BVFF PRBTS Volunteer Reporting System – Municipality Portal

TRAINING MANUAL

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I. Municipality Portal Access

Access to Online Portal

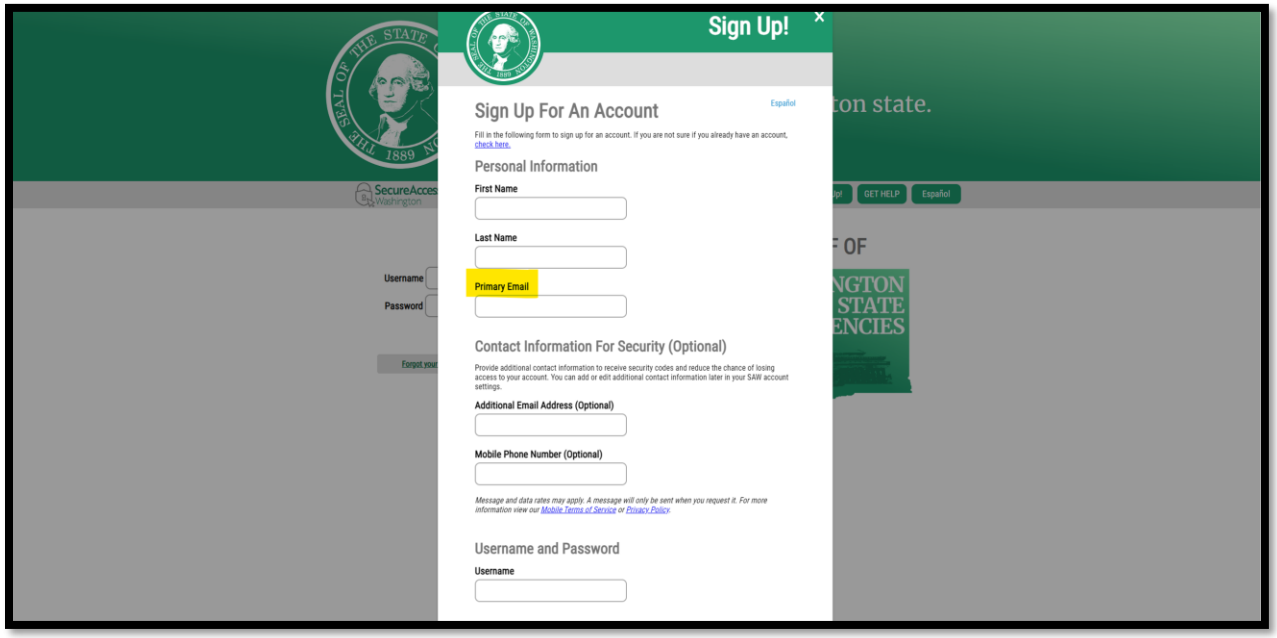
There are two ways to get access to the online portal.

A) Requesting access to BVFF service on SAW

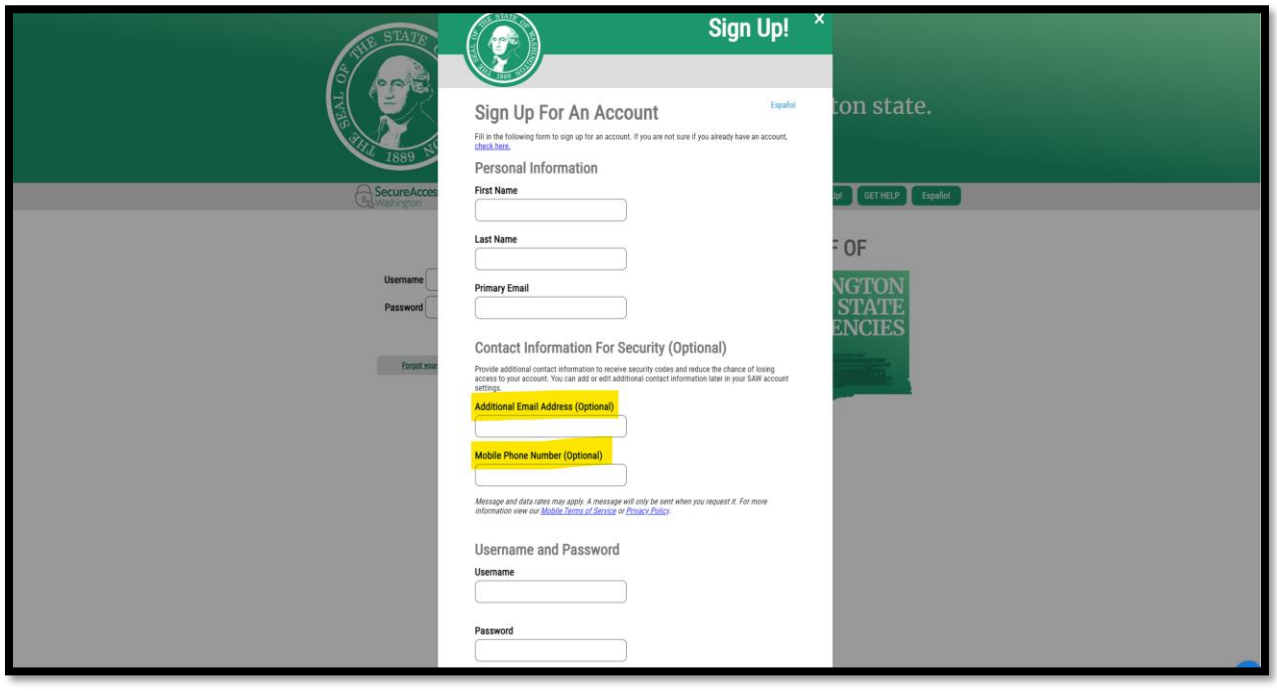
If you do not have a SAW account, please follow steps below to register for SAW account. If you are already registered, please go to "5".

1. Open the home page to SAW. Click **Sign Up**.

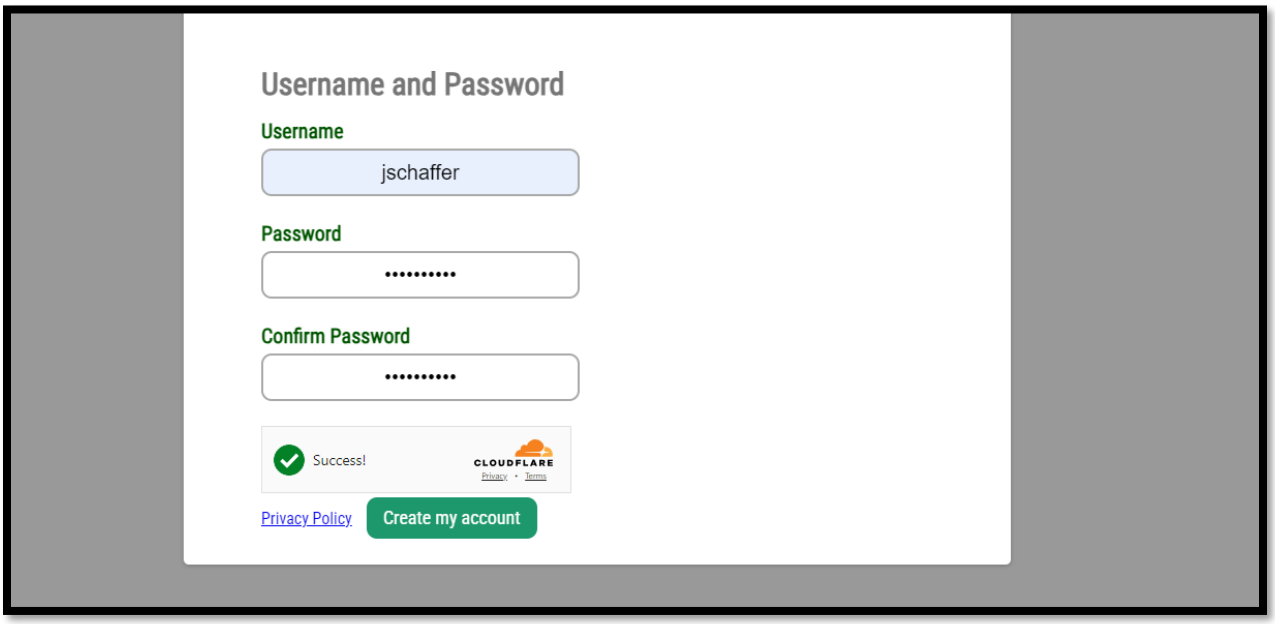
2. Enter your information. Note: A link will be sent to your **Primary Email** after this page is completed. Kindly check the spelling of the email address upon the completion of this page.



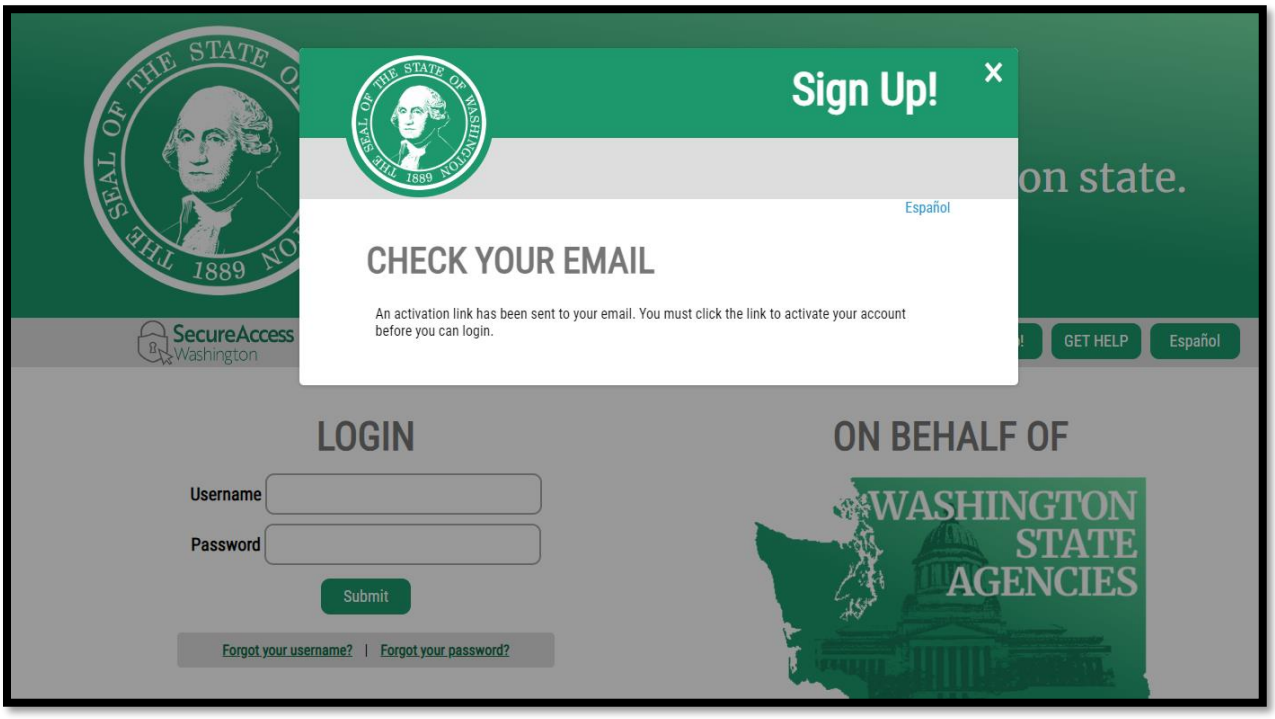
3. Enter a preferred method to receive the multi-factor 6-digit codes during Login. Note: If this is left blank, the code can be sent to the Primary Email address you entered above. You can modify this later in your SAW account.



4. Username and Password will be your login credentials to SAW. Click **Create my Account** when ready.



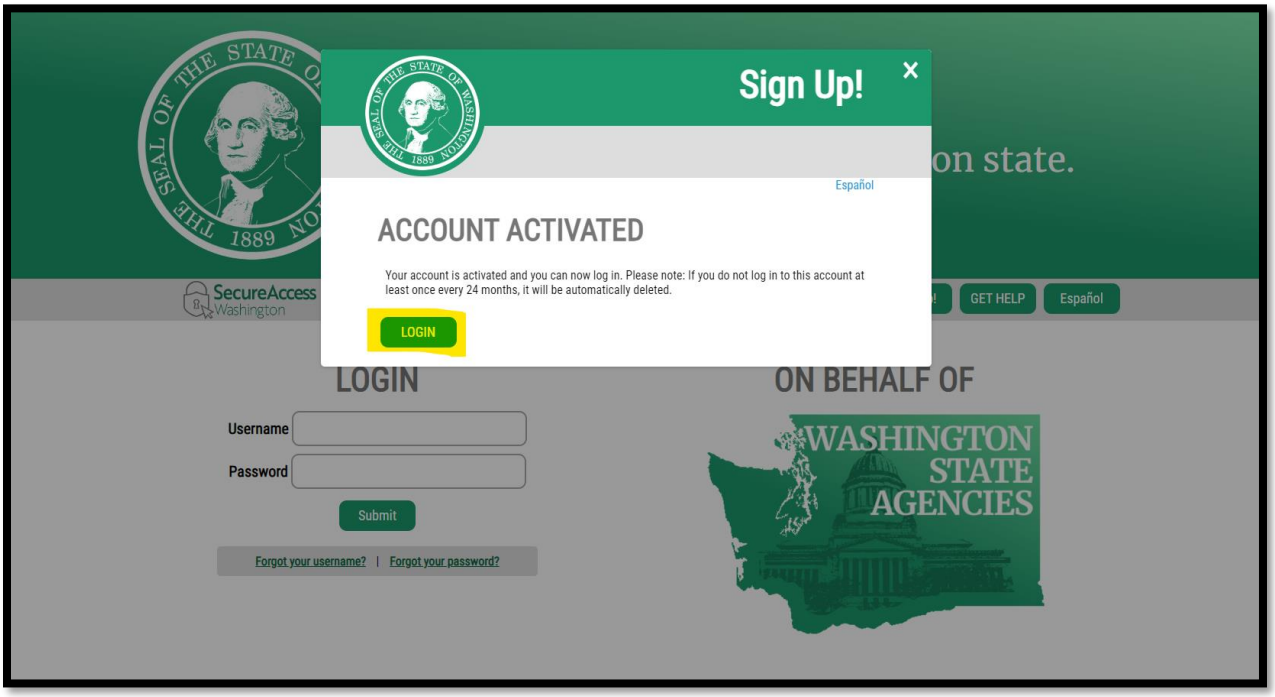
5. A popup box will appear. Follow the instructions and go to the inbox of your **Primary Email**. Look for an email from SecureAccessWashington.



6. Open the email with the subject line below. If it's not in your inbox, refresh your email page and check your Junk, Spam, All Mail etc.

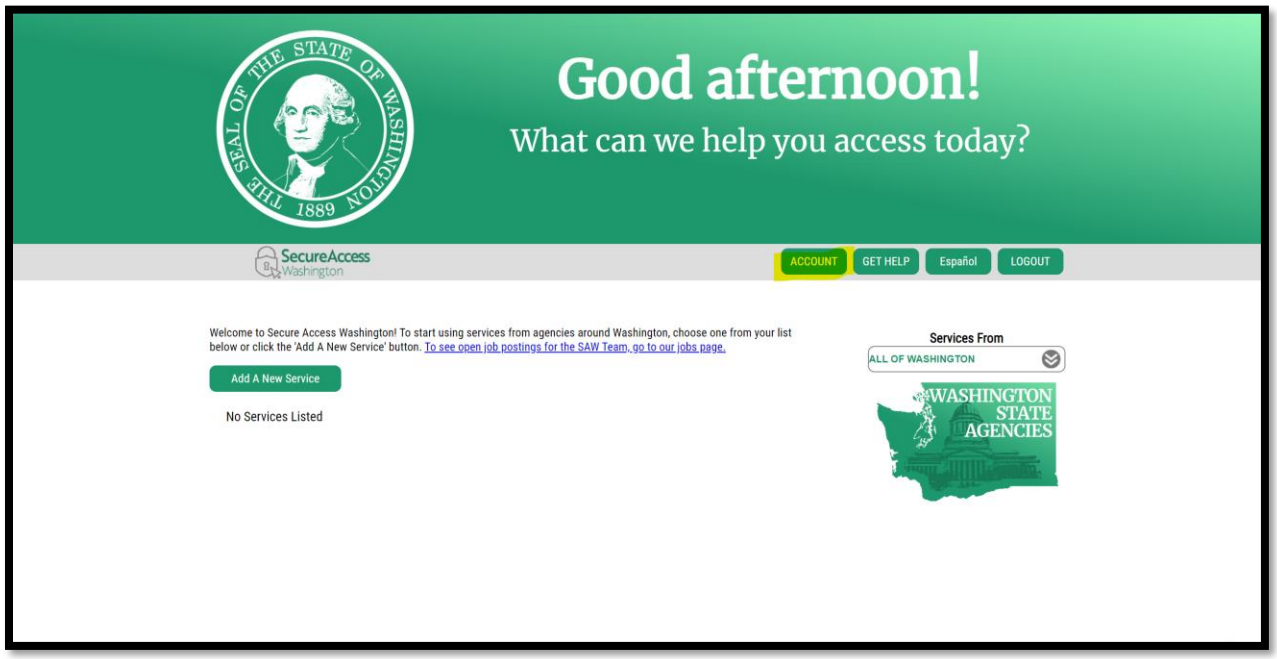
7. Click the link to active your account.

8. The link will open SAW in a New Window. Your account has now been activated. Click **Login** to proceed.

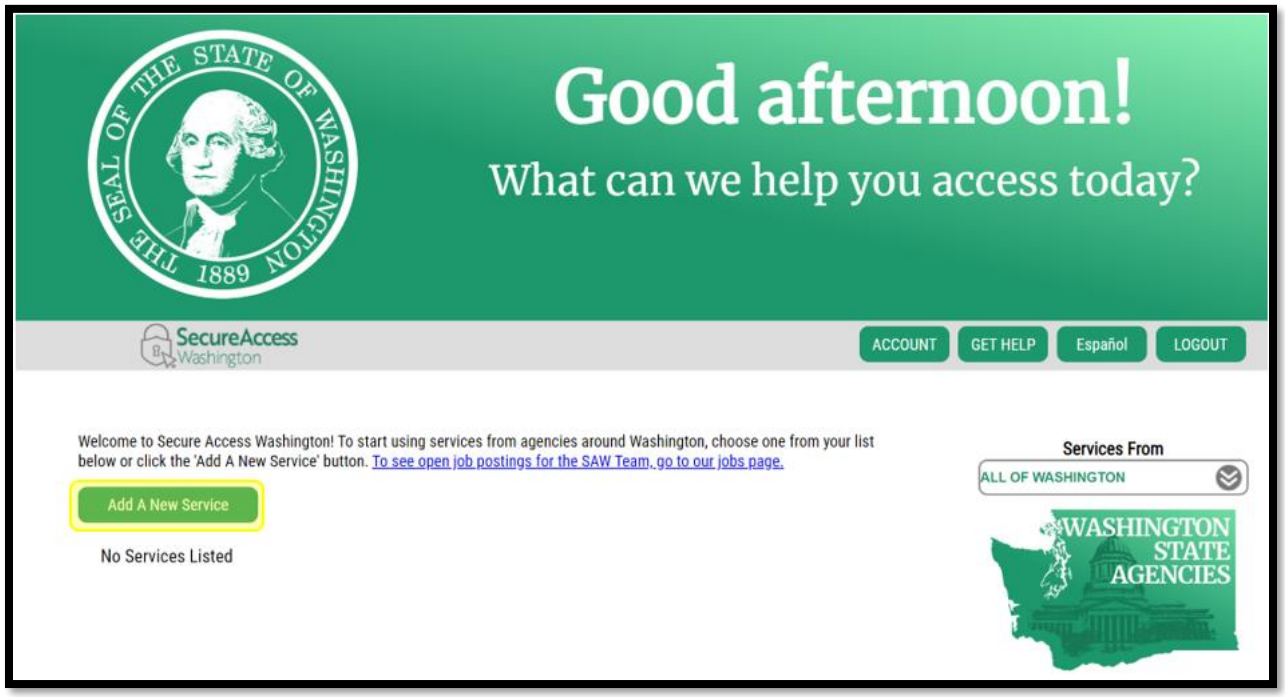


9. Enter your Username and Password. Click **Submit** to login.

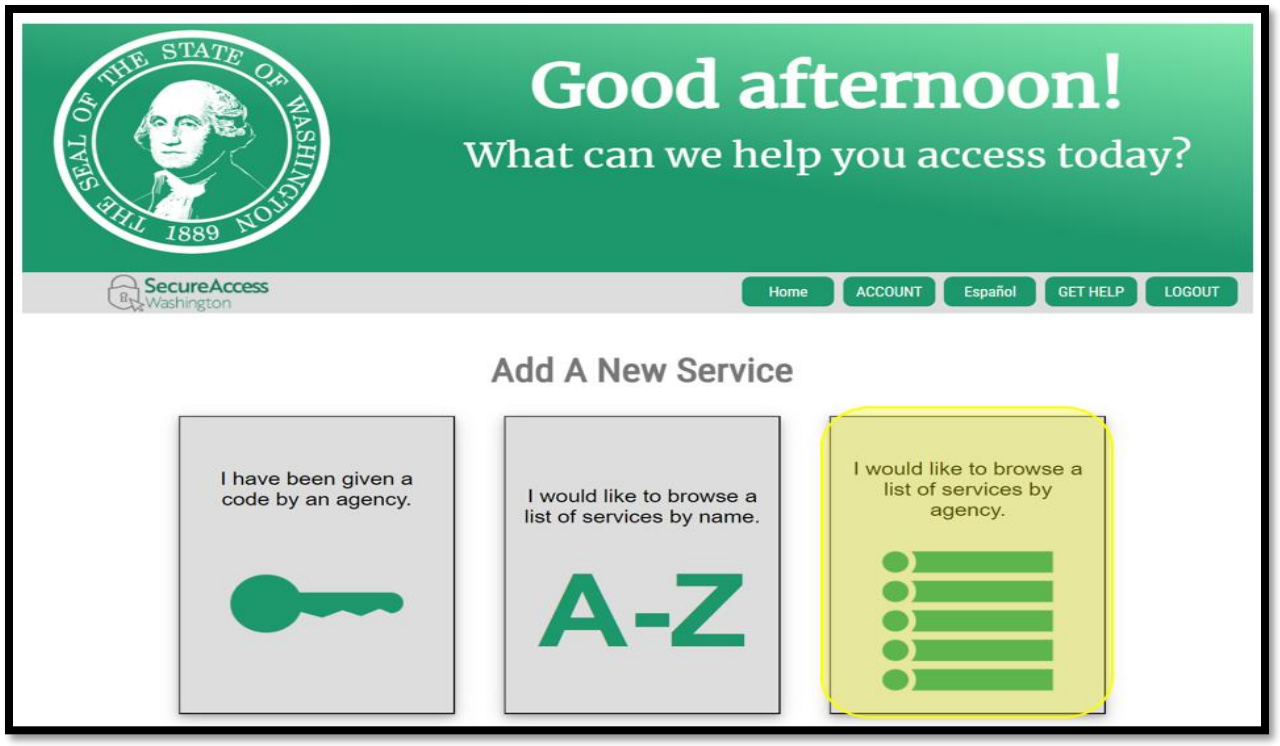
10. The following screen will open. This is the Home Screen of your SAW account. Click Account to manage account preferences such as Password and MFA.



