SECTION

2

Web Administrator Roles

Overview of the Web administrator role

The Web administrator has sole administrative control over EDX reporting for your organization, including maintenance and authorization of employer contacts and user accounts. Only the Web administrator can grant login privileges to new payroll specialists in your organization. Additional functions the Web administrator can perform to payroll specialist accounts include:

- updating account profiles,
- resetting account passwords,
- activating accounts,
- inactivating accounts where access is no longer required, and
- unlocking accounts.

Important: Web administrators **do not** create payroll specialist accounts. That is the payroll specialist's responsibility.

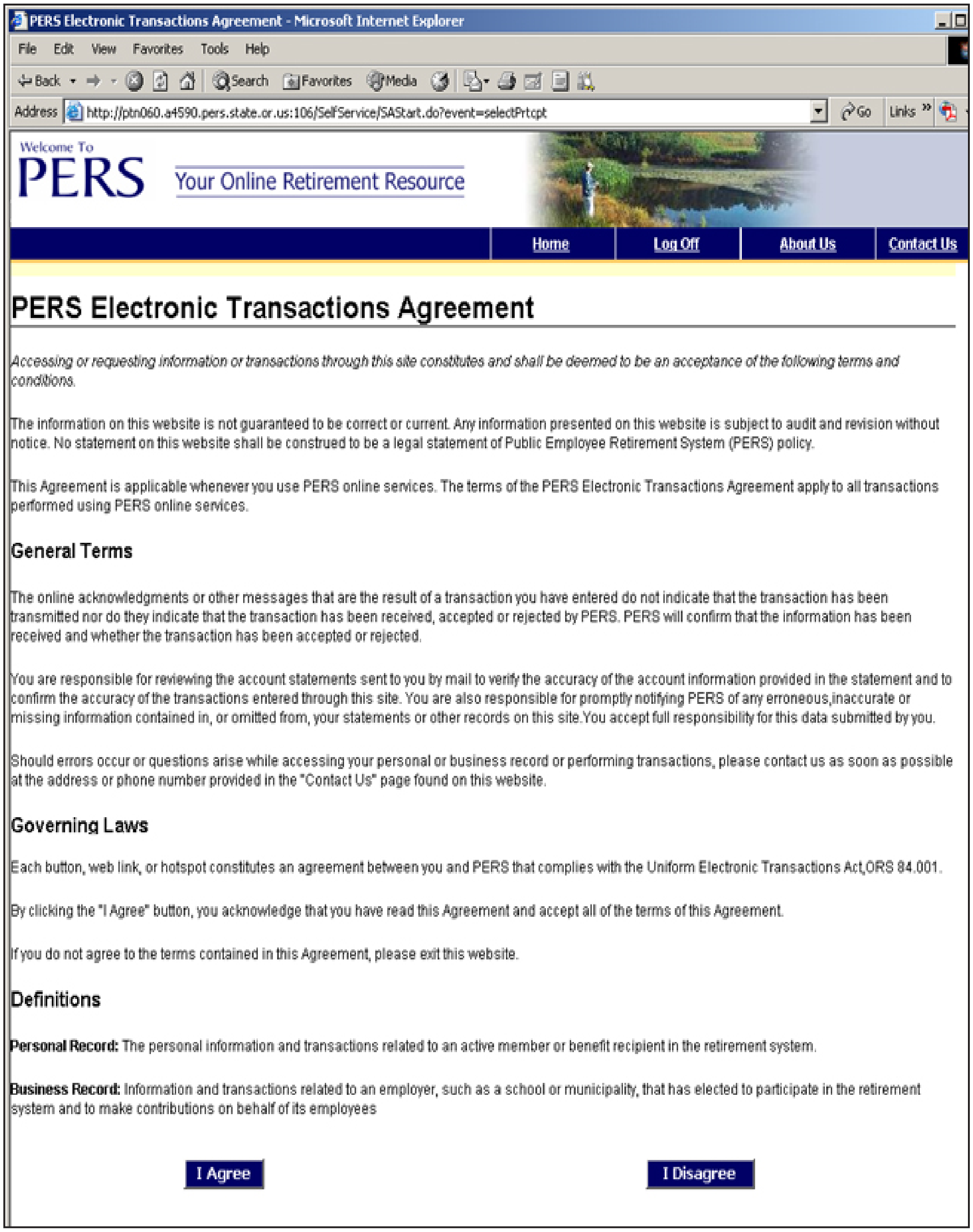
Obtaining a Web administrator account

The reporting official for your agency and the designated Web administrator must complete and sign the Web Administrator Agreement form available on the PERS Employer website at http://oregon.gov/PERS/EMP/section/er_forms/er_forms_index.shtml. Once PERS receives a completed form, it assigns and mails an EDX user ID and password to the designated Web administrator. For more information contact the Employer Service Center.

Logging on to EDX for the first time

1 Log on to EDX following the instructions outlined in "Logging on to EDX" on pages 6–8.

2 Review the *PERS Electronic Transactions Agreement*, and then click the **I Agree** button.


PERS Electronic Transactions Agreement - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://ptn060.a4590.pers.state.or.us:106/SelfService/SAStart.do?event=selectPrtcpt

Welcome To PERS Your Online Retirement Resource

Home | Log Off | About Us | Contact Us

PERS Electronic Transactions Agreement

Accessing or requesting information or transactions through this site constitutes and shall be deemed to be an acceptance of the following terms and conditions.

The information on this website is not guaranteed to be correct or current. Any information presented on this website is subject to audit and revision without notice. No statement on this website shall be construed to be a legal statement of Public Employee Retirement System (PERS) policy.

This Agreement is applicable whenever you use PERS online services. The terms of the PERS Electronic Transactions Agreement apply to all transactions performed using PERS online services.

General Terms

The online acknowledgments or other messages that are the result of a transaction you have entered do not indicate that the transaction has been transmitted nor do they indicate that the transaction has been received, accepted or rejected by PERS. PERS will confirm that the information has been received and whether the transaction has been accepted or rejected.

You are responsible for reviewing the account statements sent to you by mail to verify the accuracy of the account information provided in the statement and to confirm the accuracy of the transactions entered through this site. You are also responsible for promptly notifying PERS of any erroneous,inaccurate or missing information contained in, or omitted from, your statements or other records on this site.You accept full responsibility for this data submitted by you.

Should errors occur or questions arise while accessing your personal or business record or performing transactions, please contact us as soon as possible at the address or phone number provided in the "Contact Us" page found on this website.

Governing Laws

Each button, web link, or hotspot constitutes an agreement between you and PERS that complies with the Uniform Electronic Transactions Act,ORS 84.001.

By clicking the "I Agree" button, you acknowledge that you have read this Agreement and accept all of the terms of this Agreement.

If you do not agree to the terms contained in this Agreement, please exit this website.

