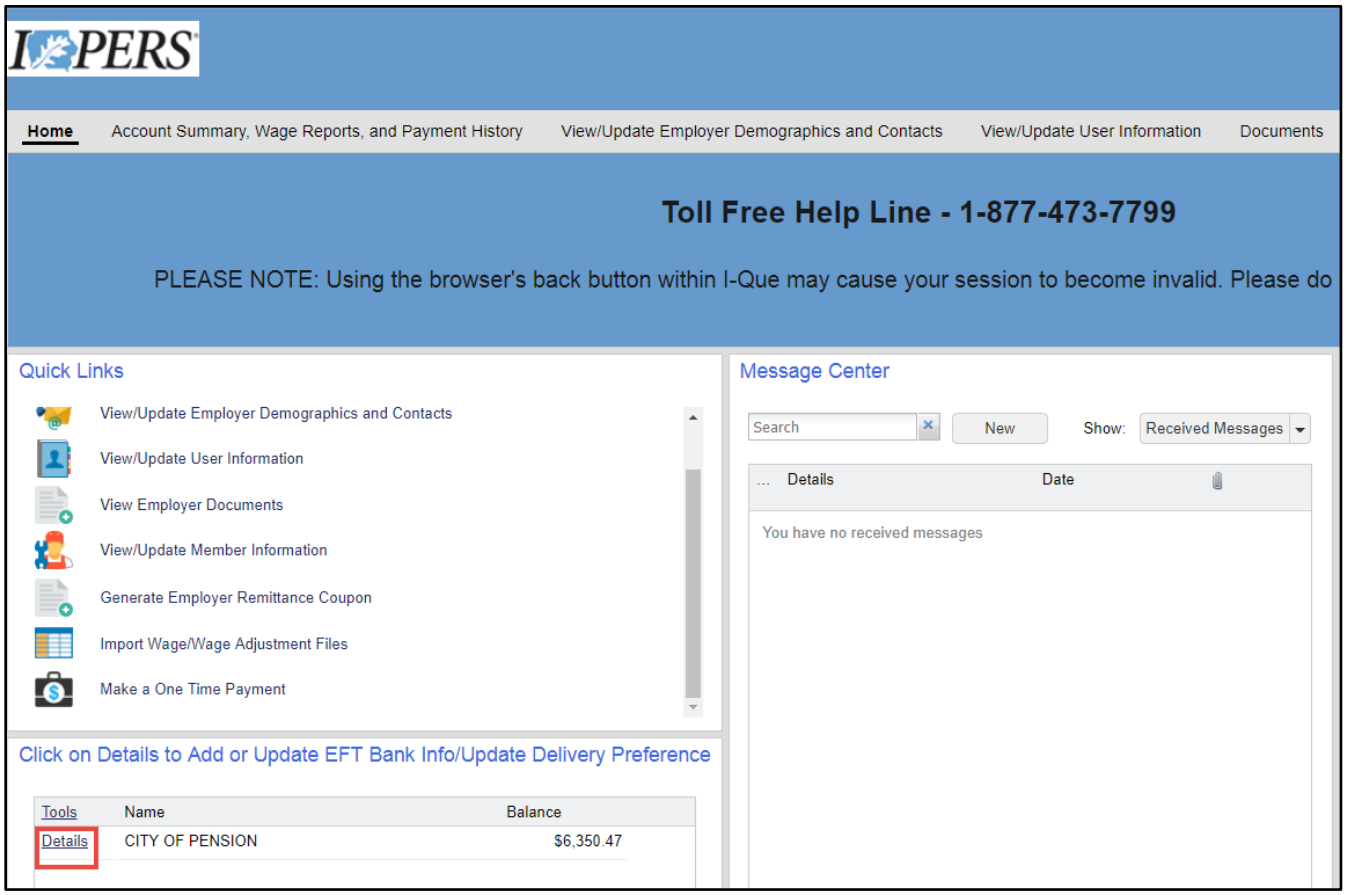


The updated information will display. Select **Back** to make changes, or select **Confirm**.

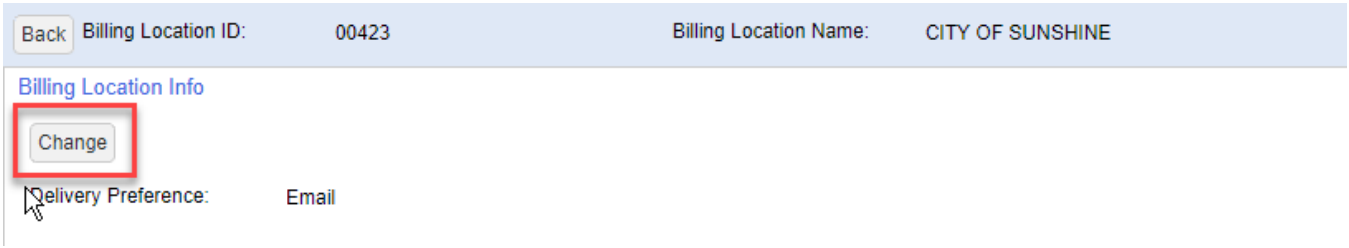


View or Update Delivery Preference

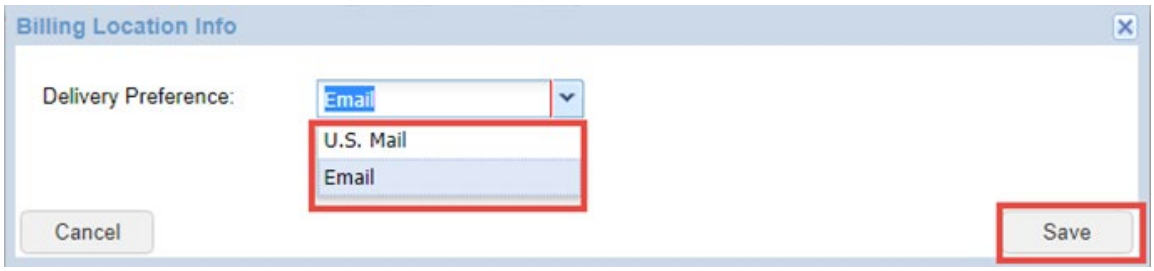
On the I-Que home page, select **Details**.



Select **Change**.



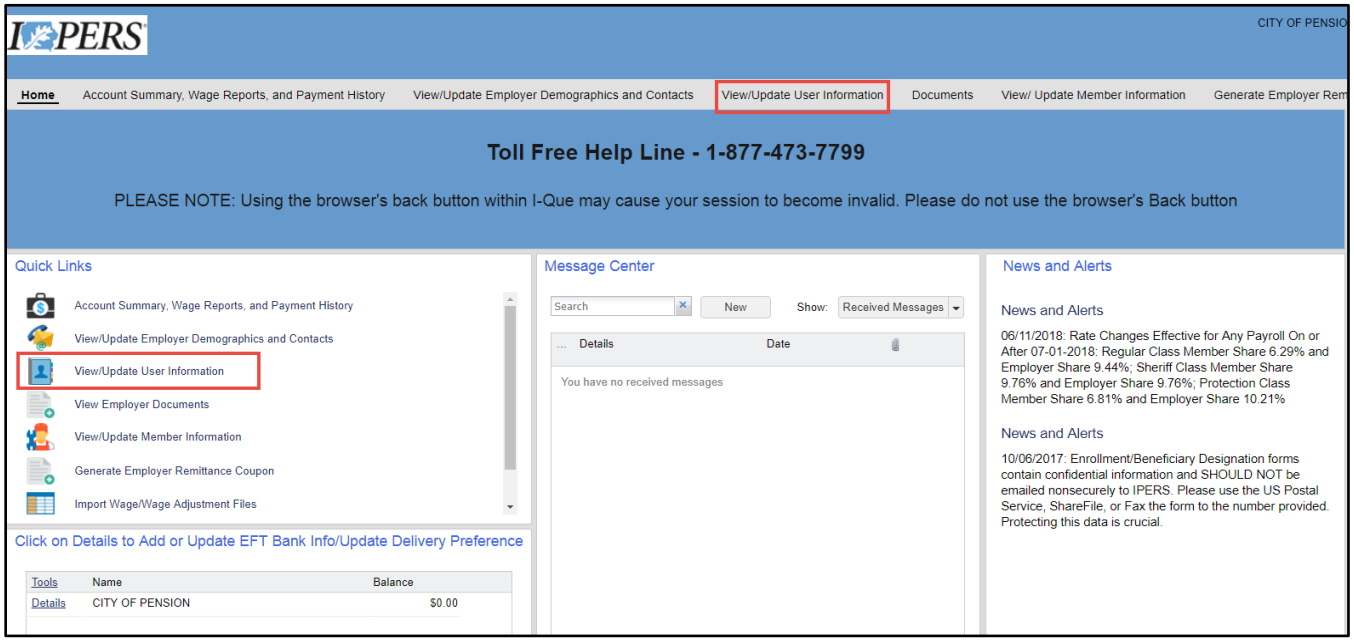
Select your delivery preference using the drop-down menu. Select **Save**.



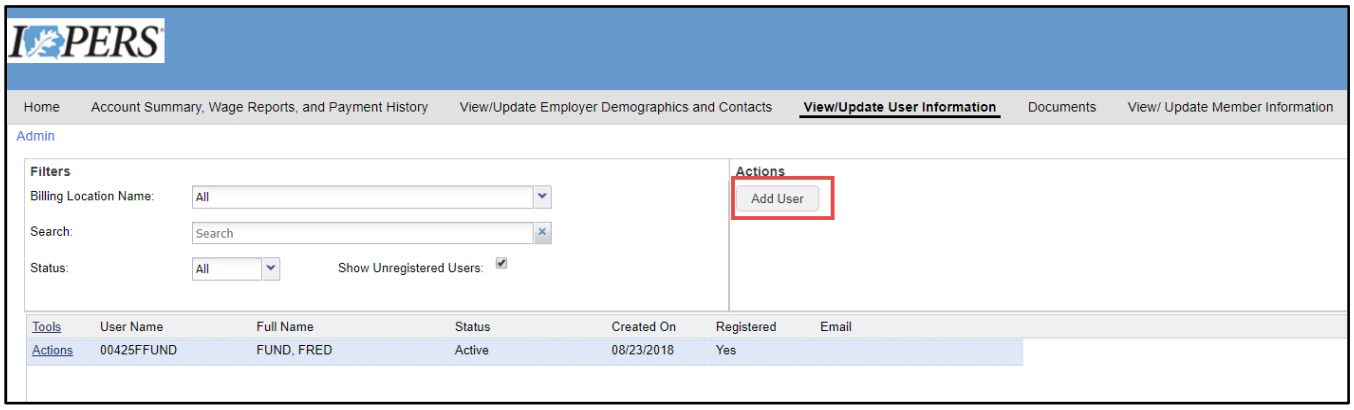
IMPORTANT: To set your delivery preference to **Email**, you must first provide an email address to I-Que under the Employer Demographics information.

Add a New I-Que User

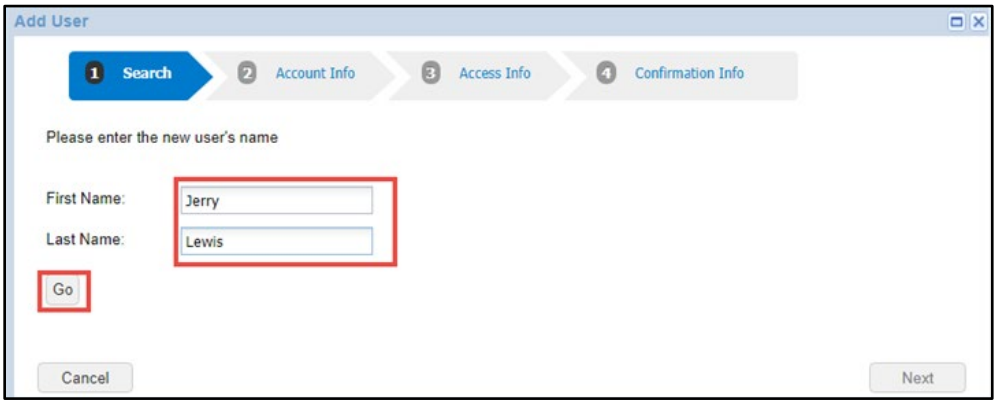
On the home page, select **View/Update User Information**.