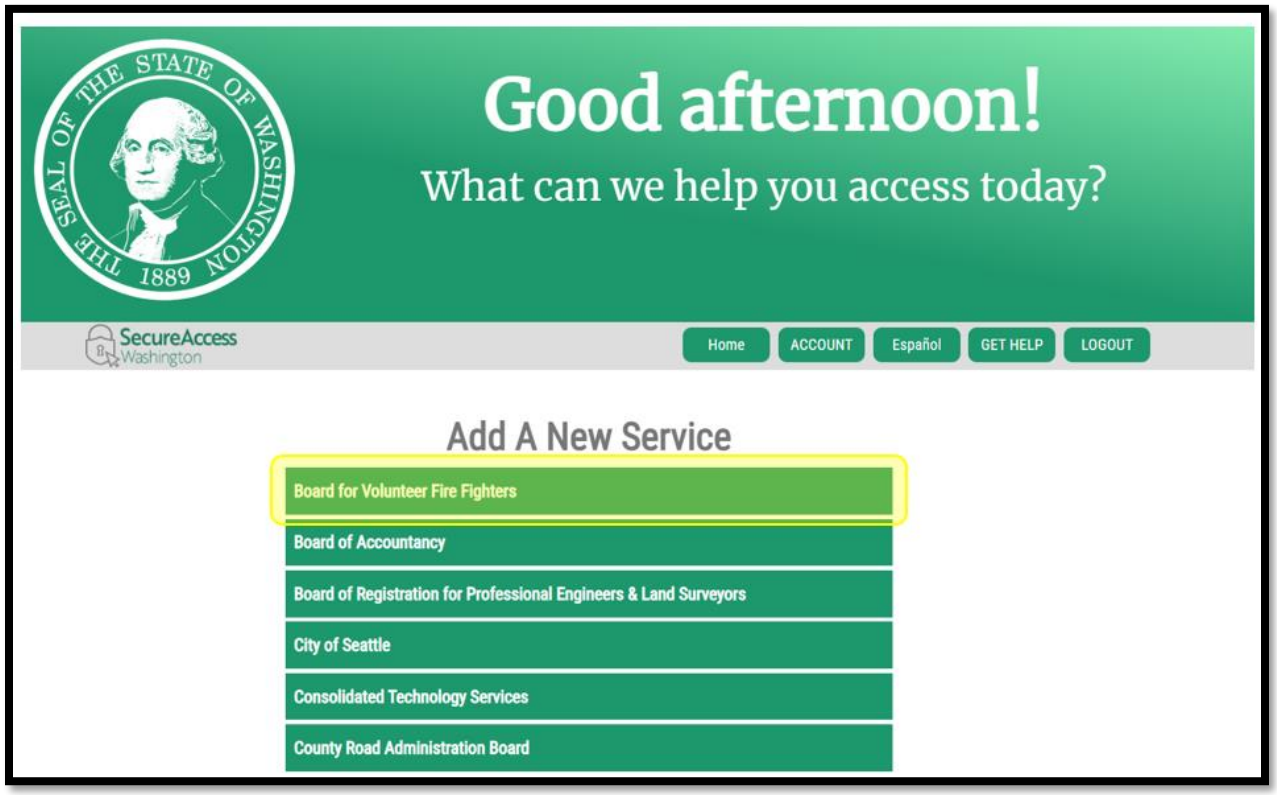
11. Click on “Add a New Service” to initiate the process of requesting access.



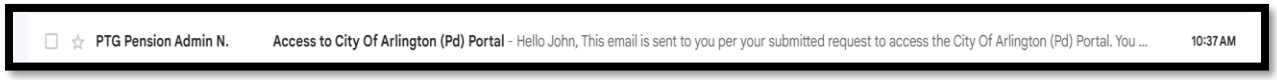
12. Click on the highlighted field “I would like to browse a list of services by agency.”



13. Select 'Board of Volunteer Fire Fighters' from the list and click on 'Apply' on the next page.



14. Please fill in your details and click 'Submit'. This request will go to BVFF. BVFF Administrators will connect your registered SAW account to PensionProPlus. When this is completed on their end, you will receive an email from PTG to your **Primary Email** address. The email will contain the following subject line. If you do not see it, check Spam, Junk, All Main, etc.

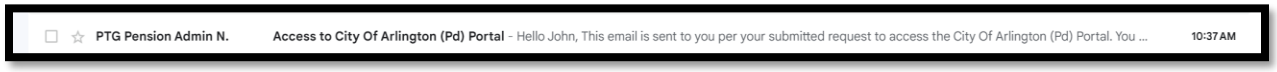


Once approved, you will see BVFF as a service on your SAW account.

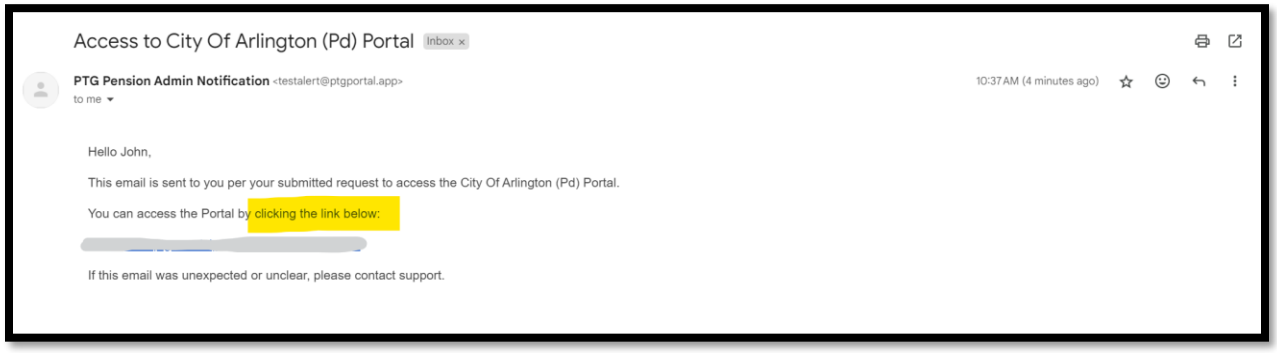
15. Open the email message. Click the link to access the Portal in PensionProPlus. **Save this link for future logins to PensionProPlus.**

B) Requesting Access to Portal service by email to BVFF

16. You can also send an email to BVFF to register your email as an administrator for your municipality. BVFF Administrators will connect your registered SAW account to PensionProPlus. When this is completed on their end, you will receive an email from PTG to your **Primary Email** address. The email will contain the following subject line. If you do not see it, check Spam, Junk, All Main, etc.

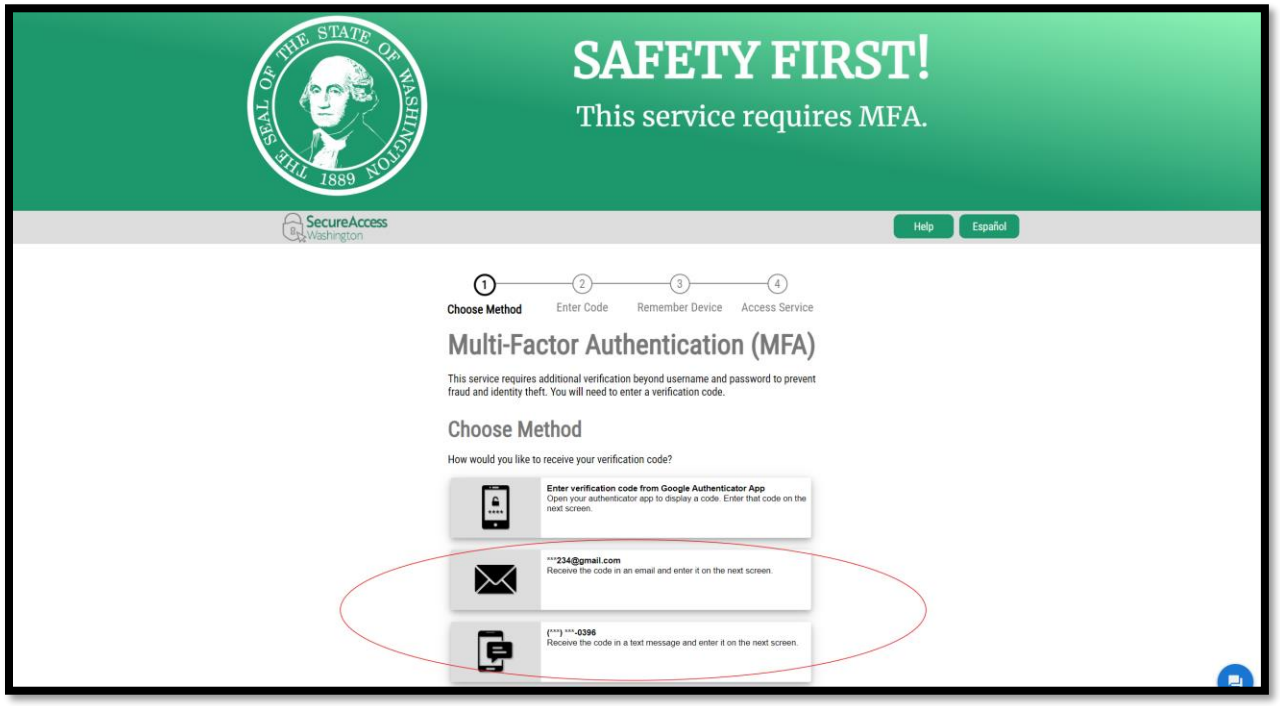


17. Open the email message. Click the link to access the Portal in PensionProPlus. **Save this link for future logins to PensionProPlus.**



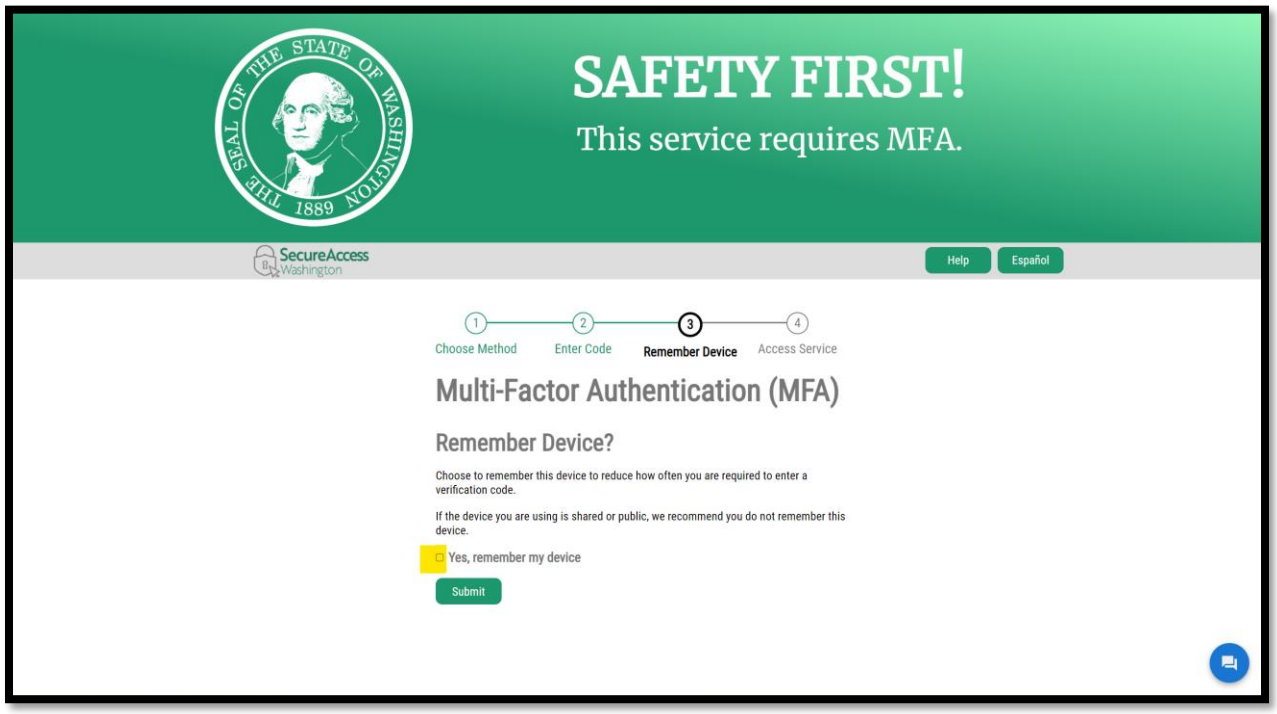
18. IF you are not already signed into SAW, the link will direct you to the SAW Home Screen. Sign In with your SAW credentials and the system will redirect you to the Portal in PensionProPlus.

19. Select the method to receive the 6-digit verification code. In this example, the account holder registered with a Primary Email ending in 234@gmail and then entered a phone number ending 0396. Return to **Step 1: Register your SAW Account** for more information.



20. The user in this example selected the phone number method. They will receive a text message to this number containing a 6-digit code. Enter the code and click **Submit**.

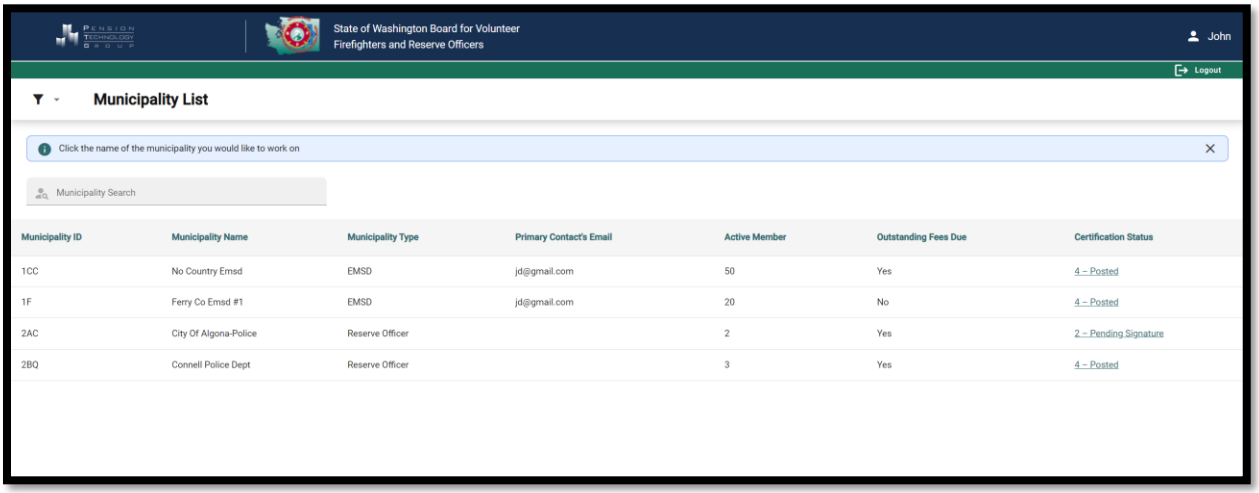
21. Check the box to “remember my device”. This will bypass the MFA step for future logins. Click **Submit** when ready to proceed.



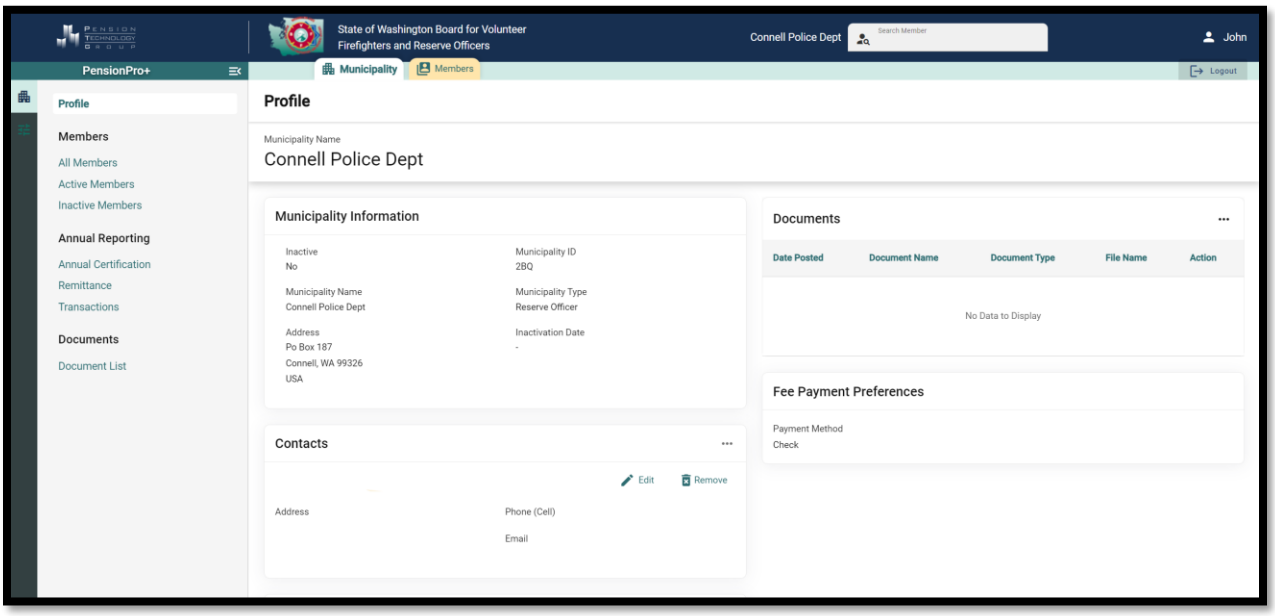
II. Municipality Profile Maintenance

To View Municipality List

1. If the user is registered to multiple municipalities, the system will open the Municipality List as the system's landing page.

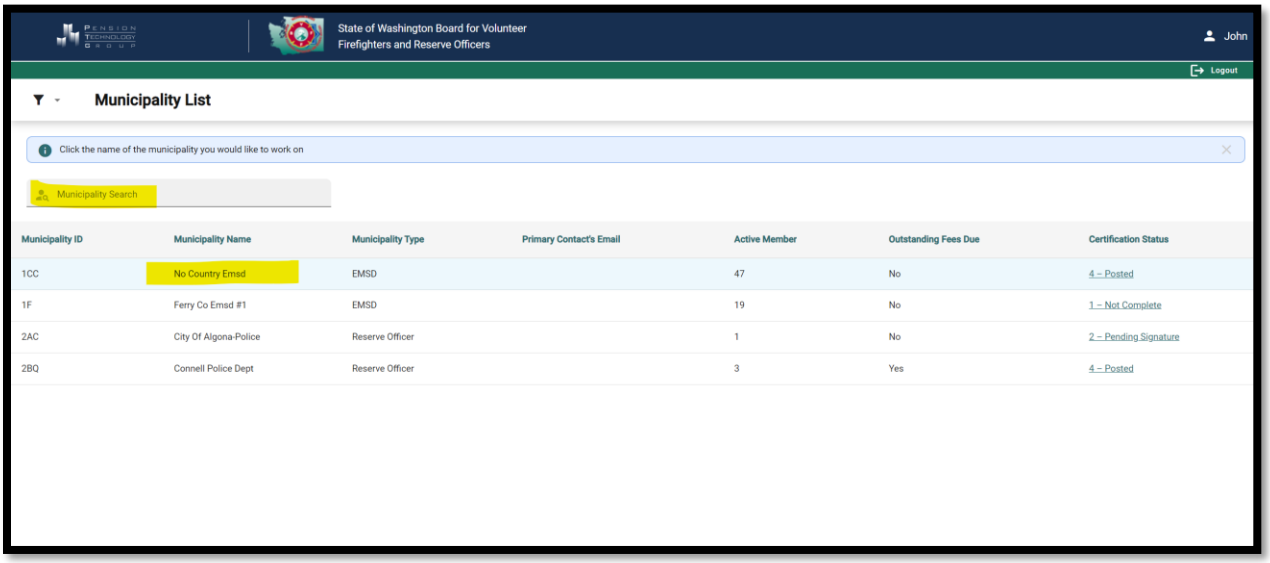


2. If the user is registered to only 1 municipality, the system will open their Municipality Profile as the system's landing page.

