



## **New Mexico Educational Retirement Board Employer Self Service (ESS) Tutorial**

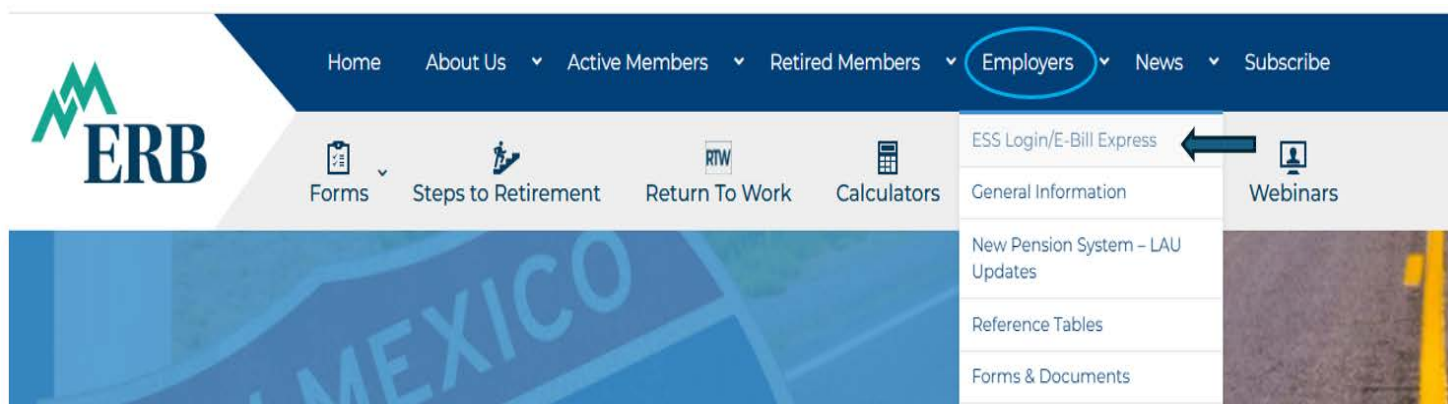
The online Employer Self Service is for ERB employer use only.  
An ERB employer is a NM Public School K-12, a NM public college or university.  
Each employer has designated individuals who use this service.

This tutorial will guide you with step by step instructions for each menu item in the ESS.

If you have questions or problems about your ERB account or the ESS,  
send an email to [lau.help@erb.nm.gov](mailto:lau.help@erb.nm.gov)

New Mexico Educational Retirement Board  
5211 Las Soleras Drive, Santa Fe, NM 87507  
6201 Uptown Blvd. NE Suite 204, Albuquerque, NM 87110  
Toll Free Number: 1-800-663-1919 Fax: (855) 214-0835

Go to [www.erb.nm.gov](http://www.erb.nm.gov) and click on the “Employers” link which is located in the top banner.



## Employer Self-Services (ESS) Portal



Click UPLOAD FILES

You will be asked for your Employer Code. Your employer code is 5 digits. If you do not have this information, please contact ERB by sending an email to [lau.help@erb.nm.gov](mailto:lau.help@erb.nm.gov).

You will have a temporary password the first time you log in. Your temporary password is your 3 letter school abbreviation in ALL CAPS followed by your 5 digit employer code. For example XXX01234.

Click “Log In”

