

Vendor Reporting User Guide

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Public Employee Retirement System of Idaho

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REFERENCE

DEFINITIONS & TERMINOLOGY

Term	Explanation
Deduction	An individual record of an amount that either comes out of or gives a credit to a member's sick leave balance or benefit.
Dependent Identifier	An ID used to connect a deduction to a member's dependent. The premium is still connected to the member and comes out of their sick leave balance or monthly benefit, but this designates the deduction as related to a different individual.
Member ID	A unique identifier tied to the member account that the premium is deducted from. This is not the same as a member's SSN/National ID.
MFA	Acronym for Multi-Factor Authentication, which is the system that requires a second step to verify the identity of a user when logging in. For example, a code that is texted to a cell phone or generated by an app on your phone.
Sick Leave Balance	An amount that is used to pay insurance premiums without having the amount deducted from a member's monthly benefit. When a sick leave balance is \$0.00, the member may still be eligible to deduct the premium from their monthly benefit.
User	When used on its own, user refers to any person that is accessing the site. When used in the term Vendor User, this is a specific set of site permissions. For example, both a Vendor Admin and a Vendor User are users.

LOGIN & FORGOT PASSWORD

FIRST-TIME LOGIN

A Vendor Admin or PERSI Admin must create your account and send you a registration email. The link expires after 24 hours. If it is expired, contact your Vendor Admin to resend the email.

REGISTRATION

1. Open the account creation email and click the link.
2. Enter your username (the email address the registration email was sent to).

3. Create a password.
 - Passwords must be at least 15 characters and may include numbers and special characters.
 - If you receive a “HaveIBeenPwnd” warning, choose a different password.
4. After setting your password, click **Return to Login Page**.
5. Log in with your username and new password.
6. You will be prompted to set up Multi-Factor Authentication (MFA) via app or text. MFA setup is only required the first time you log in.

TROUBLESHOOTING REGISTRATION

When you initially set your password, if you type your username in incorrectly along with a password that meets the criteria, you will be shown the confirmation page that says you successfully reset your password. This is for security reasons: your password will not actually be set. If you have trouble logging in with your email and password after setting the password, click the link in the email again and go through the process again to set your password.

MULTI-FACTOR AUTHENTICATION (MFA) SETUP

1. Choose how to receive MFA codes:
 - **Text message**
 - **Authenticator app** (recommended) – e.g., Microsoft Authenticator, Google Authenticator, Duo Mobile, Authy.
2. You must enable at least one method; you may enable both.
3. To add an authenticator app:
 - Click **Add Authenticator App**.
 - Follow the prompts to scan the QR code or manually enter the key.
4. To add a phone number:
 - Click **Add Phone Number**.
 - Enter your number in the pop-up window.
 - If you already have an MFA app, you can skip this step by clicking **Opt Out**.
5. After setup, you will be redirected to the Vendor Reporting Landing page.

LOGGING IN

1. On the Landing page, click **Log In** in the top right corner.
2. Enter your username and password. Click **Log in**.
3. If the login is successful, the MFA screen will appear:
 - **App MFA enable** – enter the code from your authenticator app.
 - **Text MFA enable** – enter the code sent to your phone.
 - **Both enable** – choose which method to use.
4. Enter the code and click **Log In**.

5. After successful MFA verification, you will be redirected to the Vendor Reporting Landing page, where your profile appears in the top right.

Note: If you have attempted to log in with the wrong password multiple times, you may be locked out of your account for an hour. You will have to wait and return to Vendor Reporting when the lockout expires.

LOGGING OUT

1. Click **Log Out** in the top right corner.
2. You will also be logged out automatically after a period of inactivity.

FORGOT PASSWORD

1. On the login page, click **Forgot your password?**
2. Enter your email address and click **Reset Password**.
3. If the email is associated with an account, you will receive a verification email.
4. Click the link in the email to open the password reset page.
5. Enter your username and a new password that meets all password requirements.
6. After confirmation, click **Return to Login Page** and log in with your new password.

FORGOT USERNAME

1. On the login page, click **Forgot your Username?**
2. Enter your email address and click **Send Username**.
3. If the email is associated with an account, you will receive an email with your username
4. Once you have received your username, you can log in with your username and password.

CHANGE OR UPDATE MFA METHOD

Vendors can view and make updates to their profile settings by clicking their name in the top right corner. To add an authenticator app after opting out at registration:

1. Click **Add Authenticator App**.
2. Download an authenticator app like Microsoft Authenticator for [Android](#) and [iOS](#) or Google Authenticator for [Android](#) and [iOS](#).
3. Scan the QR Code or enter the key provided into your authenticator app.
4. Once you have scanned the QR code or input the key above, your authentication app will provide you with a unique code. Enter the code in the confirmation box below.
5. Click **Verify**.

Note: If you have completely lost access to your phone number or authenticator app, have your organization's Vendor Admin contact PERSI through the **Messages** tab to delete the account and re-do the registration process.

VENDOR LANDING PAGE

After logging in to Vendor Reporting, you will be directed to the Landing page. From here, you will be able to access all the site functions from the links in the sidebar.

1. Single Vendor Access

- If you have access to only one vendor, click any link in the sidebar to go directly to the relevant page.

2. Multiple Vendor Access

- If you have access to more than one vendor, clicking a sidebar link opens a list of vendors you can access.
- Click **Select** next to the vendor you want to open. You will be taken to the page you originally selected in the sidebar.
- After selecting a vendor, sidebar links will take you directly to those pages until you:
 - ◆ Log out and back in, or
 - ◆ Click **Select Vendor** in the header to choose a different vendor.

3. Search for Vendors

- Vendor Admins and others with multiple vendor access can use the **Search** function to quickly find and select a vendor.

SEARCHING FOR A VENDOR

For PERSI Admins and others that have access to more than 10 vendors, a query builder will appear at the top of the table of vendors.

1. In the query builder, enter part of all of the vendor's name or vendor code.
 - Partial matches are included in the search results by default.
2. Click outside the text box, press **Tab**, or press **Enter** to apply the filter.
3. In the search results, click **Select** next to the vendor you want to access.
4. You will be directed to the page you originally selected in the sidebar.

SITE MESSAGES

When you log in, you may see a banner or pop-up message containing important, time-sensitive information from PERSI. Read all messages carefully.

- **Banner messages** – Appear at the top of the page and remain visible until you click **Acknowledge**.
- **Pop-up messages** – Prevent navigation until you read the message and click **Acknowledge**.
- Clicking **Acknowledge** closes the message and notifies PERSI that you have read it.

HEADER FUNCTIONS

The header is visible on all pages, and you will be able to access these functions from anywhere once you have logged in.

HIDING THE MENU

In the upper-left corner of the header, you will see a button with three horizontal lines. Clicking this button will minimize the sidebar. Clicking it again will make the sidebar reappear.

SELECT VENDOR

Under the page header, you will see the vendor's name and code for the vendor you are logged in to. If you have access to more than one vendor, there will be a **Select Vendor** link next to the vendor code. Clicking this link brings you back to the Vendor Search.

PROFILE (YOUR NAME)

The **Profile** link takes you to the page to manage your account. See [Account Management & Settings](#) for more information.

LOG OUT

The **Log Out** link next to your name will log you out of Vendor Reporting and redirect you to the Landing page. To access any other part of Vendor Reporting, you will need to log back in.

HOME PAGE

The Home Page provides an overview of the vendor's important information.

- To make changes, navigate to the appropriate page.

Note: A *red* unsubmitted changes banner appears when a file has been uploaded but not submitted. Changes must be submitted to be applied to the next payroll.

VENDOR INFORMATION

The Vendor Information section lists the phone numbers and addresses that PERSI has on record for the vendor. To update any of this information, contact PERSI.