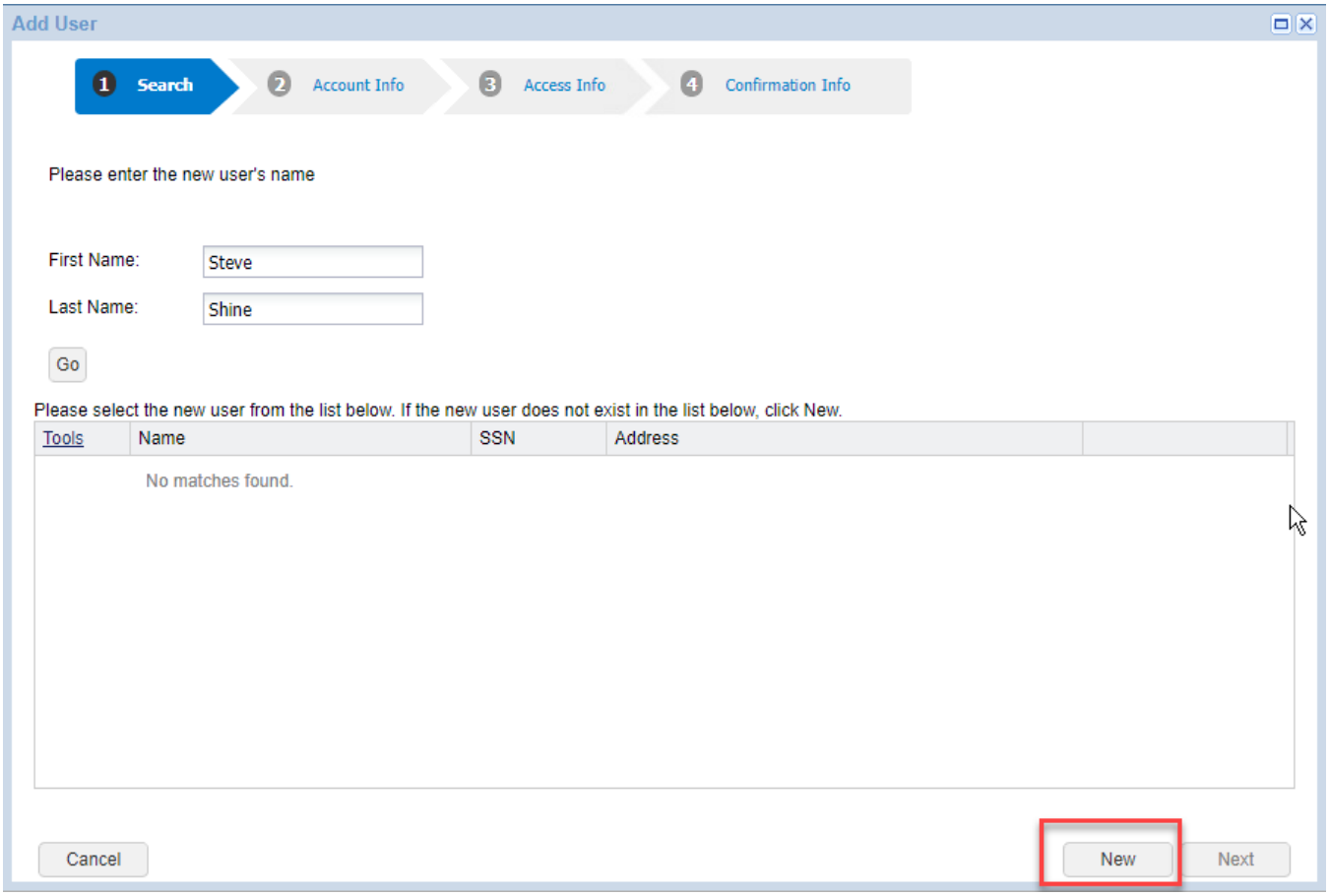
Select **Add User**.



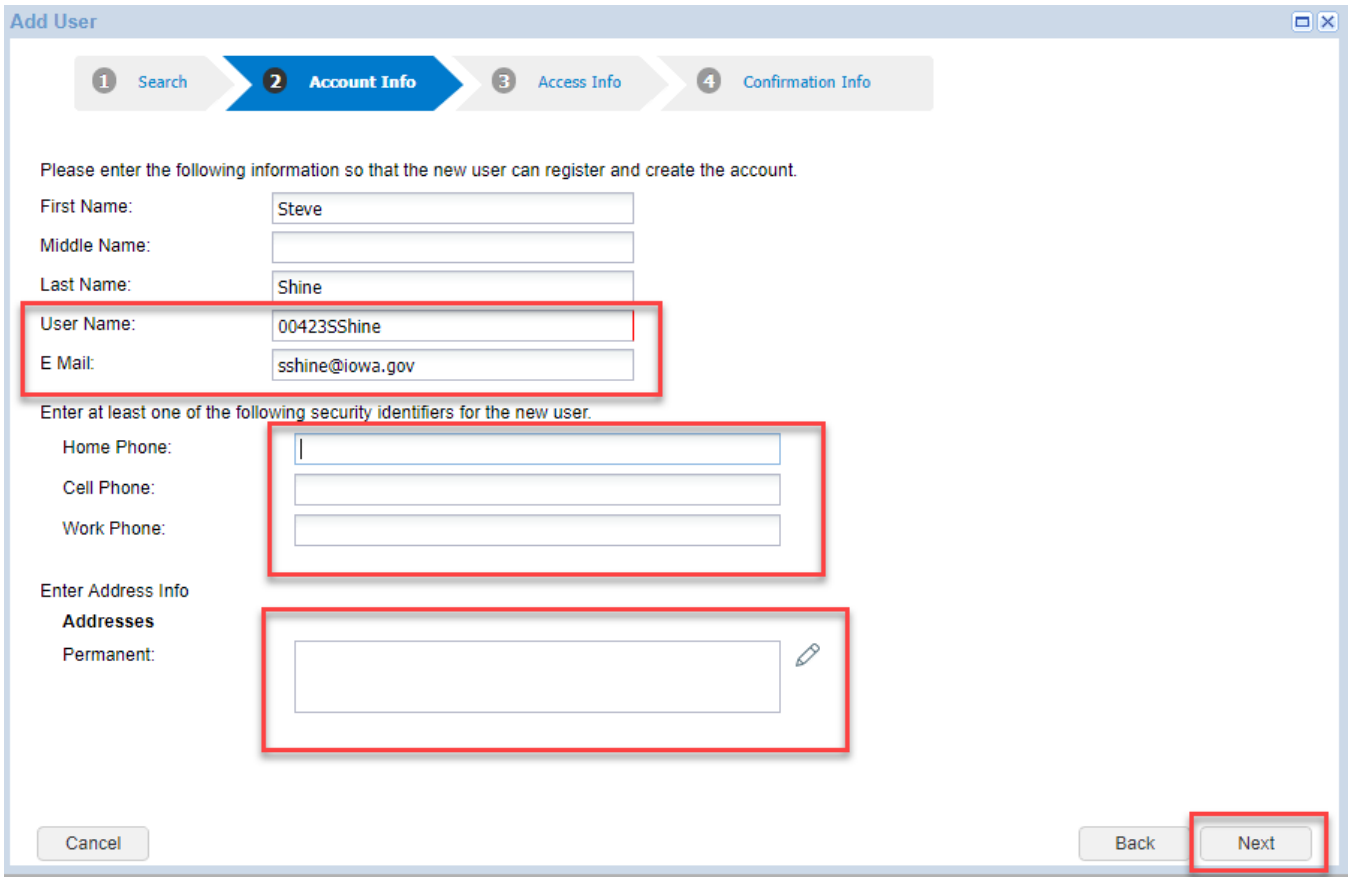
The **Add User** window will appear. Enter the First and Last Name of the new user. Select **Go**.



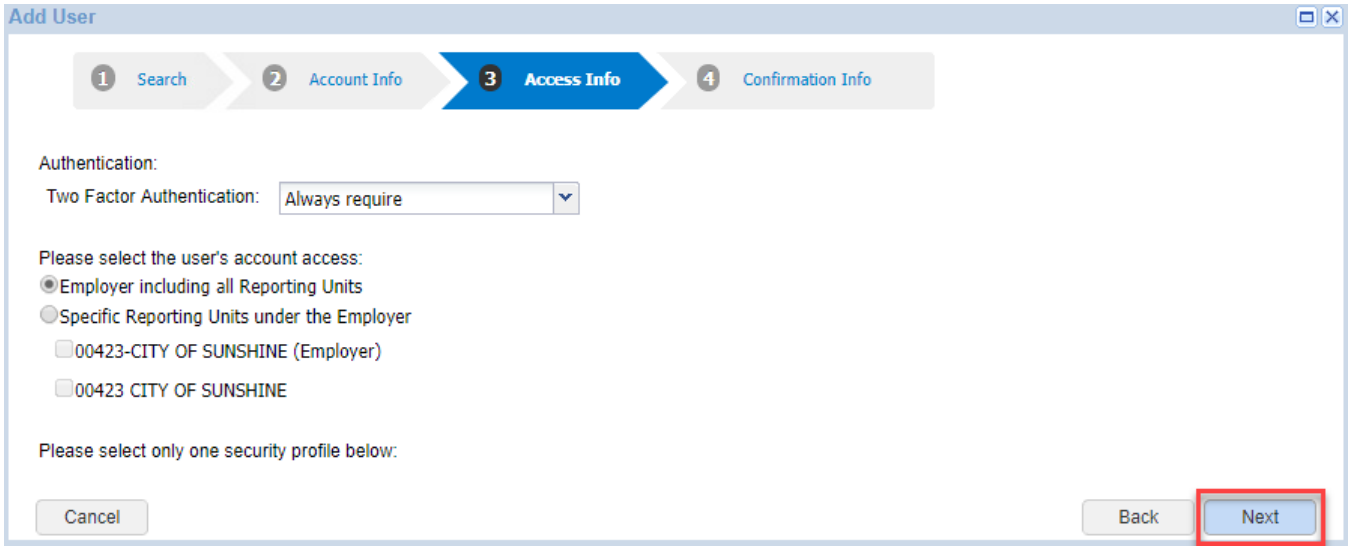
If I-Que does not find a match, select **New**.



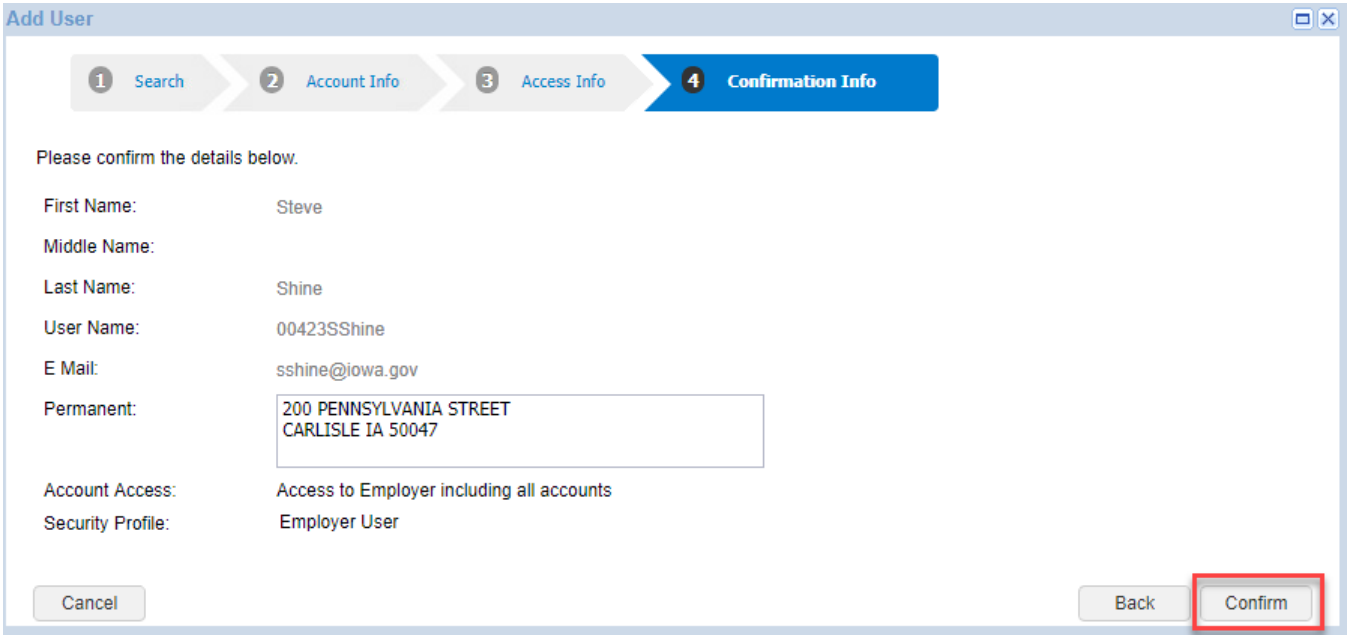
In the **User Name** field, ***enter the 5-digit employer number, first letter of first name and first 6 of last name***. Enter the **user's email address**. Enter one of the **security identifiers** and the **user's address**. Select **Next**.