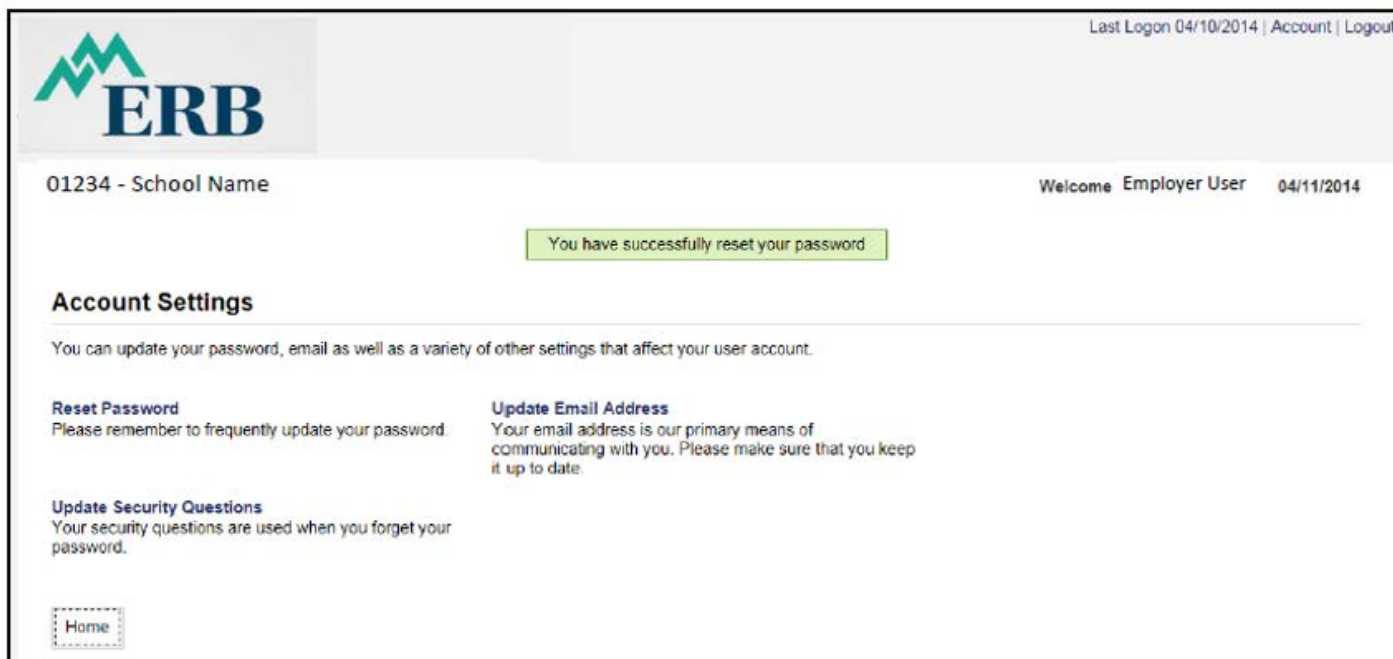
You will be re-directed to a “Reset Password” screen.

Enter your temporary password, your new password, confirm your new password.

Click “Save”

You will be directed to the “**Account Settings**” page. You can click “**Home**” to proceed with ESS.

The **Account Settings** page will allow you to reset your password, update your security questions and update your email address. You can find this page by clicking “**Account**” in the upper right corner. When finished, click “**Home**.”



The screenshot displays the ERB (Education Resource Bank) Account Settings page. At the top left is the ERB logo, and at the top right, it shows the user's last login date as 04/10/2014, along with links for Account and Logout. Below the header, the user's school name is listed as "01234 - School Name" on the left, and a welcome message "Welcome Employer User" with the date "04/11/2014" is on the right. A central green message box states, "You have successfully reset your password". The main heading is "Account Settings", followed by a sub-heading: "You can update your password, email as well as a variety of other settings that affect your user account." Three options are listed: "Reset Password" (with a note to frequently update passwords), "Update Email Address" (with a note that email is the primary communication method), and "Update Security Questions" (with a note that they are used for password recovery). A "Home" button is located at the bottom left.

## Home

The Home page will have general information about your ESS account. Your **Menu** items will navigate you through ESS. You can also access your **Account** settings here. The **News** and **Alerts** features is for ERB to use to communicate information to you.

The screenshot shows the ERB Home page. At the top left is the ERB logo. The top right corner displays 'Last Logon 07/11/2014' and a circled 'Account' link next to a 'Logout' link. Below the header, the school name '01234 - School Name' is on the left, and 'Welcome Employer User 07/15/2014' is on the right. A left-hand menu is visible with 'Menu' circled and 'Home' highlighted with a blue arrow. The main content area is titled 'Home' and contains the text 'Welcome to V3 Employer Self Service.' Below this are two large empty boxes labeled 'News' and 'Alerts', both with their respective labels circled. At the bottom right, it says 'Showing Records 1 - 1 of 1'.

## Profile

The Profile page will have the information ERB has on record for your respective school. If you need to update this information, please contact your respective ERB analyst.

01234 - School Name

Welcome Employer User 03/19/2014

### Menu

[Home](#)
[Profile](#)
[Work Report Submission History](#)
[Upload a File](#)
[Work Report Submission](#)
[Help](#)

### Employer

This screen contains basic information about your employer. If the information is out-of-date or incorrect, please contact the fund office.