CONTACT INFO

Displays the vendor's primary and secondary contacts with their phone numbers and email address.

- To update contact information, an administrator must make changes on the Contact & Users page (see the [Creating a Contact](#) section for more information).

GROUP INFORMATION

Lists all groups associated with the vendor. The table includes the group's code, name, start date, end date (if applicable), and insurance type.

- Use the caret arrow to view all deductions for the current payroll month.
- The table is read-only. Changes must be made on the [Deductions](#) or [Upload](#) pages.

TRANSFERRING A GROUP

Allows you to merge two groups or move all active deductions from one group to another. Ongoing and Holiday deductions will be migrated; however, no changes will be made to Adjustments or Cancelled deductions.

To transfer deductions:

1. Click **Transfer Group** on the right side of the row for the group you want to move deductions out of.
2. In the pop-up window, select the destination group from the dropdown list of active groups.
3. Click **Transfer**.
4. In the confirmation dialog box, verify the group you are transferring to and click **Confirm Group Transfer**.

Once confirmed, all Ongoing and Holiday deductions from the original group will be moved, and a corresponding deduction will be created in the destination group.

FILTERING GROUP DETAILS

To filter the deductions in the group, see the [Building an Advanced Search Query](#) section.

TOTALS AS OF NEXT PAYROLL

Displays both the total number of deductions for the next payroll as well as the total sum of the deductions. Totals are broken down into:

- **Ongoing Deductions**
- **Adjustment Deductions**
- **Holiday Deductions**

The total for all three is displayed at the bottom of the page. This amount changes when deduction amounts are changed either via individual edits on Deductions or bulk changes on Upload. Changes that have been uploaded but not submitted are not reflected in this total.

DEDUCTIONS

The Deductions page displays all current deductions that will be processed in the next payroll. You can make limited changes to deductions on this page. To make changes that are not available here, you will need to upload a file on the [Upload](#) page.

When on the **Deductions** page, you may see a red text box informing you that there are unsubmitted changes on the [Upload](#) page. This only appears when there has been a file that was uploaded but not submitted. These changes are not reflected on the Deductions page until they have been submitted on the Upload page.

TOTALS AS OF NEXT PAYROLL

The Totals as of Next Payroll card displays both the total number of deductions for the next payroll as well as the total sum of the deductions. Totals are broken down into:

- **Ongoing Deductions**
- **Adjustment Deductions**
- **Holiday Deductions**

The total for all three is displayed at the bottom of the page. This amount changes when changes to deduction amounts are saved, either via individual edits on this page or bulk changes on Upload. Changes that have been uploaded but not submitted are not reflected in this total.

EXPORTING THE CURRENT DEDUCTIONS FILE

You can download an Excel file of the current deductions at any time by clicking the **Excel Icon** button that is in the header of the **Current Deductions** section. The name of the file that you download will be CurrentDeductions.xlsx. This file does not meet the file requirements for uploading deductions.

Note: The download will ignore any filters you have on the **Current Deductions** view on this page - it will include all deductions for this payroll, not just the deductions that are visible if there is a filter being used.

ADDING A NEW DEDUCTION

1. Click **Add Deduction**.
 - A **Check Eligibility** pop-up appears.
2. Enter the member's **National ID** (usually SSN) and **Date of Birth**.
3. Click **Check Eligibility**.
 - If the member is eligible, the **Edit Vendor Deduction** pop-up will appear.
4. To add a new Ongoing deduction:
 - Select a **Group Code**.
 - Enter a **Premium Amount**.

- (Optional) Enter a **Note**.
 - Click **Submit**.
 - If no errors occur, the pop-up will close, and the deduction will appear in the **Current Deductions** table for the upcoming payroll run.
5. If the submitted Ongoing deduction uses a Group ID, the member already has:
 - The existing deduction ends and moves to **the Stopped/Modified Deductions** table.
 - A new deduction will be created on the **Current Deductions** table.
 6. To add a new Ongoing deduction for a **dependent**:
 - Enter a unique **Dependent Identifier**.
 - Use the same Dependent Identifier for any future deductions for that dependent.
 - If the same **Dependent Identifier + Group ID** already exists, the current deduction ends and moves to the **Stopped/Modified Deductions** table, and a new one will appear in **Current Deductions**.

To add a new Adjustment, you will need to fill out the same fields as Ongoing as well as choose the Adjustment Month and Adjustment Year.

TROUBLESHOOTING THE ELIGIBILITY CHECK

When adding a new deduction, you may run into the following errors when checking the member's eligibility. To see the warnings and errors that you might encounter for new deductions, see [Troubleshooting Ongoing Deductions](#) and [Troubleshooting Adjustments](#).

Error Text	Description & Solution
National ID is required.	You must enter a valid National ID.
No eligible member found for this SSN.	The SSN is incorrect, or the member is ineligible.
Date of Birth is required.	For all three of these errors: You must enter a valid date of birth in MM/DD/YYYY format.
'Date Of Birth' must not be empty.	
Date Of Birth is not a valid date.	
Date of Birth does not match the information on record for this SSN.	Either the SSN or date of birth you are entering is incorrect for the member you are adding.

EXPORTING THE UPLOAD FILE

To update to the deductions, you can download and modify a separate Upload file.

1. Click **Export Upload File** in the header of the **Current Deductions** section
 - An Excel file of the current deductions will download.

- The name of the file that you download will be in the format [Vendor Code]_CurrentDeductions_[MMYYYY].xlsx.
2. Open the file in Excel.
 - Only **Ongoing deductions** are included.
 - Holiday and Adjustment deductions are not included since they do not repeat monthly.
 3. Make any necessary changes to existing Ongoing deductions or add new deductions.
 4. Save the file in the same format.
 5. Upload the file using the [Upload](#) page. ([See Upload section for details.](#))

DOWNLOADING THE MEMBER ID MAPPING FILE

To improve member security, the Member ID is used instead of the SSN in Upload files. The Member ID Mapping file allows vendors to link the Member ID to the member's records.

1. Locate the **Download Member ID Mapping** button next to the **Export Upload File** button.
 - This option is only available to **Vendor Admin**, **PERSI Admin**, or **Tegrit Admin** users.
2. Click **Download Member ID Mapping**.
 - You will receive an Excel file named VendorCodeMemberIDMappings.xlsx.
3. Open the file.
 - The file contains two columns: **National ID** and **Member ID**.
4. Use the Member ID to update your system records with the correct ID.

Note: This file download will be made available for a limited time after the new Vendor Reporting site is launched so that vendors are able to assign the correct Member ID to members with existing deductions in their system. If this button no longer appears for Admin users, the function has been disabled. For new deductions moving forward, you will need to use Check Eligibility for each member to verify eligibility and get the Member ID to use for the deduction.

THE CURRENT DEDUCTIONS TABLE

The Current Deductions section shows a table of all deductions that will be processed in the upcoming month's payroll. If there are many deductions, the table may be split up over multiple pages. The default is 10 deductions per page.

CURRENT DEDUCTION COLUMNS

Column Name	Description
Group	The Group Code of the group that this deduction is related to.
Member ID	The ID used by the system to identify the member. This is provided by Vendor Reporting and is not the same as the member's SSN.

Full Name	The name of the individual associated with this row. This shows the name in “First Middle Last” format, but if sorted by this column it sorts by last name.
Dependent Identifier	This is the custom identifier used to indicate that this row is for the dependent of the member. The Member ID must be the member’s, but an identifier unique to the dependent should be used here. By default, any pre-existing dependent rows are in the format “MemberID_DependentFirst_DependentLast”.
Reason	The type of deduction: Ongoing, Adjustment, or Holiday.
Adjustment Date	This is blank unless the Reason is Adjustment. This shows the month and year that the adjustment will be applied to.
Premium Amount	The dollar amount of the deduction (or credit, if applicable) for this row.
Sick Leave Balance	The member’s remaining sick leave balance that the Premium Amount will be applied to. If this field is empty and there is not an error regarding not enough funds, the Premium Amount is applied to the member’s monthly benefit.
Notes	If there is a short note, the text is displayed here. For longer notes, a See Notes button will be shown. Click the See Notes button for a pop-up that displays the full note.