Definitions

Personal Record: The personal information and transactions related to an active member or benefit recipient in the retirement system.

Business Record: Information and transactions related to an employer, such as a school or municipality, that has elected to participate in the retirement system and to make contributions on behalf of its employees

I Agree   I Disagree

3 In the **New Password** text box (shown circled), type your new password. **Important:** Passwords must be a minimum of seven characters and must contain three of the four following character types:

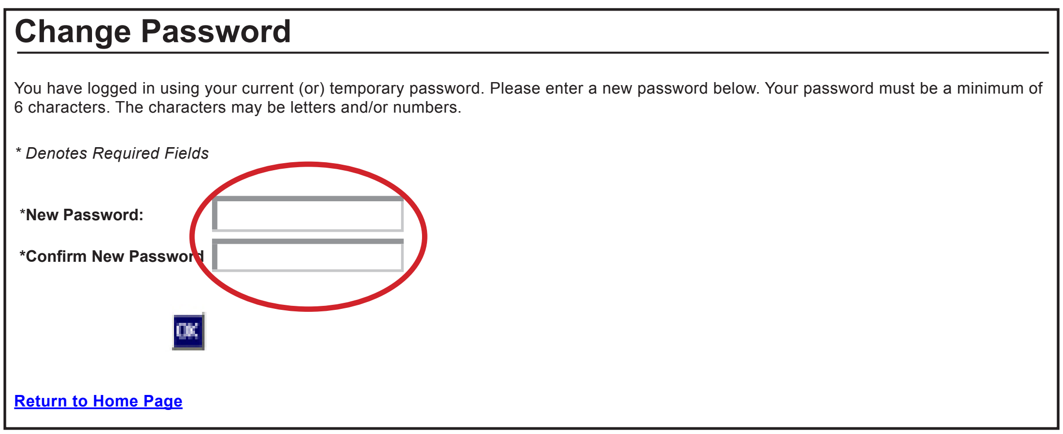
- Uppercase letters (A-Z)
- Lowercase letters (a-z)
- Numeric characters (0-9)
- Non-alphanumeric characters (#, @, %, etc.)

Example: **MyPassw0rd**.

The password you type must not contain three or more characters from your user account name.

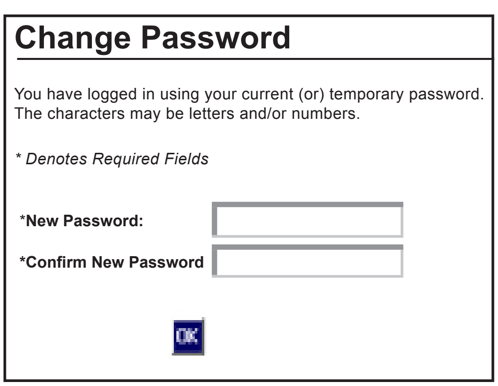
Write down the password for future reference. If you forget your password and you are a:

- Payroll specialist, contact your Web administrator.
- Web administrator, contact the Employer Service Center.

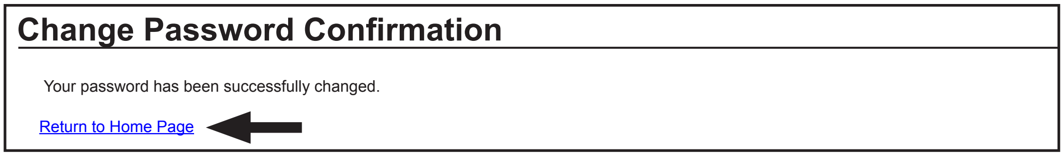


4 In the **Confirm Password** text box, retype your new password.

5 Click the **OK** button; *Change Password Confirmation* confirms EDX has changed your password.



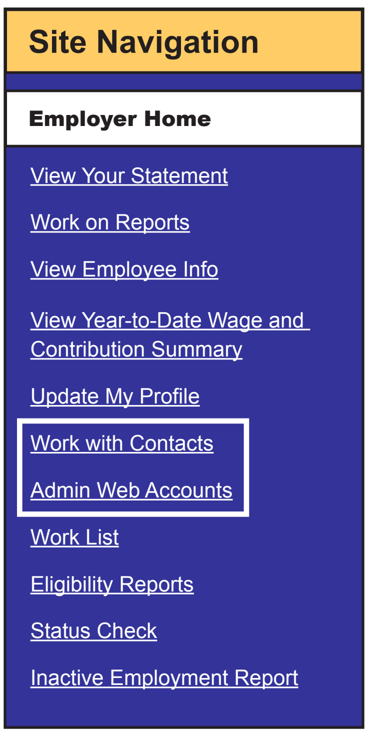
6 Click on the **Return to Home Page** link (indicated by the arrow) to return to the *Employer Home Page* screen.



Maintaining employer Web accounts

Because a Web administrator has access to more EDX functions than payroll specialists, there are two additional links (highlighted by the box) available on the left navigation pane after the Web administrator logs on:

- Work with Contacts
- Admin Web Accounts



Working with contacts is discussed on pages 24–30.

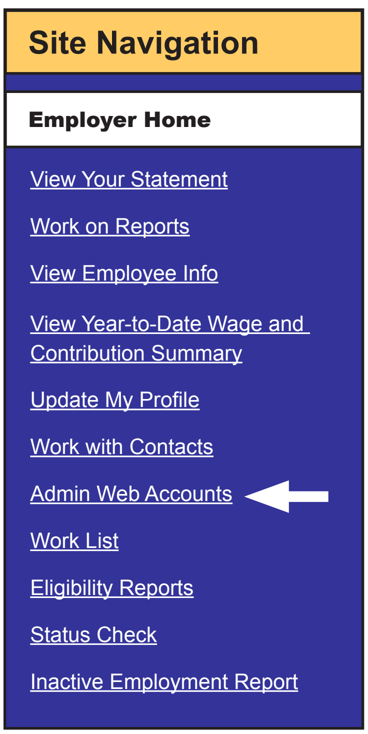
Clicking on the Admin Web Accounts link takes you to the *Maintain Employer Web Accounts* screen, where you can perform various tasks related to controlling the payroll specialist accounts for your organization.

1 Log on to EDX following the instructions outlined on pages 6–8.

2 In the Selected column (highlighted by the box) on the *Employer Home Page* screen, click on the **select** link associated with the employer account you want to work on.

Note: The icon in the Selected column denotes which employer is selected. If you have access rights to only one employer, it is already selected when you log on to EDX.

3 Click on the **Admin Web Accounts** link (indicated by the arrow) to view the *Maintain Employer Web Accounts* screen.



The *Maintain Employer Web Accounts* screen shows the various functions a Web administrator can perform to a payroll specialist's account.