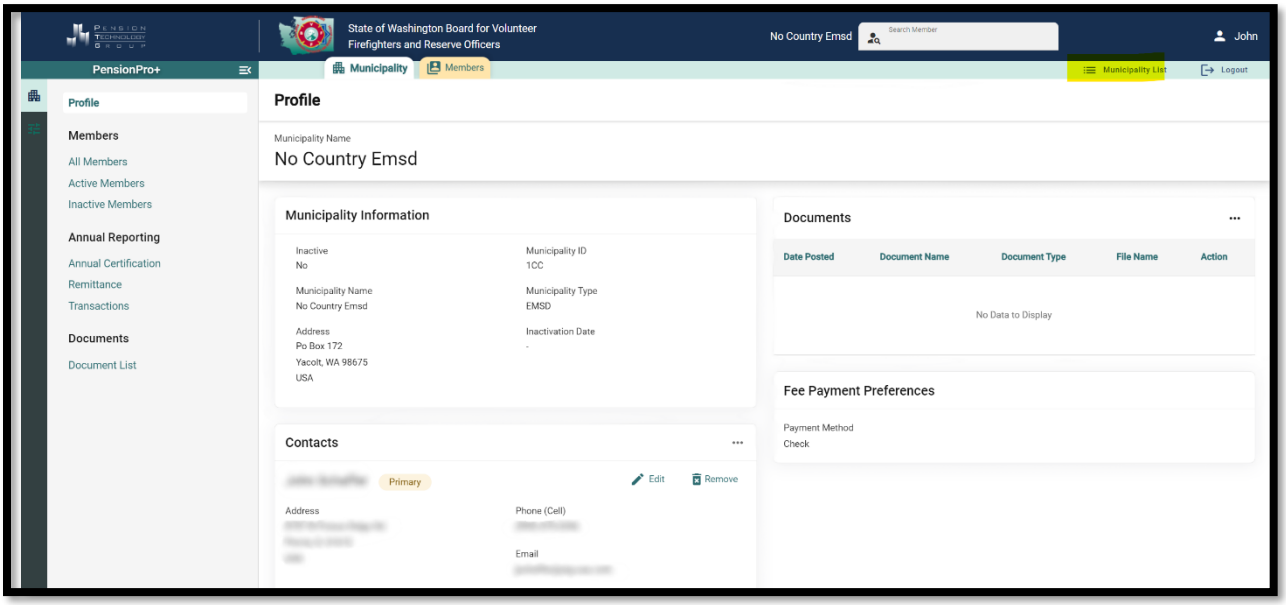


To View Municipality Profile

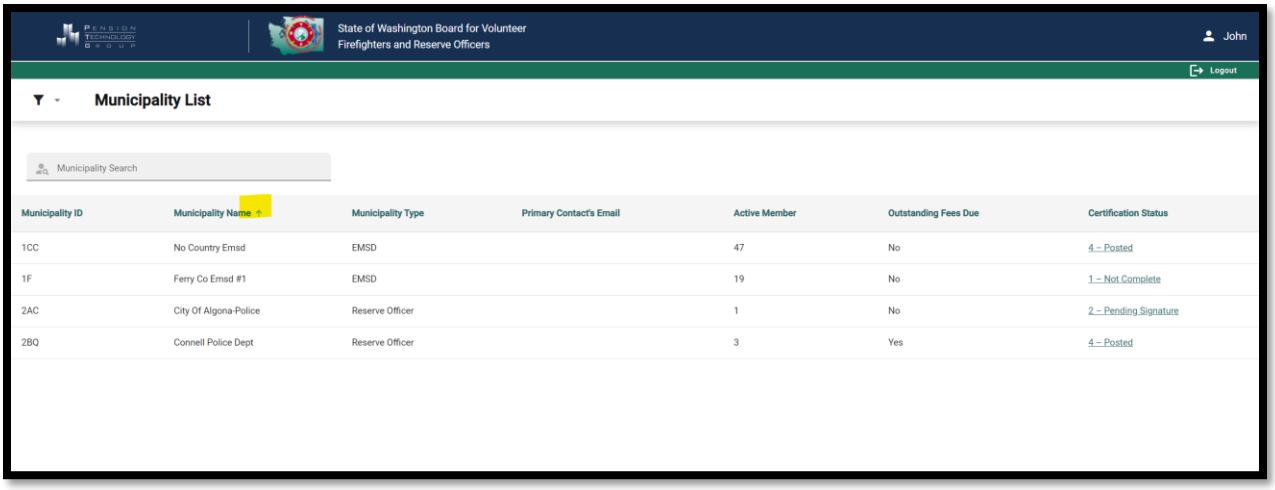
1. To open a Municipality, click on a municipality from the list or enter the name into the Municipality Search Bar.



2. To return to the Municipality List, click the highlighted tab in the top right.

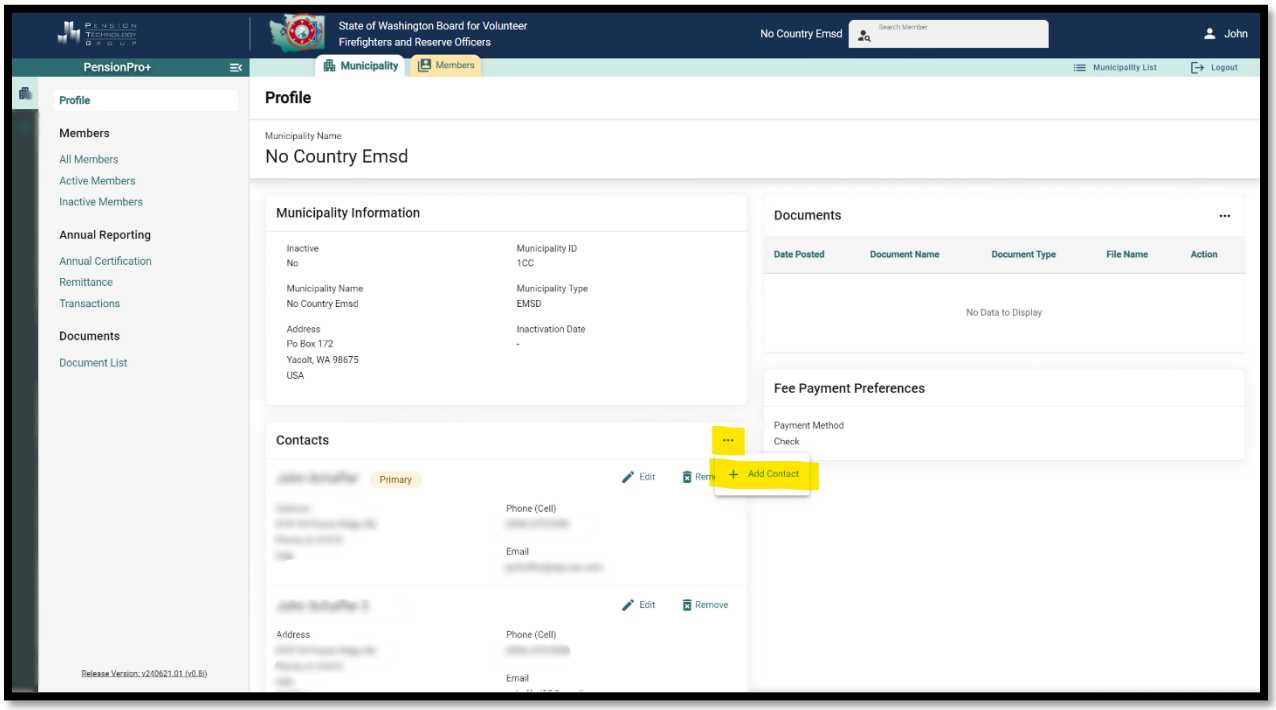


3. Additionally, users can click on the header column to change the sorting order to descending or ascending.

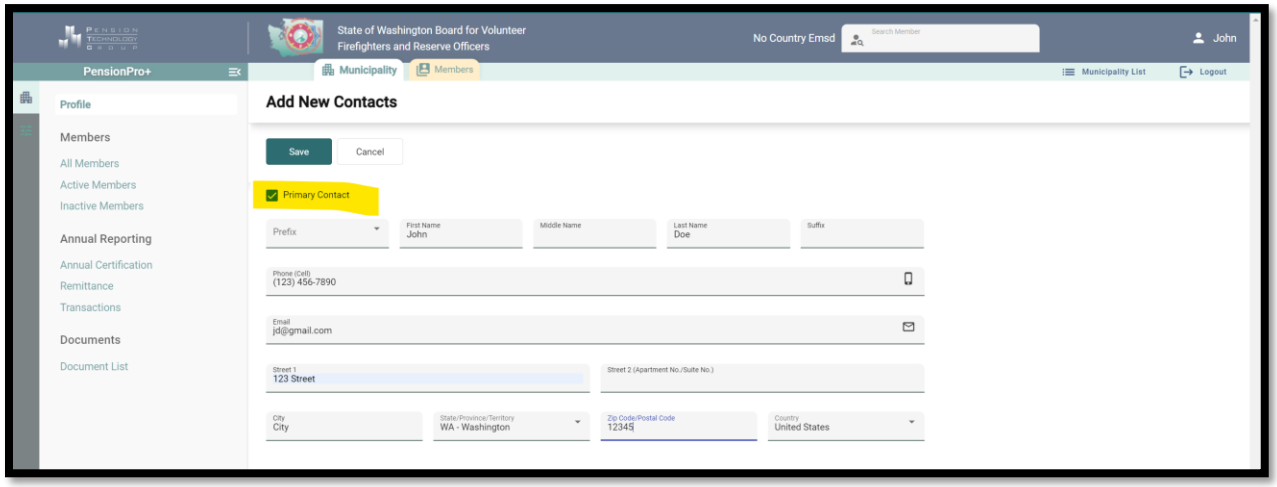


To Add Municipality Contact

1. Select **Add Contact** from the Actions list in the Contacts section of the Municipality Profile screen.

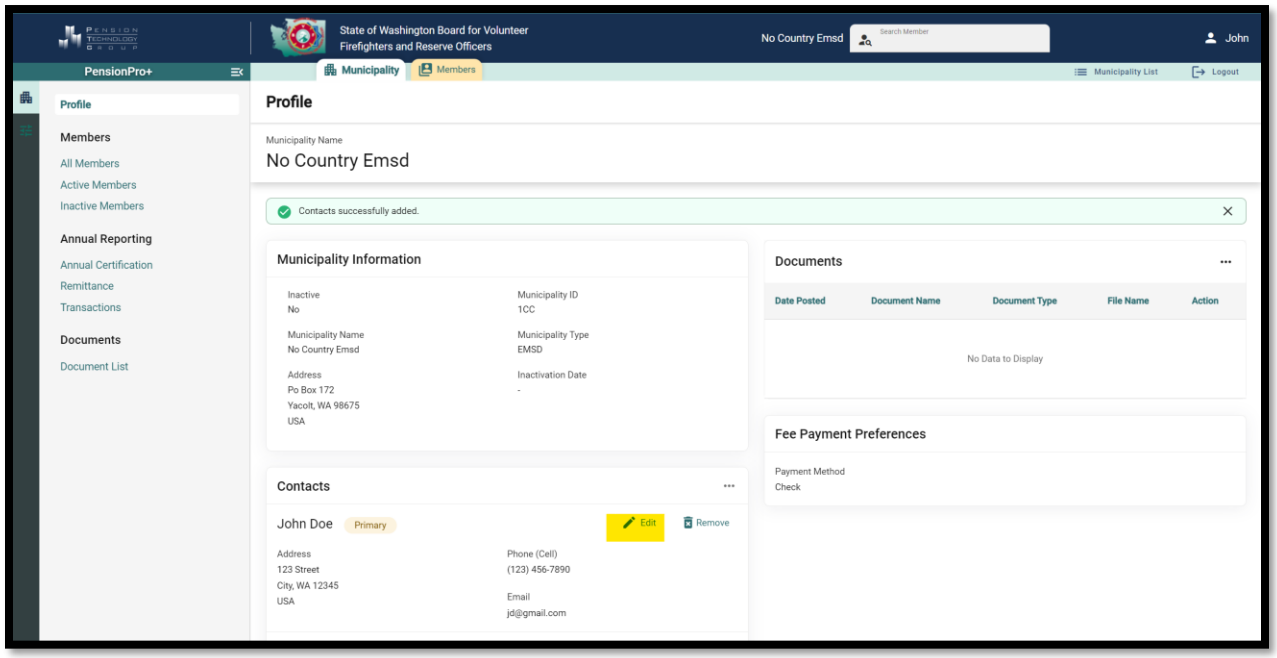


2. Fill in the required information. Click **Save** to save changes or **Cancel** to discard them. (If the contact is marked as the **Primary Contact**, the system will replace the current primary contact with the newly added primary contact to ensure that each municipality has only one primary contact.)

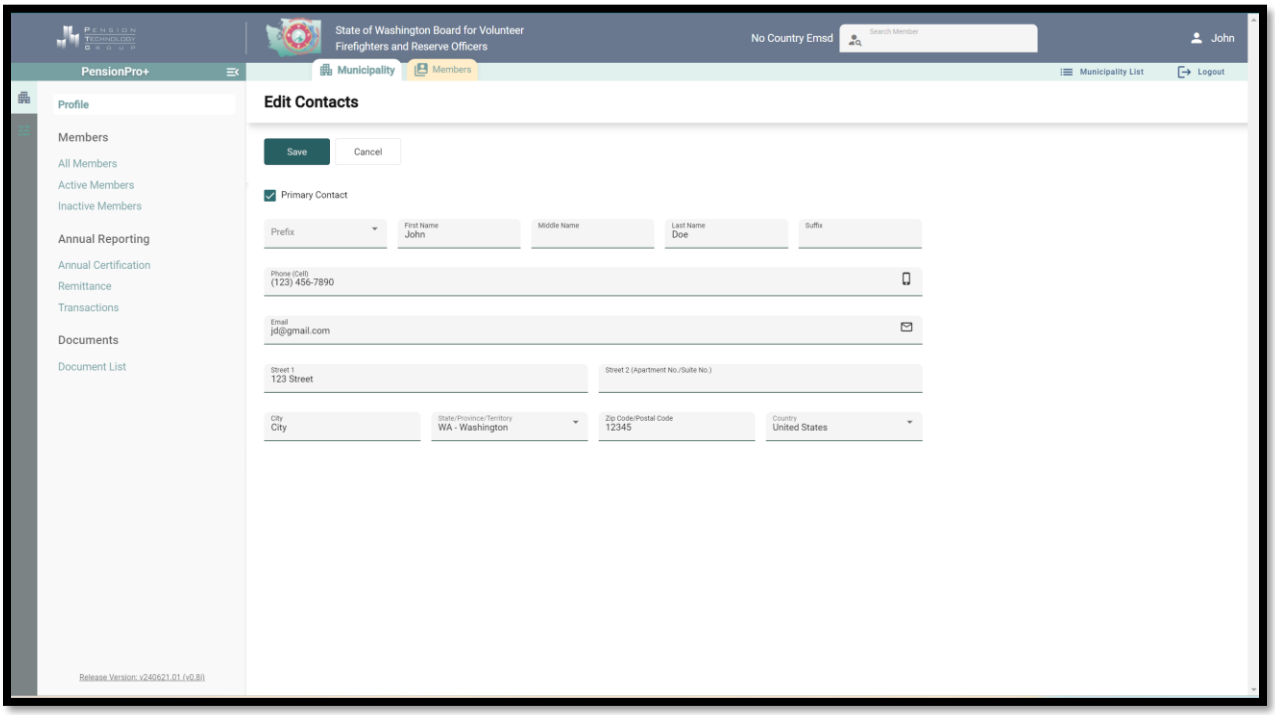


To Edit Municipality Contacts

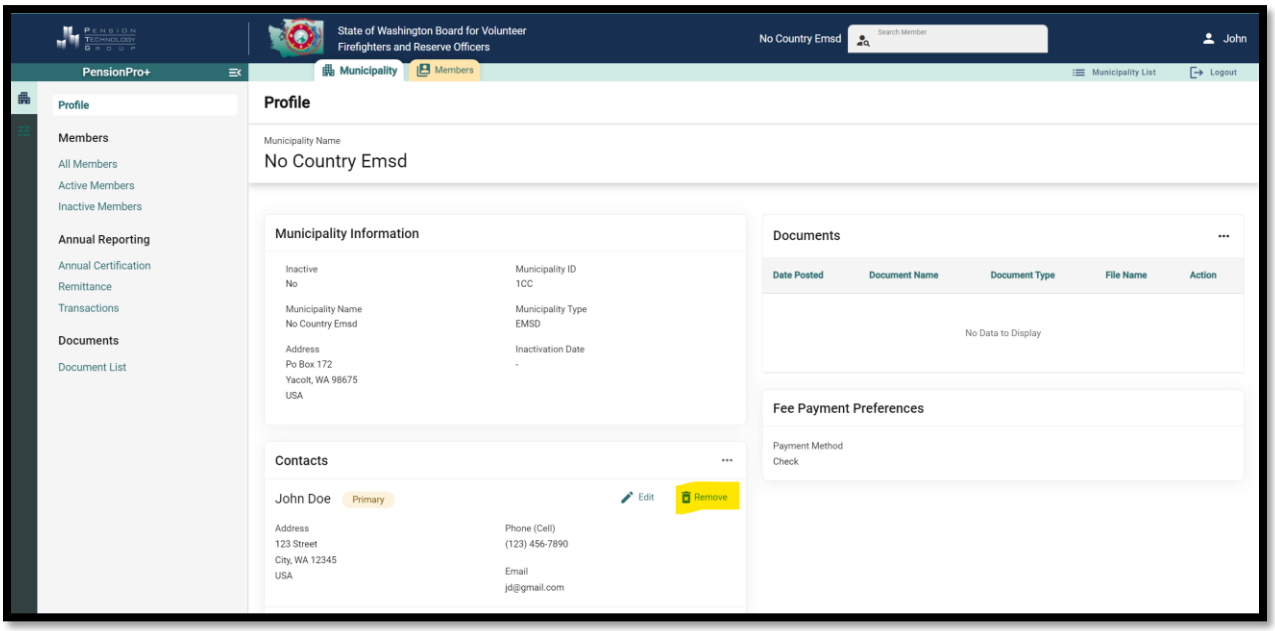
1. Click the **Edit** button of the targeted contact record in the **Contacts** section of the **Profile** screen.



2. Enter the information. Click **Save** to save changes **or Cancel** to discard them.

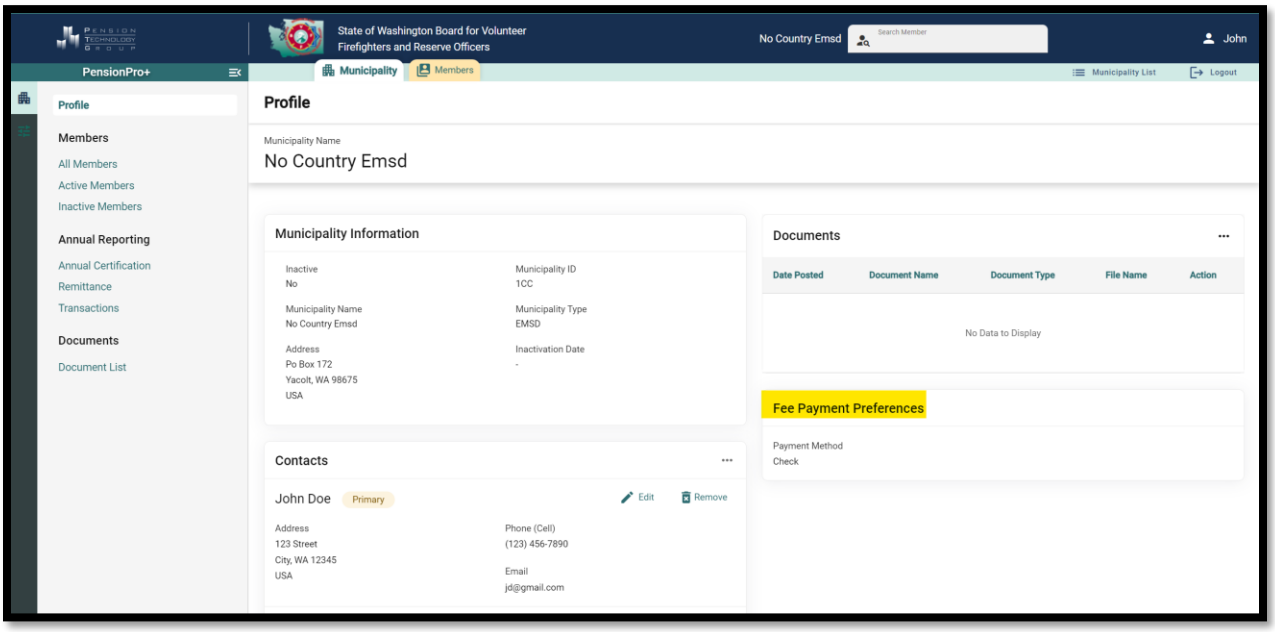


3. **Remove** an existing municipality contact by clicking **Remove** at the targeted contact record in the **Contacts** section of the **Profile** screen.



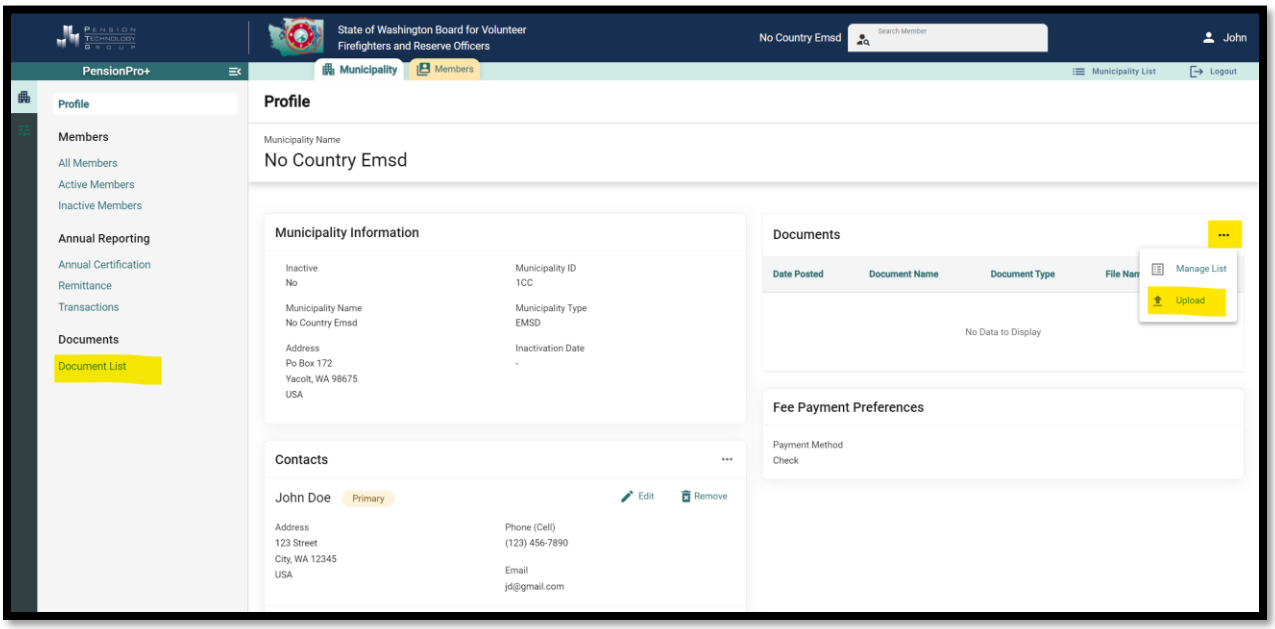
To Edit Fee Payment Preferences.

1. This functionality is pending due to a delayed implementation of electronic payments. The Payment Method is set to **Check** until then.