EDITING INDIVIDUAL DEDUCTIONS

To make changes to an Ongoing deduction:

1. Right-click the row you want to edit.
2. Select one of the following actions:
 - **Edit deduction**
 - **Add Adjustment**
 - **Add Holiday**
 - **Cancel Coverage**

Important: The following fields are not editable:

- Member ID
- Member Name
- Dependent Identifier
- Group Code

To change these fields, you must either:

- Use the **Add Deduction** button, or
- Upload a row on the **Upload** page.

Only **Ongoing** deductions can be edited. If you need to change an existing **Adjustment** or **Holiday** row, you must delete it and re-add it from the menu of the related Ongoing deduction.

- To delete an Adjustment or Holiday: right-click the row and select **Delete**.
- You cannot delete an Ongoing row and must right-click to choose **Cancel Coverage** instead.

EDITING AN ONGOING DEDUCTION

The only fields you can update on an Ongoing deduction are:

- Premium Amount
- Notes

To edit these fields:

1. Right-click the **Ongoing** deduction row.
2. Select **Edit Deduction**.
 - A pop-up will appear showing the following fields:
 - ◆ Member ID
 - ◆ Employer
 - ◆ Full Name
 - ◆ Dependent Identifier
 - ◆ Group Code
 - ◆ Reason
3. Update the **Premium Amount** and/or **Notes**.
4. Click **Submit**.
 - If there are no errors or warning, the pop-up will close and changes will display on the page.

TROUBLESHOOTING ONGOING DEDUCTIONS

You may encounter the following warnings or errors when editing an Ongoing deduction or adding a deduction via Add New Deduction.

Warning/Error Text	Solution
Warning: Premium is greater than 150% of the previous premium	Verify that the Premium Amount is correct. If so, you can continue with warnings.
Warning: Premium is less than 50% of the previous premium	Verify that the Premium Amount is correct. If so, you can continue with warnings.

Error: Premium amount must be greater than \$0	The Premium Amount for Ongoing deductions must be a positive number greater than \$0.
Error: The total of deductions are greater than available funds.	The sum of this member's deductions (including any Ongoing, Adjustment, or Holiday rows) for this payroll need to be less than the sum of the member's sick leave balance plus their benefit amount, if any. If needed, remove a row or decrease the amount and direct bill the remainder.
Error: The sum of deductions must be equal to or less than the remaining sick leave balance.	The sum of this and any other existing deductions are greater than the available sick leave balance and this Member ID has no monthly benefit that can be used. Reduce this or another deduction so the sum matches the sick leave total. If the member may have a monthly benefit that's eligible for deductions, message PERSI to see if there is a different Member ID to use for this member to use the monthly benefit moving forward.
Reason is required.	(Add New Deduction only) You must choose a Reason from the dropdown menu.
Group is required.	(Add New Deduction only) You must choose a Group Code from the dropdown menu.
Member has been retired more than 2 months and has not maintained continuous coverage	(Add New Deduction only) The deduction you are adding is past the deadline. If this is incorrect, you must contact PERSI to add this deduction.

ADDING A HOLIDAY ROW

To add a Holiday row:

1. Right-click the **Ongoing** deduction for the individual and group you want to edit.
2. Select **Add Holiday**.
 - A pop-up will appear showing the following fields:
 - ◆ Member ID
 - ◆ Employer
 - ◆ Full Name
 - ◆ Dependent Identifier

- ◆ Group Code
- ◆ Reason
- Editable fields
 - ◆ Premium Amount
 - ◆ Note

Details:

- The default Premium Amount for a Holiday is the negative of the current Ongoing deduction's Premium Amount.
- You can change the Premium Amount if needed.
- Adding a note to the Holiday row *does not* change the note in the Ongoing row.

When finished:

- Click **Submit**.
- If there are no errors or warnings, the pop-up will close and a new Holiday row will be added.
- The Ongoing row will not be changed.

CHANGING OR REMOVING A HOLIDAY ROW

To **remove** a Holiday row:

1. Right-click the **Holiday** row.
2. Select **Delete**.
3. Confirm by clicking **OK** in the Delete Record pop-up.

You cannot make changes to Holiday rows once they are submitted. If the row needs to be corrected, you must remove the existing Holiday row and then repeat the process above to create a new Holiday row.

TROUBLESHOOTING HOLIDAYS

Error Text	Solution
Holiday premium is greater than the Ongoing amount.	The Holiday credit cannot refund more than the Ongoing deduction amount. For example, if the matching Ongoing row has a Premium Amount of \$100, the Holiday row must be a negative number between -\$0.01 and -\$100, inclusive.
Premium amount for holiday must be less than \$0.	The Holiday credit row must be a negative number.

ADDING AN ADJUSTMENT ROW

To add an Adjustment row:

1. Locate the row for the **Member**, **Dependent Identifier**, and **Group ID** you want to add an Adjustment to.
2. Right-click the row.
3. Select **Add Adjustment**.

A pop-up will appear showing the following fields:

- Member ID
- Employer
- Full Name
- Dependent Identifier
- Group Code
- Reason (set to Adjustment)

Required fields to complete:

- Premium Amount
- Adjustment Month
- Adjustment Year

Optional Field:

- Note (this will not change the note in the Ongoing row).

When you have filled out the required fields, click **Submit**. If there are no errors or warnings, the pop-up will close and a new Adjustment row will be added. The Ongoing row will not be changed.

CHANGING OR REMOVING AN ADJUSTMENT ROW

You cannot make changes to Adjustment rows once they are submitted. If the row needs to be corrected, you must right-click the row and click **Delete**, confirm deletion, and then repeat the process above to create a new Adjustment row with the changes you need to make.

TROUBLESHOOTING ADJUSTMENTS

Error Text	Solution
Adjustment must be in the past.	The Premium Date must be earlier than the current payroll month.
Premium amount for adjustment cannot be \$0.	Change the Premium Amount. In most cases, this can be a positive or negative number.
Adjustment month must be a valid month.	The Adjustment Month must be a one- or two-digit number between 1 and 12. Verify the Premium Month and update accordingly.

Adjustment year must be a valid year.	The Adjustment Month must be a four-digit number between 2000 and the present year. Verify the Premium Year and update accordingly.
Group is not active during Adjustment period.	The Group ID selected was not an active group in the Premium Month and Year. Verify the Group ID, Premium Month, and Premium Year, then update accordingly.
The total of deductions are greater than available funds.	The sum of this member's deductions (including any Ongoing, Adjustment, or Holiday rows) for this payroll need to be less than the sum of the member's sick leave balance plus their benefit amount, if any. If needed, remove a row or decrease the amount and direct bill the remainder.
Value of Adjustment is greater than original deduction(s).	This negative adjustment is subtracting too much from this premium month and year (for this member, in this group). Verify this adjustment amount and correct it as needed until the total of the relevant Ongoing, Holiday, and Adjustment rows for this premium month/year equals 0 or greater.
The sum of deductions must be equal to or less than the remaining sick leave balance.	The sum of this and any other existing deductions are greater than the available sick leave balance, and this Member ID has no monthly benefit that can be used. Reduce or remove the Adjustment.
Adjustments for Deceased members must be credits.	PERSI has the member recorded as deceased and the Adjustment is a positive amount. Verify the Adjustment amount – it may need to be negative.
Reason is required.	(Add New Deduction only) You must choose a Reason from the dropdown menu.
Group is required.	(Add New Deduction only) You must choose a Group Code from the dropdown menu.
Cannot add Adjustment prior to retirement date.	The Adjustment date is set prior to the member's retirement date. Verify the Adjustment date and correct the row.