Select **Next.**

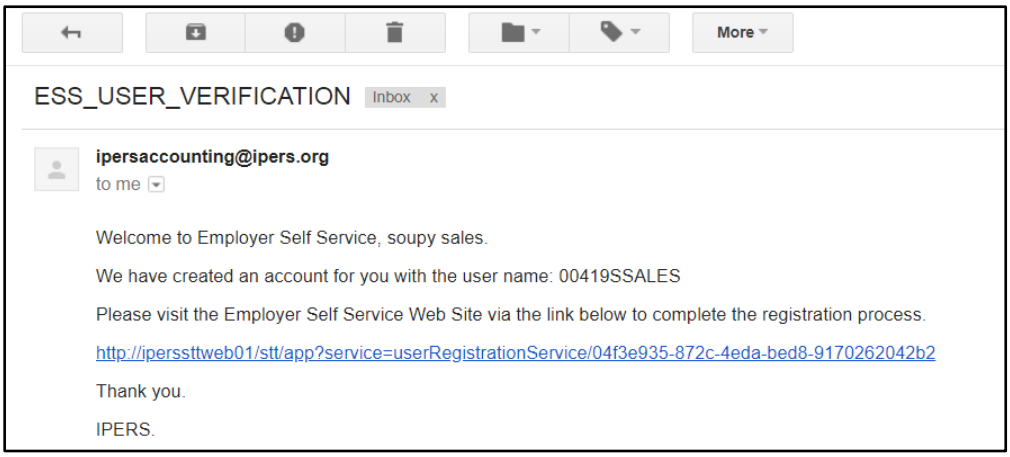


If everything is correct, select **Confirm**.

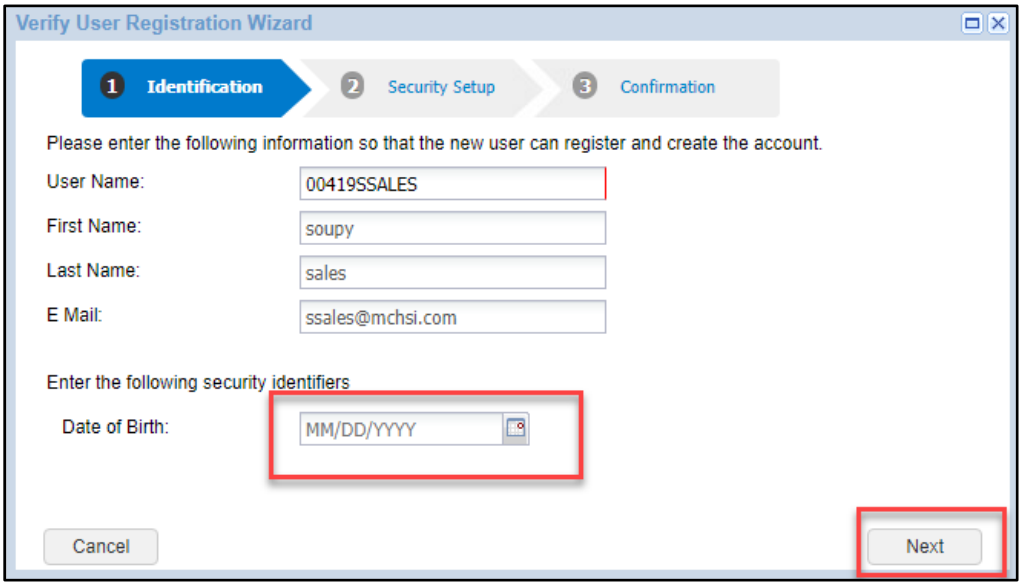


A message will appear stating that the user must complete the registration process via email. Select **OK**.

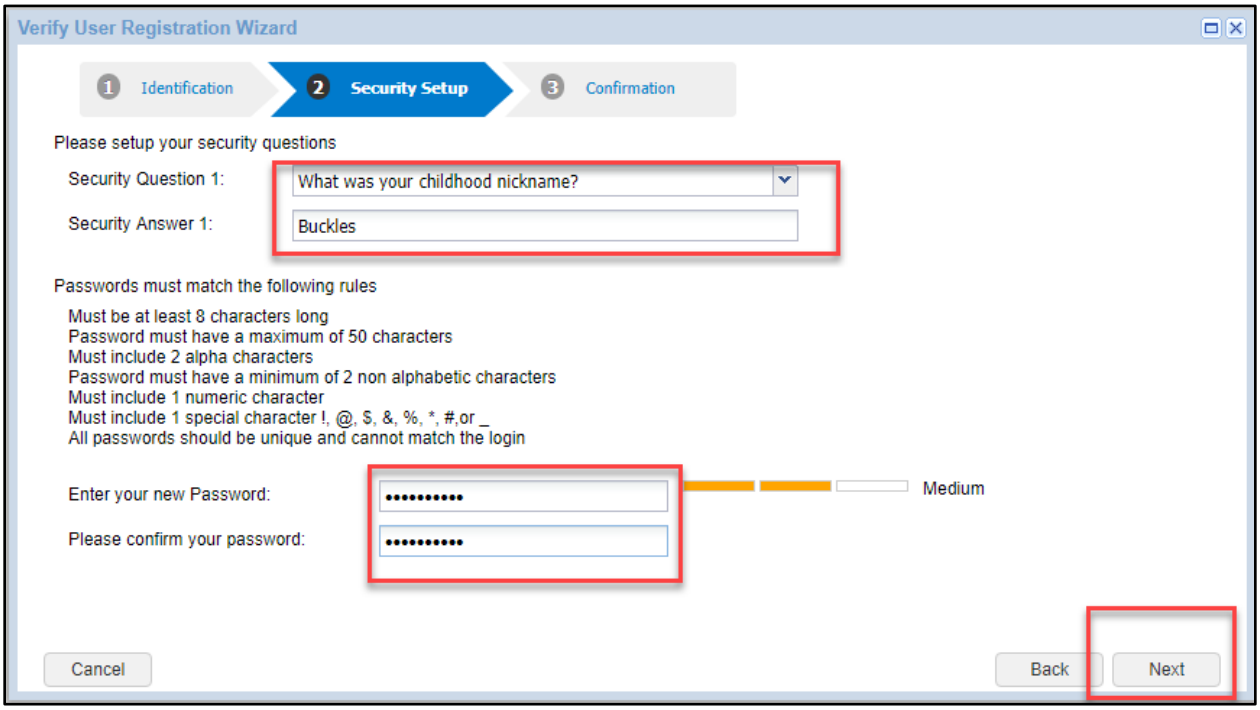
The new user must complete the registration process using the link contained in the email.



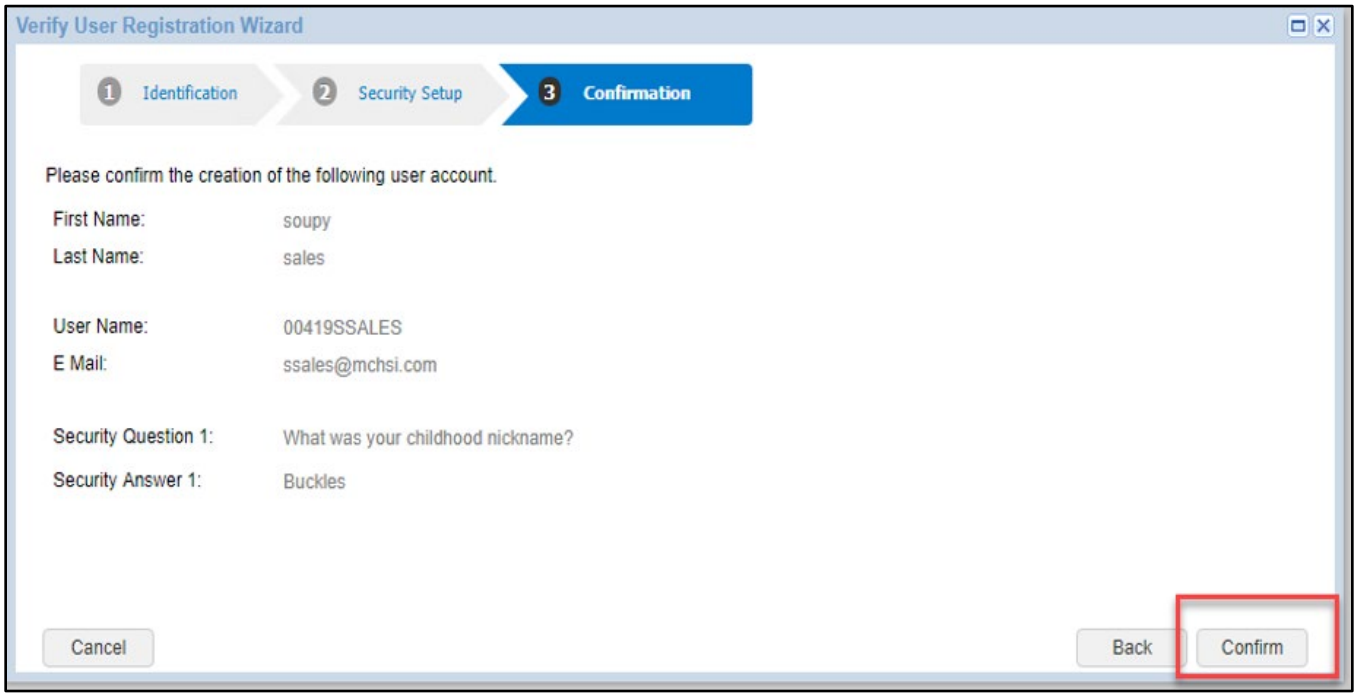
The **Verify User Registration Wizard** opens. The new user must enter the requested security identifier. Select **Next**.



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

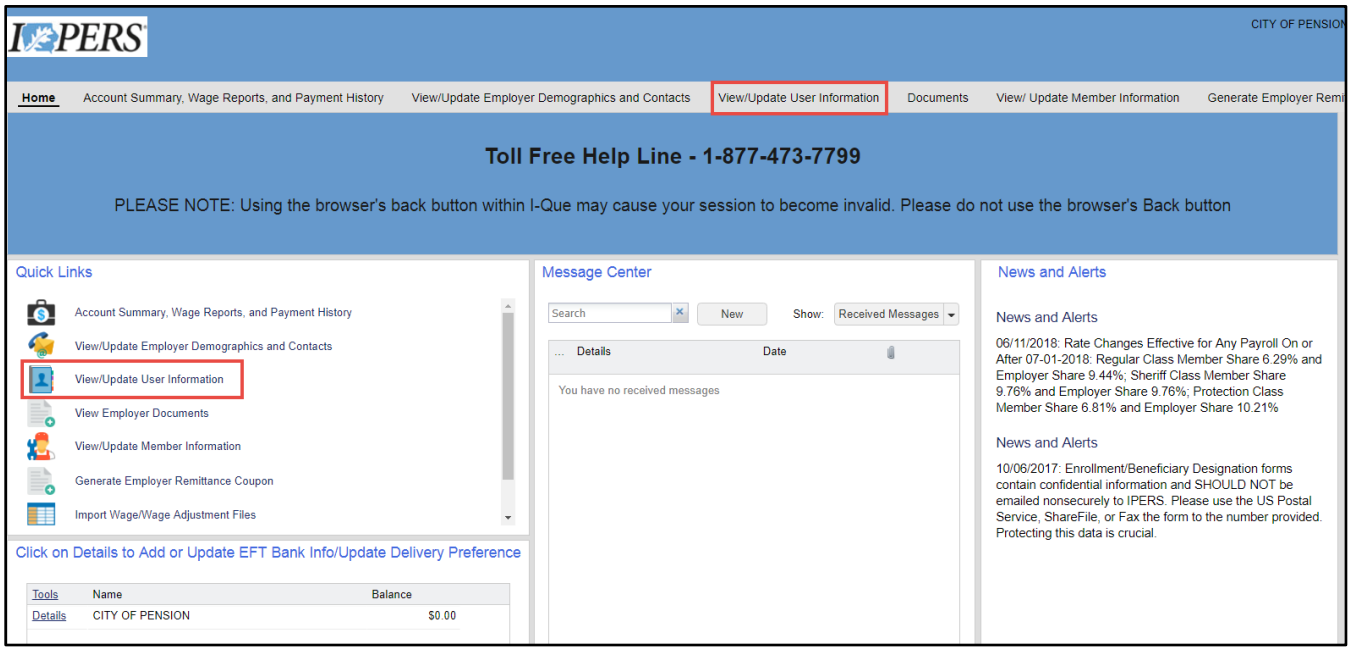


Select **Confirm**. The new user now has access to I-Que.