Overview of account status

Payroll specialist accounts, once created, can be in one of four statuses:

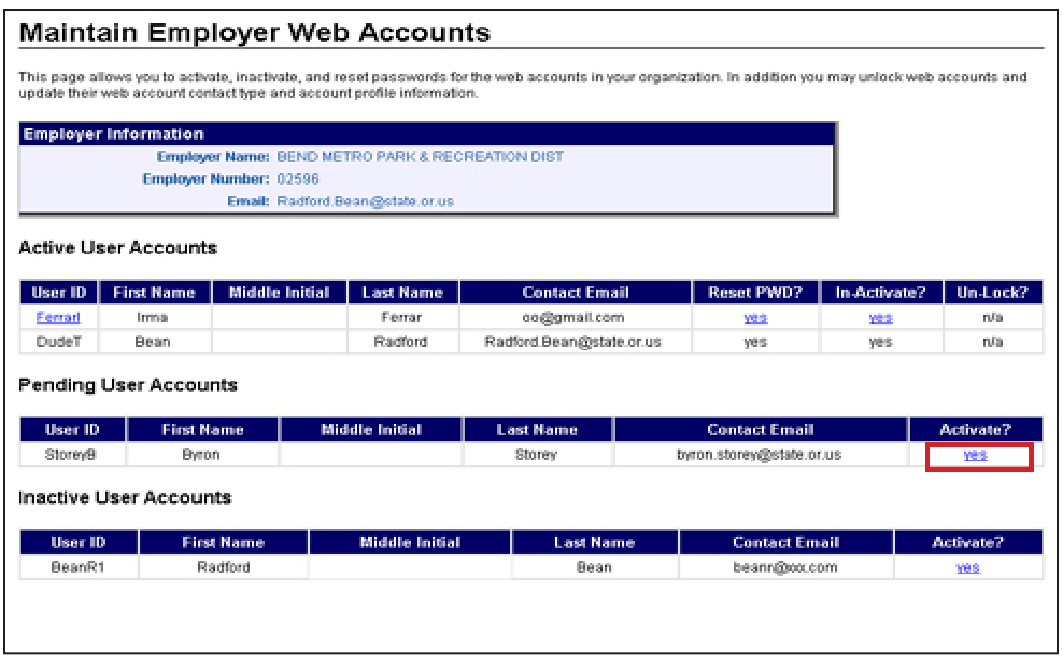
- **Pending**—The user has created a new account via the self-registration process and is waiting for the Web administrator to activate his or her account. The user cannot log on to EDX or work with the specific employer account until the Web administrator activates the account.
- **Active**—An employer must have at least one active Web administrator or payroll specialist account to log on to EDX.
- **Inactive**—The user will only be allowed to log on to EDX if he or she has at least one active employer account. However, the user will not be able to view or perform work for any employer account the Web administrator inactivated for that user. If the user has no active accounts, he or she will not be able to log on to EDX.
- **Locked**—The user has made three failed attempts to log on to EDX and cannot log on until the Web administrator unlocks the account.

Activating a payroll specialist account

As the Web administrator, it is your responsibility to take appropriate measures to verify the identity of anyone requesting access to the website before activating his or her account.

1 Follow the steps outlined on pages 17–18.

2 Locate the new user's account under the Pending User Accounts section, and then click on the **yes** link under the Activate? column (highlighted by the box) corresponding to that account to display the *Choose a Contact Type* screen.



Maintain Employer Web Accounts

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

Employer Information

Employer Name: BEND METRO PARK & RECREATION DIST
Employer Number: 02596
Email: Radford.Bean@state.or.us

Active User Accounts

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
FerrarI	Irma		Ferrar	oo@gmail.com	yes	yes	n/a
DudeT	Bean		Radford	Radford.Bean@state.or.us	yes	yes	n/a

Pending User Accounts

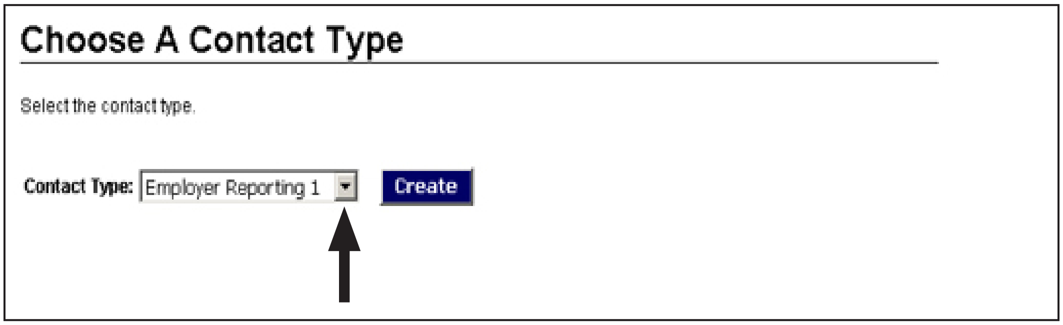
User ID	First Name	Middle Initial	Last Name	Contact Email	Activate?
StoreyB	Byron		Storey	byron.storey@state.or.us	yes

Inactive User Accounts

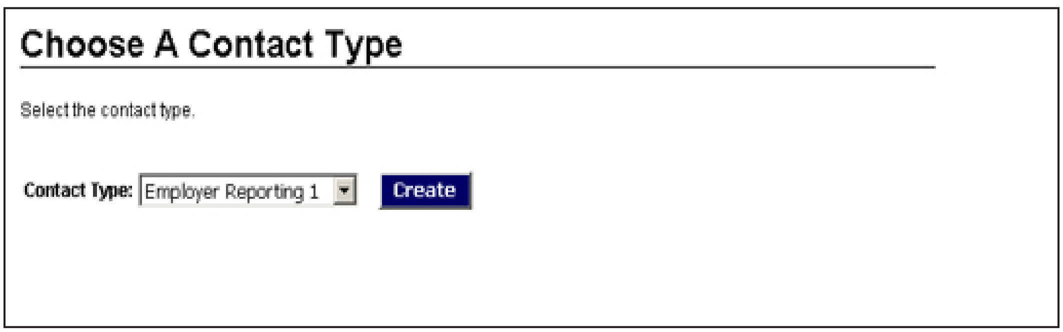
User ID	First Name	Middle Initial	Last Name	Contact Email	Activate?
BeanR1	Radford		Bean	beanr@xx.com	yes

3 Click the down arrow (indicated by the arrow) next to the **Contact Type** field and select the contact type you want to apply to the new payroll specialist's account.