CANCELLING A DEDUCTION

To cancel a deduction:

1. Right-click the Ongoing row.

2. Select **Cancel Coverage**.

A pop-up will appear showing the following read-only fields:

- Member ID
- Employer
- Full Name
- Dependent Identifier
- Reason
- Group Code

Editable field:

- Note (this will replace the note that existed in the Ongoing row).

There is a checkbox labeled **Member is Deceased** – leave this checkbox unchecked and click **Submit**.

After submitting:

- The deduction row will be removed from **Current Deductions**.
- The row will appear in the **Stopped/Modified Deductions** table at the bottom of the page.

UNDOING A CANCELLATION

There is no way to undo a cancellation and restore the previous Ongoing row. If the deduction needs to be reinstated:

- Add a new individual deduction with the same member, dependent information (if applicable), and group information. Follow the instructions in [Adding a New Deduction](#)
- [Upload](#) a file with the deduction you want to re-add.

ENDING A DEDUCTION FOR A DECEASED MEMBER

If a member is already marked as **Deceased** in PERSI's database, any Ongoing deductions will be automatically cancelled by the system.

If you are processing a member who has been reported as deceased:

1. Right-click the **Ongoing** row.
2. Select **Cancel Coverage**.
3. Check the box labeled **Member is Deceased**.
4. A new field, **Member Death Date**, will appear. Enter the member's Death Date.
5. Click **Submit**.

The row will be removed from the Current Deductions and will appear in the Stopped/Modified Deductions table at the bottom of the page.

UNDOING A DECEASED ROW

If a member has been mistakenly marked as Deceased:

- Notify PERSI that the individual is not deceased.

If the deduction is meant to be cancelled without the member being marked Deceased:

- No further action is required.

If the deduction should not have been cancelled:

- Re-add the row by adding a new individual deduction with the same member, dependent (if applicable), and group information.

TROUBLESHOOTING CANCELLATION/DECEASED MEMBER

Warning/Error	Solution
Error: Reason of Holiday and Cancel for the same premium period.	The deduction cannot be cancelled when there's a Holiday in the current deductions. Delete the Holiday and then cancel the Ongoing deduction.
Error: Cannot report member as deceased with existing Holiday.	The deduction cannot be cancelled when there's a Holiday in the current deductions. Delete the Holiday before reporting the member as Deceased.
Error: Cannot report member as Deceased with positive Adjustments.	The deduction cannot be cancelled when there's a positive Adjustment in the current deductions. Delete the Adjustment before reporting the member as Deceased.
Error: Deceased reason code without death date.	The Member is Deceased checkbox is checked but a Death Date has not been entered. Either enter a Death Date or uncheck the box.
Error: Death Date is in the future	The Death Date cannot be a future date. Verify the date being reported.
Warning: Vendor has death date, PERSI does not.	PERSI does not yet have the member marked as Deceased. PERSI will be notified of the death date entered once you submit the row. You can continue with warnings, so no further action is required.

STOPPED/MODIFIED DEDUCTIONS

The Stopped/Modified Deductions table shows any deductions that were changed or removed in the current payroll month. This includes:

- Ongoing deductions that had a premium change.
- Ongoing deductions that were stopped by setting them as Cancelled or Deceased.

You can use this information to verify that the correct deductions were stopped this month and to check that no deductions were incorrectly cancelled.

The table only saves changes to Ongoing deductions if the deduction has been run in a payroll at least once. For example, if you modify an Ongoing deduction that has been in the deductions for a few months from \$100 to \$90 and the prior information is shown in the Stopped/Modified Deductions table. If you then edit the Ongoing deduction again before payroll is run, for instance from \$90 to \$95, the deduction that is shown in the table is the \$100 deduction: since the \$90 premium was never used in a payroll run, it is not a saved record.

The Stopped/Modified Deductions table is read-only. If any deduction needs to be restored, you need to manually re-add a deduction with the correct information (see [Adding a New Deduction](#)).

UPLOAD

You can upload changes to any deductions, including adding new deductions, by using the Upload page.

The Upload page requires the use of an Excel file in a specific format. Your system may be set up to export an Excel file in this format for upload without having to make any manual changes. It is also possible to download a file with all current Ongoing deductions that is correctly formatted for upload from the Deductions page, which you can then open and edit to make changes. When you have multiple changes to make in a given pay period, it is recommended to make these changes via upload instead of individually editing rows on the Deductions page.

FILE FORMAT SPECIFICATIONS

To upload a file, you must have an Excel file that fits the following specifications.

The Excel upload file requires the column names shown below with no additional columns of data. The column names are case-sensitive. All columns must be in the file, even if there is no data in them (for example, even if there are no Member Death Date values, the column must still be in the file).

Column Name	Data Type	Restrictions	Requirement
Vendor Code	Text	2-5 characters	Required
Group Code	Text	1-255 characters	Required
Member ID	Text	2-10 characters	Required
Last Name	Text	1-30 characters	Required
First Name	Text	1-30 characters	Required
Middle Name	Text	1-30 characters	Optional
Dependent Identifier	Text	1-255 characters	Optional
Member Death Date	Date	MM/DD/YYYY	Optional

Premium Month	Numeric	1-2 digits	Required
Premium Year	Numeric	4 digits	Required
Reason Code	Numeric	1-2 digits	Required
Premium Amount	Currency	Number with 0-2 digits after decimal	Required

FIELD DESCRIPTIONS

VENDOR CODE

Vendor Code must match the code that exists in Vendor Reporting. This is to verify that the deductions being uploaded are meant to be applied to the vendor you are uploading to.

GROUP CODE

The Group Code that the deduction applies to. A member may have multiple Ongoing deductions if they are for different groups, but only one Ongoing deduction per group. The Group Code must match an existing Group Code for the vendor.

MEMBER ID

The Member ID is not the same as the member's SSN. The Member ID is provided by PERSI and can be retrieved for a new member/deduction when using the Add New Deduction feature on the Deductions page.

For Vendor Admins, it is possible to download a file on the Deductions page that maps member SSNs to Member IDs to use in the deductions by clicking the **Download Member ID Mapping** button. This is a list of all members on the Current Deductions table. This list does not include members that are eligible but do not currently have deductions – those must still be retrieved when adding a member via **Add New Deduction**

DEPENDENT IDENTIFIER

For Dependent deductions, include the member's ID in Member ID and then add a Dependent Identifier to this field for the dependent. The Dependent Identifier is not the same as a Member ID and can be in a format chosen by the vendor. If the row is only for a member, not a dependent, leave this field blank.

The combination of Group, Reason Code, and Dependent Identifier must be unique for each row. For example, a Dependent may have the same Dependent Identifier with Reason Code 01 (Ongoing) in multiple groups, but only one Ongoing deduction in each group.

For Dependents that have been transferred over from the prior Vendor Reporting, the Dependent Identifier has been created in the format of "MemberID_DependentFirstName_DependentLastName". Future Dependent Identifiers do not have to use this format, but do not change existing Dependent

Identifiers without cancelling the row with the old Dependent Identifier. Changing a Dependent Identifier will create an additional row, meaning there will be a duplicate deduction, one using the old Dependent Identifier and one using the new Dependent Identifier.

LAST NAME & FIRST NAME

The member's Last Name and First Name, used to verify that the Member ID submitted matches a member on record.

If there is a Dependent Identifier, you should still use the member's name in these fields. Name validations are not run on rows with Dependent Identifiers.