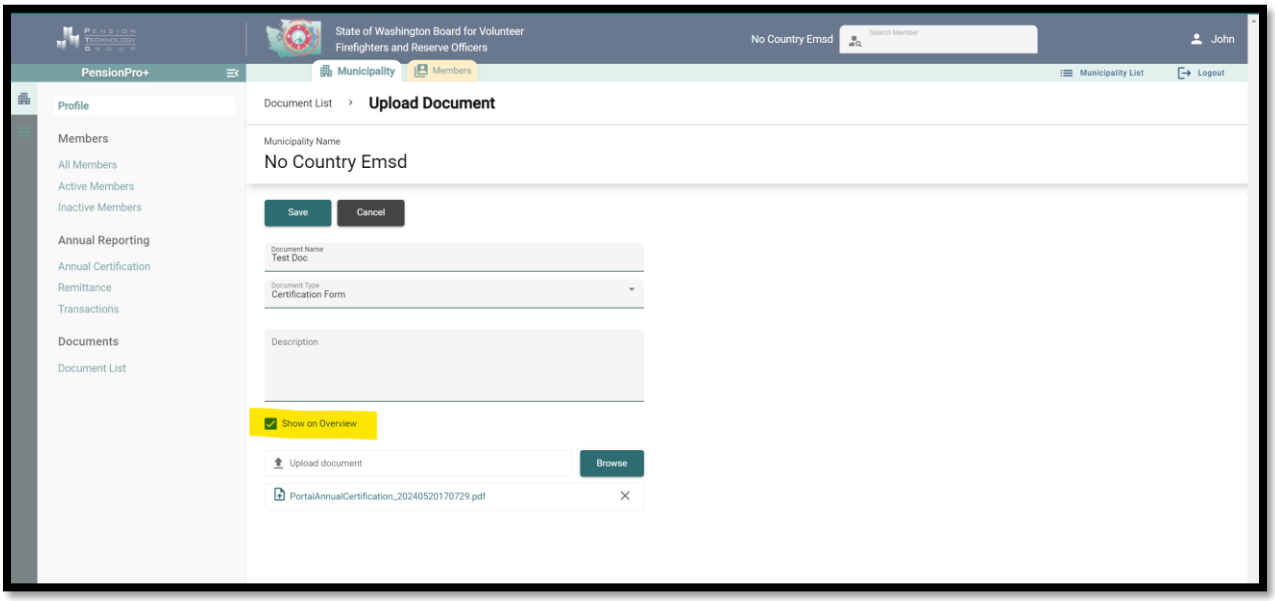


To Upload Municipality Documents

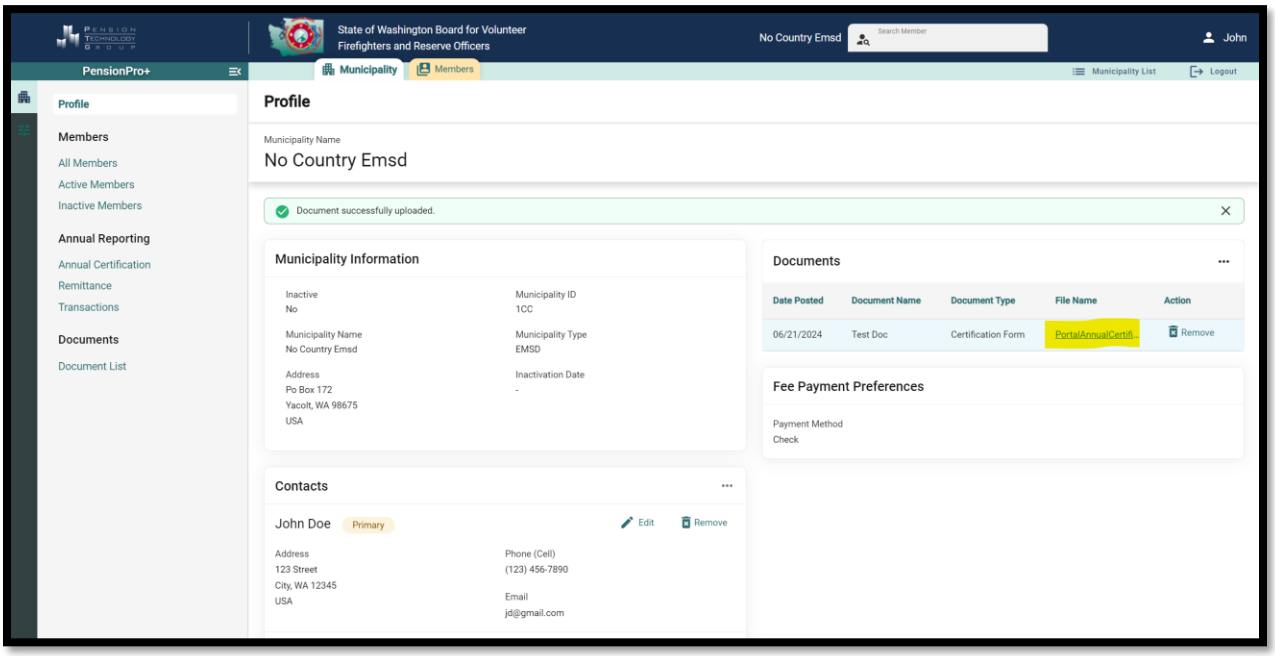
1. Either select **Upload** from the actions list in the Documents section on the Profile screen OR choose **Document List** from the left menu and click Upload.



2. Fill in the details related to the uploaded document. Click **Save** to add the new document or click **Cancel** to discard the changes. If users choose the option **Show on Overview**, the system will display the newly uploaded document at the top of the list in the Documents section on the Municipality Profile screen.

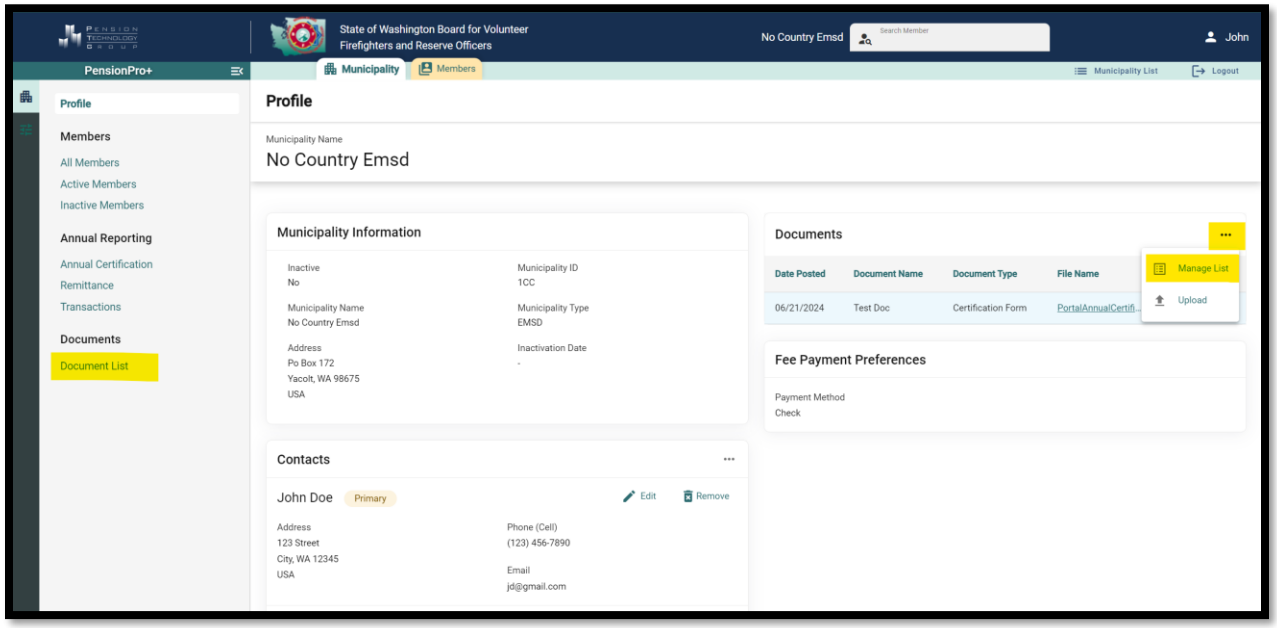


3. Users can now click on the File Name to upload the document to their device.



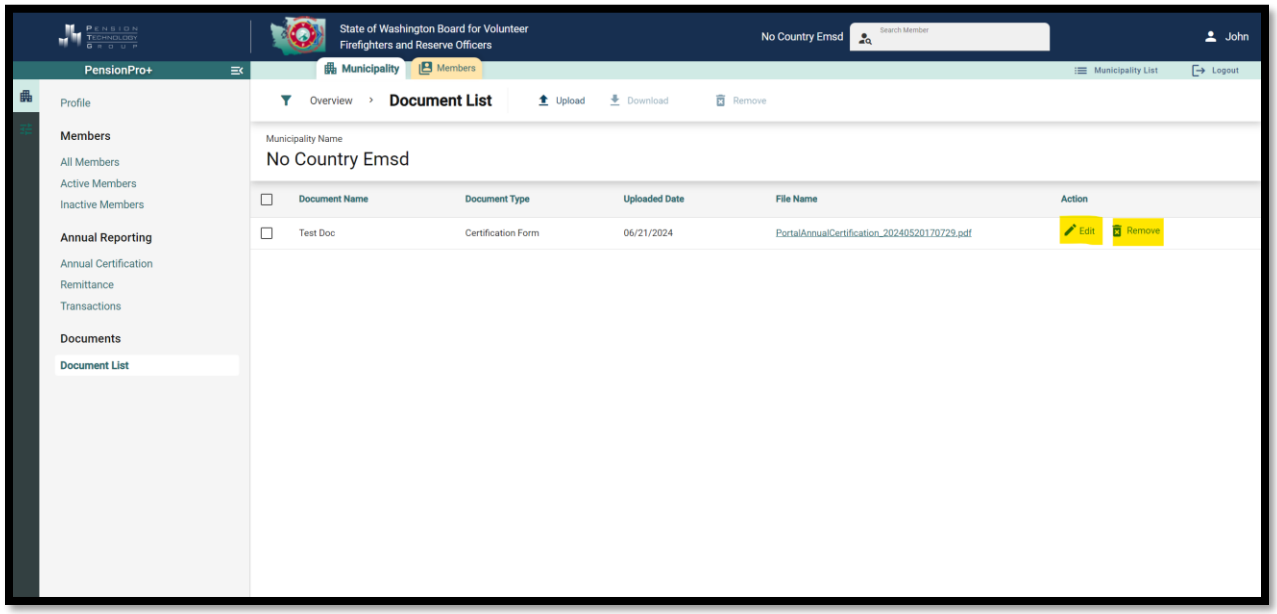
To View Municipality Document List

Either select **Manage List** from the actions list in the Documents section on the Profile screen OR choose **Document List** from the Documents tab in the left menu.



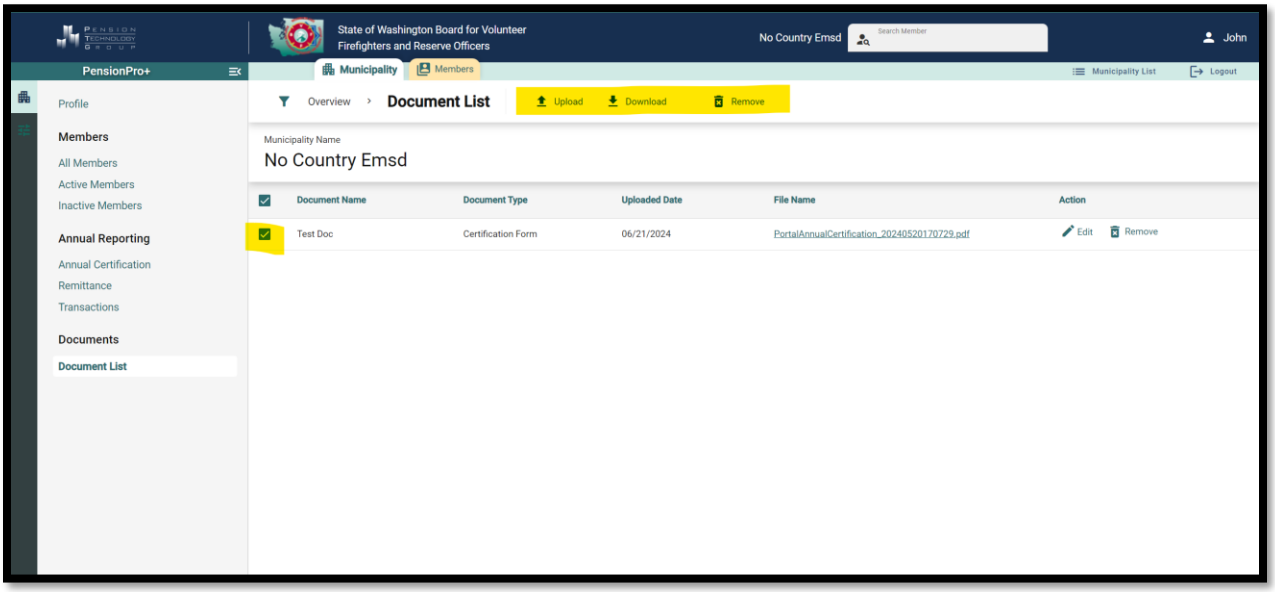
To Edit Municipality Documents

1. Click **Edit** to update the information related to a selected document in the list or Click **Remove** to delete the selected documents from the list.

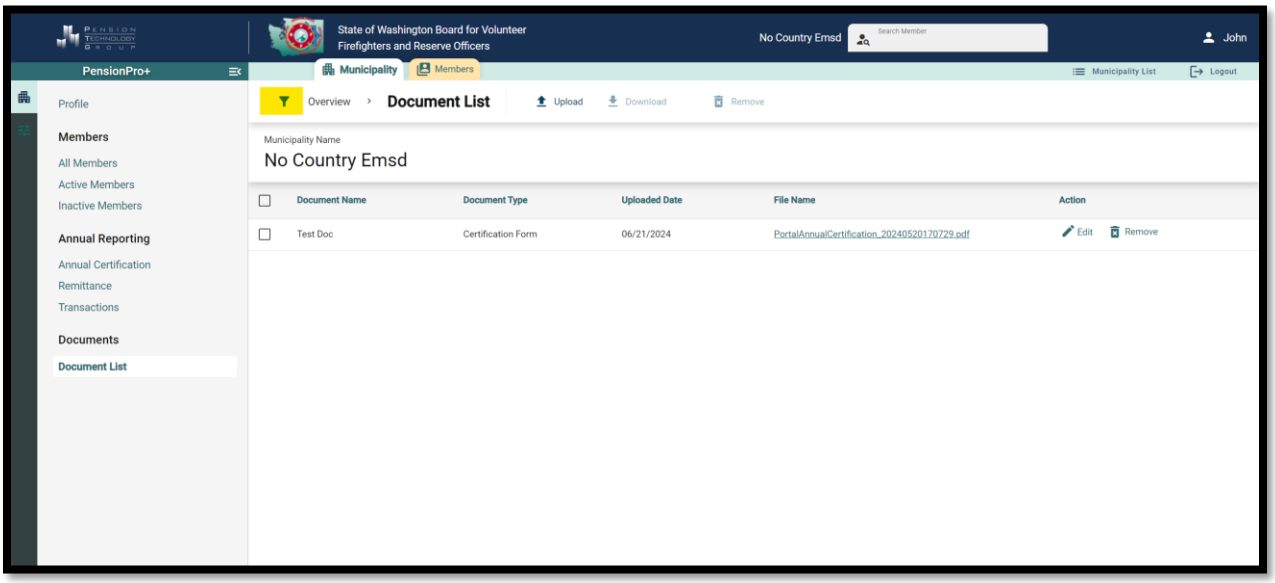


To Use Document List Functions

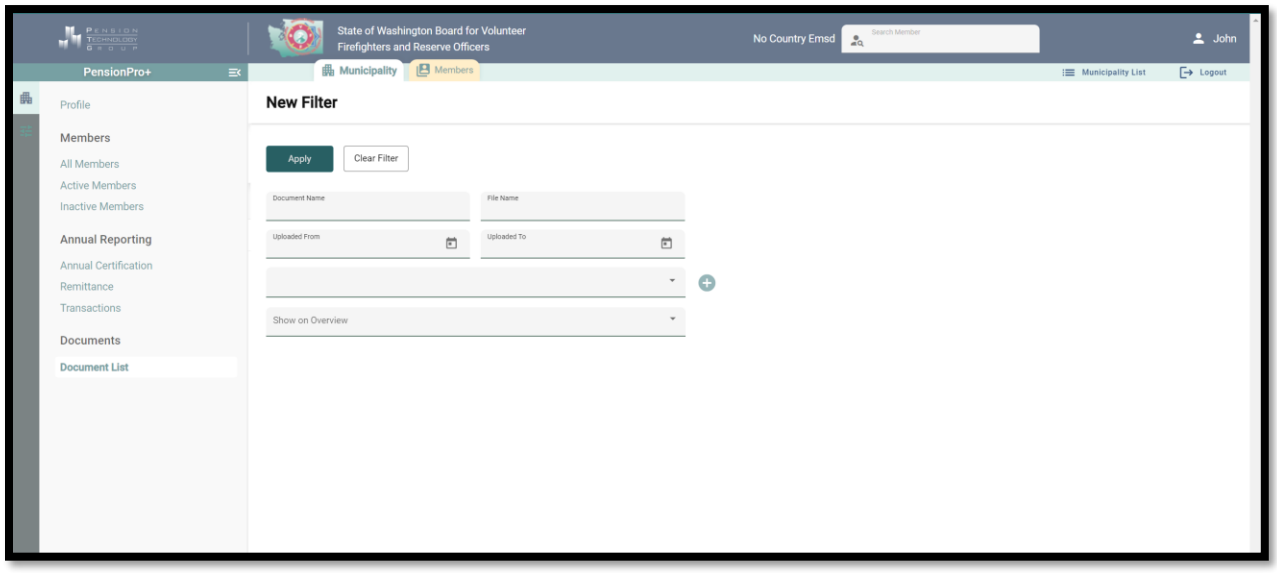
1. Users can select multiple documents by checking the box at the beginning of each row and click an option above to apply the action to checked files in bulk.



2. Additionally, users can click the Filter icon at the top of the header of the Document List screen to filter the document list as needed for easy searching.



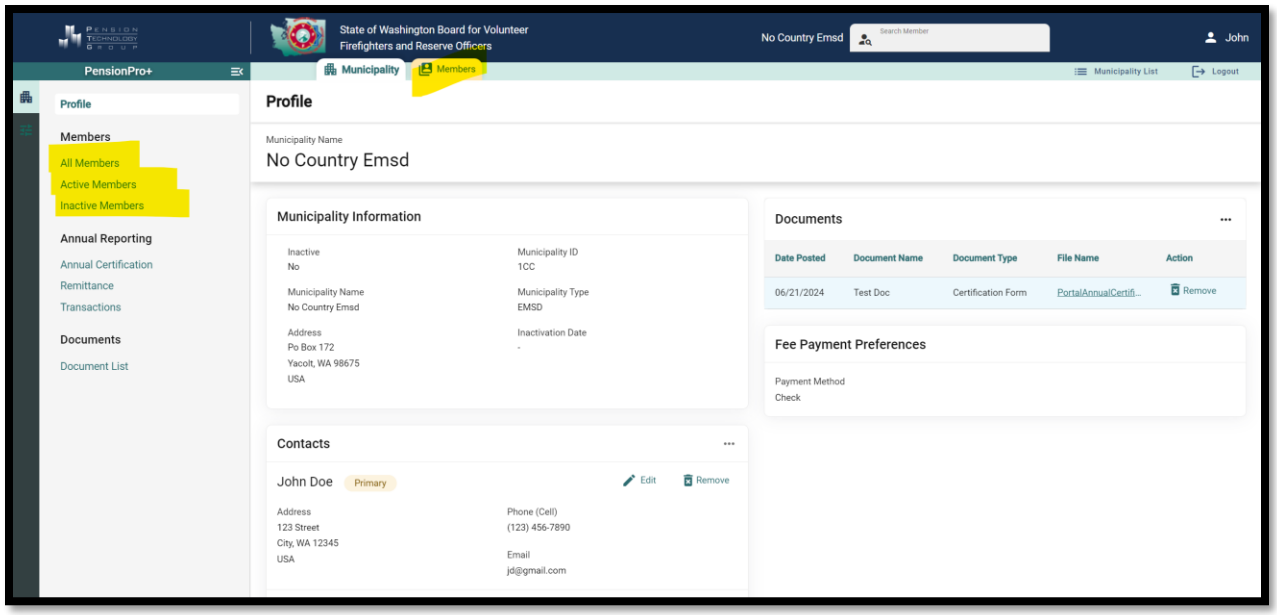
3. Enter the information and click Apply.



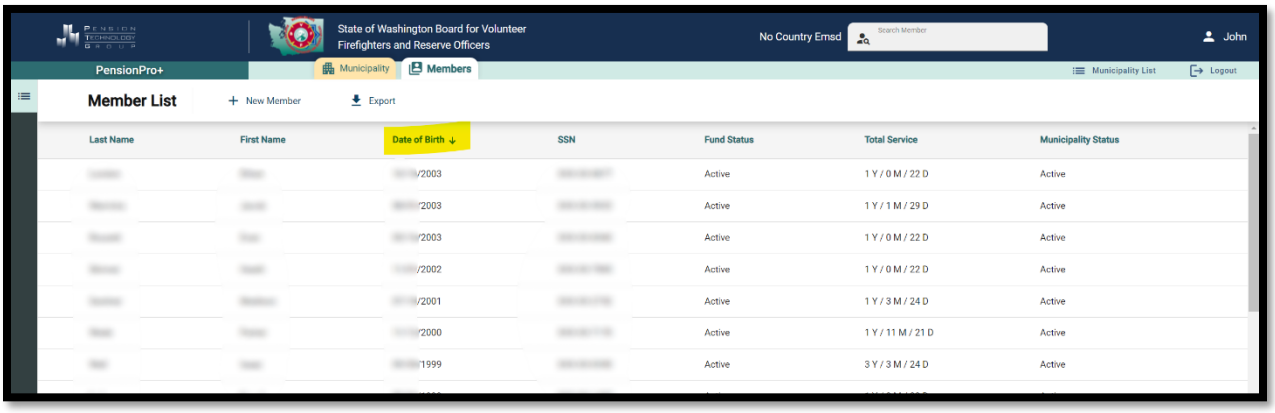
III. Member Profile Maintenance

To View the Member List

1. From the Municipality Profile, click either the **Members** tab in the top header OR click any of the 3 Members screens names in the left menu which serve as a predefined filter. Clicking “Active Members” will open a list of Active Members only.