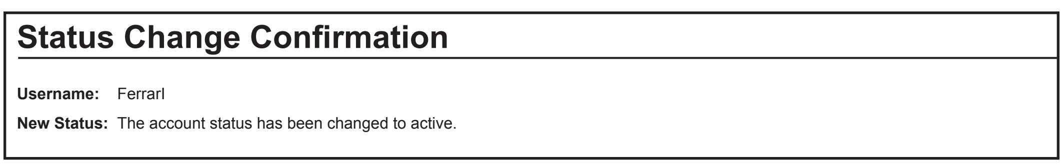
You can designate up to 15 payroll specialists, numbered 1-15. You must assign each a different contact type. The contact type you designate as Employer Reporting 1 will be the user who receives EDX e-mail notifications. If there is no Employer Reporting 1 contact assigned, you will receive all EDX e-mail notifications.



4 Click the **Create** button to view the *Status Change Confirmation* screen.



The *Status Change Confirmation* screen confirms the account status is now active. Once you activate the account, the user can immediately log on and begin using EDX.

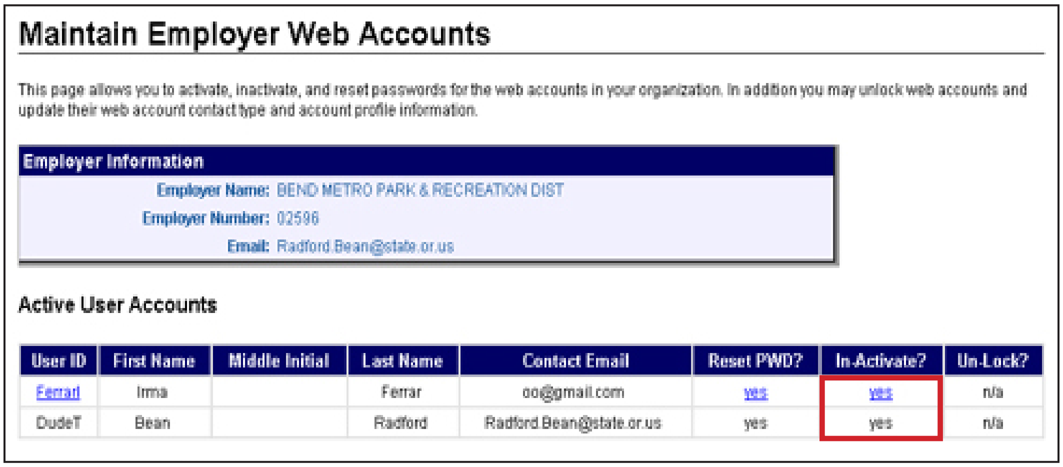


Deactivating a payroll specialist account

Deactivate a payroll specialist account any time you want to remove a person from having EDX access. To remove a payroll specialist account, you must first deactivate the account and then delete the individual from the contact list.

1 Follow the steps outlined on pages 17–18.

2 Under the Active User Accounts section, locate the account you want to deactivate, and then click on the **yes** link under the In-Activate? column (highlighted by the box) corresponding to that account.



Maintain Employer Web Accounts

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

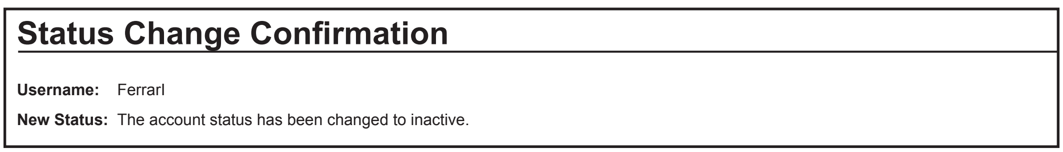
Employer Information

Employer Name: BEND METRO PARK & RECREATION DIST
Employer Number: 02596
Email: Radford.Bean@state.or.us

Active User Accounts

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
Ferrarl	Irma		Ferrar	oo@gmail.com	yes	yes	n/a
DudeT	Bean		Radford	Radford.Bean@state.or.us	yes	yes	n/a

The *Status Change Confirmation* screen confirms the account status is now inactive.



Status Change Confirmation

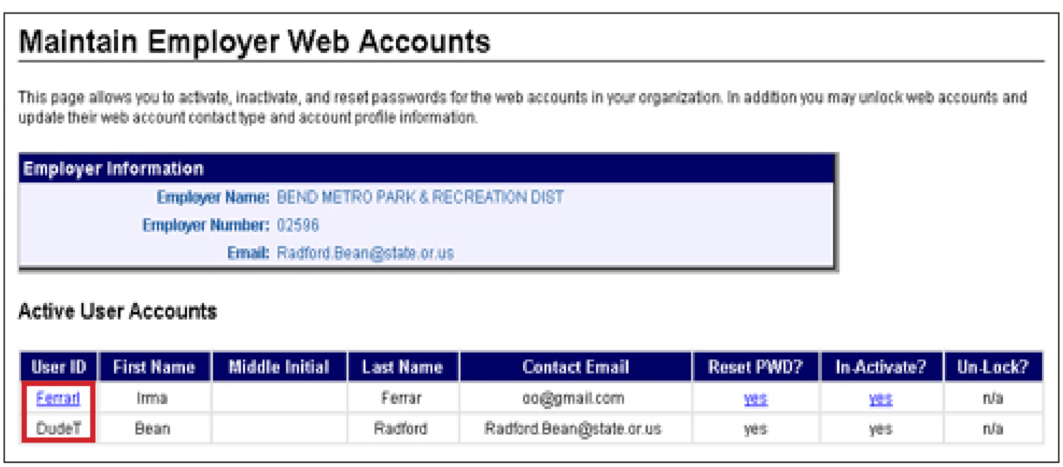
Username: Ferrarl
New Status: The account status has been changed to inactive.

3 Delete the payroll specialist from the contact list by following the instructions outlined in "Deleting contact information" on pages 29–30.

Updating a payroll specialist account

1 Follow the steps outlined on pages 17–18.

2 Under Active User Accounts, locate the user ID link in the User ID column (highlighted by the box) of the account you want to update and click on that link.