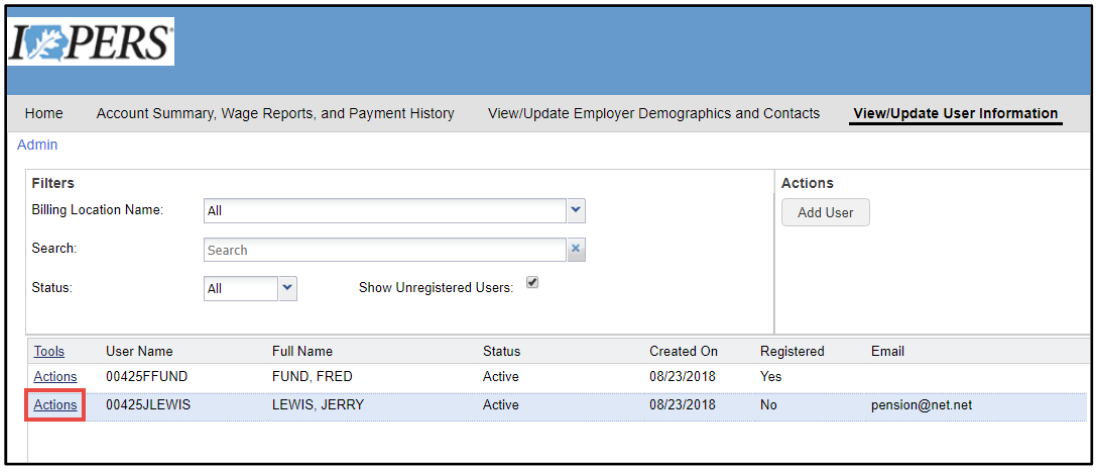


Deactivate an I-Que User

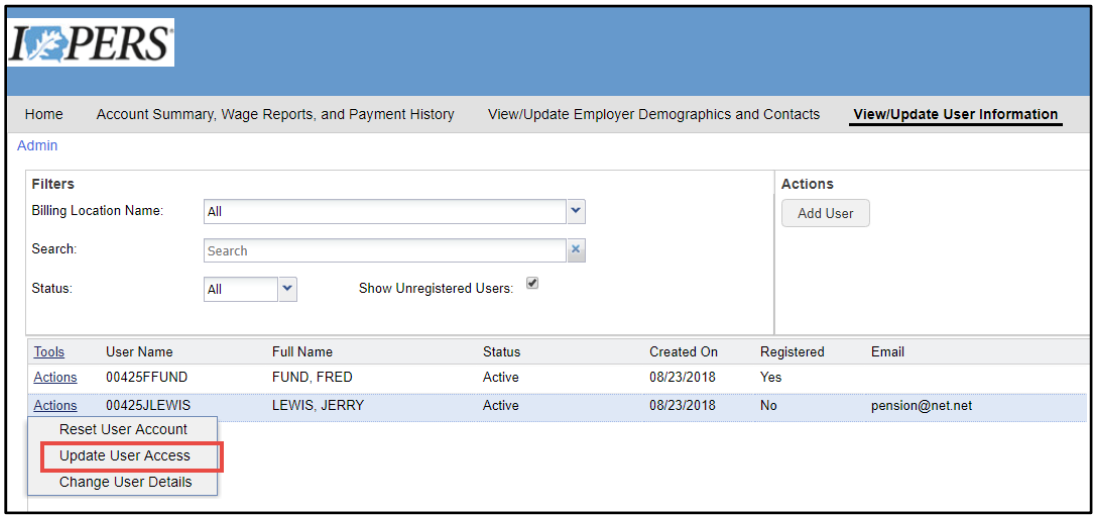
On the home page, select **View/Update User Information**.



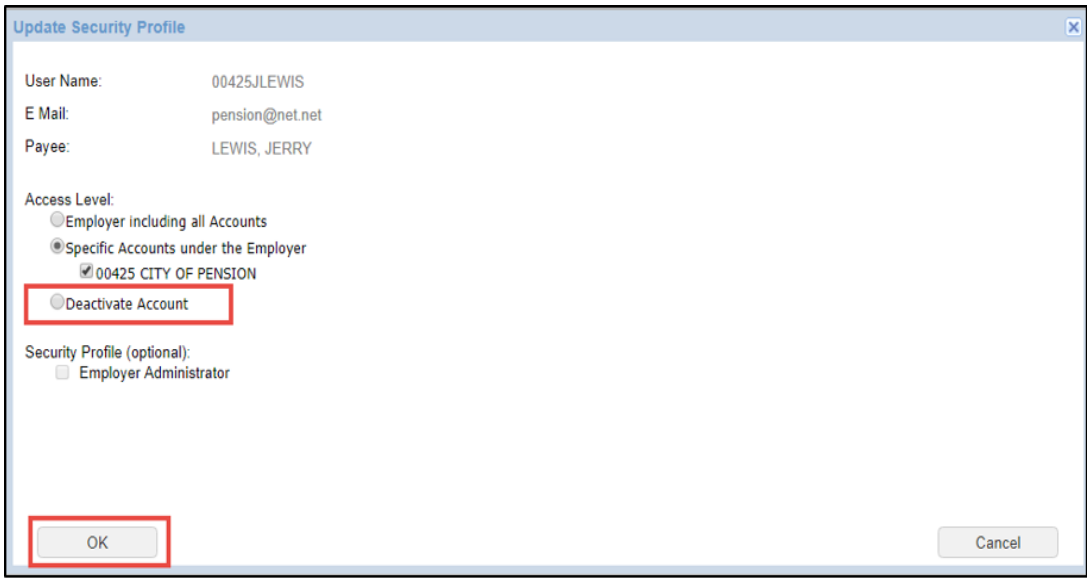
Find the user to deactivate. Click on that line and then select **Actions**.



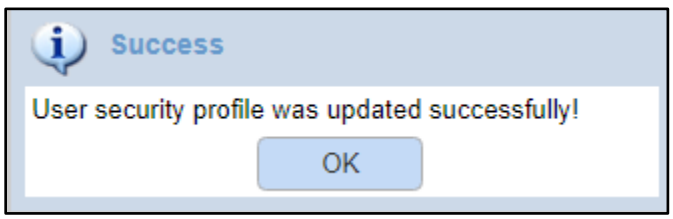
In the drop-down menu that appears, select **Update User Access**.



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

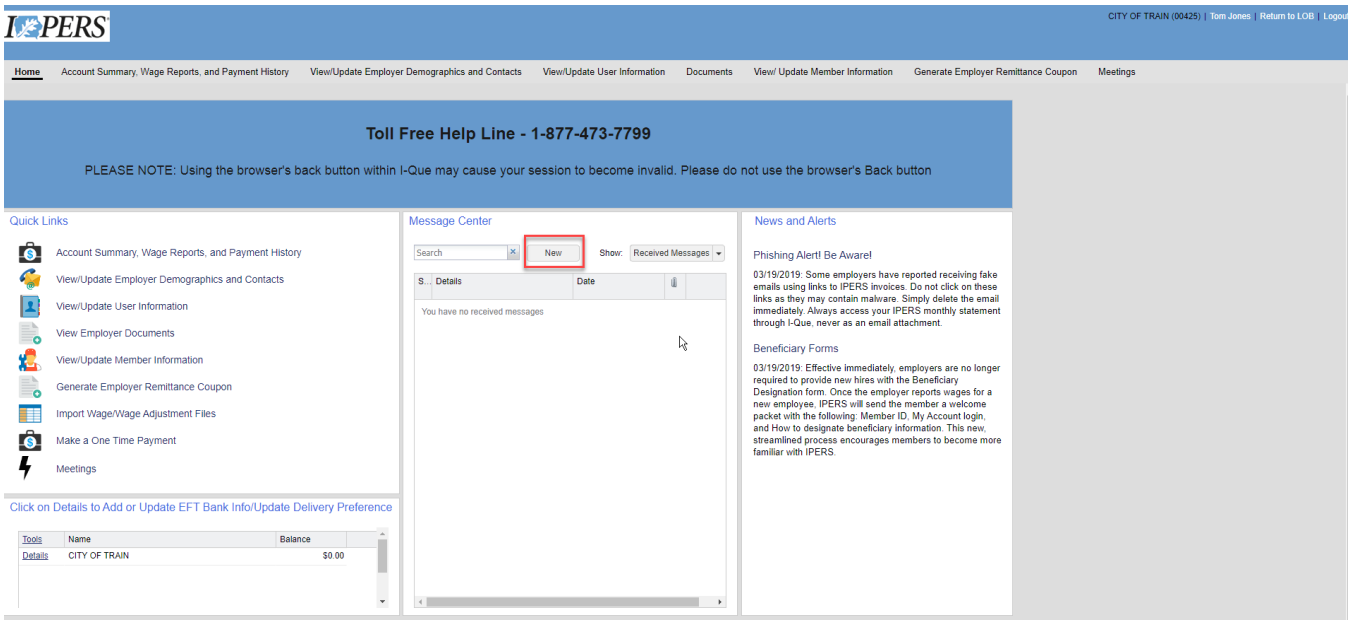


This user has now been deactivated. Select **OK**.