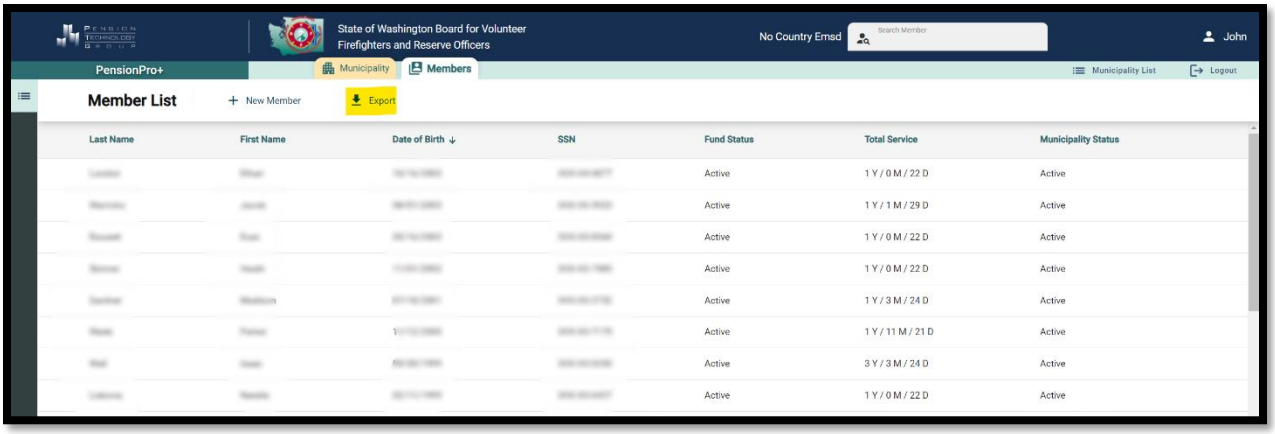


2. When viewing the member list, users can click on the header column to change the sorting order to descending or ascending.



To Export Member List

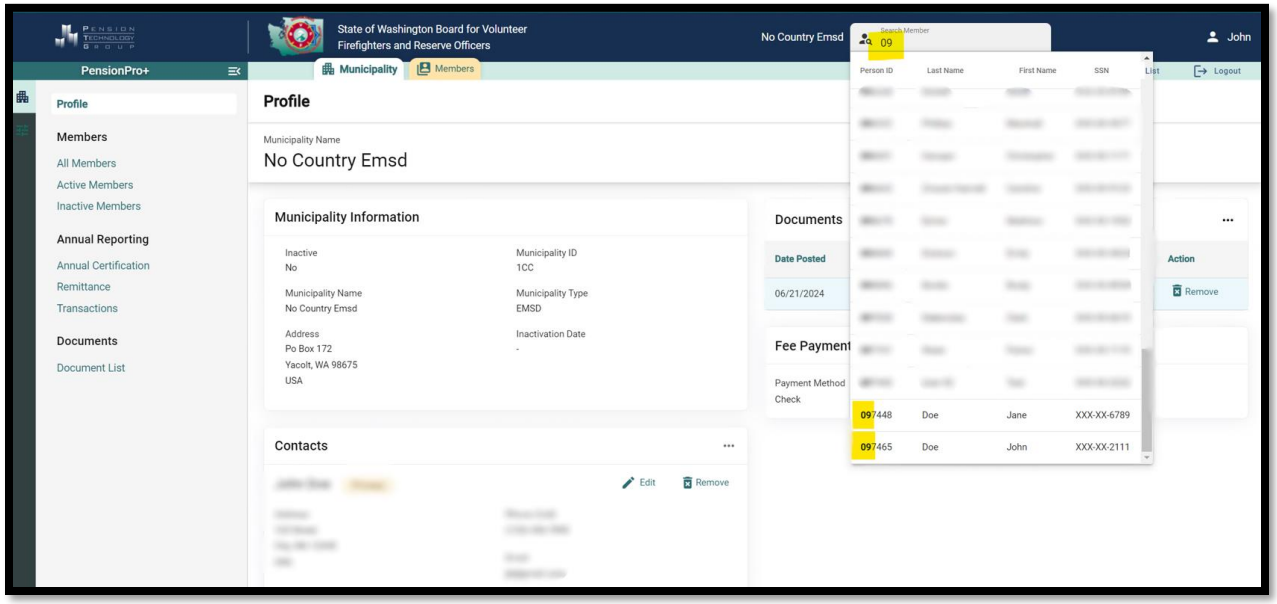
Click **Export** in the header section of the Member List screen. The system will automatically download an Excel file with all the current columns of the current participant list view to the user's device.



To View Member Profiles

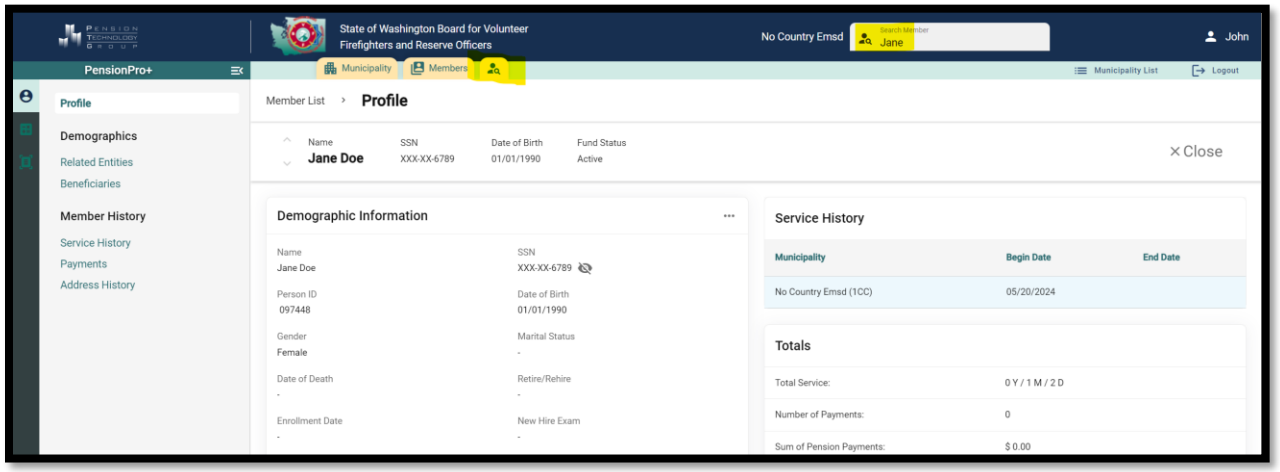
Using the Search Bar

1. Use the **Search Bar** by entering any partial portion and at least 2 digits of any of the following search criteria: **Person ID, First Name, Last Name, Full SSN, or last 4 SSN.** Based on the search criteria entered by users, the system will display a list of matching members. Users can click to select a member from the list of results to view their profile.
2. Note: When partial search criteria are entered, the results list may be very large and additional search criteria should be entered to narrow down the search list.

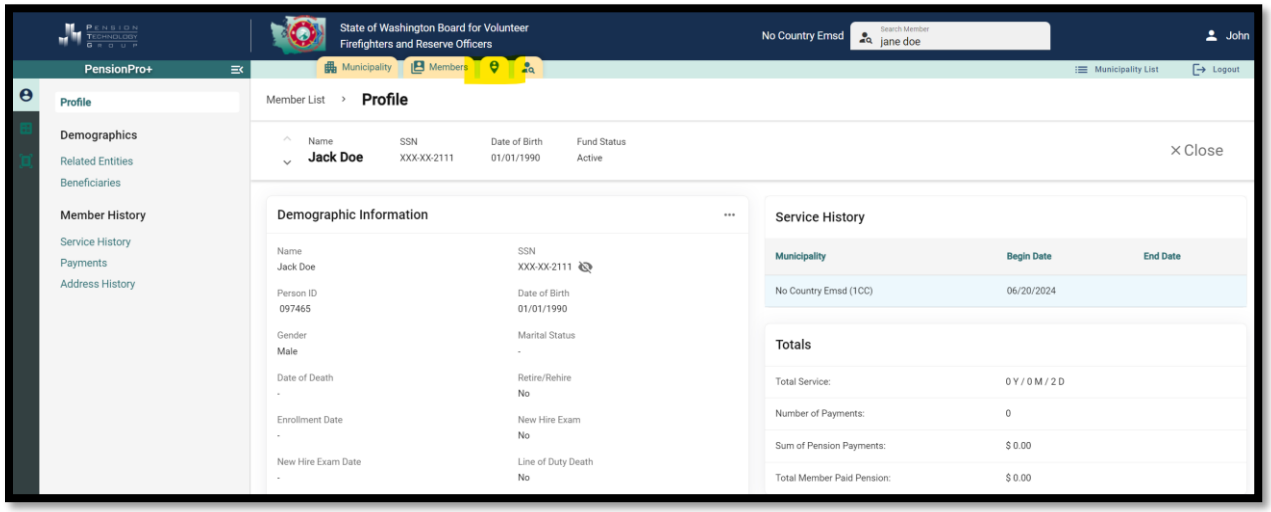


Using the Search Tabs

1. Select a member from the Search Bar Result list. After selecting, the system will display the **Search tab**.



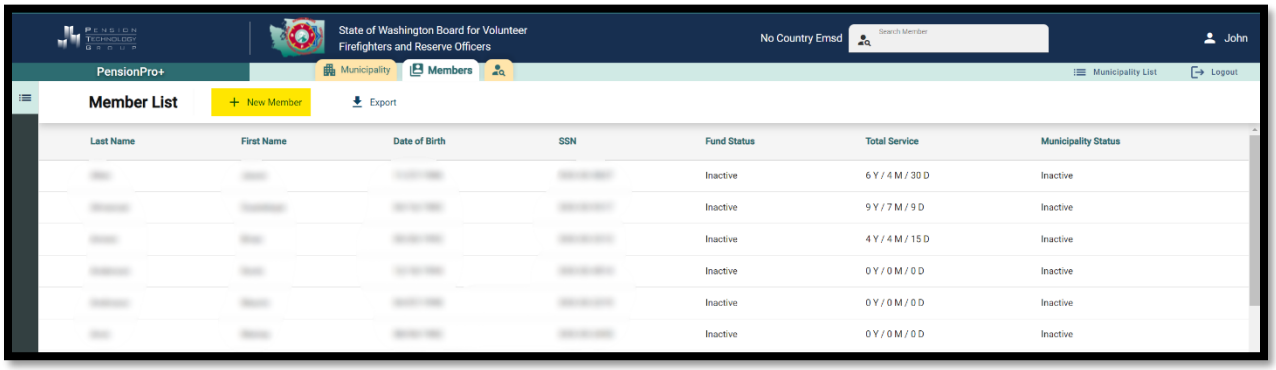
2. Or Select a member from the Member List screen and the system will display the **Individual tab**



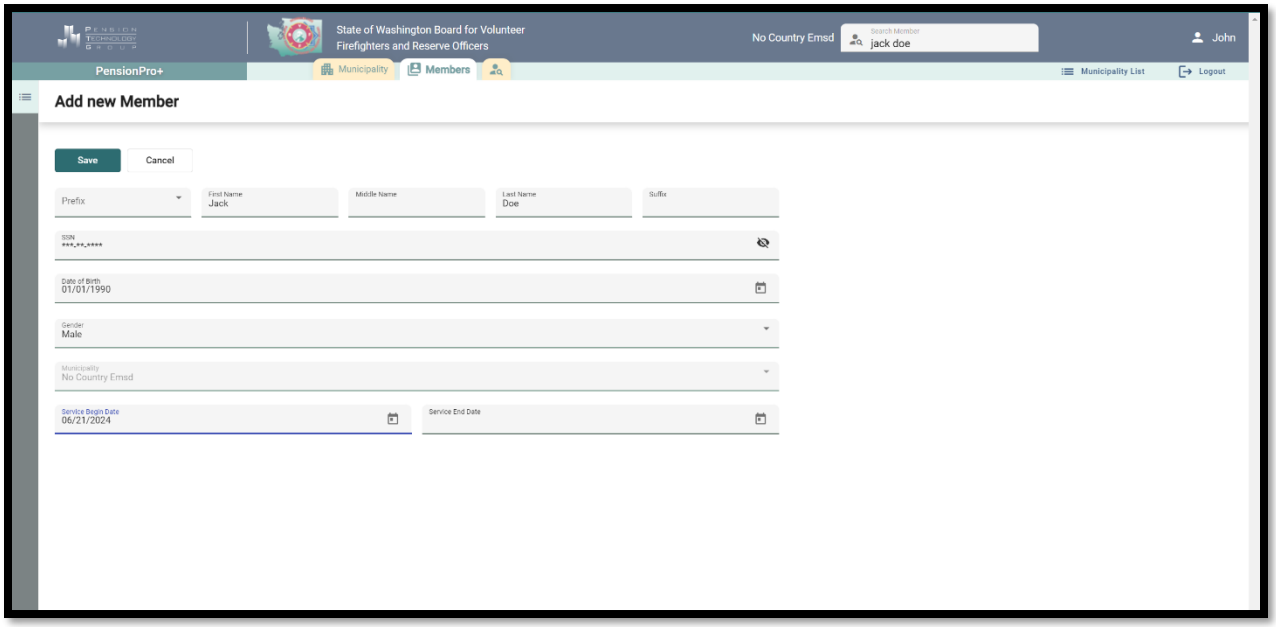
The user can now switch between the 2 open profiles by clicking these tabs.

To Add New Members

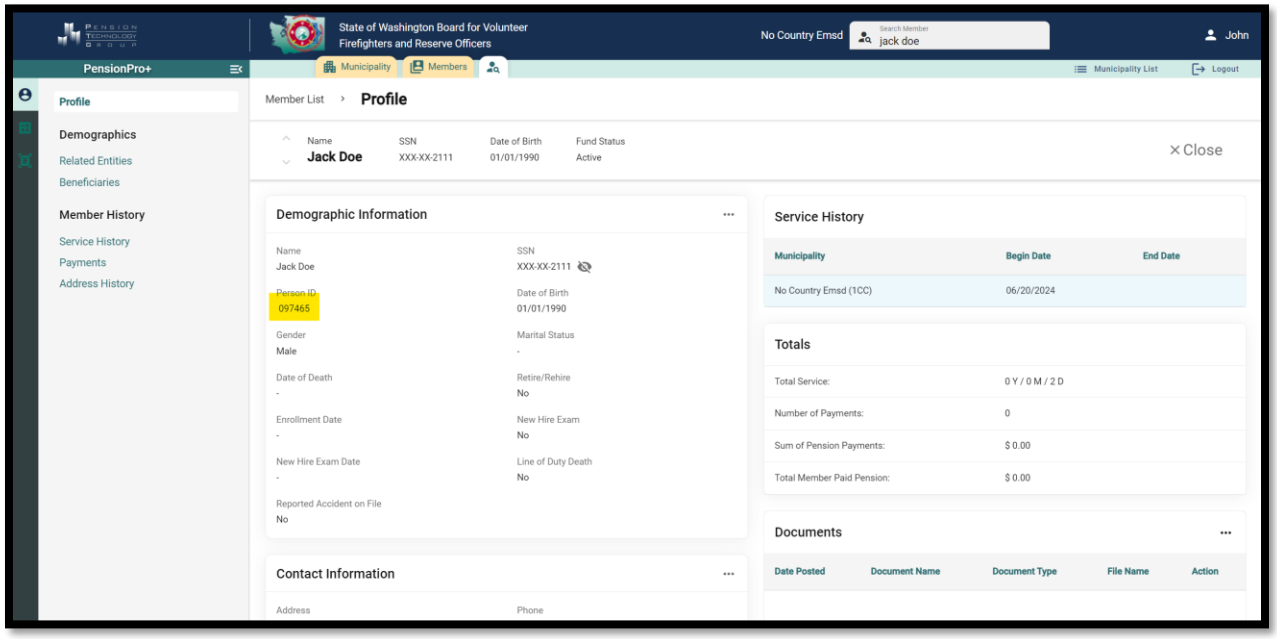
1. Click the New Member button in the header section of the Member List screen.



2. Fill in all the required fields. Click **Save** to add the member or click **Cancel** if you do not want to add them.

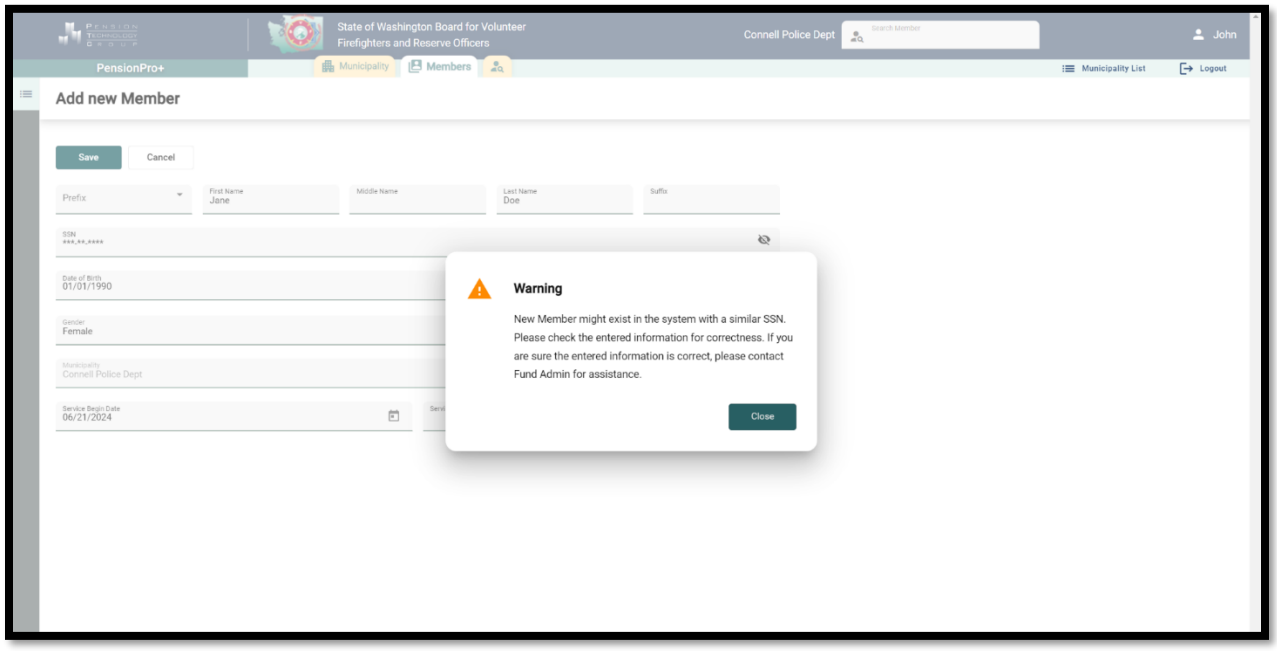


3. After successfully adding a new member, the system will display the Profile screen of the newly added member. The system will automatically generate a **Person ID** for the newly added member and set their Fund Status to Active.

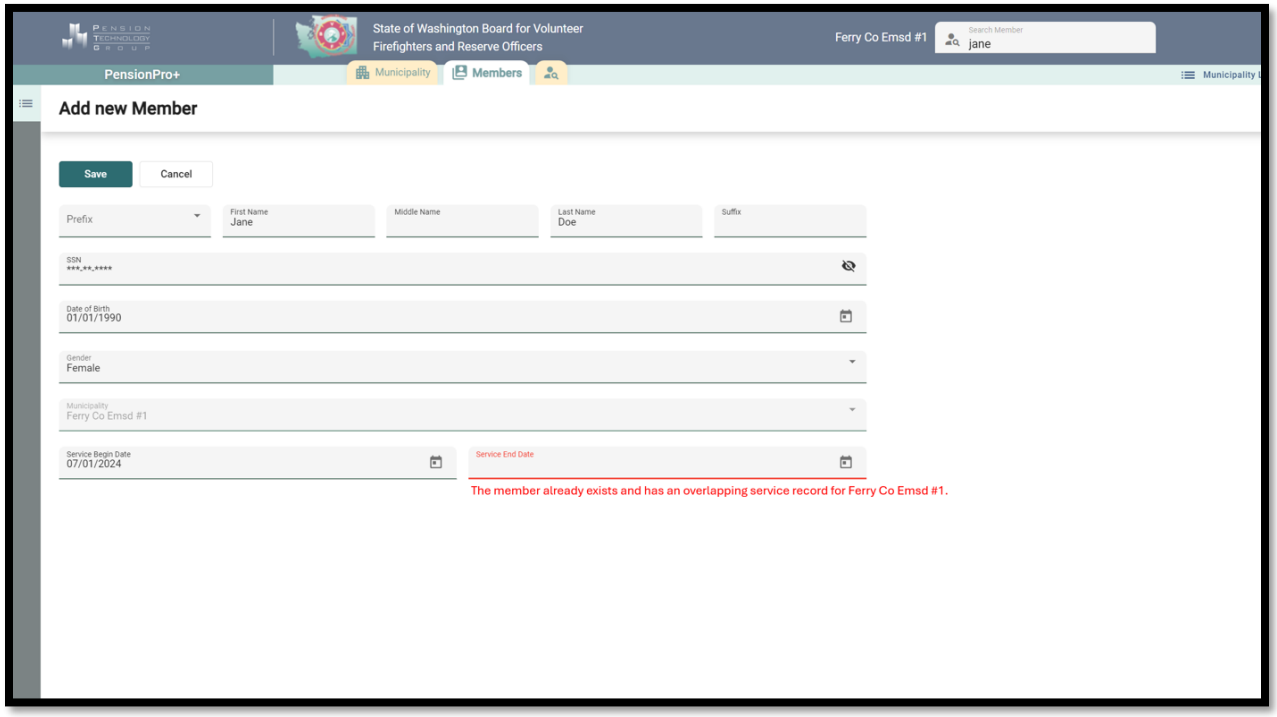


'Already Existing' Members

1. If the data entered CLOSLEY matches the data of an existing member in a different municipality, the following pop-up box will notify the user instructing them to contact BVFF Administrators.