Maintain Employer Web Accounts

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

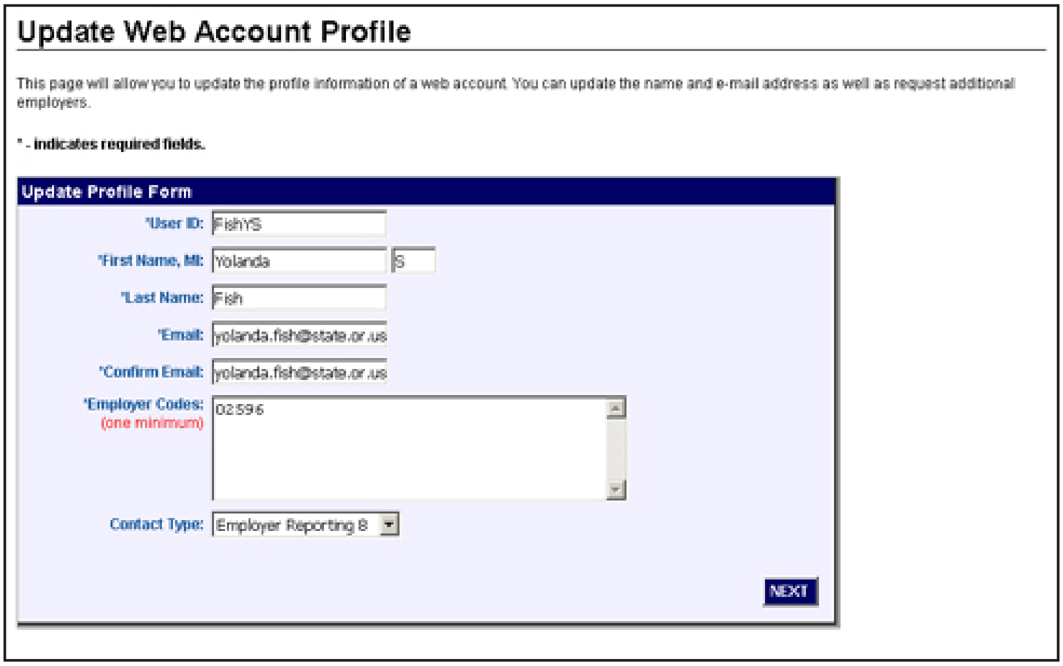
Employer Information

Employer Name: BEND METRO PARK & RECREATION DIST
Employer Number: 02596
Email: Radford.Bean@state.or.us

Active User Accounts

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
Ferrarl	Irma		Ferrar	oo@gmail.com	yes	yes	n/a
DudeT	Bean		Radford	Radford.Bean@state.or.us	yes	yes	n/a

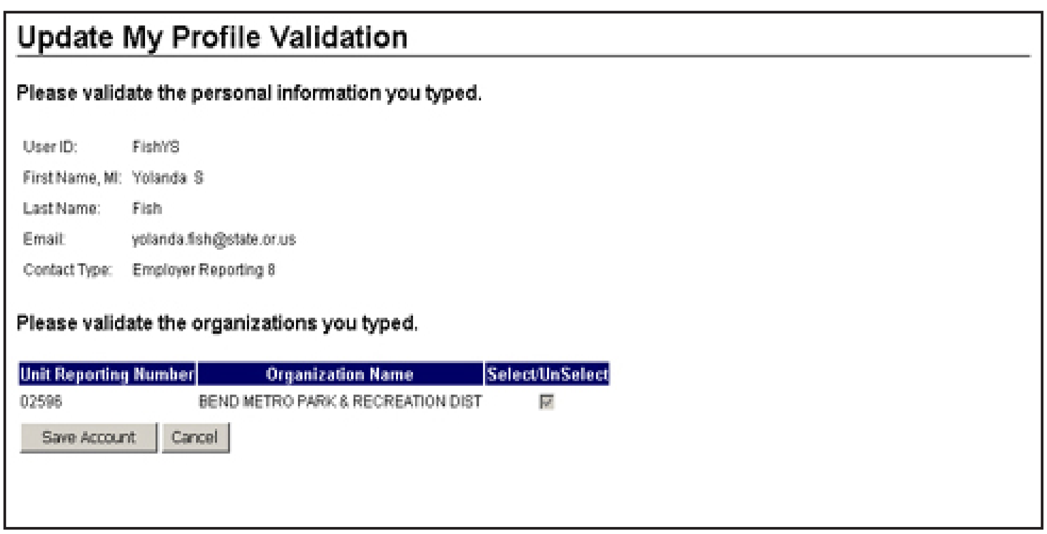
3 Modify the user's profile information, as necessary, and then click the **NEXT** button to display the *Update My Profile Validation* screen.



4 Verify the information displayed on the *Update My Profile Validation* screen pertaining to the user's personal profile details and requested employers is correct.

Note: Check marks in grayed-out check boxes cannot be unchecked. Check boxes become grayed out once a payroll specialist account has been saved.

5 Click the **Save Account** button to accept the changes; otherwise, click the **Cancel** button to return to the previous page to make the necessary corrections.



The *Update My Profile Confirmation* screen confirms you have updated your account information.

Update My Profile Confirmation

Your account information has been updated. New employer accounts requested will be in Pending status until activated by the employer's web administrator.

Resetting a payroll specialist password

1 Follow the steps outlined on pages 17–18.

2 Locate the user under the Active User Accounts section whose password you want to reset, and then click on the **yes** link under the Reset PWD? column (highlighted by the box) corresponding to that account.

Maintain Employer Web Accounts

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

Employer Information

Employer Name: BEND METRO PARK & RECREATION DIST
Employer Number: 02596
Email: Radford.Bean@state.or.us

Active User Accounts

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
Ferrari	Irma		Ferrar	oo@gmail.com	yes	yes	n/a
DudeT	Bean		Radford	Radford.Bean@state.or.us	yes	yes	n/a

Pending User Accounts

The *Reset Password Confirmation* screen confirms you have reset the payroll specialist's password and that EDX has sent the user an e-mail containing a temporary password. (Refer to "Changing your password" on pages 11–12 on how to change your temporary password.)

Reset Password Confirmation

Username: FishYS
Status: Temp Password Mailed To User **FishYS**

Unlocking a payroll specialist account

A user account will become locked if the user makes three unsuccessful attempts to log on to EDX. When that occurs, you must unlock the account.

1 Follow the steps outlined on pages 17–18.

2 Locate the locked account under the Active User Accounts section, and then click on the **yes** link under the Un-Lock? column (highlighted by the box) corresponding to that account.

Maintain Employer Web Accounts

This page allows you to activate, inactivate, and reset passwords for the web accounts in your organization. In addition you may unlock web accounts and update their web account contact type and account profile information.

Employer Information

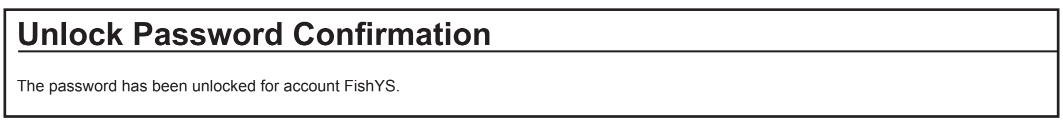
Employer Name: PUBLIC EMPLOYEES RETIREMENT SYSTEM
Employer Number: 01061
Email: beanr@state.or.us

Active User Accounts

User ID	First Name	Middle Initial	Last Name	Contact Email	Reset PWD?	In-Activate?	Un-Lock?
DianaR	Rose		Diana	abc@xxx.com	yes	yes	yes
RobinsonS	Steven		Robinson	abc@claremont.com	yes	yes	n/a
SledgeP	Paul		Sledge	beanr@state.or.us	yes	yes	n/a

Pending User Accounts

The *Unlock Password Confirmation* screen confirms you have unlocked the password.