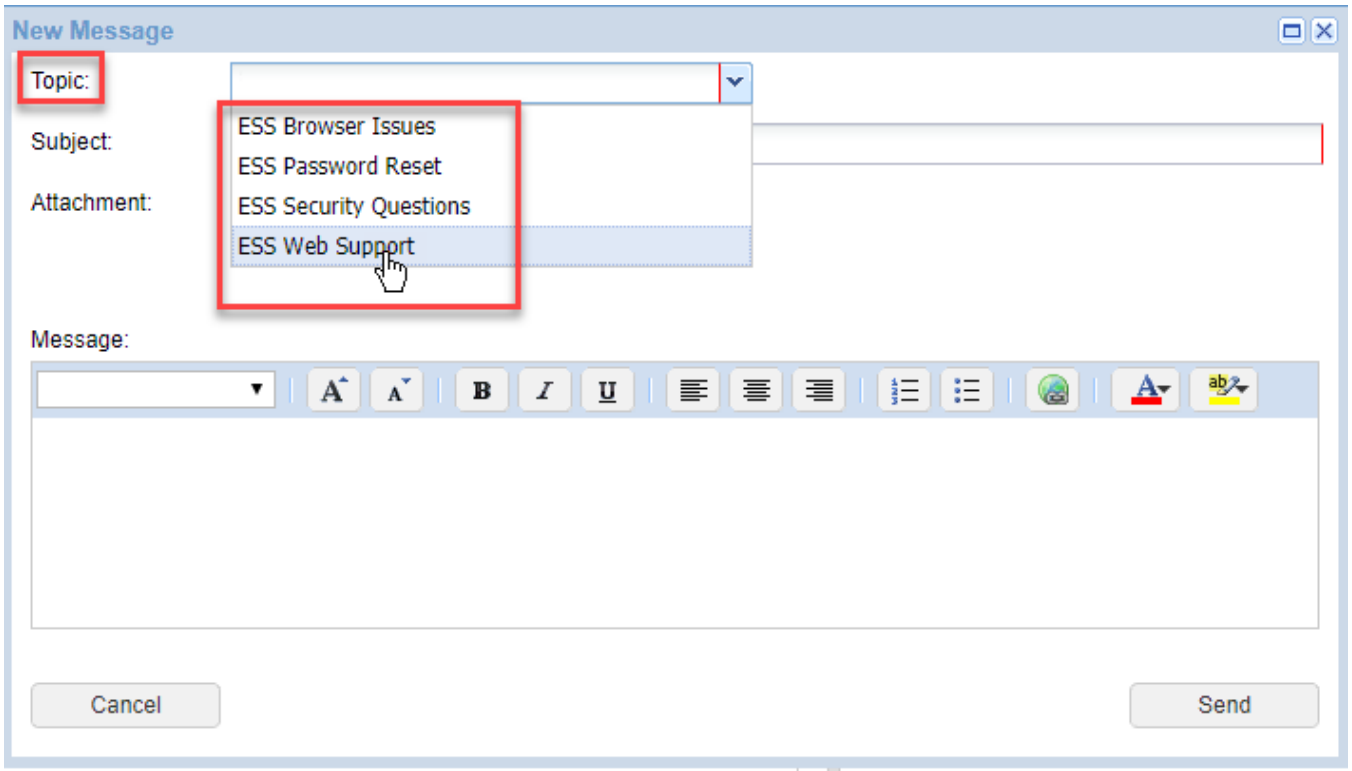


Message Center

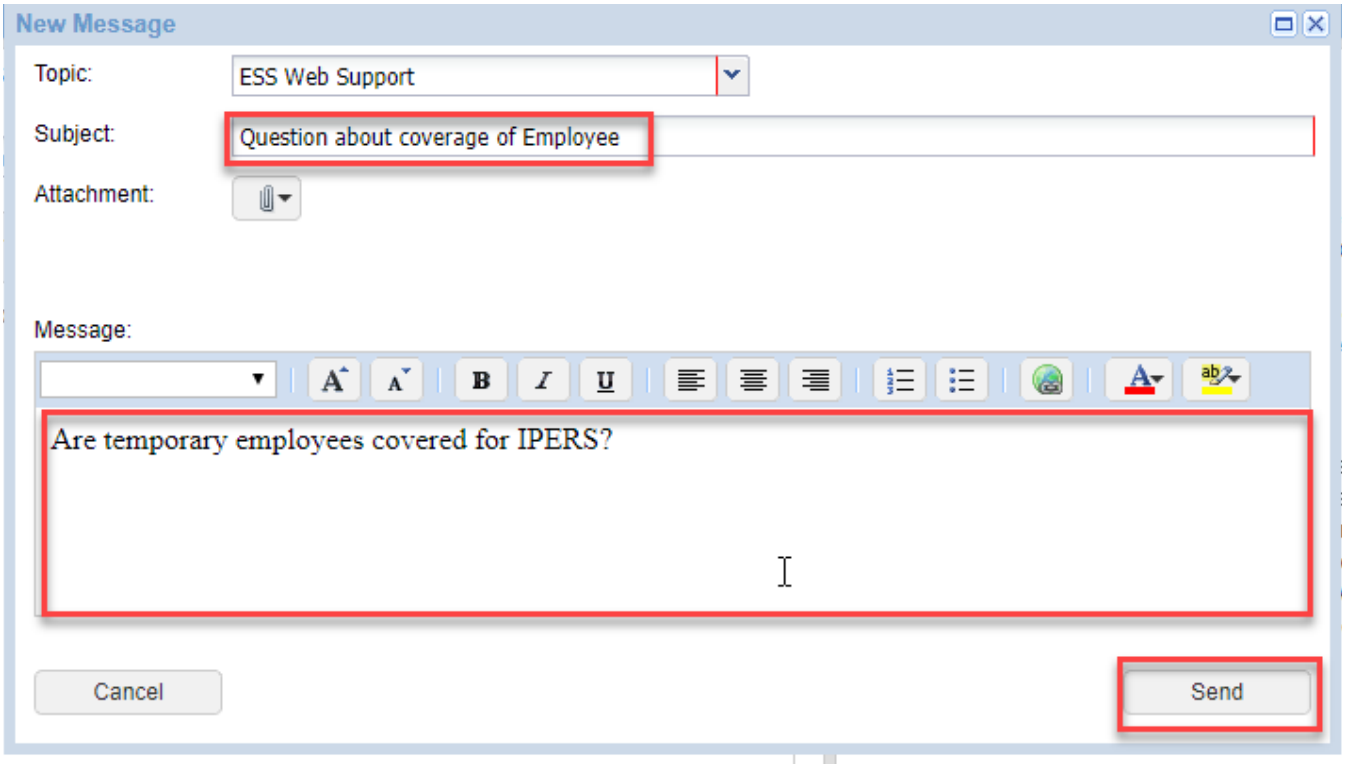
On the home page, under the Message Center, select the New button



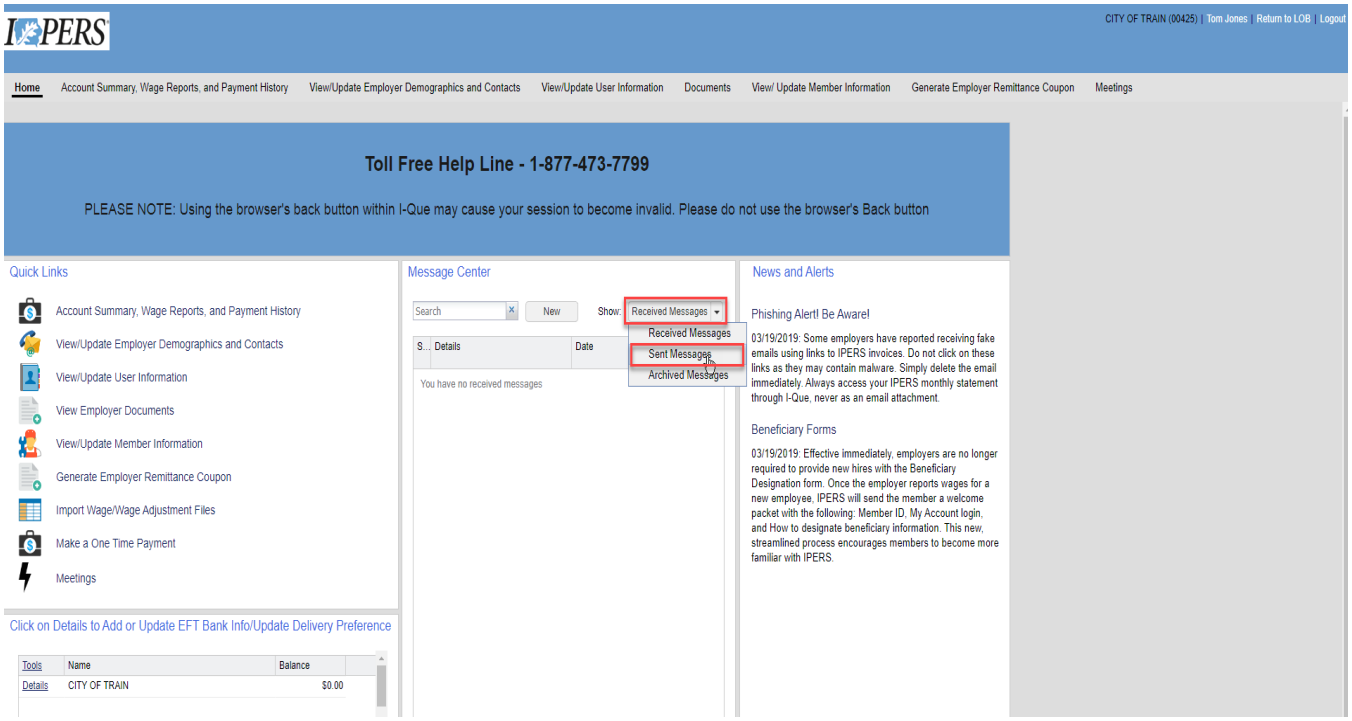
Under the Topic drop down – select one of the choices that best describes your subject



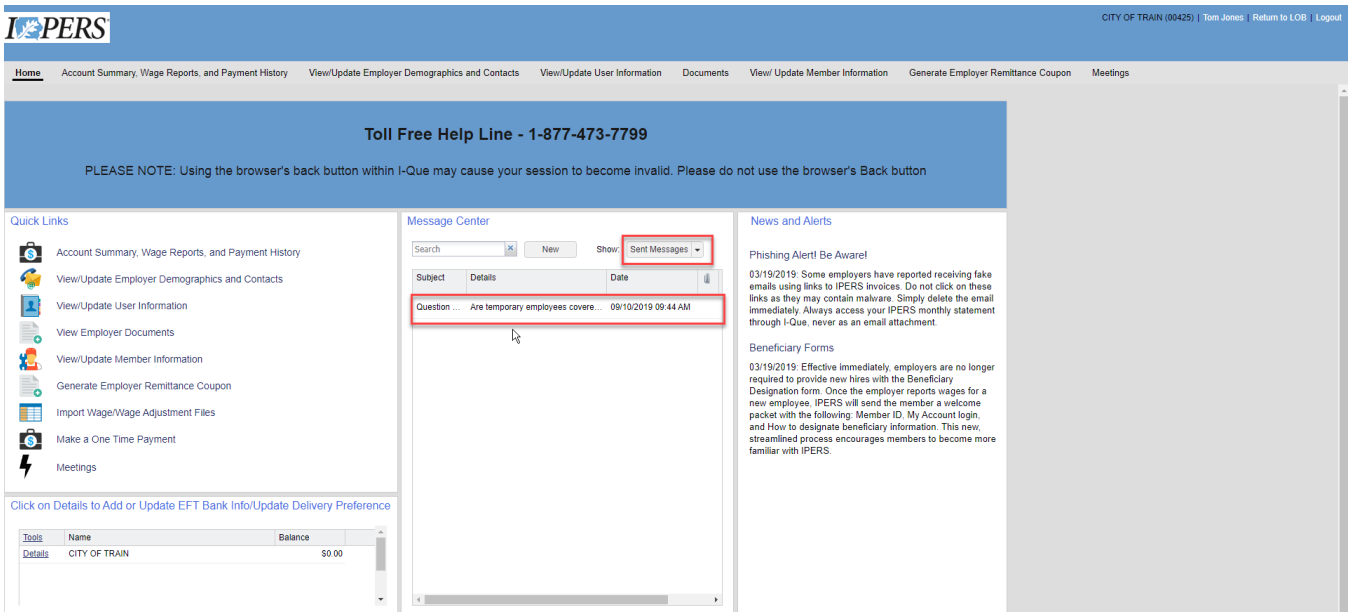
Fill in the Subject line, type your message, and select the Send button



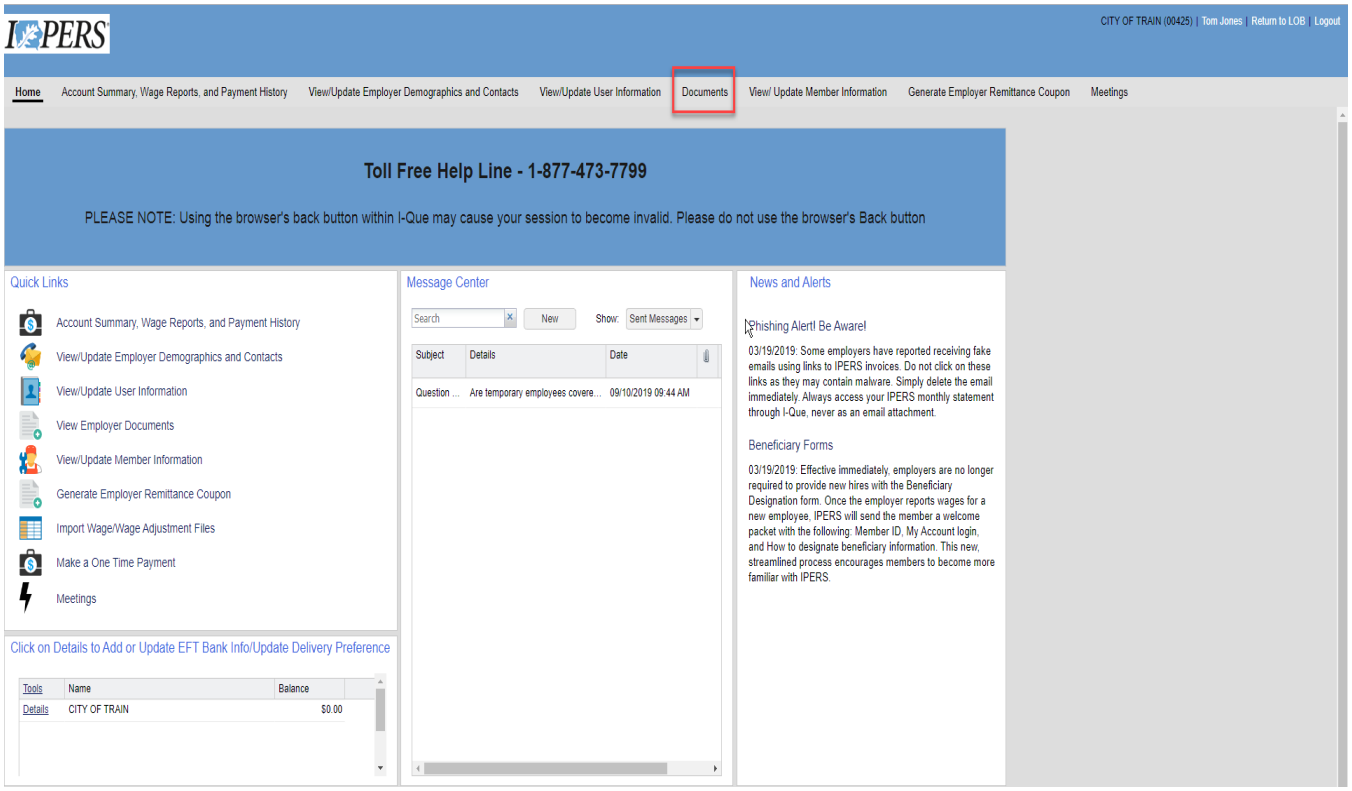
In order to see your sent message, change the drop down to Sent Messages