### Demographics

Name: School Name

Code: 01234

### Employer Address

PO Box 0000  
City, NM 88000

#### Phone:

Phone: 505 555-1234

#### Email:

Primary: email@email.edu

#### Fax:

Fax: 505 555-1234

### Contact Information

The following people and organizations are designated as official employer contacts.

Name	Type	Contact Role	Phone	Email
School Rep	Other Person	Payroll		
School Rep	Other Person	Benefits		
School Rep	Other Person	Other		
School Rep	Other Person	Manger		
School Rep	Other Person			

Showing Records 1 - 5 of 5

Please review the displayed information and contact NMERB at 505-827-8030, ask for your analyst, or email us at ERB-WebHelp@state.nm.us if the information does not look correct.

## Work Report Submission History

This page will allow you to see your work report submission history. You can click on a date range to display your work report submission history. [The Type and Status options default to Regular and All—leave these at their default settings.](#) This page is informational only.

Last Logon 07/11/2014 | Account | Logout

01234 - School Name Welcome 01234 Employer User 07/15/2014

### Work Report History

Please review the displayed information and NMERB at 505-827-8030 ask for your analyst or Email us at ERB-WebHelp@state.nm.us if the information does not look correct. You may submit work reports under one or more billing locations based on the agreements you have in place with ERB.

Billing Location: 01234-School Name

Date Range: 3 Months Type: Regular Status: All

Start Date	Stop Date	Received Date
04/01/2014	04/30/2014	
03/01/2014	03/31/2014	


Showing Records 1 - 2 of 2

Back

## Upload a File

Here you will upload your monthly file for **File Type: Member Detail**.

See step by step instructions below.


Last Logon 07/11/2014 | Account | Logout

01234 - School Name
Welcome Employer User 07/15/2014

**Menu**

- Home
- Profile
- Work Report Submission History
- Upload a File
- Work Report Submission
- Help

### Upload a File

To upload a file first select the Account that you wish to upload a file for. Select the file from your desktop by clicking the 'Browse' button. Then select the file type and fill in the file details. When the file is ready to be uploaded, please click the 'Upload' button. Depending on the size of your file the upload process could take many minutes. Please do not navigate away from the current page while an upload is in progress or the upload will fail.  
 If you encounter a problem in submitting your file, please contact NNERB at 505-827-8030, ask for your analyst or email us at ERB-WorkHelp@state.nm.us

Account:

File Type:

File:

XXX012014M1

Description:

1. Validate your school name
2. Choose a file type
3. Click "Browse" to locate your file
4. Enter your file name here. *The file name must be your 3 letter school code, month & year, file type: **XXX012014M1***. Be sure there are no typos—this will cause an error.
5. Click "Upload"

## Upload a File—Member Information Continued....

Your file has been uploaded successfully when the process bar reaches 100%.

01234 - School Name
Welcome Employer User
03/18/2014

**Menu**

- Home
- Profile
- Work Report Submission History
- Upload a File
- Work Report Submission
- Help

### Upload a File

To upload a file first select the Account that you wish to upload a file for. Select the file from your desktop by clicking the 'Browse' button. Then select the file type and fill in the file details. When the file is ready to be uploaded, please click the 'Upload' button. Depending on the size of your file the upload process could take many minutes. Please do not navigate away from the current page while an upload is in progress or the upload will fail.  
 If you encounter a problem in submitting your file, please contact NMERB at 505-827-8030, ask for your analyst or email us at [ERB-WebHelp@state.nm.us](mailto:ERB-WebHelp@state.nm.us)

DEM012014M1 100%
Cancel

When the upload is complete, you will be redirected to the **Work Report Submission** page. Your file will appear in **“Uploaded Files.”** (Please disregard the **“Status”** and **“Records”** fields. These are new features that do not apply to your use of ESS.)

01234 - School Name
Welcome Employer User
03/18/2014

**Menu**

- Home
- Profile
- Work Report Submission History
- Upload a File
- Work Report Submission
- Help

### Uploaded Files

Below are the details of the file that has been uploaded for processing.

Date Range:

1 Month

Upload New File
Refresh

[Print](#) [Export](#)

Date	Type	Description	Status	Records
03/18/2014	Member Information	XXX012014M1	Not Processed	29

Showing Records 1 - 1 of 1

You can click **“Upload New File”** to upload another file.