Unlock Password Confirmation

The password has been unlocked for account FishYS.

Employer contact information

EDX stores employer contact information for all authorized users and other contacts identified for your organization.

This information has two primary purposes:

1. PERS staff uses it to phone, mail, fax, or e-mail employer reporting contacts.
2. EDX uses it to send e-mail notifications.

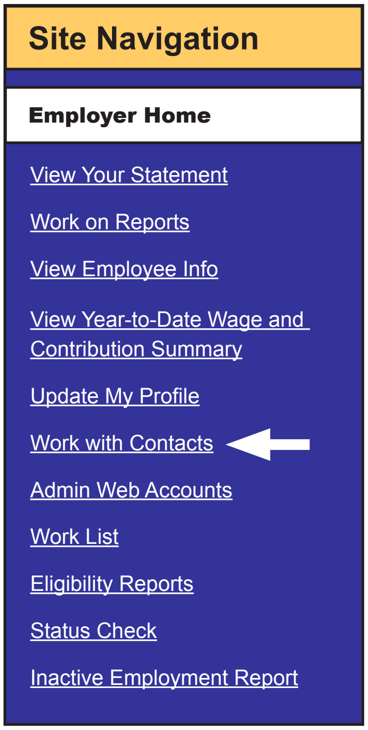
   The contact you designate as Employer Reporting 1 will be the user who receives EDX e-mail notifications. As Web administrator, if you do not assign an Employer Reporting 1 contact, you will receive all EDX e-mail notifications.

Adding contact information

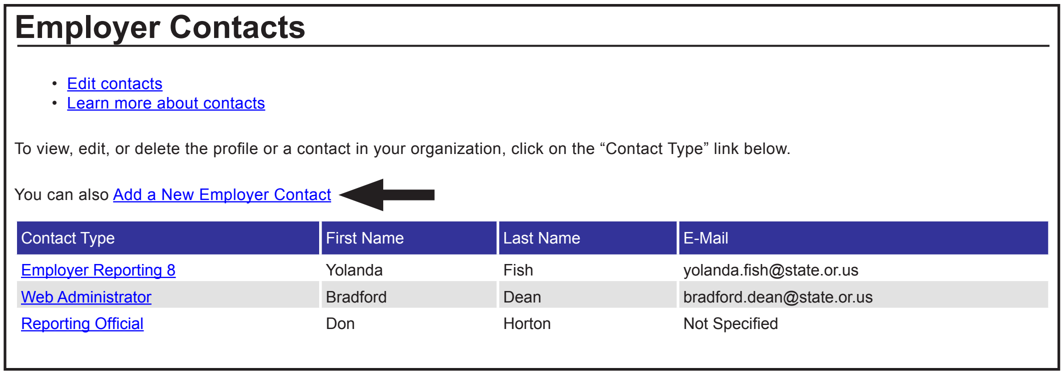
By adding contact information, you can develop a contact list of employees in your organization authorized to use EDX and assign a reporting role to each authorized user.

Important: Adding contact information does not create an EDX user account. Only an individual requesting EDX access can create a user account. For more information on creating a user account, see "Creating a payroll specialist account" on pages 32–36.

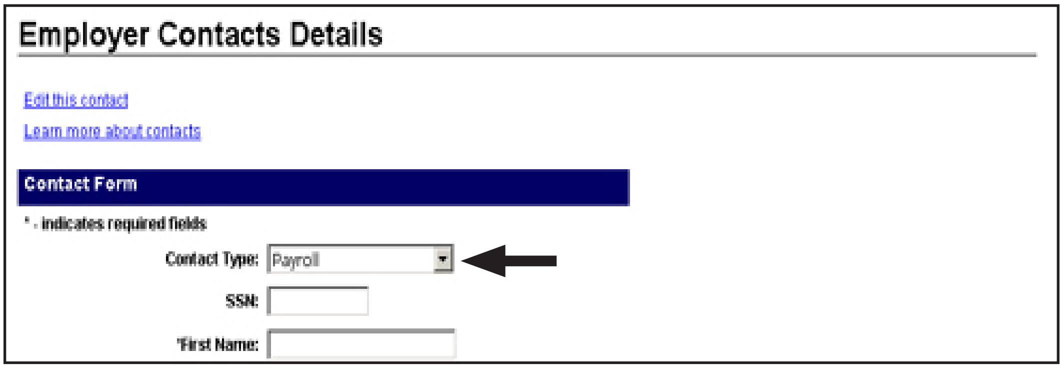
1 Click on the **Work with Contacts** link (indicated by the arrow) to display the *Employer Contacts* screen.



2 Click on the **Add a New Employer Contact** link (indicated by the arrow) to display the *Employer Contacts Details* screen.