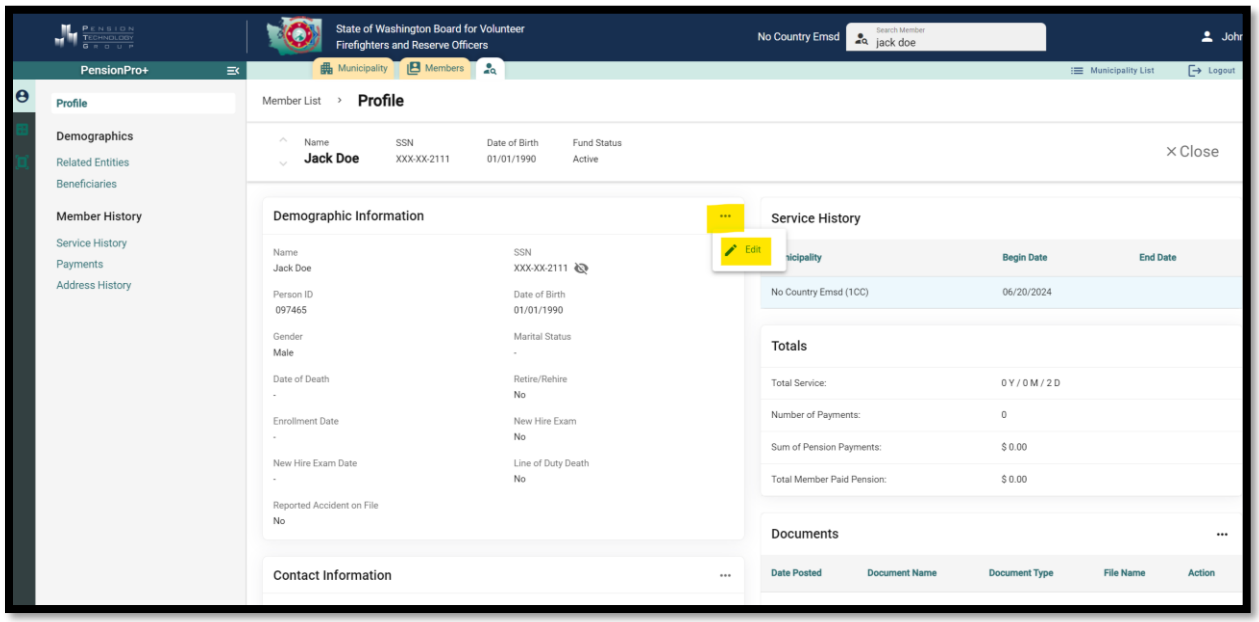


2. Additionally, if the data being entered EXACTLY matches the data of an existing member, the system will notify the user of a service overlap in the municipality.

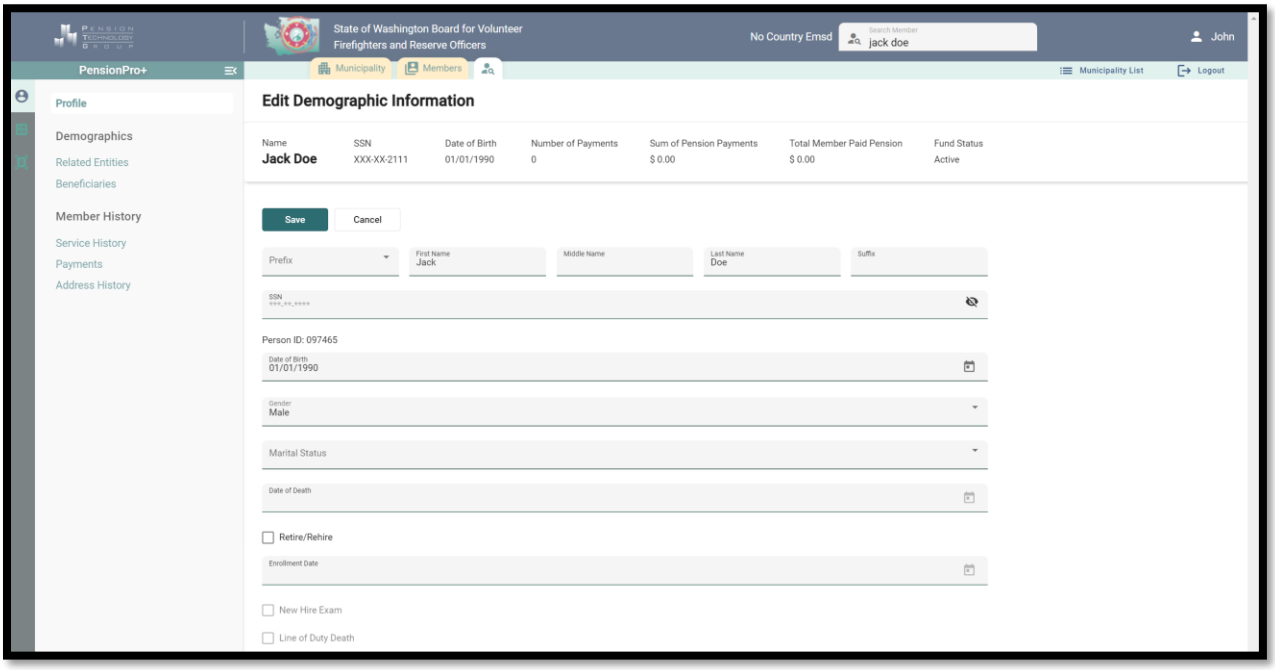


To Edit Demographic Information

1. At the Profile screen, select **Edit** from the actions list in the Demographic Information section.

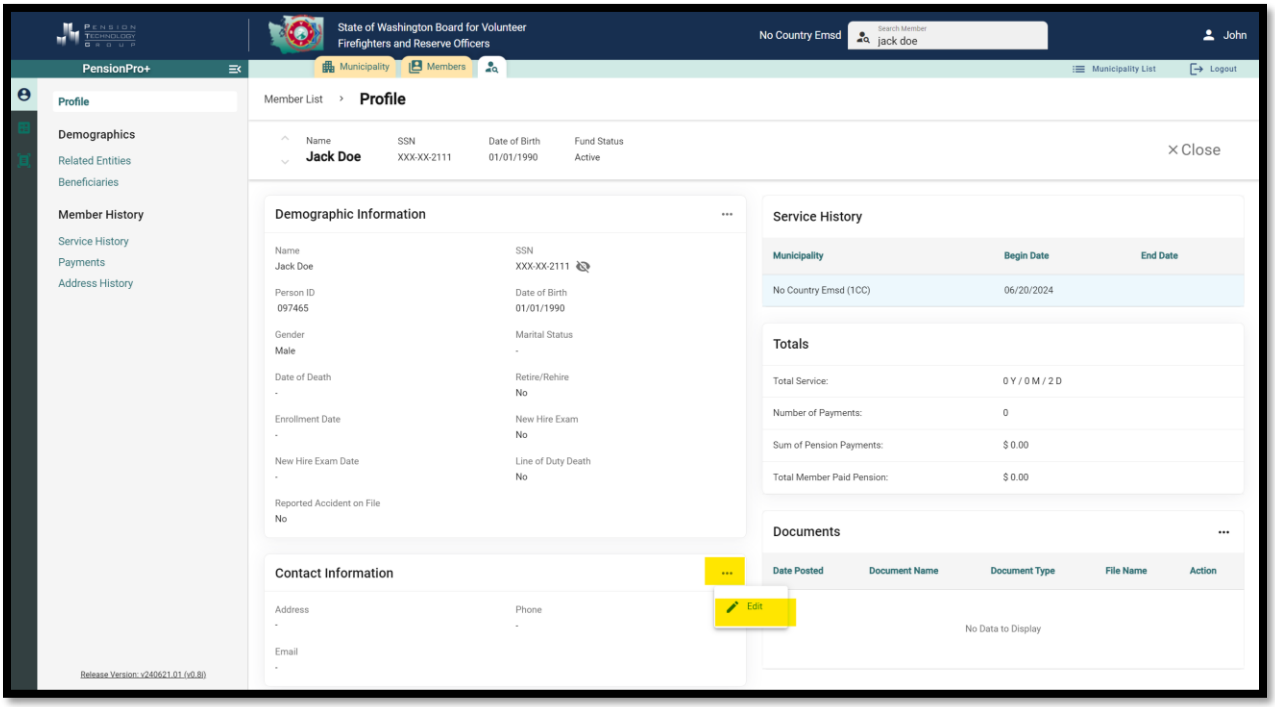


2. After editing, click Save to save changes or click Cancel to discard any modifications.

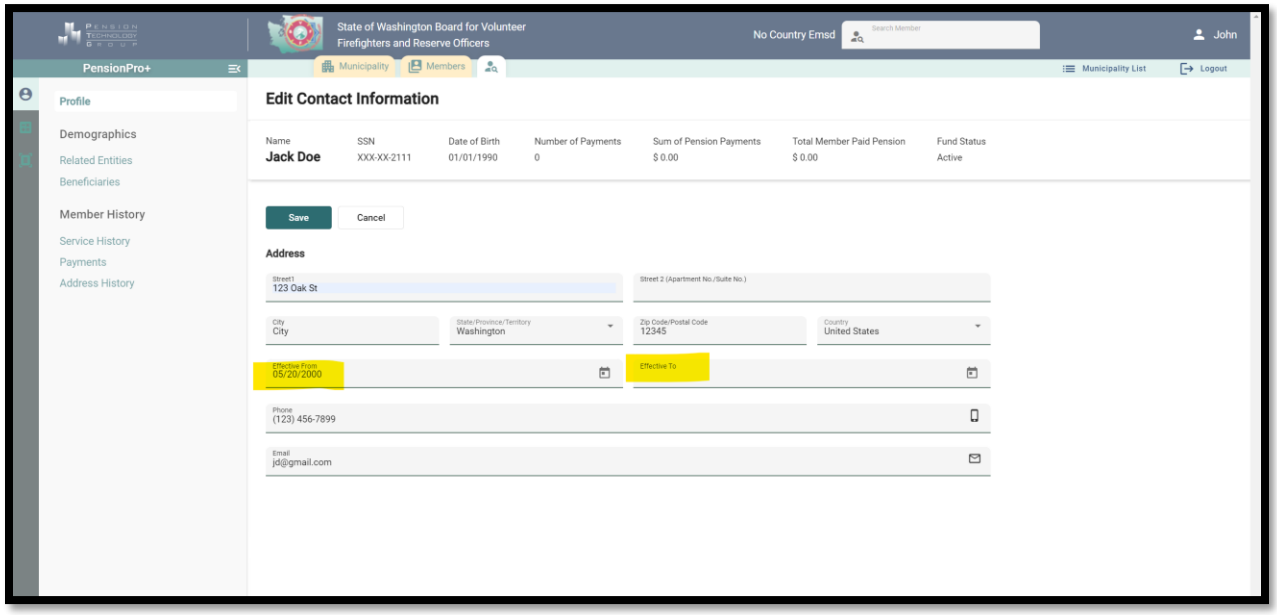


To Edit Member Contact Information

1. Click **Edit** from the actions list in the Contact Information section. After editing, click Save to save changes or click Cancel to discard any modifications.

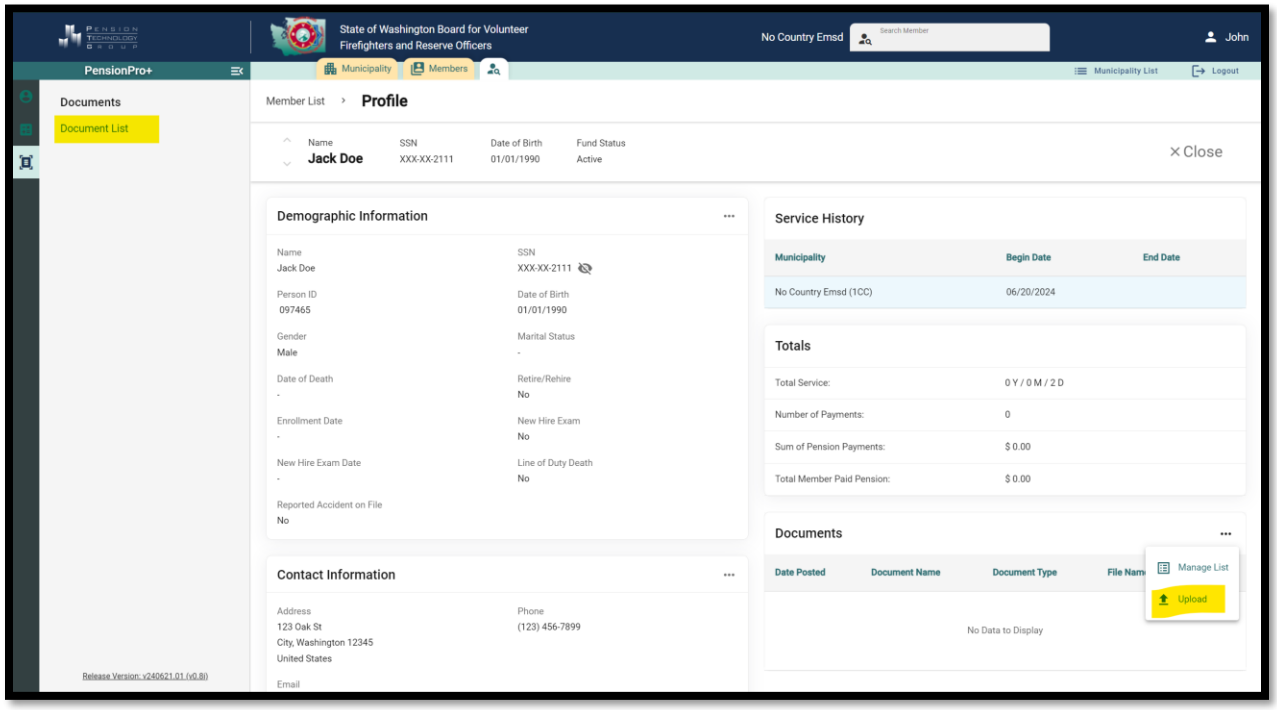


2. Users can set an effective period for a contact address using the **Effective from** and **Effective To** fields. Users can view the effective status of the current address when editing.

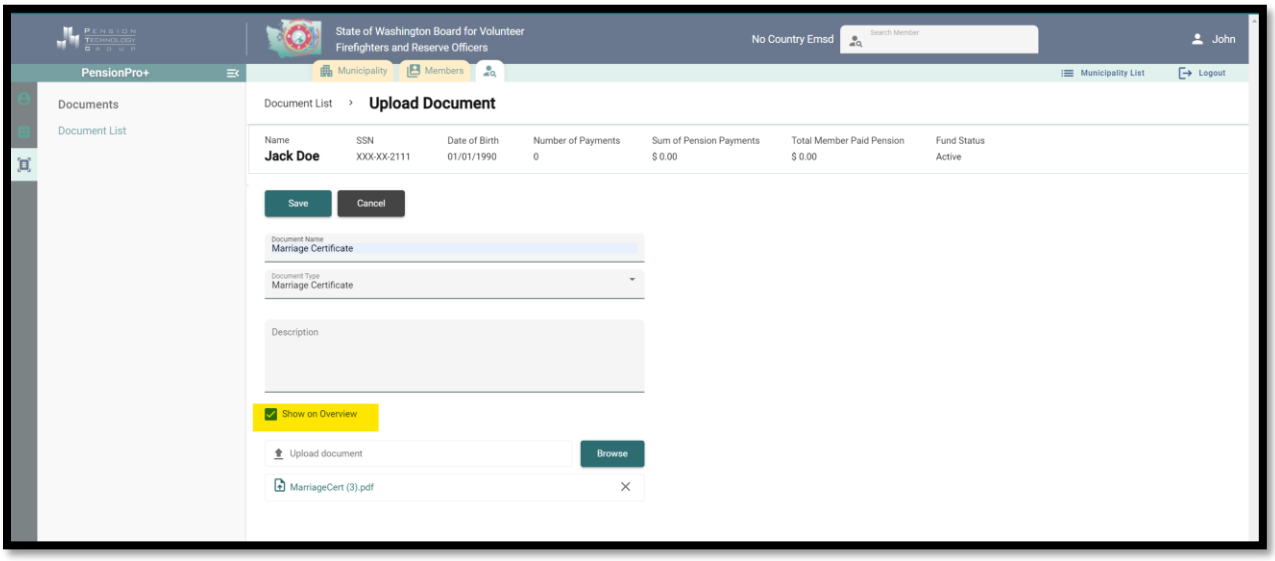


To Upload Member Documents

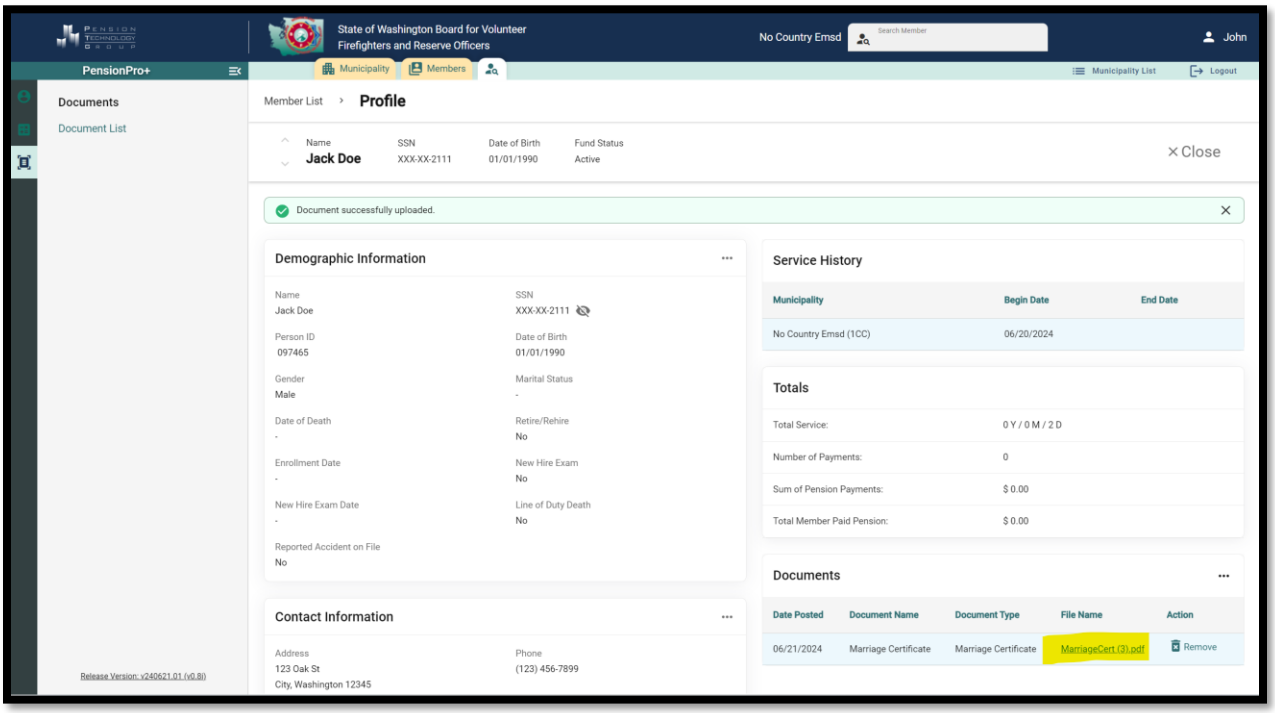
1. Either select **Upload** from the Actions list in the Documents section on the Profile screen OR open **Document List** from the Documents tab in the left menu and click Upload on the Document List screen.



2. Fill in the details related to the uploaded document. Click **Save** to add the new document or click Cancel to discard the changes. If users choose the option **Show on Overview**, after successfully saving, the system will display the newly uploaded document at the top of the list in the Documents section on the Member's Profile screen.

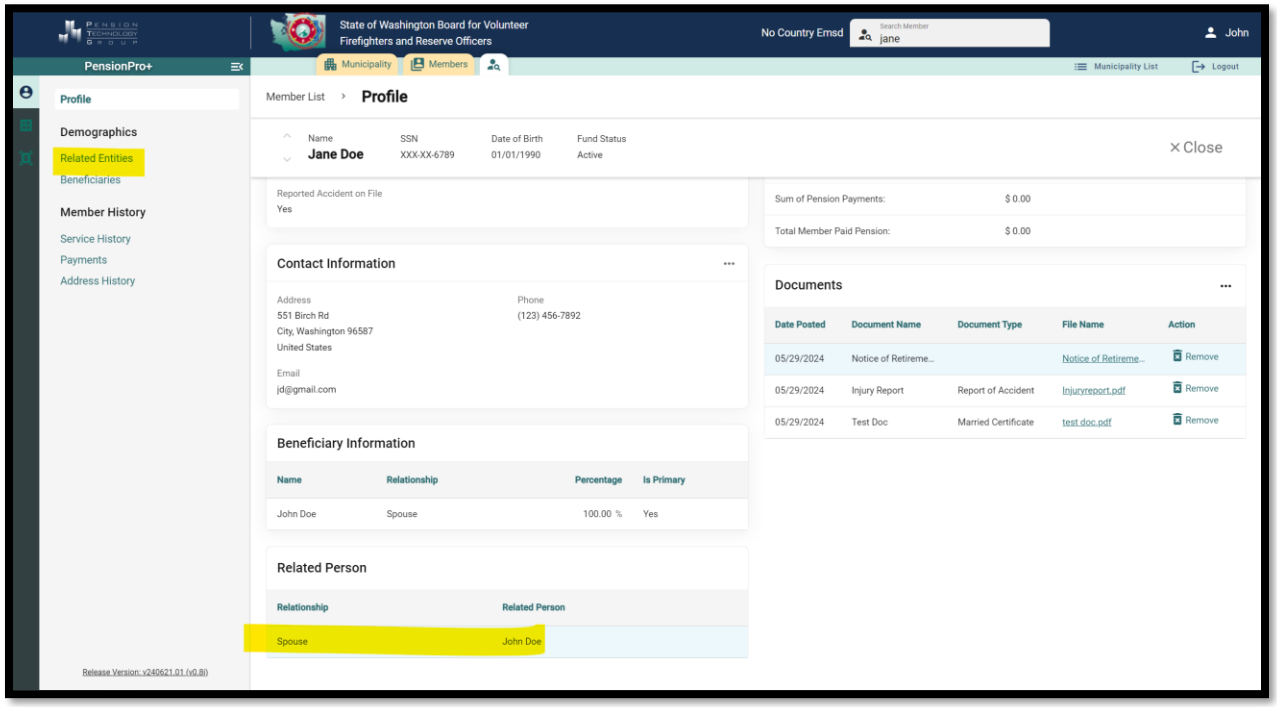


3. Users can now click on the File Name to download the document to their device.



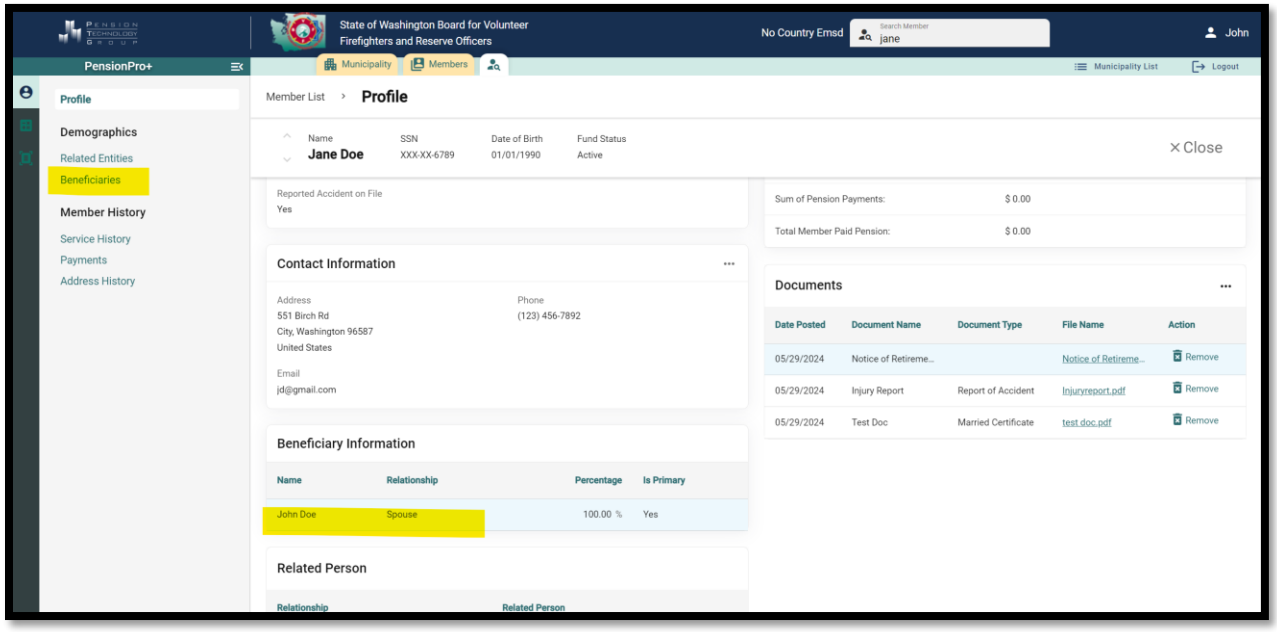
To View Related Entities

Either click the on a record from the **Related Person** card on the Member Profile OR click the **Related Entities** screen label from the left menu.