MIDDLE NAME

The member's Middle Name, an optional field.

MEMBER DEATH DATE

If the member's deductions are being ended due to death, the Member Death Date is required along with the Reason Code 03 (Deceased). If the Reason Code is not 03, then the Member Death Date must be empty.

Member Death Date does not have to include leading 0 in dates – 01/01/2025 and 1/1/2025 are both valid.

This is only for the member's death date. If a dependent is deceased, the row should be Reason Code 02 (Cancelled) instead of Reason Code 03. If the member is deceased, then the dependent row should still be Reason Code 02 while the member row(s) are Reason Code 03.

PREMIUM MONTH & PREMIUM YEAR

The Premium Month is a one- or two-digit number. The Premium Year is a four-digit number.

If the Reason Code for the row is 04 (Adjustment), then the Premium Month and Premium Year must match the month and year for the past deduction being adjusted, respectively. Adjustments cannot match the current month. Rows with any other Reason Code must match the month and year of the payroll month currently shown on the Deductions page.

REASON CODE

The Reason Code includes a leading 0. Sometimes, Excel will automatically format the number to remove the leading 0. This can be fixed by changing the number format of the column to Text instead of General, but this is not required for the upload, as the system can convert a single digit to the code with a leading 0. The table below is a guide to the codes in use.

Code	Reason Name	Description
01	Ongoing	Monthly premium amount for the new enrollment or continuing retiree policy.

02	Cancel Coverage	The ongoing monthly reduction is ending due to termination or policy expiration.
03	Deceased	The ongoing monthly reduction is ending due to death of the retiree.
04	Adjustment	An amount owed to either the vendor or retiree as a correction.
05	Holiday	A credit applied to the Ongoing deduction for the same month and same group for the retiree.

PREMIUM AMOUNT

The amount for the deduction. Depending on the Reason Code, the number may be positive or negative, as detailed in the table below.

Code	Criteria for Amount of Deduction
01	Must be a positive number and cannot be 0.
02	Must be 0 or blank.
03	Must be 0 or blank.
04	Can be positive or negative. The sum total of any of this member's transactions (Ongoing, Holiday, any prior Adjustment, and the current Adjustment) for this group and month cannot be less than 0. There must be an existing corresponding Ongoing row for the month being adjusted.
05	Must be negative, but the sum total of the Ongoing and Holiday for this month and group must not be less than 0. There must be a corresponding Ongoing row per Holiday row.

UPLOADING A FILE

If you have an Excel file in the correct format, you can upload it to add or change deductions.

Steps to upload a file:

1. Click **Upload File**.
2. Drag and drop the file into the window or browse to select it.
3. The file will upload and process automatically.
 - If the file is formatted correctly, a message will confirm that the upload was successful.
 - If the file is not formatted correctly, see [File Format Errors](#).
4. Click **Close**, the Edited/Uploaded Vendor Deductions table will show all changed or added deductions.

Uploading when rows already exist:

- If you click **Upload File** and select a file while there are rows in the Edited/Uploaded Vendor Deductions table, a confirmation pop-up will appear with the message *Uploading a new file will delete any unsubmitted changes on this page. Continue?*
- If you click **Clear Changes and Upload File**, the changes on the page will be removed and the changes from the new file will be shown in the Edited/Uploaded Vendor Deductions table.
- If you click **Cancel**, you will return to the Upload pop-up. You can close the pop-up to manage the existing rows before uploading a new file.

Submitting changes:

- If there are no errors or warnings, click **Submit Changes** to submit all changed records. (See [Pending Deduction Errors & Warnings](#) for instructions on handling errors and warnings.) When you go to the Deductions page, you will be able to see the changes reflected there.
- If you have corrected any errors or warnings, either by editing or deleting rows, you can check again by clicking **Validate Changes**. Once complete, you will see that any corrected errors will be cleared, and any new errors will be shown. If there are no new errors and all previous errors have been cleared, you can now click **Submit Changes**.

If you do not want to submit the deductions shown in the table, you can click **Clear All Records**. This will remove all rows from the table and no changes will be saved.

Any rows remaining in the Edited/Uploaded Vendor Deductions table will be lost if they are not submitted before payroll is run for the month.

TROUBLESHOOTING EDITED/UPLOADED VENDOR DEDUCTIONS

If you are making changes to rows in the Edited/Uploaded Vendor Deductions page, there is a small chance that you may encounter an “infinite spinner” animation. If there is a circle rotating on the page and you are unable to click anything, please wait a few seconds. If the spinner does not go away, you can refresh the page. In most cases, the changes you have made will have been saved, but in rare cases, the most recent change (such as an edit to one row or deleting one row) may not have been saved. If your most recent change has not been saved, you can repeat the change and it should now save correctly.

FILE FORMAT ERRORS

If the Excel file is not formatted correctly, instead of a message stating that the upload was successful, you may see some of the following errors:

- The errors will indicate which row(s) in the Excel file has the error. To correct these errors, you will need to open and change the Excel file or provide a different file.

Important:

- The file will stop processing after 100 errors.
- If there are more errors, those will show up on upload if you have corrected the first 100 errors.
- If you notice that all or most rows have the same error, this likely means that a column is formatted or labeled incorrectly or the file is for the wrong vendor.

Error Text	Description & Solution
Vendor code not valid for current vendor.	The Vendor Code does not match the vendor that you are uploading the file for. Verify that you are uploading the correct file and/or change the Vendor Code in the file. You can only upload for one Vendor Code at a time.
Dependent Identifier must be 255 characters or less.	The Dependent Identifier is too long. Change the Dependent Identifier.
First name is required and must be 30 characters or less.	The First Name is either missing or too long. Verify the First Name and correct the row.
Group code is required and must be 255 characters or less.	The Group Code is either missing or too long. Verify the Group Code and correct the row.
Last name is required and must be 30 characters or less.	The Last Name is either missing or too long. Verify the Last Name and correct the row.
Member death date must be a valid date in MM/DD/YYYY format.	Member Death Date is formatted incorrectly. Verify that the Member Death Date is correct and fix the formatting. You may have to choose the Short Date format for the column in Excel.
Member ID is required and must be between 2 and 10 characters.	The Member ID is missing or is the wrong number of characters. Verify the Member ID and correct the row.
Middle name must be 30 characters or less.	The Middle Name is too long. Verify the Middle Name and correct the row.
Premium amount is required.	The Premium Amount is missing or is not a number. Verify the Premium Amount and correct the row.
Premium month is required and must be between 1 and 12	The Premium Month is missing or is not a valid month. Verify the Premium Month and correct the row.

Premium year is required and must be valid year.	The Premium Year is missing or not a valid year. The year must be between 2000 and the current year. Verify the Premium Year and correct the row.
Reason code is required and must be '01', '02', '03', '04', or '05'.	The Reason Code is missing or not a valid code. Verify the Reason Code and correct the row. Note: the numbers 1-5 can be used without the leading 0.
Vendor code is required and must be between 2 and 5 characters.	The Vendor Code is missing or the wrong number of characters. Verify the Vendor Code and correct the row.

PENDING DEDUCTION ERRORS & WARNINGS

If the file is uploaded successfully, you may see some of the following errors or warnings on individual rows.

Errors:

- You are unable to submit while any row has an error.
- To move forward:
 1. You can delete rows with errors from the Edited/Uploaded Vendor Deductions table to submit the rows that do not have errors. If you re-upload the file after submitting rows without errors, only the rows with changes that have not been submitted will be shown.
 2. You can address the errors.
 - Edit the Excel file and re-upload it, **or**
 - Click the **Edit (Pencil icon)** button to the left of the row with the error and make the change to the individual record on the page.