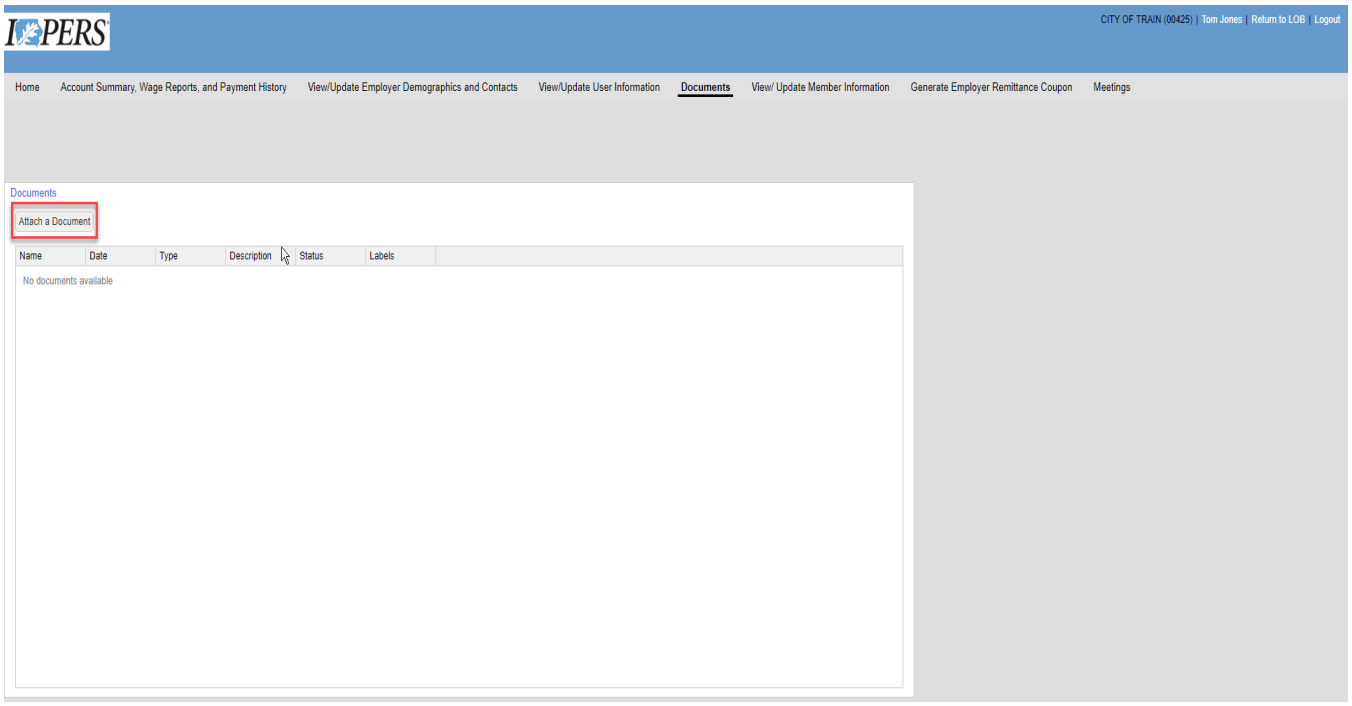
All sent messages will be displayed



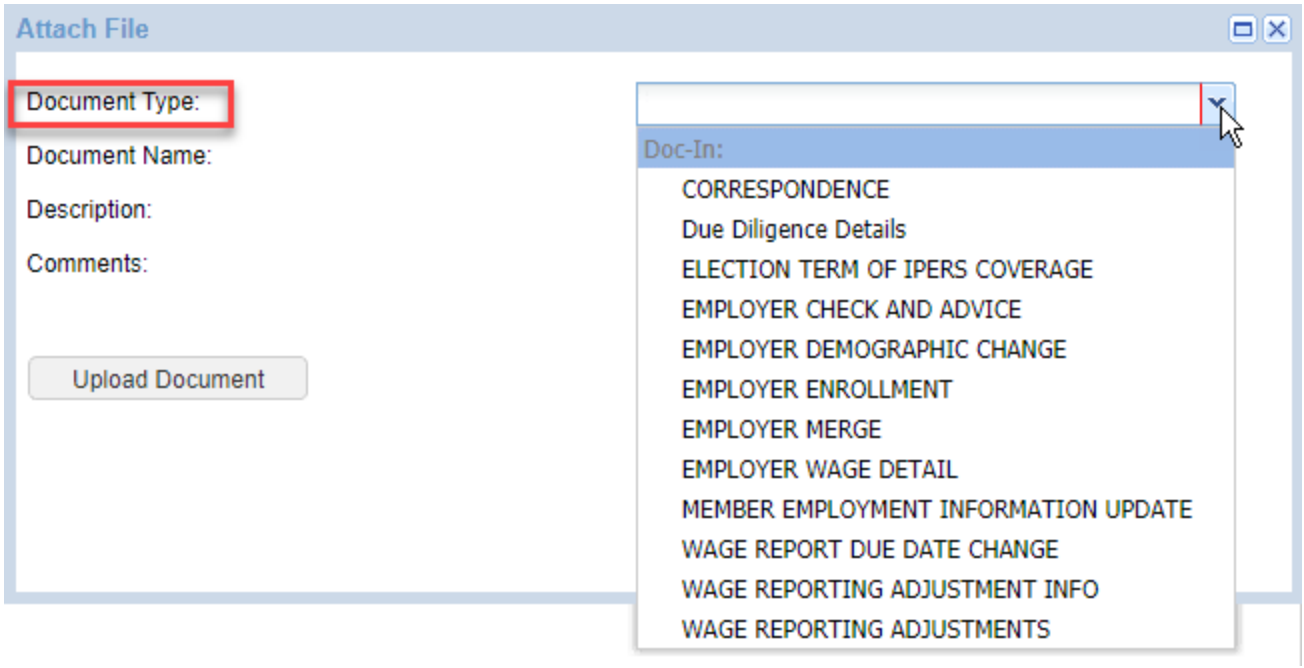
If you need to send IPERS a spreadsheet or other documents, you must first attach the document or spreadsheet to your documents in I-Que. Select the Documents tab on the Home page



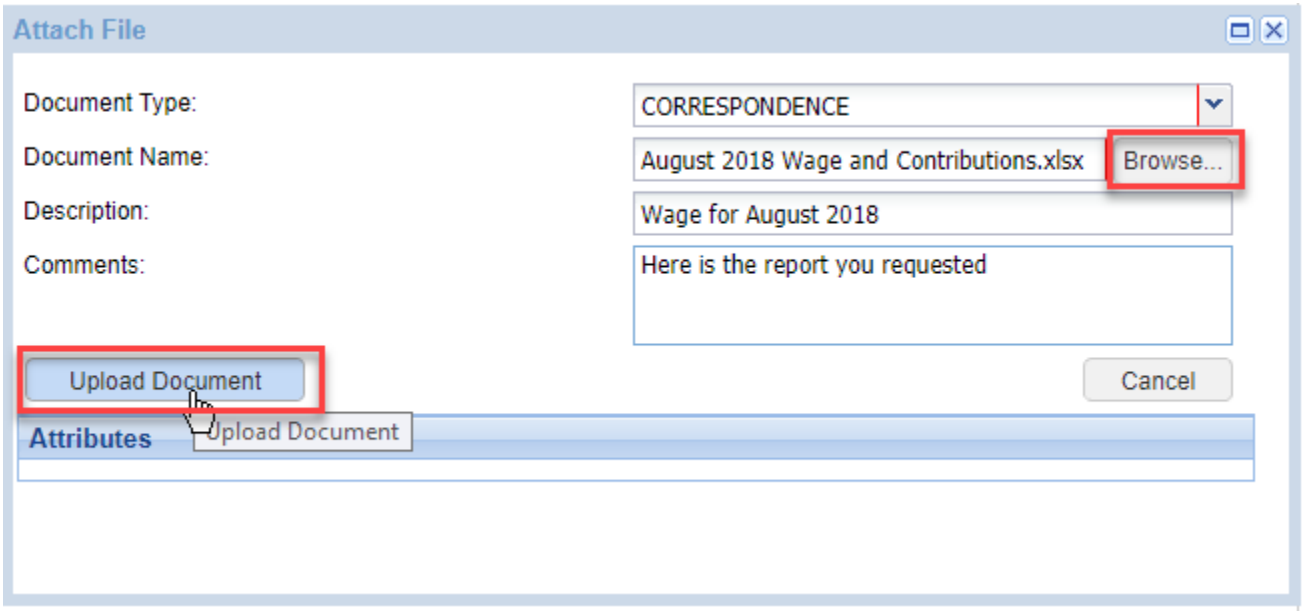
Select Attach a Document to browse for your document or spreadsheet

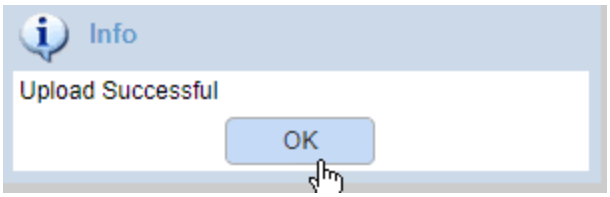


Choose from the drop down the appropriate type of document you are attaching

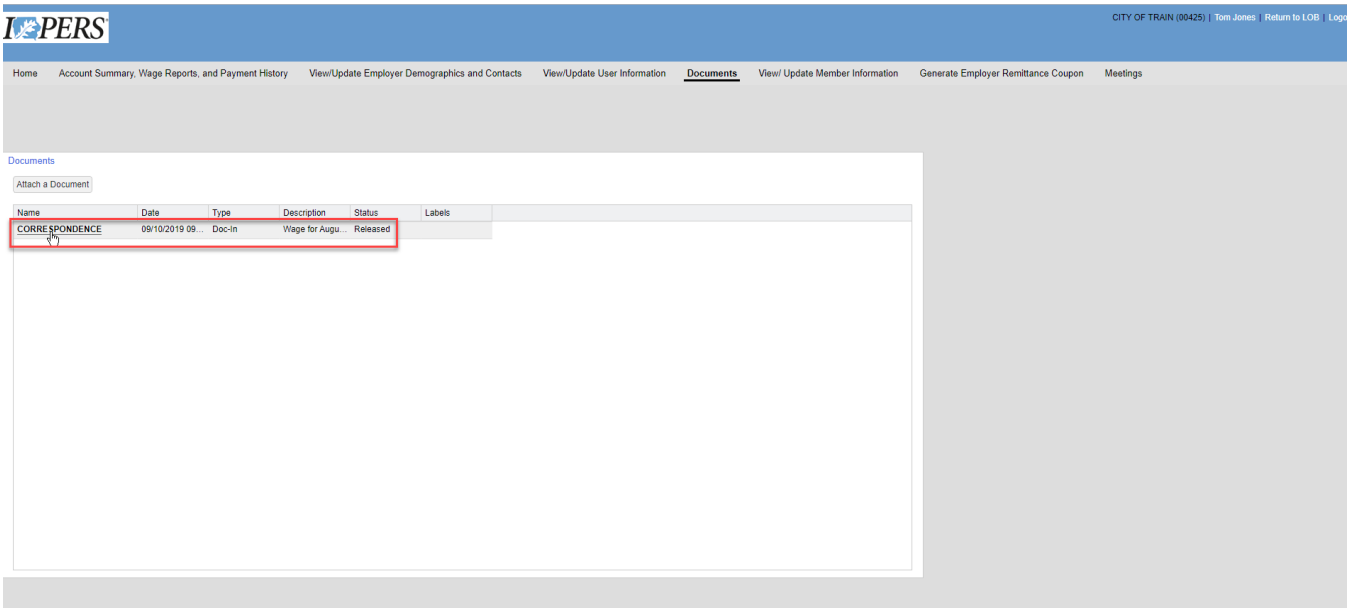


Select the Browse button to find the document or spreadsheet, fill in a brief description and any comments you wish to make. Then select Upload Document