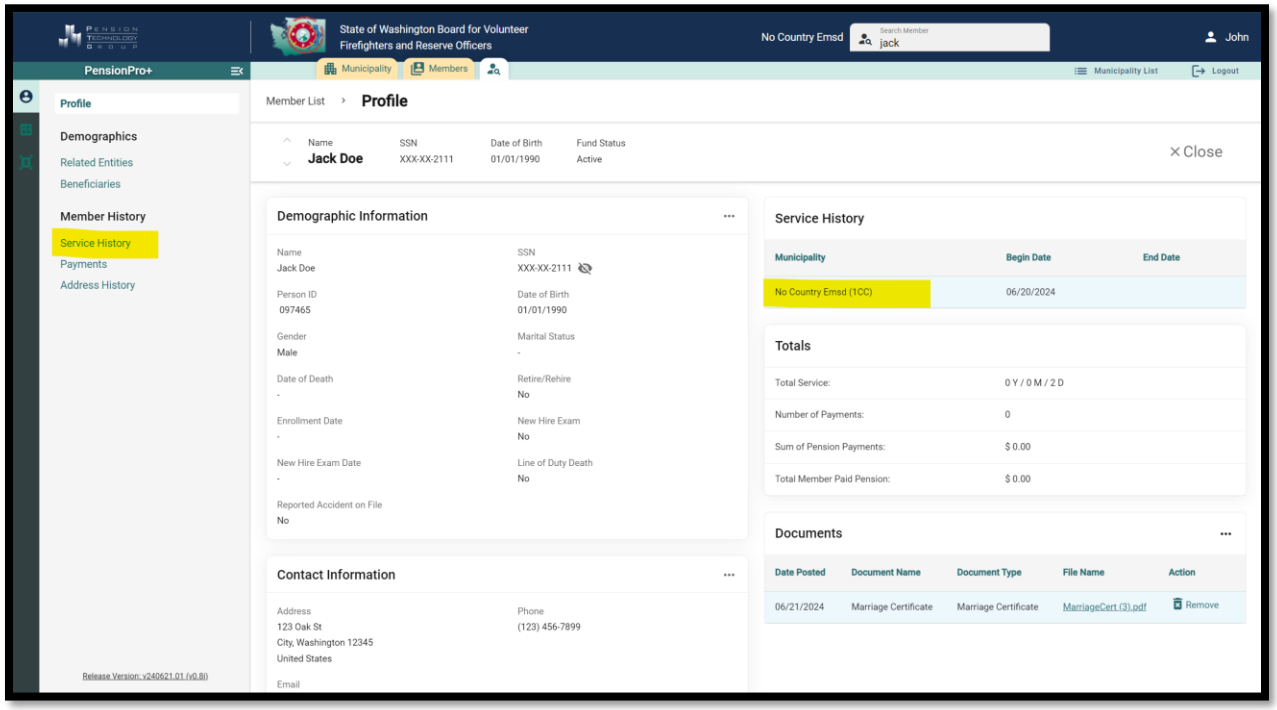
To View Beneficiaries

Either click on a record from the **Beneficiary Information** card on the Member Profile OR click the **Beneficiaries** screen label on the left menu.

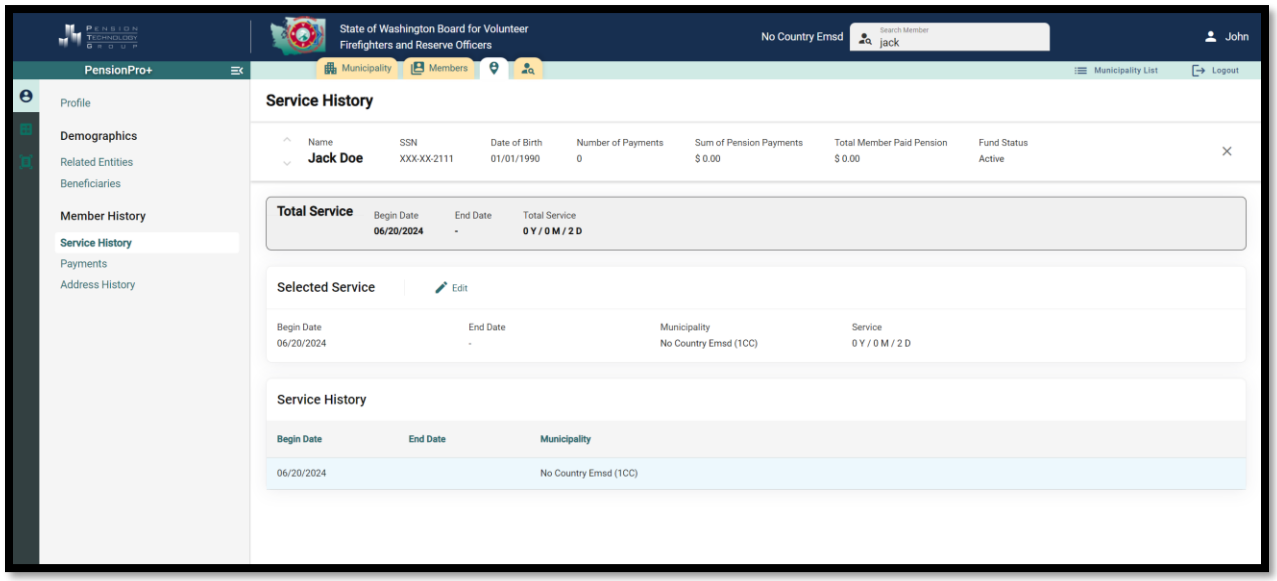


To View Service History

1. At the Member Profile screen, select a service period from the Service History card OR click Service History on the left menu.

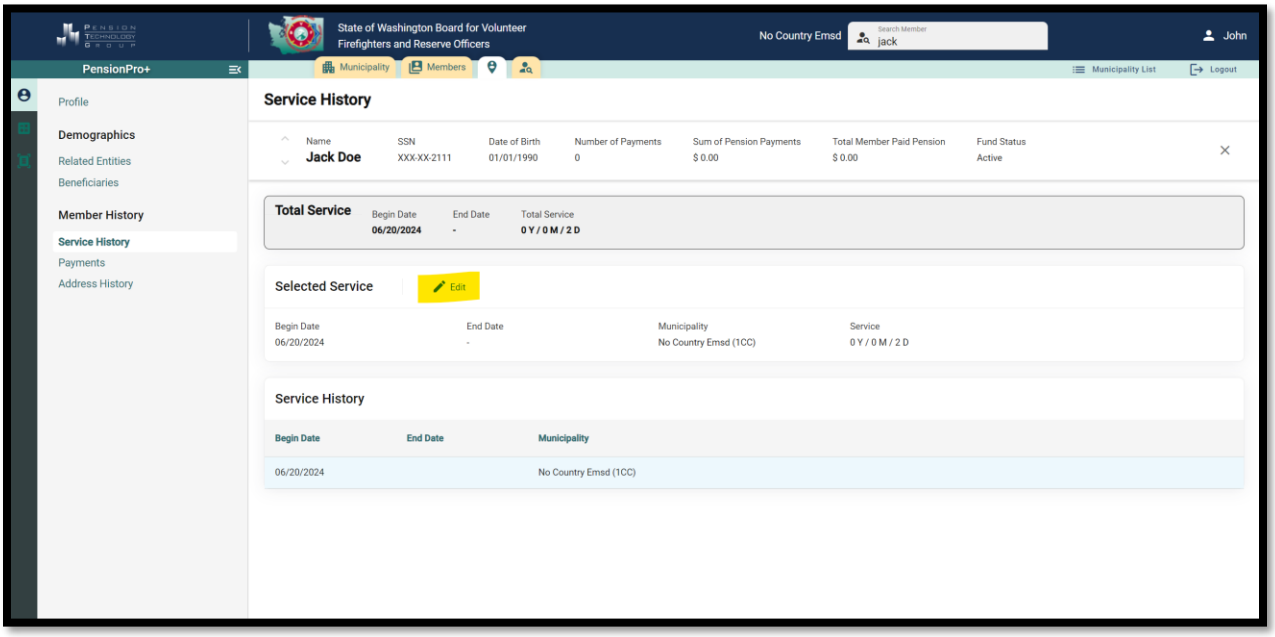


2. Click on a service period from the Service History section and the system will display details of the selected service period on the Selected Service card.

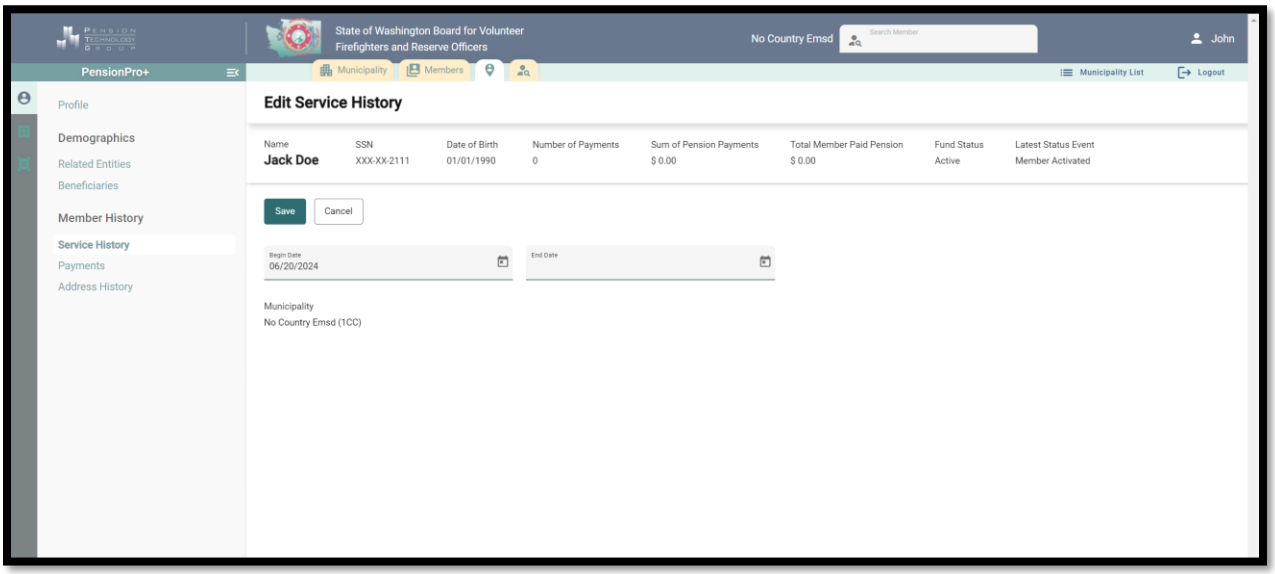


To Edit Service History

1. Click **Edit** on the selected service period.

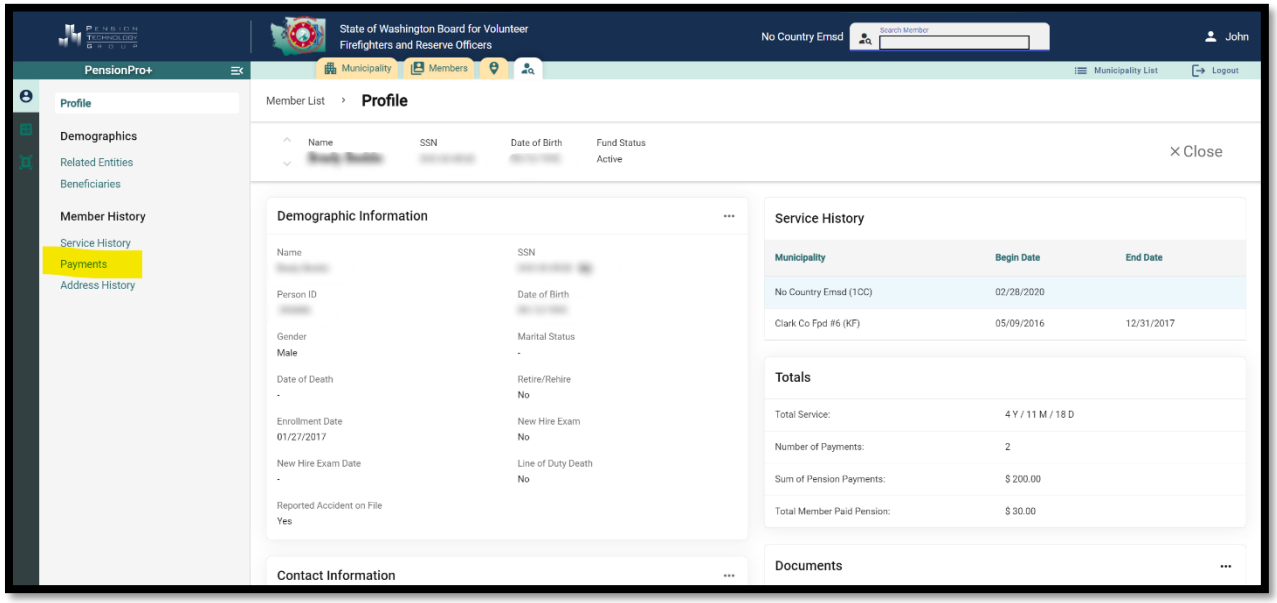


2. Modify the **Begin Date**, add the **End Date** or modify. Click **Save** to confirm or **Cancel** to undo.

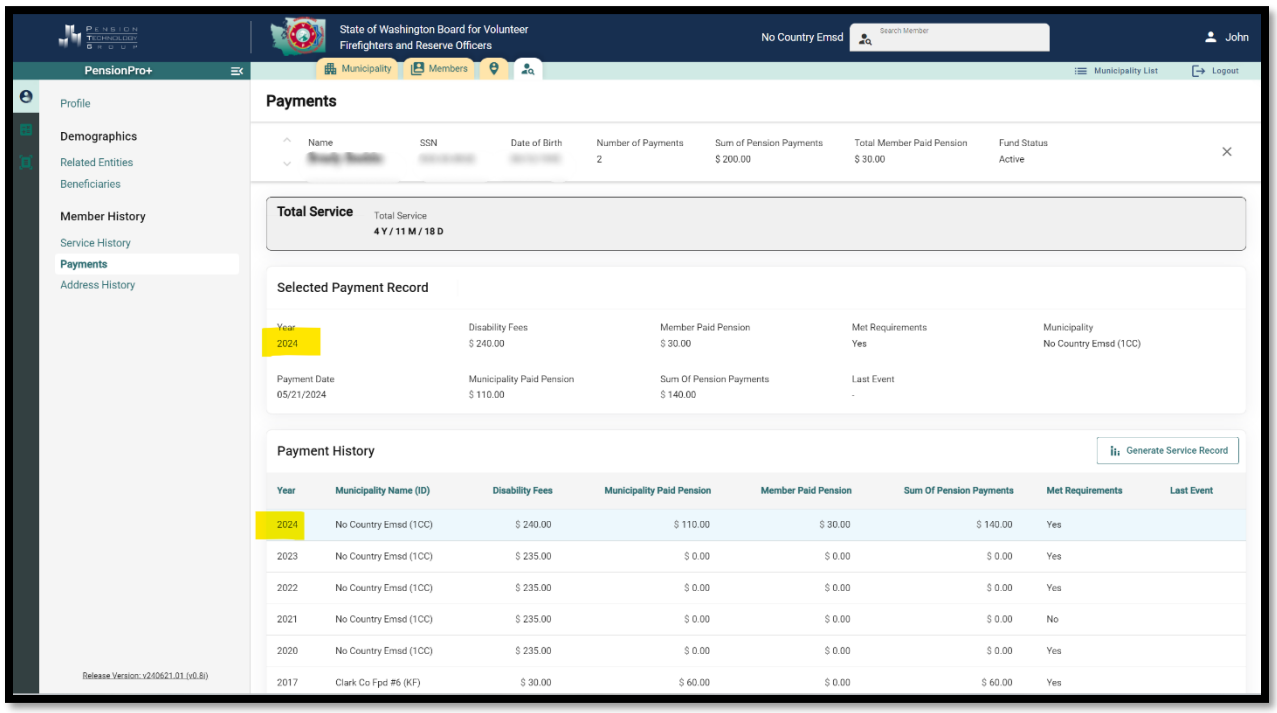


To View Payments

1. At the Member profile screen, select **Payments** from the left menu.

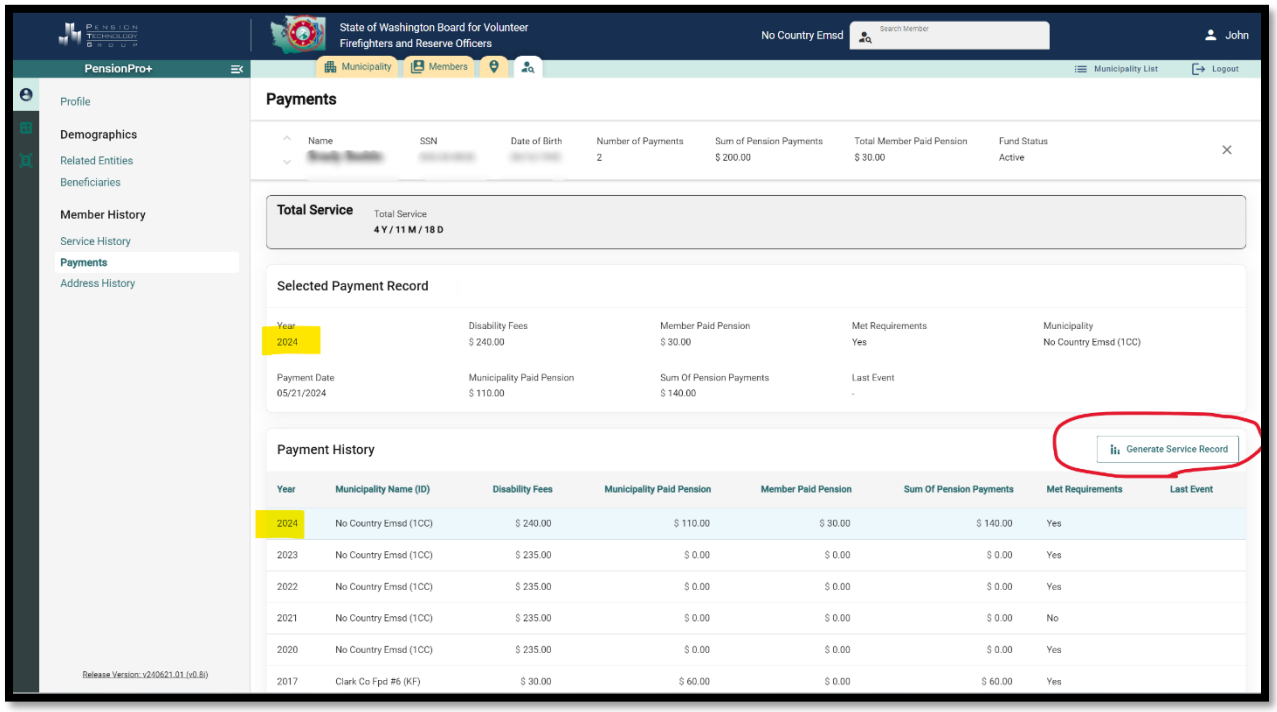


2. Select an individual record from the Payment History list and the information will be displayed above in the Selected Payment Record section.