WARNINGS

You can submit rows that have warnings but no errors. These are informational and help confirm that you are submitting the correct information.

Warning Text	Description & Solution
First name does not match.	The First Name does not match the name that PERSI has on record. This may be due to a slight difference (such as one record being John and another being Johnathan), but it may also indicate that the Member ID does not match the member if the name is completely different. Confirm that the name matches this Member ID. If so, you can continue with warnings.

	Submitting this row will not change the member's name on record.
Last name does not match.	The Last Name does not match the name that PERSI has on record. This may be due to a name change (such as one record being Jane Smith and another having the maiden name Jane Jones), but it may also indicate that the Member ID does not match the member if the name is completely different. Confirm that the name matches this Member ID, and if so, you can continue with warnings. Submitting this row will not change the member's name on record.
Premium is greater than 150% of the previous month's premium.	The Premium Amount is unusually high for this deduction. Verify that the Premium Amount is correct. If so, you can continue with warnings.
Premium is less than 50% of the previous month's premium.	The Premium Amount is unusually low for this deduction. Verify that the Premium Amount is correct. If so, you can continue with warnings.
Vendor has Death Date, PERSI does not.	PERSI does not yet have the member marked as Deceased. PERSI will be notified of the death date entered once you submit. If the Death Date is correct, you can continue with warnings, no further action is required.

ERRORS

Deductions that have any of the following errors cannot be submitted until they are corrected. If the row should be a valid deduction but is blocked by an error that cannot be corrected, see [Handling Valid Deductions Stopped by Errors](#) below.

Error Text	Description & Solution
Member not found based on Member ID.	This Member ID does not match any member. Verify the Member ID and correct the row.
Member is Deceased.	PERSI has the member marked as Deceased. It is not possible to submit a deduction other than a Deceased row or a credit Adjustment. Remove or correct the row.
Adjustments for Deceased members must be credits.	PERSI has the member marked as Deceased. Adjustments must be credits for Deceased members. Remove or correct the row.

The sum of deductions must be equal to or less than the remaining sick leave balance.	The total of all Adjustment, Ongoing, and Holiday deductions for this member in this payroll month has exceeded the amount available in the sick leave balance. Adjust the amount in the row(s) until the sum is equal to the sick leave balance, and direct bill the remainder. Next month, cancel any Ongoing deductions for this Member ID. If the member should be able to deduct from their monthly benefit, use the Add Deduction function next month to re-add the member. This will provide a new Member ID associated with the monthly benefit if the sick leave is exhausted.
The total of deductions are greater than available funds.	The total of all Adjustment, Ongoing, and Holiday deductions for this member in this payroll month exceed the sum of the member's sick leave and the gross monthly benefit. If this is due to an Adjustment, you may need to split the Adjustment amount over multiple months. If this is due to an Ongoing deduction, you may need to cancel the deduction and direct bill the member. Message PERSI if you are not sure what action to take.
Member does not have a payment this month.	The member does not have a payment scheduled for this payroll. Their retirement/payment start date may not have been set by PERSI or it may be set for a future month. You must delete this row.
Death Date is required for Deceased members.	The Reason Code is 03 but there is no Death Date. Either change the Reason Code if it is incorrect or enter the correct Death Date.
Retiree is not eligible for insurance reductions.	The member either has a gap of more than 2 months between their Retirement date and the current payroll, or their last Ongoing deduction was cancelled more than 2 months ago. They are not able to start a new deduction. Delete this row, and message PERSI if this is in error.
Member has Death Date but Reason code is not –Deceased.	There is a Death Date for the deduction, but the Reason Code is not 03. Either change the

	Reason Code if it is incorrect or remove the Death Date.
Premium must be greater than 0.	Ongoing (Reason Code 01) deductions must be \$0.01 or greater. Verify the Premium Amount or Reason Code and correct the row.
Premium must be 0.	Cancel Coverage (Reason Code 02) and Deceased (Reason Code 03) rows must have a Premium Amount of 0. Verify the Premium Amount or Reason Code and correct the row.
Premium cannot be 0.	Adjustments (Reason Code 04) must be a positive number of \$0.01 or greater, or a negative number. Verify the Premium Amount or Reason Code and correct the row.
Premium must be less than 0.	Holidays (Reason Code 05) cannot be 0 or a positive number. Verify the Premium Amount or Reason Code and correct the row.
Member ID has other rows with death info.	There is another row for this member that has a Death Date. If the member is not Deceased, correct the row with a Death Date. If the member is Deceased, delete this row.
Premium month and year must match current payroll.	Deductions that are not Adjustments must have a Premium Month and Year that match the current payroll month. Verify that the row is meant to be submitted this month and correct or delete the row.
Cannot have a Reason of Ongoing and Cancel for the same premium month and year.	There cannot be both an Ongoing and Cancel row submitted for the same Member ID, Group, and Dependent Identifier within the same payroll month. Delete one of the rows.
Cannot have a Reason of Holiday and Cancel for the same premium month and year.	There cannot be both a Holiday and Cancel row submitted for the same Member ID, Group, and Dependent Identifier within the same payroll month. Delete one of the rows.
Cannot have a Reason of Holiday without an Ongoing deduction for the same premium month and year.	A Holiday cannot be submitted without either an existing Ongoing deduction or an Ongoing deduction being submitted at the same time. Either add an Ongoing deduction or delete the Holiday row.

Holiday premium is greater than the Ongoing amount.	The Holiday credit cannot refund more than the matching Ongoing deduction amount. For example, if the matching Ongoing row has a Premium Amount of \$100, the Holiday row must be a negative number between -\$0.01 and -\$100, inclusive.
Value of Adjustment is greater than original deduction.	An Adjustment credit cannot refund more than the total of the matching Ongoing deduction plus any previously submitted Holidays and Adjustments. Verify the Adjustment amount and correct the row.
Member has been retired for more than 2 months and has not maintained continuous coverage.	This member has no sick leave, has been retired for more than 2 months, and has never had coverage or cancelled their coverage more than 2 months ago. This deduction cannot be added. If there are extenuating circumstances, please message PERSI.
Group ID not found for current Vendor.	The Group ID does not exist for this Vendor or is inactive during the payroll period associated with this deduction. Verify the Group ID and correct the row.
Reason cannot be empty.	There must be a Reason for each row. Verify the row and either select a Reason or delete the row.
Adjustments must be in the past.	The Premium Month and Year must not be on or after the current payroll month
Adjustment month must be a valid month.	The Premium Month must be a number between 1-12
Adjustment year must be a valid year.	The Premium Year must be a year between 2000 and the current year.
Cannot report member as deceased with existing Holiday.	The Deceased row cannot be submitted when there is already a Holiday for this member, either in the current Deductions or in this upload. Delete the Holiday row(s) to report the member as Deceased or delete the Deceased row.
Cannot report member as Deceased with positive Adjustments.	The Deceased row cannot be submitted when there is already a positive Adjustment for this member, either in the current Deductions or in

	this upload. Delete the Adjustment row(s) to report the member as Deceased or delete the Deceased row.
Death Date in the future	The Death Date is after the current date. Verify the Death Date and correct the row.
Cannot add an Adjustment prior to the retirement date.	The Adjustment date is set prior to the member's retirement date. Verify the Adjustment date and correct the row.

HANDLING VALID DEDUCTIONS STOPPED BY ERRORS

There may be some exceptions where valid deductions cannot be submitted due to errors. In these cases, you should message PERSI using the [Messages and Inbox](#) function with the subject line *Deduction Override Request*. In the message, include the following information:

- Vendor Code
- Group ID
- Member ID
- Dependent Identifier (if needed; do not use the dependent's SSN)
- Premium Month & Year (if for an Adjustment)
- Reason Code or Reason (for Ongoing, Holiday, or Adjustment)
- Premium Amount
- Error received when attempting to submit this deduction
- Reason why the override is being requested

PERSI will review this information and either enter the override or respond with the solution to the issue.