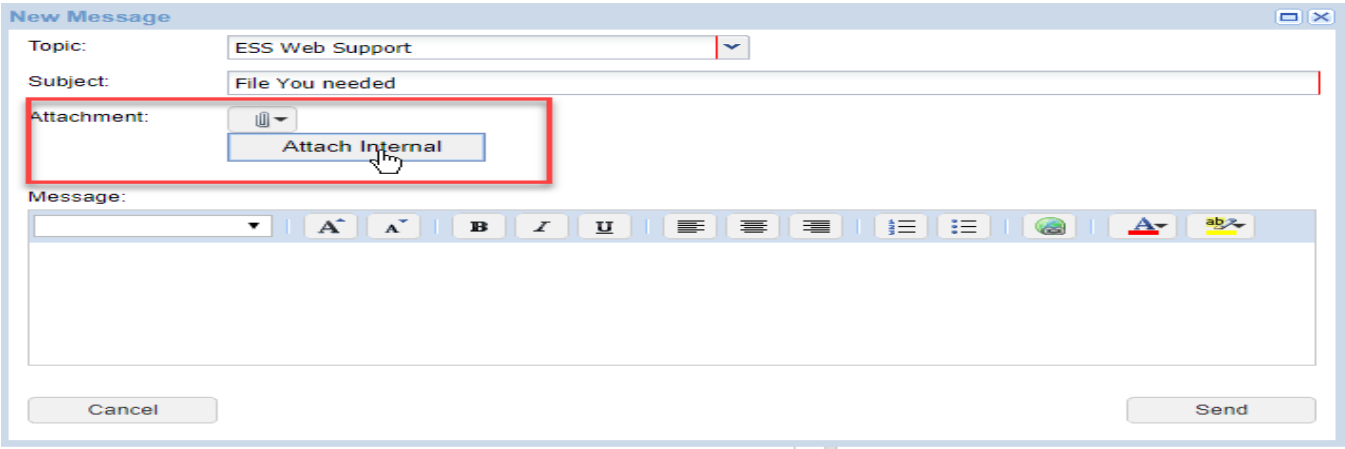




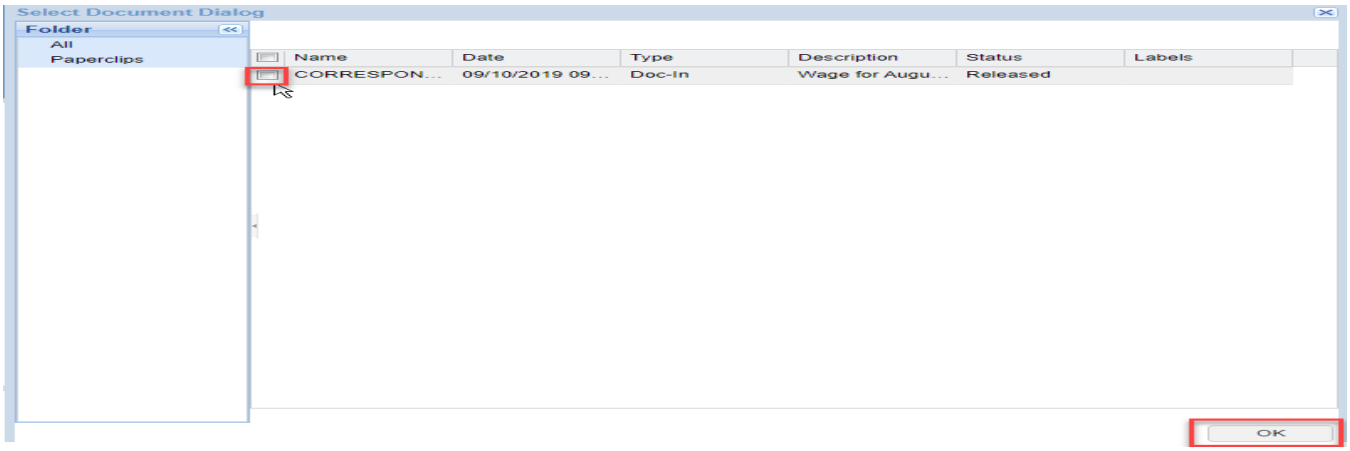
This document is now stored in I-Que and can now be shared securely



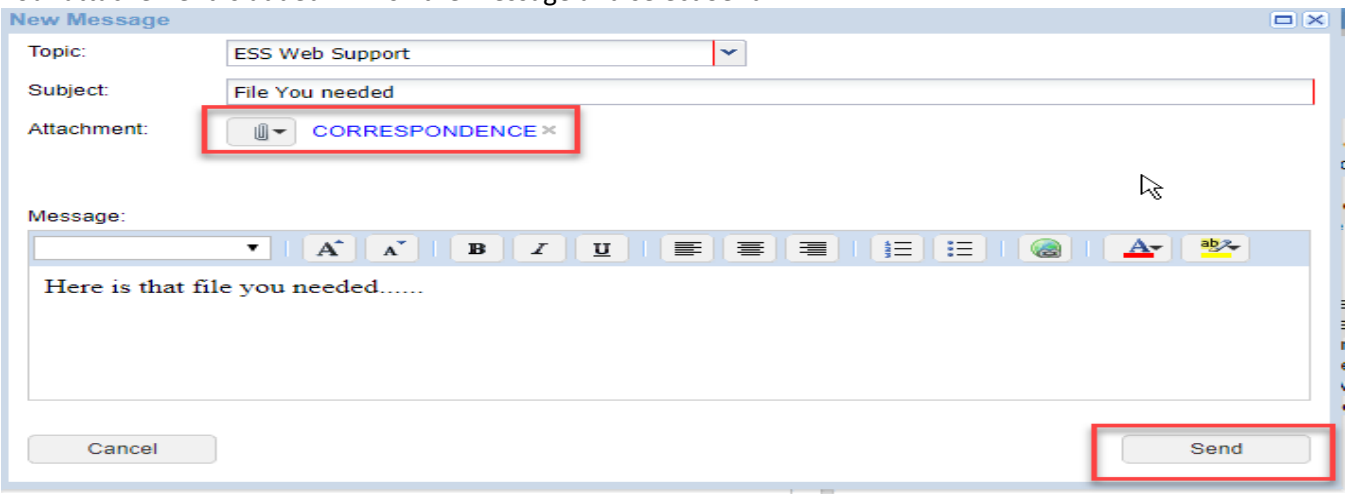
Go back to the Home page and create a new message, you should be able to browse to find this newly added document by selecting Attach Internal



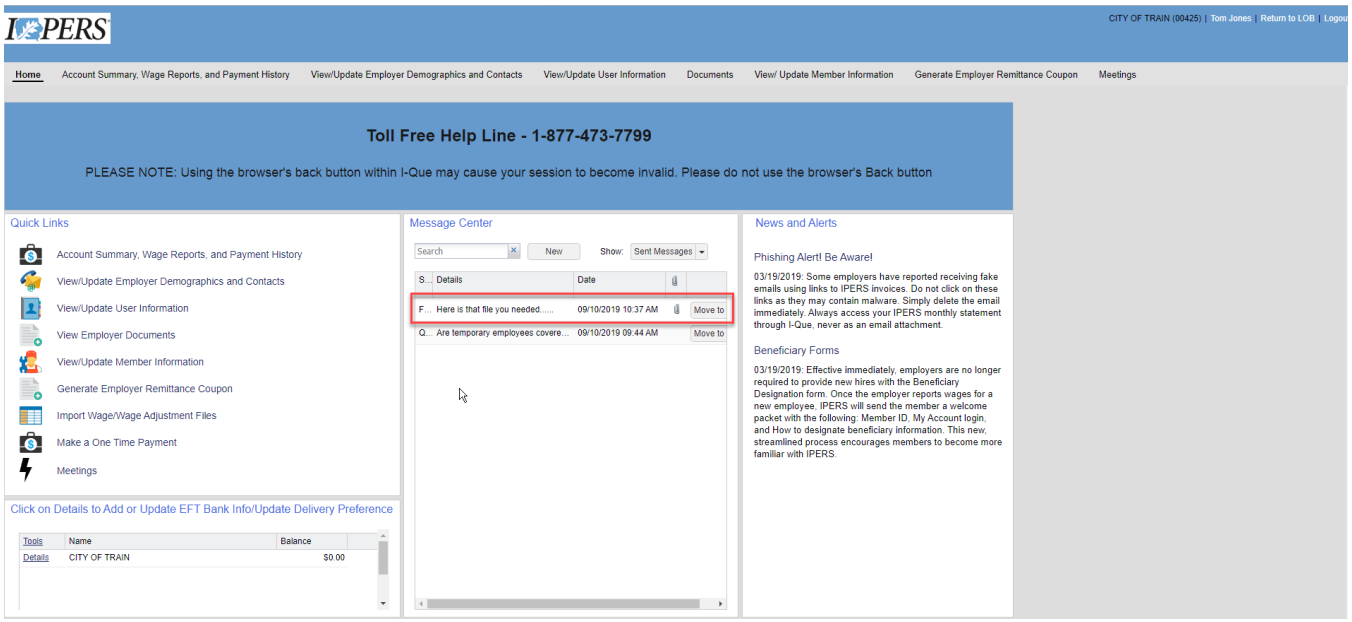
This will take you to the Documents where you just saved the doument you wish to share. Select the box next to the document and then the OK button