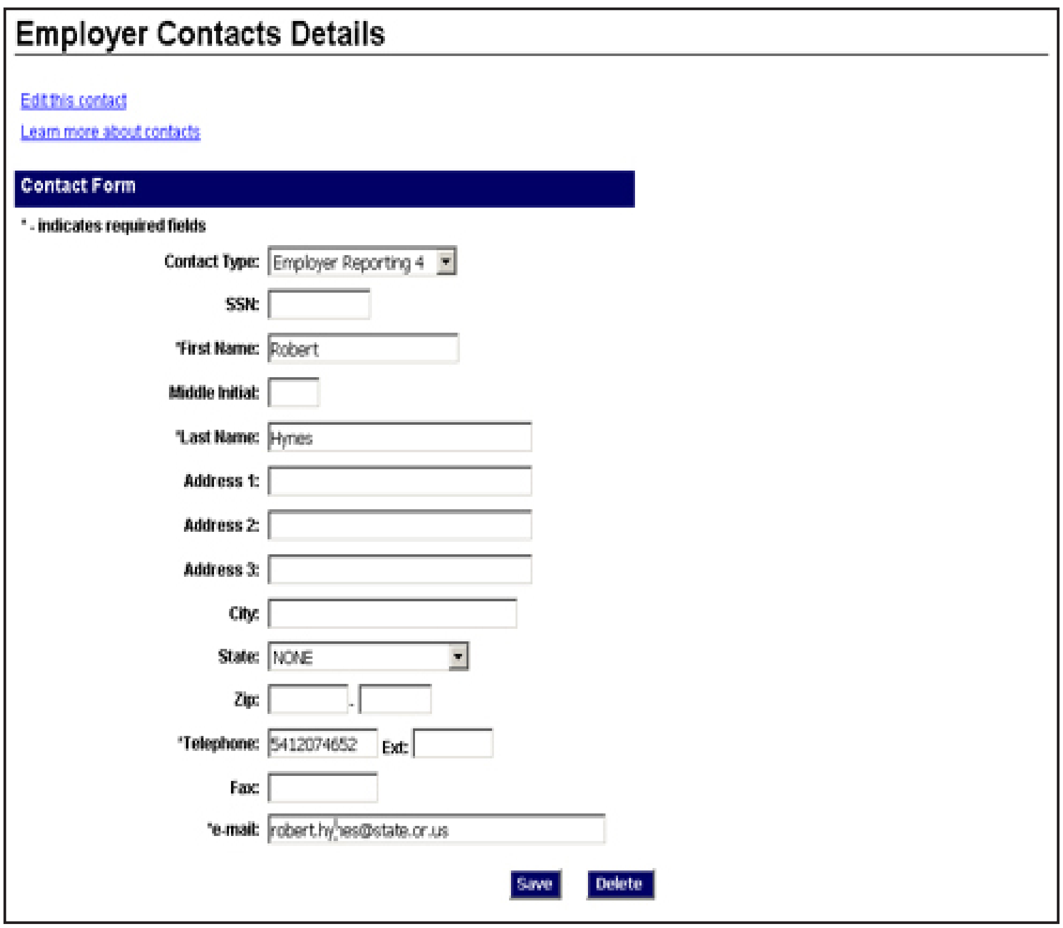


3 Click the **Contact Type** down arrow (indicated by the arrow) and select a contact type from the drop-down list.

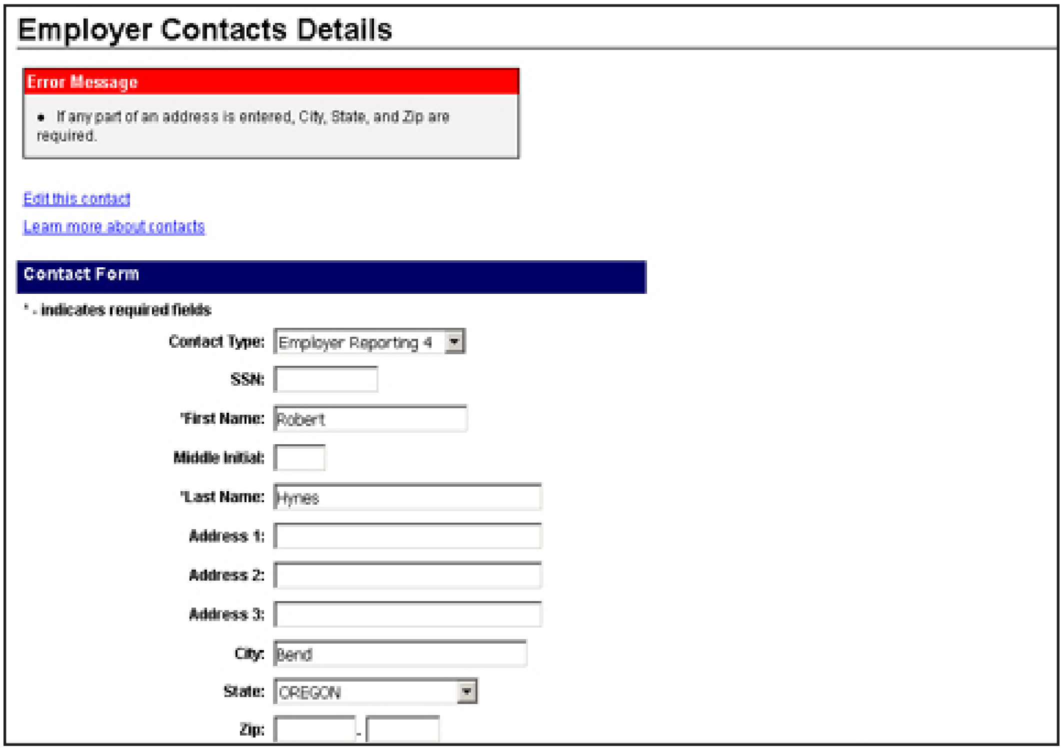


4 Type data into the required **First Name**, **Last Name**, **Telephone**, and **e-mail** text boxes. The text boxes designated by the asterisk are the only ones you must complete.

5 Click the **Save** button to return to the *Employer Contacts* screen.



Note: If you enter address information, you must fill in the **Address 1**, **City**, **State**, and **Zip Code** fields. Leaving any one of these fields blank will result in an error message, as shown below.

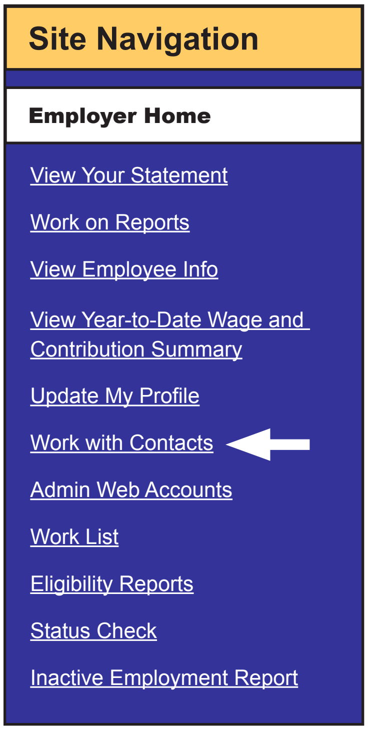


Editing contact information

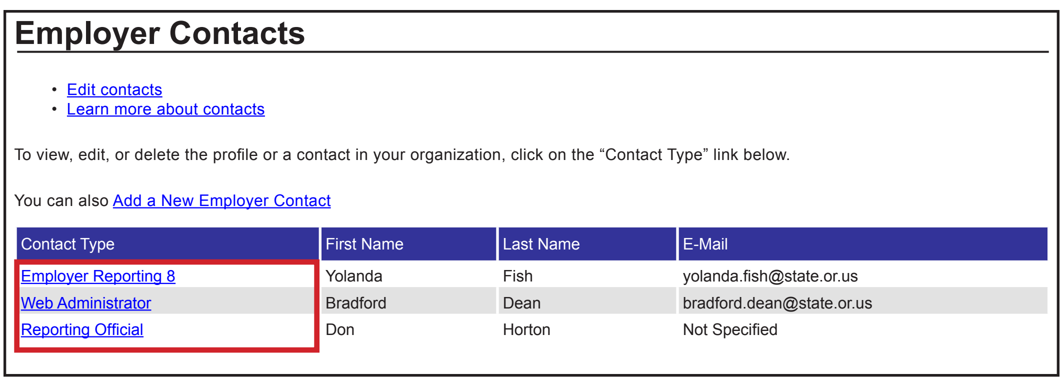
You must edit the information separately for each contact. You can edit the following information:

- Address
- City
- State
- Zip
- Telephone
- Fax
- E-mail address

1 Click on the **Work with Contacts** link (indicated by the arrow) to display the *Employer Contacts* screen.



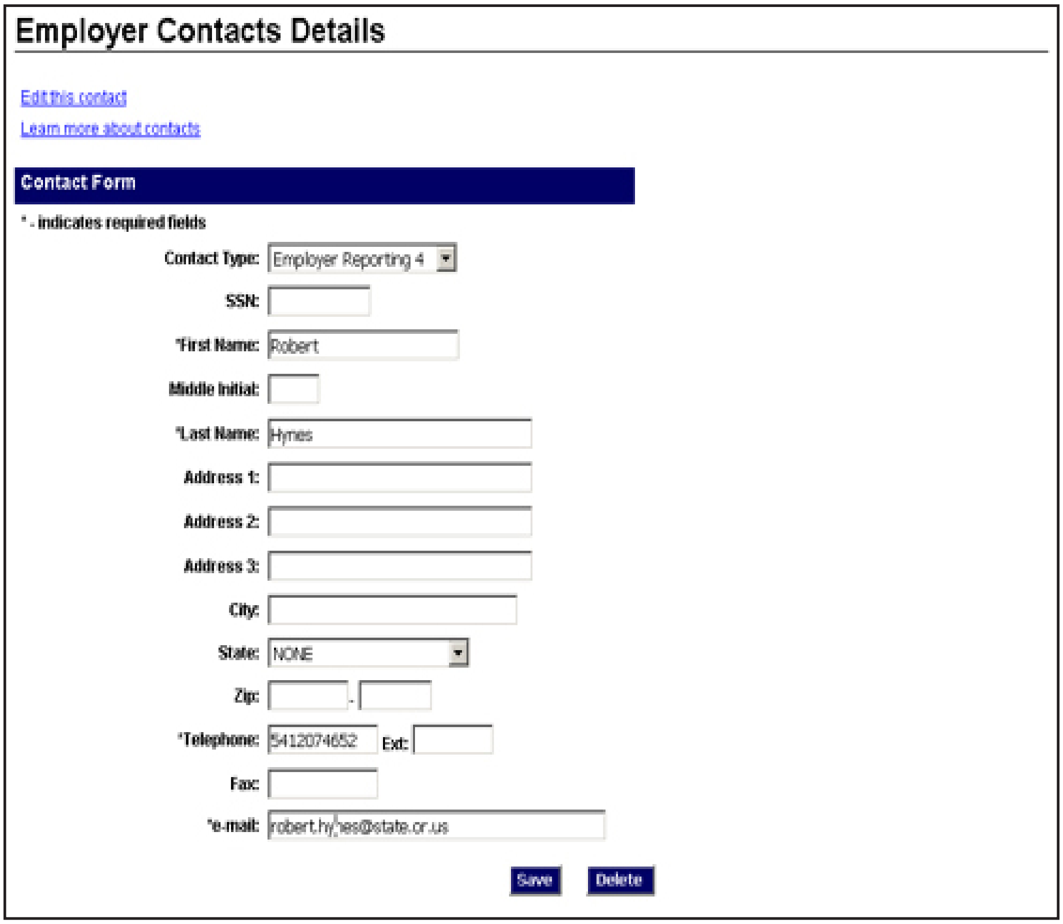
2 Click on the **Contact Type** link (highlighted by the box) to select the contact you want to edit. The *Employer Contacts Detail* screen opens, displaying the details of the selected contact.



3 Modify the contact information as needed.

Note: When updating a contact’s information, you cannot modify **SSN**, **First Name**, **Middle Initial**, or **Last Name**; these fields are locked and no changes can be made. If an error exists in any of these fields, you must delete and re-create the employer contact. (See the topic “Adding contact information” on pages 24–27.)

4 Click the **Save** button; EDX returns you to the *Employer Contacts* screen.

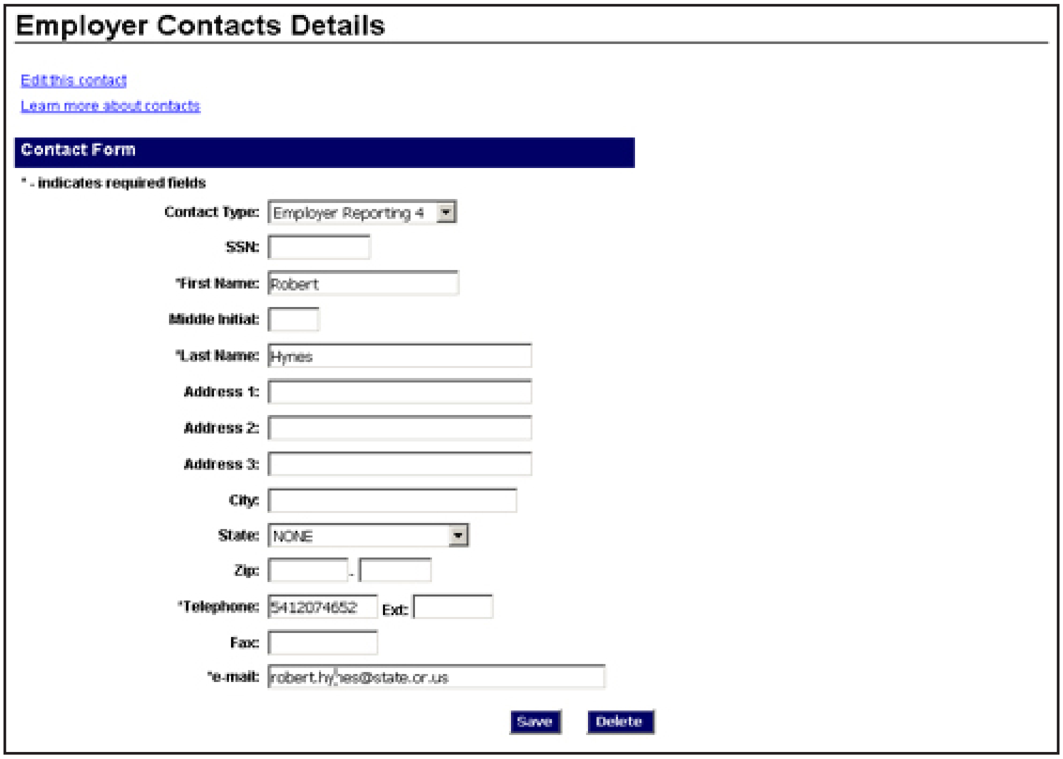


Deleting contact information

Important: Deleting a payroll specialist's contact information prevents that user from logging on to EDX. If you only want to deactivate a payroll specialist account but maintain the contact information, do not proceed further.

1 Follow steps 1–2 outlined in the previous topic to view *Employer Contacts Details*.

2 Click the **Delete** button.



3 Click the **OK** button when prompted by *Contact Delete Confirmation*; EDX returns you to *Employer Contacts*.