MESSAGES

The Message Center is a more secure way of communicating with PERSI than email and is the preferred method of communication.

The Vendor Reporting Inbox is not private. All users for this vendor, both present and future, will be able to see the messages that have been sent and received. Be mindful of this when sending messages, especially when it comes to member information.

INBOX & MESSAGE MANAGEMENT

To access the Inbox:

1. Click **Messages** in the sidebar

2. You will land on the **Message Center Inbox** where you will see messages that have been sent to this vendor.
 - Messages in the Inbox list that have bold text have not yet been read by anyone with access to this vendor.
 - If you click the message subject in the Inbox list, the message will be shown in the Message pane to the right of the list of messages. The full message thread will be shown when you click the message, so you can view the history of the conversation.
 - If you need to respond to a message, click the **Reply** button in the top left of the Message pane, and a pop-up will appear where you can type a response.

If a message thread is resolved or you no longer need the information in the message, you can click the **Delete** button in the top-right of the Message pane. The message will be moved to the Deleted tab. Messages that are in the Inbox are saved indefinitely, but messages in the Deleted tab may be removed permanently after some time.

SENDING MESSAGES

To send a message to PERSI:

1. Click the **Create Message** button. A pop-up will appear for you to compose a message.
2. Fill out both the **Subject** and **Body** of the message to be able to continue.
3. (Optional) Add an attachment before sending the message.
 - Click the **+ button** next to the Attachments header, and a pop-up will appear that allows you to select a file and add a **Name** for the file.
 - Once you have composed the message, click **Send**. The pop-up will close, and the message will be sent to PERSI.
 - If you click **Cancel**, then the pop-up will close, and the message will not be saved or sent.

HISTORY

The History page allows you to download a report of all the deductions for any prior payroll month, in XLSX (Excel) format.

To download, click **Download Report** in the relevant row.

Note: The report does not match the formatting requirements to be used on the Upload page. This avoids the accidental upload of historical reports when attempting to upload the current month's deductions.

ACCOUNT MANAGEMENT & SETTINGS

After you have logged in for the first time, you will be able to manage your account settings from the **Profile page**.

Options include:

- Profile name

- Username
- Email address
- Password
- MFA options from the Profile page.

Note that if you are a PERSI user logging in via **SSO**, you will only see the **Profile Information** and **External Logins** cards.

PROFILE INFORMATION

PROFILE NAME

Your profile name is initially based on the name used on the Contacts & Users page during the account creation. You can change your profile name at any time, but this only affects the name you see on this page and in the header when you are logged in. If you need to change your name in the Contact Information section of the site, contact your Vendor Admin.

To change your profile name, click **Update Profile Name** and type in your name. After you click **Update**, you will see a popup confirming that your profile name has been changed. The changes may not show in the header until you log out and log back in again.

USERNAME

Your default username is the same as the email that was used to create your account, but the username can be any text and does not need to be an email address. You can change your username at any time by clicking **Update Username** and typing in your new username. After you click **Update**, you will see a popup confirming that your username has been changed. The next time you log in, you must use your new username.

EMAIL ADDRESS

When you click **Update Email**, a pop-up will appear with a field showing your current email address. You can make changes and then click **Update**. You will then be sent an email to the new address with a verification code to enter on the second step. Your new email address is shown on this step so that if you don't receive the code, you can verify that you entered the right email. The new email address will not be saved until you enter the correct verification code and then click **Update**.

Changing this email address does not change the contact email shown on the Home page or the Contacts & Users page. To have the contact email address changed, contact a Vendor Admin.

PHONE NUMBER

You can update the phone number used for MFA. This can only be used with US phone numbers that can receive text messages. If you have not added the text message MFA option, the cell phone number will be empty. When you click **Update Phone Number**, a pop-up will appear with a field showing your

current phone number (if one exists). Change the phone number and then click **Update**. A text will be sent to the new number with the verification code. The new phone number will not be saved until you enter the correct verification code and then click **Update**.

TIME ZONE

You can update the time zone to reflect your location. When your account is created, the time zone is set to US Mountain Time by default. Click **Update Time Zone** to change it and then click **Update** when you have made changes.

PASSWORD

The Password card shows you the date and time that your password was last changed. You can click **Update Password** to change it.

Enter your current password and then type in the new password twice. The password must follow the same password requirements as in Registration and in Forgot Password.

EXTERNAL LOGINS

This card is only visible if you are logging in via SSO as a PERSI or Tegrity user. This card shows which type of SSO is connected to your account. No changes can be made here.

MULTI-FACTOR

This card shows you which MFA methods are enabled for your account. You cannot make any changes to this card, but changing your cell phone number or MFA app may show changes on this card.

AUTHENTICATOR APP

This card allows you to add or update an Authenticator App for your account. If you do not currently have one set up, the card will only show the button **Add Authenticator App**. If you already have an app connected to your account, **Setup Authenticator App** allows you to add an additional app without disabling the first app, while **Reset Authenticator App** will clear out any existing apps and allow you to enter a new one. Resetting the app requires you to enter a new one; you cannot disable the use of an app entirely.

The pop-up that appears that allows you to add or update apps is the same one that appears in Account Creation.

CONTACTS & USERS

The Contacts & Users page is used to manage both the Contacts shown on the Home page as well as Vendor Reporting permissions via adding users to contacts.

Contacts serve two functions. First, someone that is only a contact is added without granting access to Vendor Reporting. This is so that there is an option to add an individual's contact information even if they do not need to use the website. Second, a contact can be given Vendor Reporting permissions as a Vendor User or Vendor Admin. You cannot create a Vendor User or Vendor Admin without first creating their Contact, unless you are a PERSI Admin (see [Advanced User Administration for PERSI Admins](#)).

ACCESS & PERMISSIONS

Non-Admin accounts cannot access the Contacts & Users page. Vendor Admins can add contacts and users for their own vendor, while PERSI Admins can manage contacts and users for all vendors. If a user needs access to multiple vendors, a Vendor Admin must contact PERSI to request this.

CREATING A CONTACT

To create a contact:

1. Click the **Add Contact** button and a **Create New Contact** pop-up will appear.
2. Complete the form. The following fields are required:
 - First Name
 - Last Name Primary Email Address
 - Vendor Contact Type

Vendor Contact Type options:

- **Primary** – Every vendor must have one Primary contact. May be shown on other parts of the website and visible to non-admin users.
- **Secondary** – May also be visible on other parts of the website.
- **Other** – Grants Vendor Report access but does not display on the Home Page Contacts table. Only visible on the **Contacts & Users** page.

You cannot delete the Primary contact until you have set another contact as the Primary. If you need to remove a contact that is currently the Primary contact, you must edit a different contact and change their Contact Type to Primary. This will replace the Primary contact, which will then have the Contact Type changed to Other. You can now delete the contact that was previously the Primary contact.

After filling out the form, click **Save**. If there are no errors, the pop-up will close and the new contact will have been added to the page.

USERS WITHOUT CONTACT INFORMATION

If a PERSI Admin has given a user access to a vendor, that user will show up on the **Contacts & Users** page of that vendor with their user information and an empty contact section. Click **Add Contact** on that card to add the information for that user, if desired.

ADDING VENDOR REPORTING ACCESS TO A CONTACT

IMPORTANT NOTES ABOUT CONTACTS AND USERS

Once you have added Vendor Reporting permissions to a contact, changes made to the contact's name, email, and/or phone number will not change the information on the user's account profile. Similarly, if the user makes changes to their profile or login information (such as their name, phone number, or email address), this will not change any of the information on their contact card. Any changes that should be made to both the contact and user account must be edited separately.