Your attachement is added – finish the message and select Send

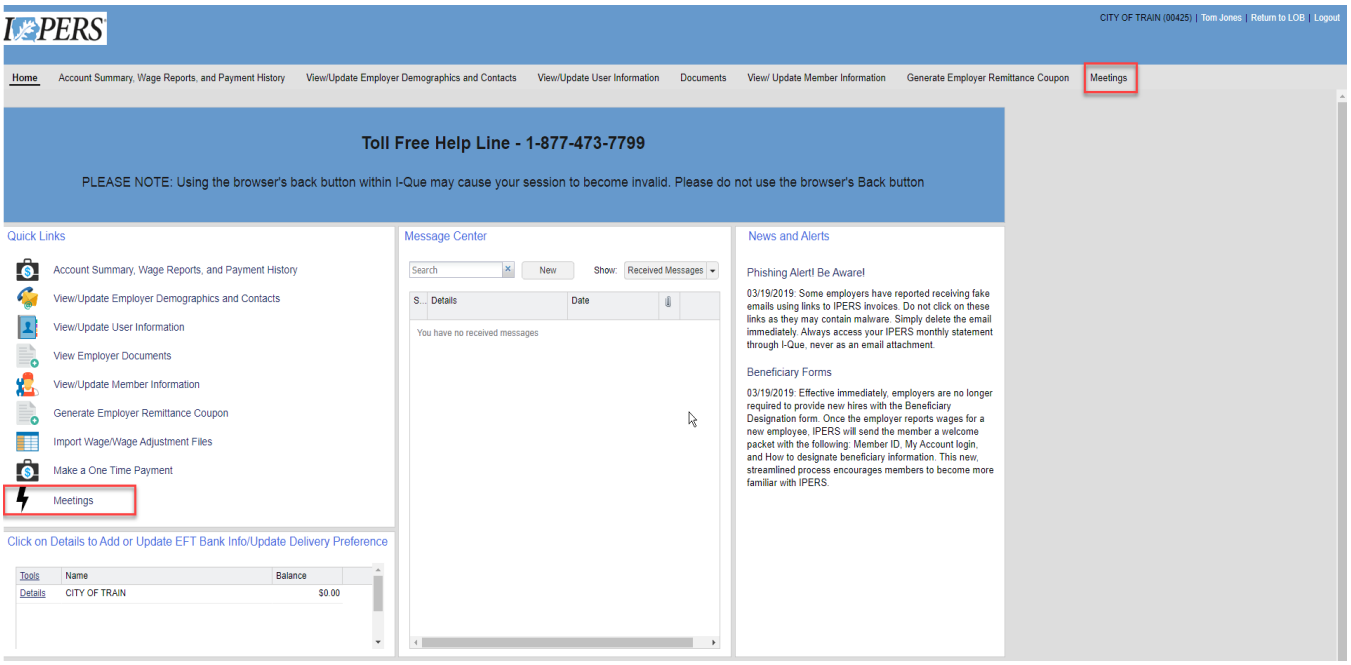


Your message and attachment are now sent securely

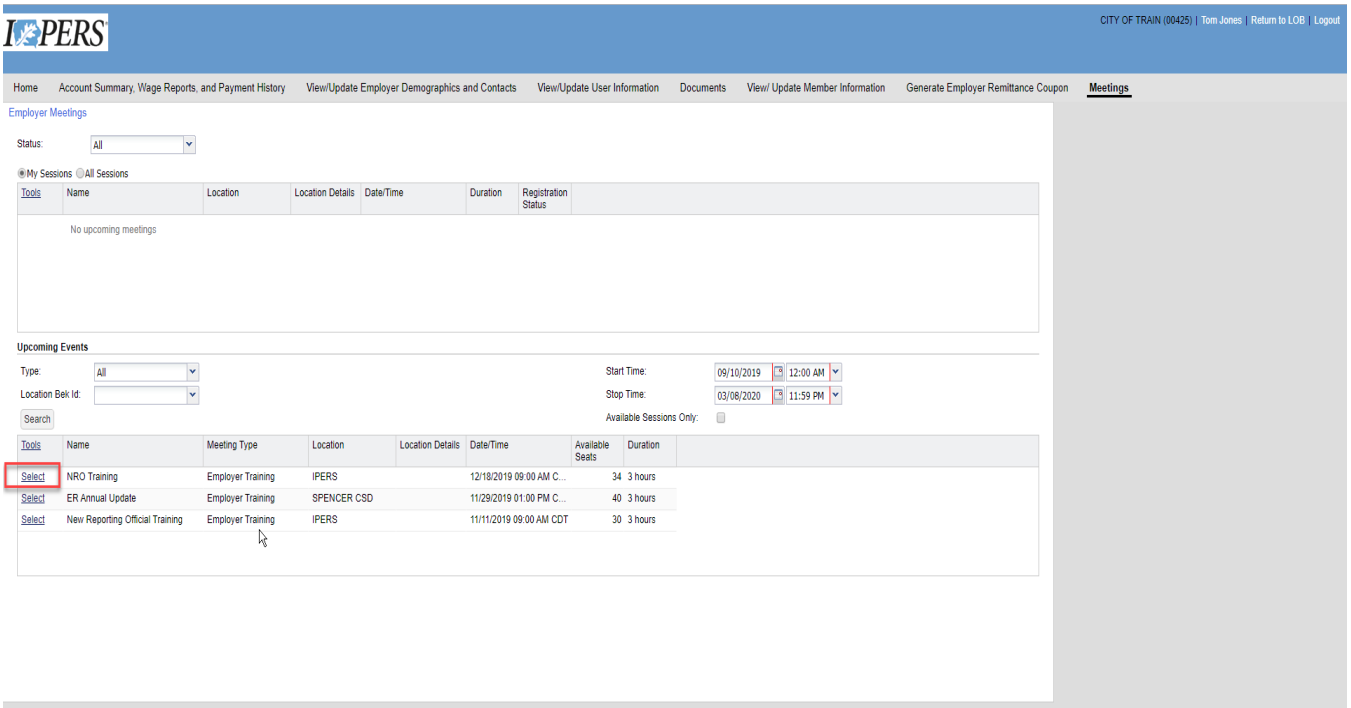


Training Registration

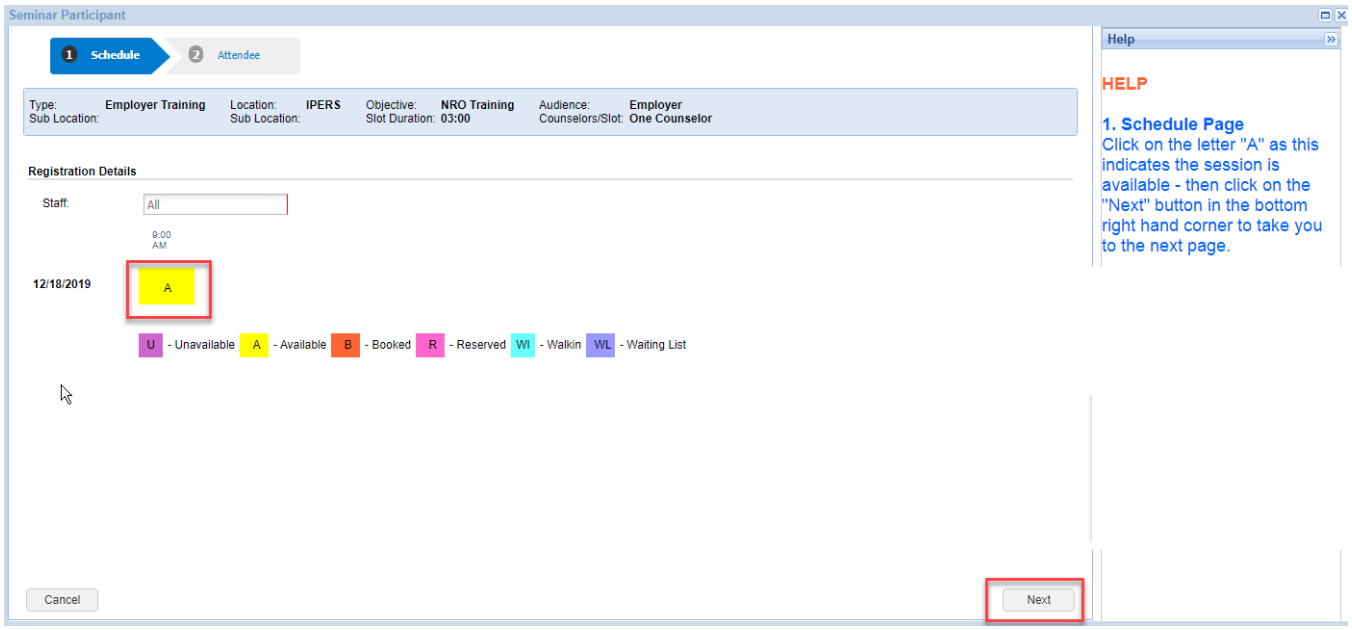
On the home page, select **Meetings**



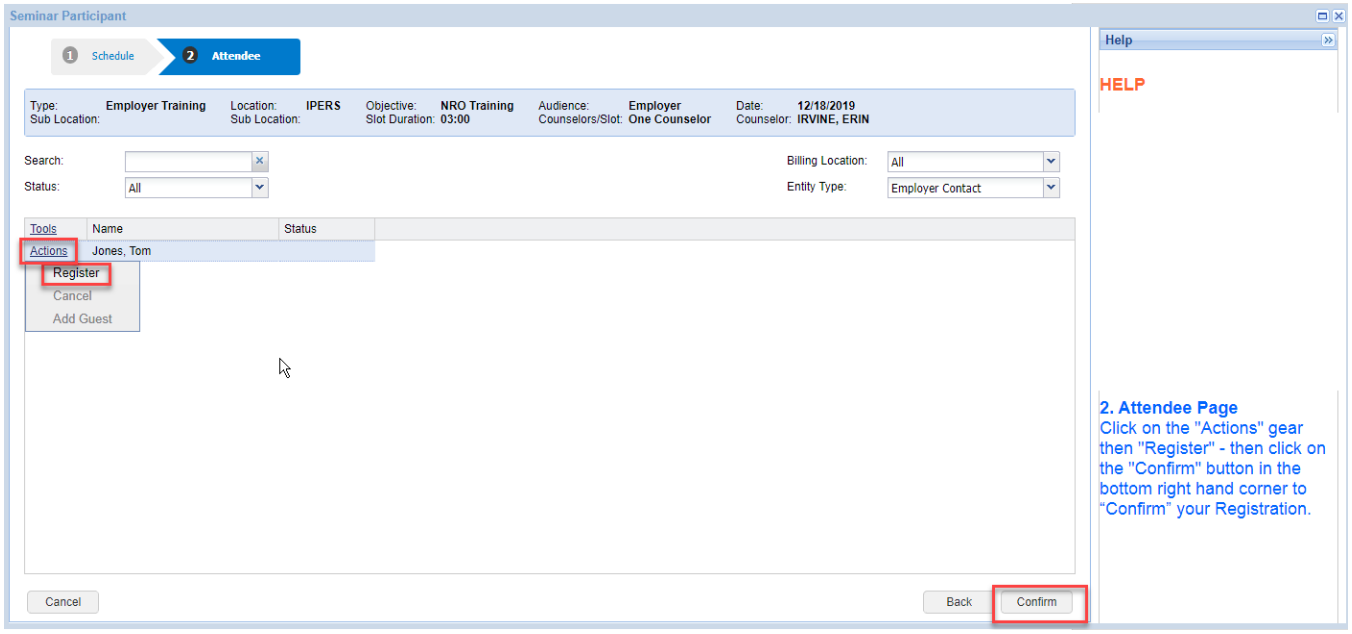
Under the “Upcoming Events” click Select for the session you wish to attend



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

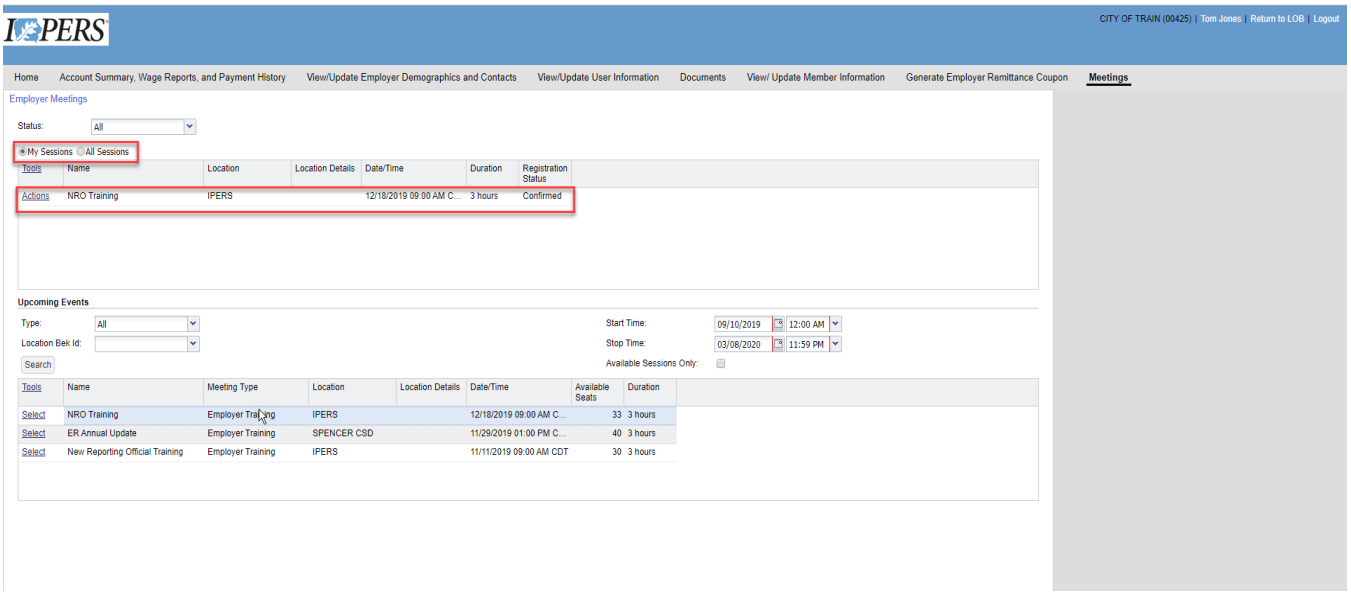


All current Contacts will show – choose the Actions link and Register for each contact that you wish to attend, then select the Confirm button. NOTE - if you are wanting to add an attendee that does not appear on this screen, please add them first as a Contact under the View/Update Employer Demographics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

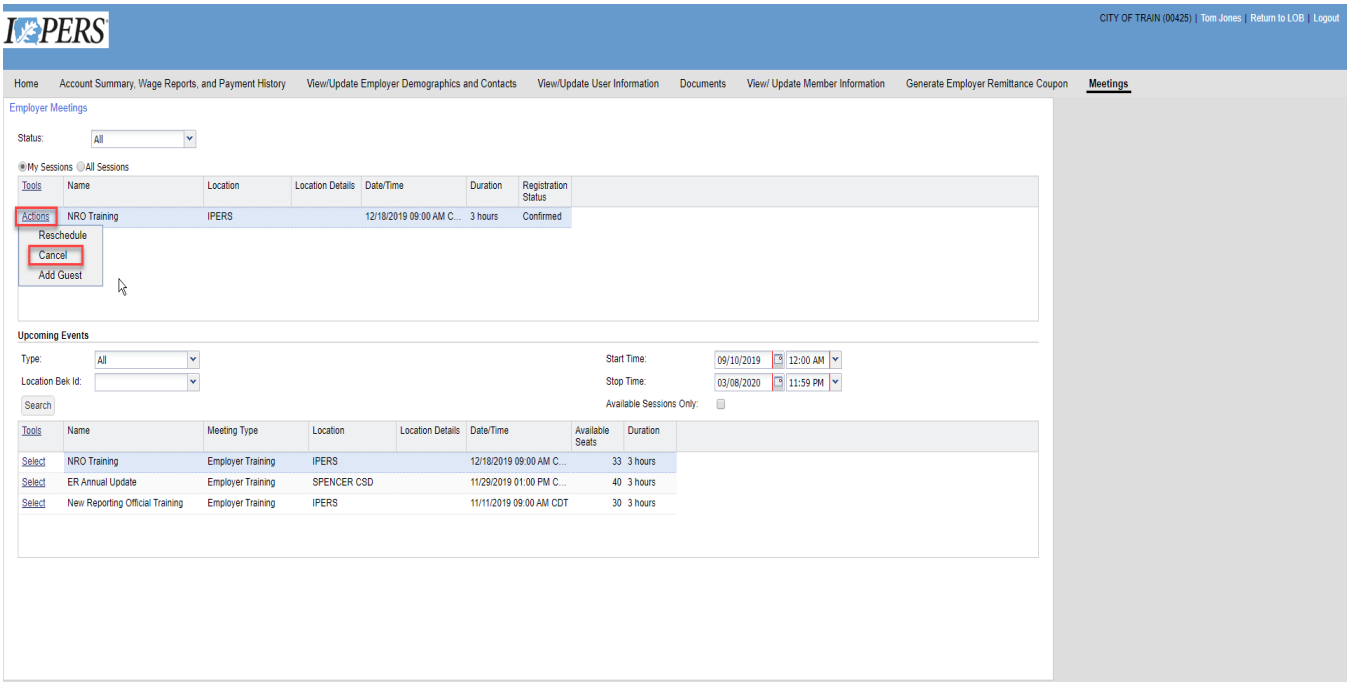


You will be returned to the training registration screen – you will be able to see that you are scheduled for this training session under My Sessions. You will receive a separate email from IPERS confirming your registration.

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.



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



Questions? *Contact us.*

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146.006 10/2019
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