## Upload a File

Here you will upload your monthly file for **File Type: Work Report**.

See step by step instructions below.

01234 - School Name Welcome Employer User 08/06/2014

### Upload a File

To upload a file first select the Account that you wish to upload a file for. Select the file from your desktop by clicking the 'Browse' button. Then select the file type and fill in the file details. When the file is ready to be uploaded, please click the 'Upload' button. Depending on the size of your file the upload process could take many minutes. Please do not navigate away from the current page while an upload is in progress or the upload will fail. If you encounter a problem in submitting your file, please contact NMERB at 505-827-8030, ask for your analyst or email us at [ERB-WebHelp@state.nm.us](mailto:ERB-WebHelp@state.nm.us)

**Menu**  
Home  
Profile  
Work Report Submission History  
Upload a File  
**Work Report Submission**  
Help

Account: School Name  
File Type: Work Report  
File: T:\XXX012014W1 Browse...  
Description: XXX012014W1

1. Validate your school name
2. Choose a file type
3. Click "Browse" to locate your file
4. Enter your file name here. *The file name must be your 3 letter school code, month & year, file type: XXX012014W1.* Be sure there are no typos—this will cause an error.

6. Click "Upload"

When the upload is complete, you will be redirected to the **Work Report Submission** page. Your file will appear in **"Uploaded Files."** Here, you can click **"Upload New File"** if you have more files to upload. (Please disregard the **"Status"** and **"Records"** fields. These are new features that do not apply to your use of ESS.)

01234 - School Name Welcome Employer User 03/18/2014

### Upload a File

To upload a file first select the Account that you wish to upload a file for. Select the file from your desktop by clicking the 'Browse' button. Then select the file type and fill in the file details. When the file is ready to be uploaded, please click the 'Upload' button. Depending on the size of your file the upload process could take many minutes. Please do not navigate away from the current page while an upload is in progress or the upload will fail. If you encounter a problem in submitting your file, please contact NMERB at 505-827-8030, ask for your analyst or email us at [ERB-WebHelp@state.nm.us](mailto:ERB-WebHelp@state.nm.us)

**Menu**  
Home  
Profile  
Work Report Submission History  
Upload a File  
**Work Report Submission**  
Help

DEM012014M1 100%

01234 - School Name Welcome Employer User 03/18/2014

### Uploaded Files

Below are the details of the file that has been uploaded for processing.

Date Range:

Date	Type	Description	Status	Records
03/18/2014	Work Report	XXX012014W1	Not Processed	29

Showing Records 1 - 1 of 1

## Employer Help

These pages will give you definitions and explanations of each menu item of the Employer Self Service.

The screenshot shows the NNERB Employer Self Service interface. At the top right, it says "Last Logon 03/19/2014 | Account | Logout". The logo "NERB" is on the left. Below the logo, it says "01234 - School Name" and "Welcome Employer User 03/19/2014". A menu is visible on the left with "Employer Help" highlighted. The "Employer Help" section contains links for Profile, Work Report Submission, History, Work Report Submission, and Change Password. A "Welcome to Employer Help" message states: "Each selection at your left corresponds with the menu selections on the NNERB Employer web pages. Click on a desired menu selection you wish to learn more about."

## Logout

You can logout by clicking "Logout" at the upper right corner.

The screenshot shows the NNERB Employer Self Service interface. At the top right, it says "Last Logon 03/19/2014 | Account | Logout". The logo "NERB" is on the left. Below the logo, it says "01234 - School Name" and "Welcome Employer User 03/19/2014". A menu is visible on the left with "Home" highlighted. The "Home" section contains the text "Welcome to V3 Employer Self Service." and two boxes labeled "News" and "Alerts". The "Logout" link in the top right corner is circled in blue.

## Logged Out

You'll get a confirmation when you have successfully logged out of Employer Self Service.

The screenshot shows a "Logged Out" confirmation message. The text reads: "You are now logged out of the SelfService Application. We recommend that you close your web browser when you have finished your online session. The information screens that you just viewed will remain in your browser's memory until the browser is closed." At the bottom, there is a button labeled "Log back into the V3 solution". An arrow points from the text "Click here to log back into your ESS account." to the button.