If the email address entered is already associated with a user in the system, instead of creating a new account, a notification will be shown that you should contact PERSI for help. Only PERSI Admins can grant access to multiple vendors, so if you are attempting to give an existing user access to additional vendors, contact PERSI to have the access added. If the email address is already in use by another user in the same vendor, you will need to choose a different email address for this account.

ADDING A USER TO A CONTACT

To add Vendor Reporting access to a contact:

1. Click the **Add New User** button and a pop-up will appear.
2. The user **Email Address** field will copy the contact email address by default, but you can change the user email address here if necessary.
3. Select the **Permission Type** for the user:
 - **Administrator** – has full Vendor Reporting functionality, including the Contacts & Users page.
 - **User** – Has access to all Vendor Reporting functionality **except** the Contacts & Users page.
4. Submit the form. Once submitted, the user account is created.
5. An email will be sent to the user's email address. When the user clicks the verification link in the email, they will create a password and complete the process described in the [First-Time Login](#) section.

RESENDING THE ACCOUNT CREATION EMAIL

The link in the Account Creation email will expire 24 hours after the email is sent.

- If the link has expired, an Admin must click the **Resend Registration Email** button on the contact's card to have a new email sent.
- The button will be shown on the contact card until the user has completed the [First-Time Login](#) process.

CONTACT & USER ADMINISTRATION

CHANGING USER PERMISSIONS

Click **Edit User** to change the user's permissions between Administrator and User. You can also view the user email here, because it may be different from both the contact email and the username.

Note: If the user has access to multiple vendors, there will be no **Edit User** button and you will be unable to edit the user's permissions.

If the user's permissions must be immediately revoked, you can:

1. Lock the user's account (see below).
2. Contact PERSI to have them remove access to a vendor.

PASSWORD RESET

If a user has forgotten their password, click the **Send Password Reset Email** button on their Contact card. This will send them an email so they can complete the password reset process.

For more information on this, see the [Forgot Password](#) section.

LOCKING & UNLOCKING ACCOUNTS

Both PERSI Admins and Vendor Admins can lock user accounts, even if the user has access to multiple vendors. If an account is locked, this applies to all vendor logins for that account.

Reasons for locking an account may include:

- Security concerns (e.g., a compromised password).
- An employee is leaving their position and requiring immediate removal of access.

To unlock an account:

1. Contact PERSI.
2. PERSI will verify that the account should be unlocked.

Note: If required, PERSI can remove access to specific vendors before unlocking.

DELETING A CONTACT

To delete a contact, click the **Delete** button in the top right of the contact card. Confirm the deletion in a pop-up and then the contact will be removed.

If the contact has an associated user, the user's access to the vendor will be removed. If the user has access to no other vendors, their account will be locked.

TROUBLESHOOTING CONTACT ADMINISTRATION

The user didn't receive their registration email

The email may take a few minutes to arrive, and sometimes longer if there are any system delays. If the user hasn't received the email after an hour, you should continue to the next steps.

1. Verify the **Email Address**

- Confirm with the user, to make sure the correct email address was used for account creation.
- The email address they are using may not match the email address in their Contact.
- If the wrong email address was used, contact PERSI to have them change the email address in the user information.
- Once PERSI has changed the email address, you can resend the email by clicking the **Resend Registration Email** on the user's contact card.

2. Check **Spam/Junk** and **Deleted folders**

- Ask the user to review their spam/junk folder.
- They should also check their Deleted folder in case a spam filter sent it there directly.

If the user still has not received the email, then you can contact PERSI for further troubleshooting.

The link in the registration email doesn't work

The registration link expires after **24 hours**. If it has expired, resend the registration email by clicking the **Resend Registration Email** on the user's contact card.

If the link in the email is not clickable, this is a known issue with some versions of Outlook:

1. Have the user copy the link from the email.
2. Paste it into their browser's address bar.
3. Continue registration as normal once the page opens.

The user can't log in with their email address

If the user has already logged in, they may have changed their username to no longer be the same as their email address, or they may have changed it to a different email.

If you can confirm that the user is the same person that you are talking to, you can find their contact card and give them the Username shown there.

The user says that they can't log in to their account even though they know the username

The user may be locked out, either due to entering the wrong password too many times or because their account was locked on the Contacts & Users page.

If the user was locked out due to the wrong password, they will need to wait a couple of hours before they can log in. In the meantime, they can use the **Forgot your password?** link on the login page to reset their password to one they know.

If the user is locked on the Contacts & Users page, you will need to contact PERI to verify that the user can be unlocked.

BUILDING AN ADVANCED SEARCH QUERY

The **Query Builder** allows advanced filtering of tables (e.g., Deductions).

1. Click the + next to the AND/OR field.
2. Choose **Add Condition**.
 - First dropdown = field to search.
 - Second dropdown = type of search.
 - Depending on the field, there will either be a text box or third dropdown.

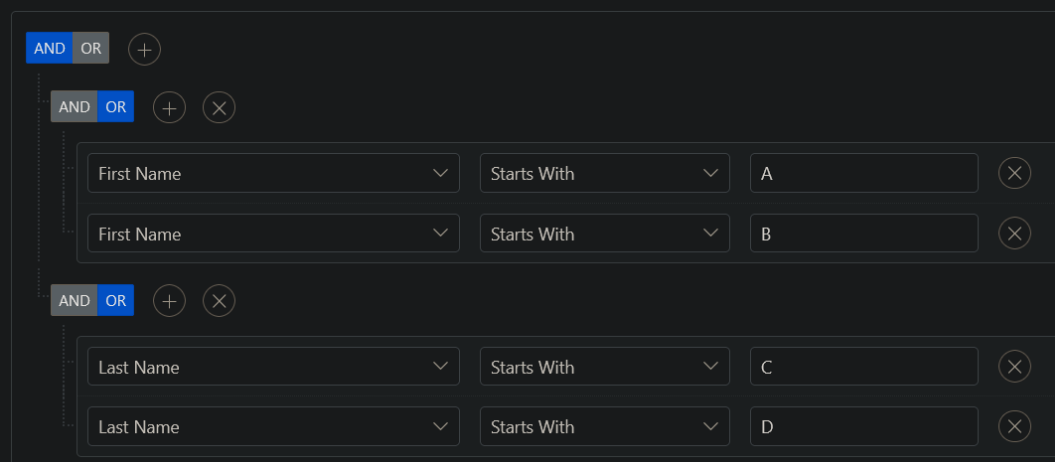
Multiple Conditions:

- **AND** = results must meet all conditions.
- **OR** = results can meet one or more conditions.

Groups:

- Use Add Group to specify different search criteria and whether you want to search with the **AND** or **OR** option for different groups of criteria.

For example, in the screenshot below, the use of groups and search criteria would create the search “Show me all rows where the First Name starts with A or B and the Last Name starts with C or D.” This search would show you a row where the person’s name is Adam Davis (First name starts with A and last name starts with D), but not a row where the person’s name is Adam Adams (First name starts with A but the last name doesn’t start with C or D) or Chris Davis (The first name doesn’t start with A or B but the last name does start with D).



The screenshot displays the Query Builder interface with a dark theme. At the top, there are buttons for 'AND' (highlighted in blue), 'OR', and a '+' icon to add a new condition. Below this, the query is built using nested groups. The first group is defined by an 'AND' button and contains two conditions: 'First Name' starts with 'A' and 'First Name' starts with 'B'. The second group is defined by an 'OR' button and contains two conditions: 'Last Name' starts with 'C' and 'Last Name' starts with 'D'. Each condition is represented by a dropdown menu for the field, a dropdown for the search type ('Starts With'), and a text input for the value. Each condition also has a close button (X) to the right.