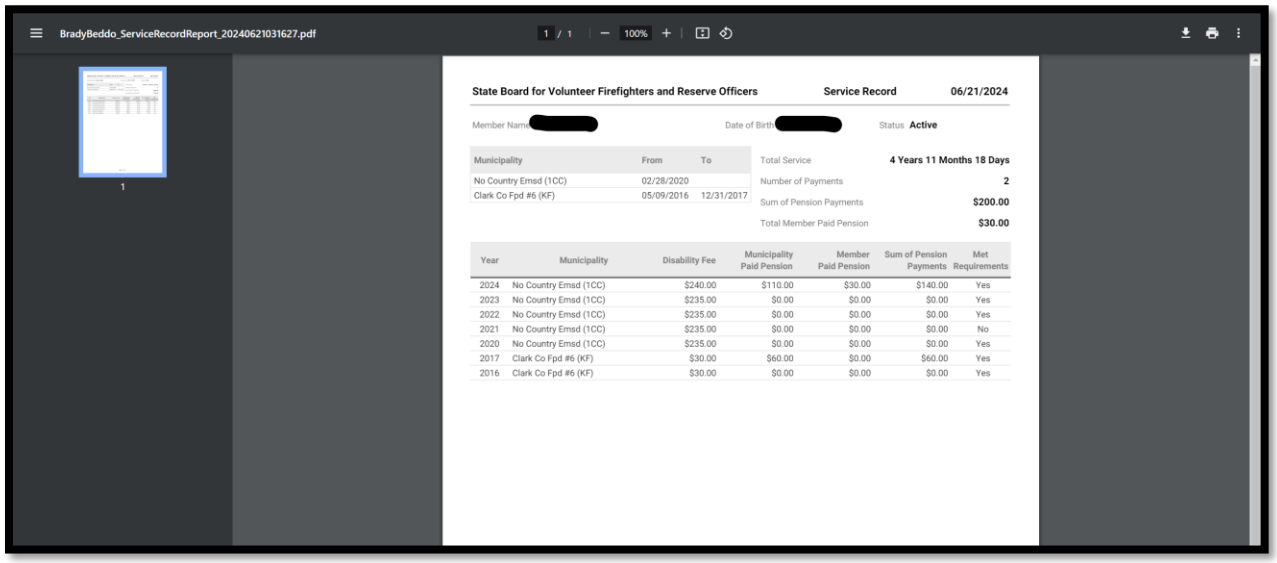


To Generate Service Record

1. Click **Generate Service Record** and the system will upload the record to the user's device.

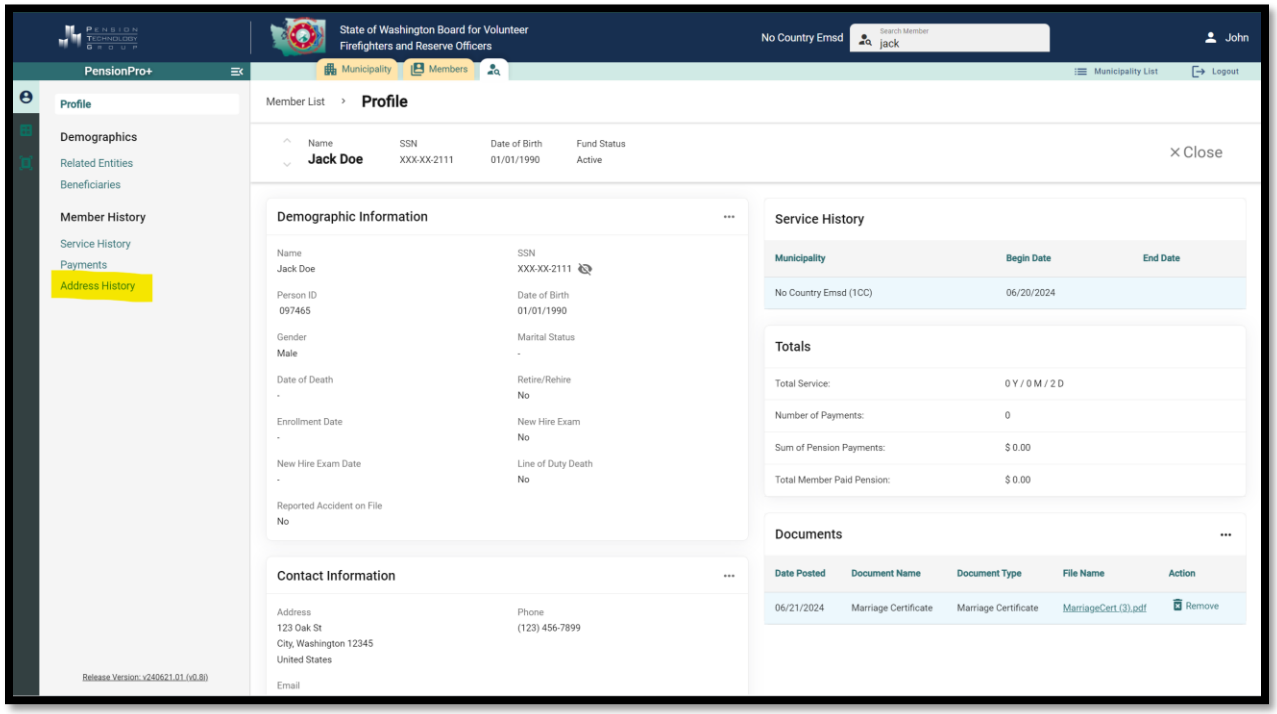


2. Opening the pdf will display the record.



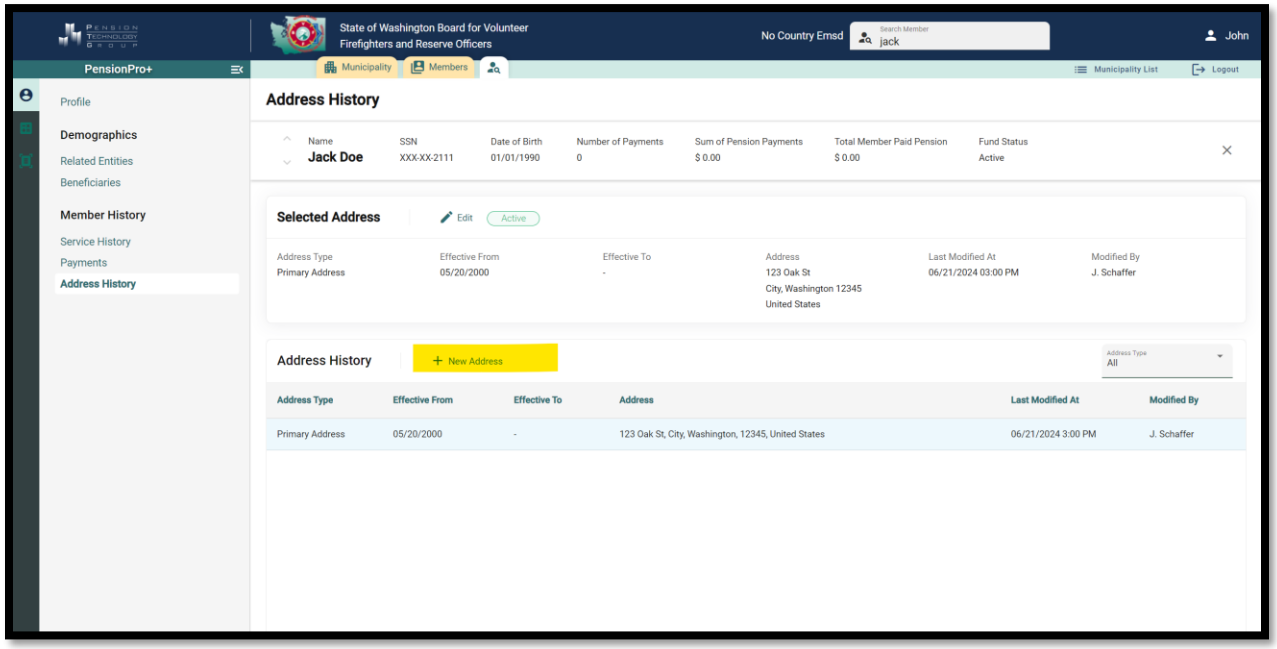
To View Address History

1. At the member profile screen, Select **Address History** on the left menu.

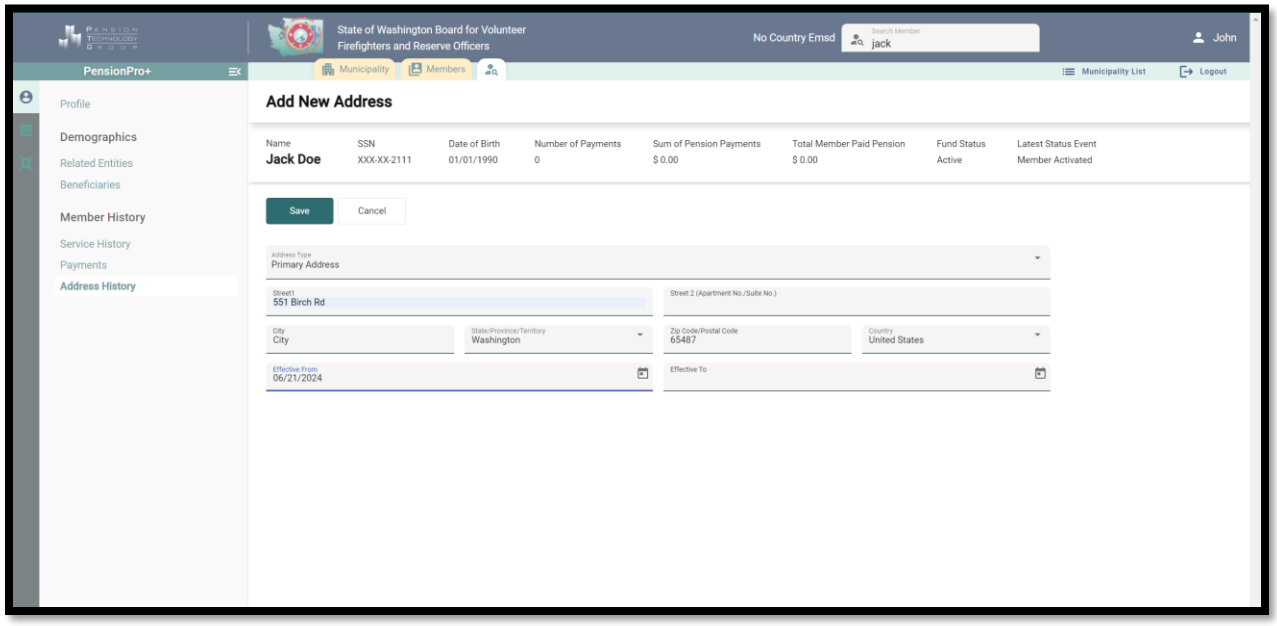


To Add New Address

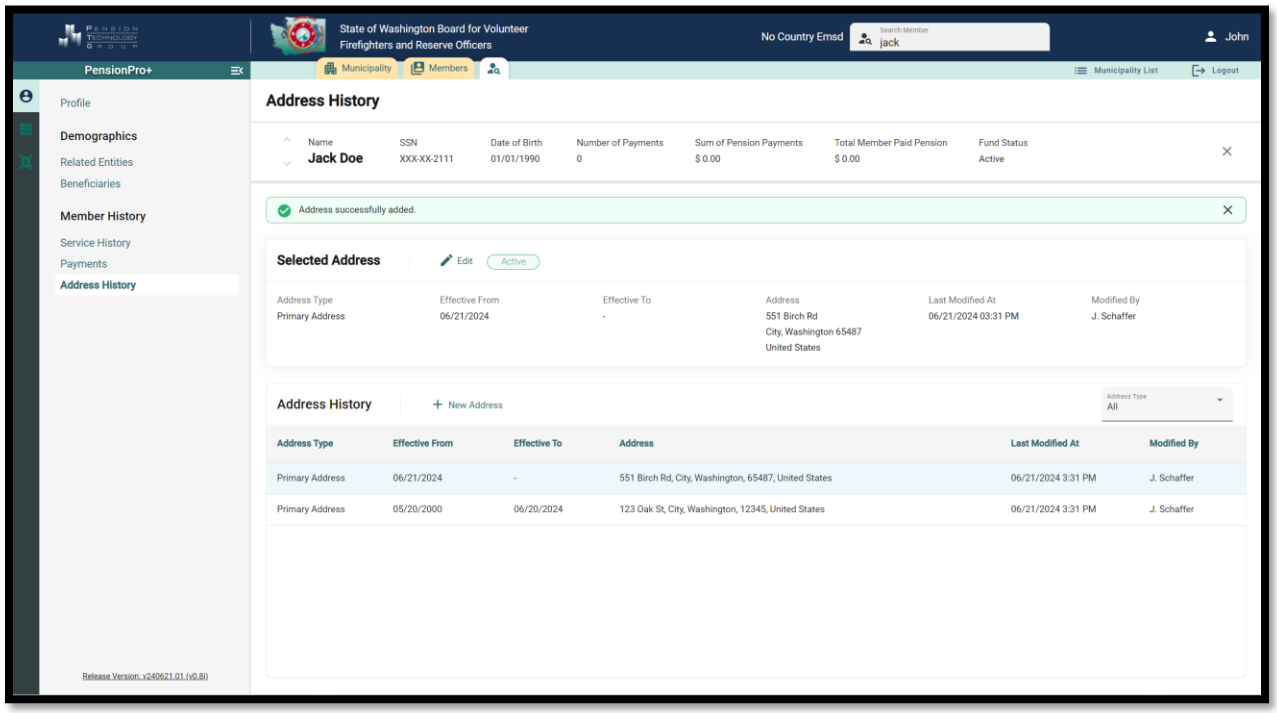
1. Click **+ New Address** on the Address History card when viewing the Address History screen.



2. Fill in the required information. Click **Save** to save changes or **Cancel** to discard them.

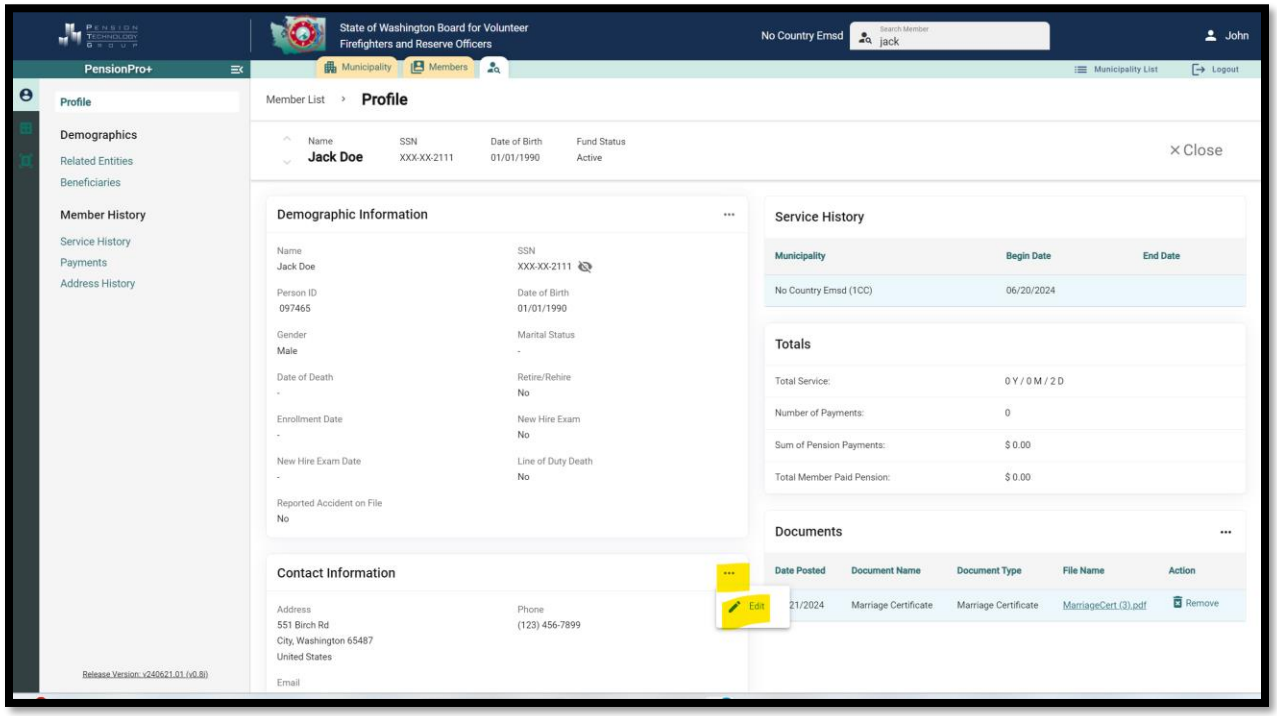


3. The newly added address will also be shown on the Address History card in the Address History screen, ordered by the latest effective period. In cases where multiple addresses share the same effective period, the system will prioritize displaying the Primary Address ahead of the POW Address.

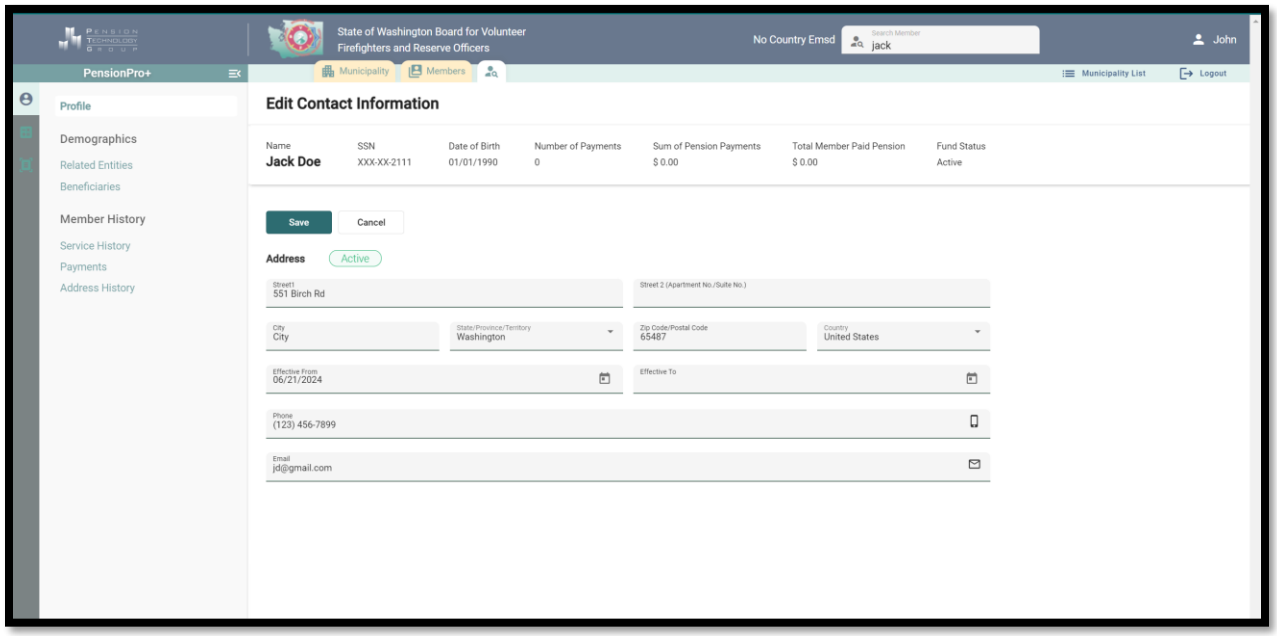


To Edit Address

1. Select **Edit** from the Actions list in the Contact Information section on the Profile screen.

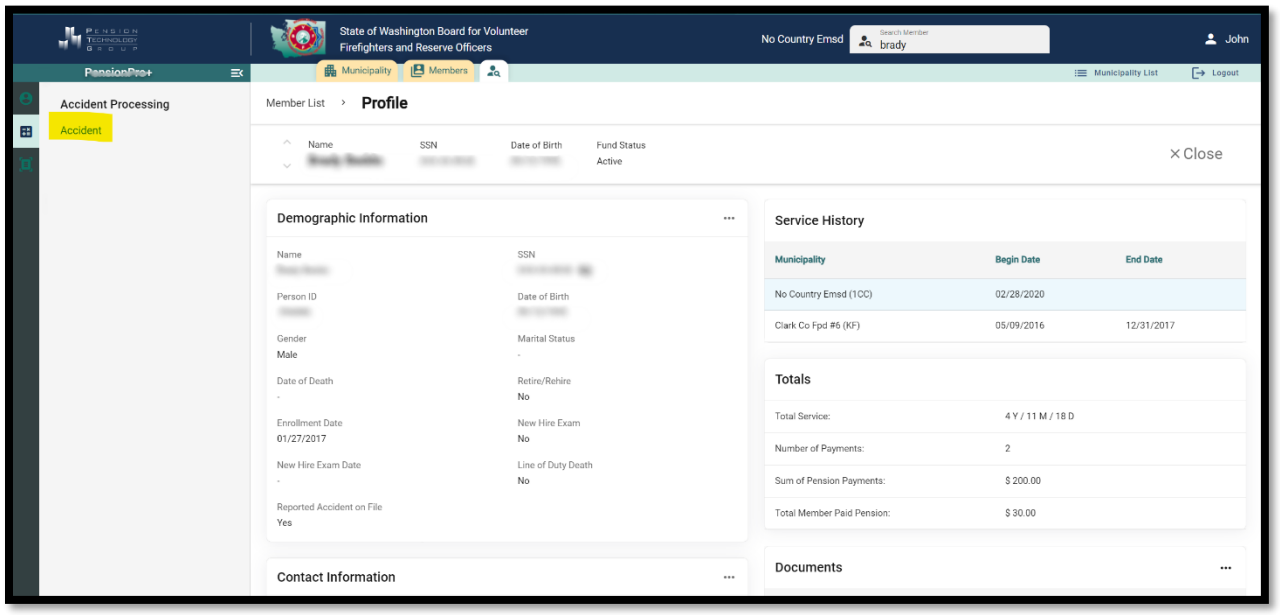


2. Fill in the required information. Click **Save** to save changes or **Cancel** to discard them.

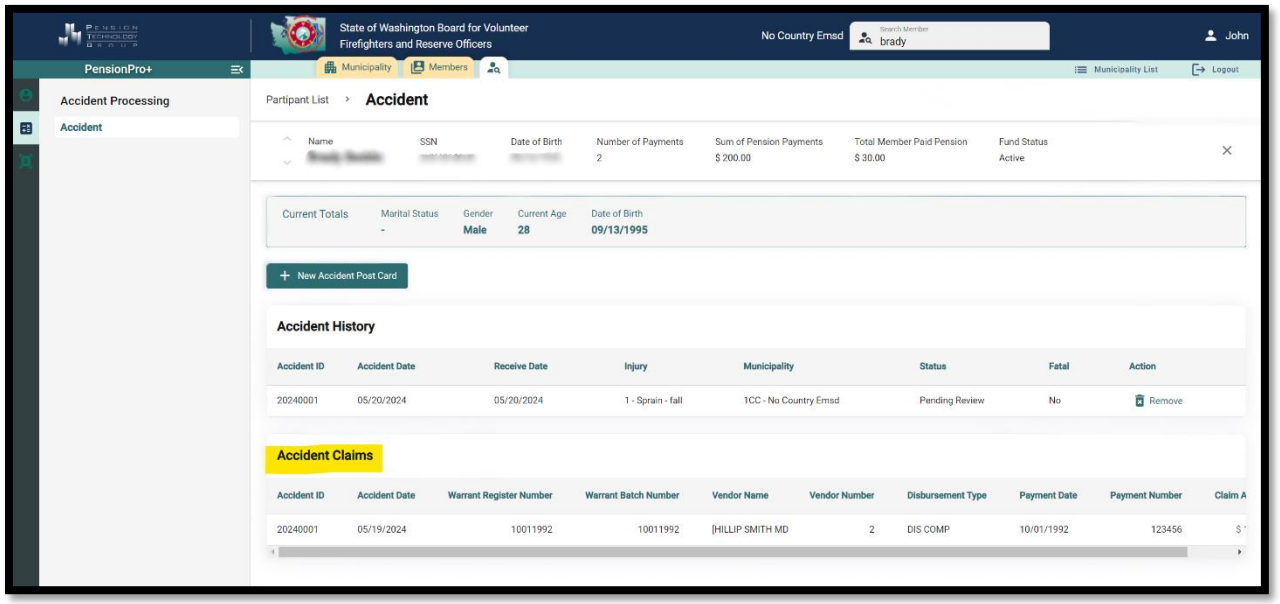


To View Accident

1. From the Member Profile screen, click **Accident** from the Accident Processing tab on the left menu.

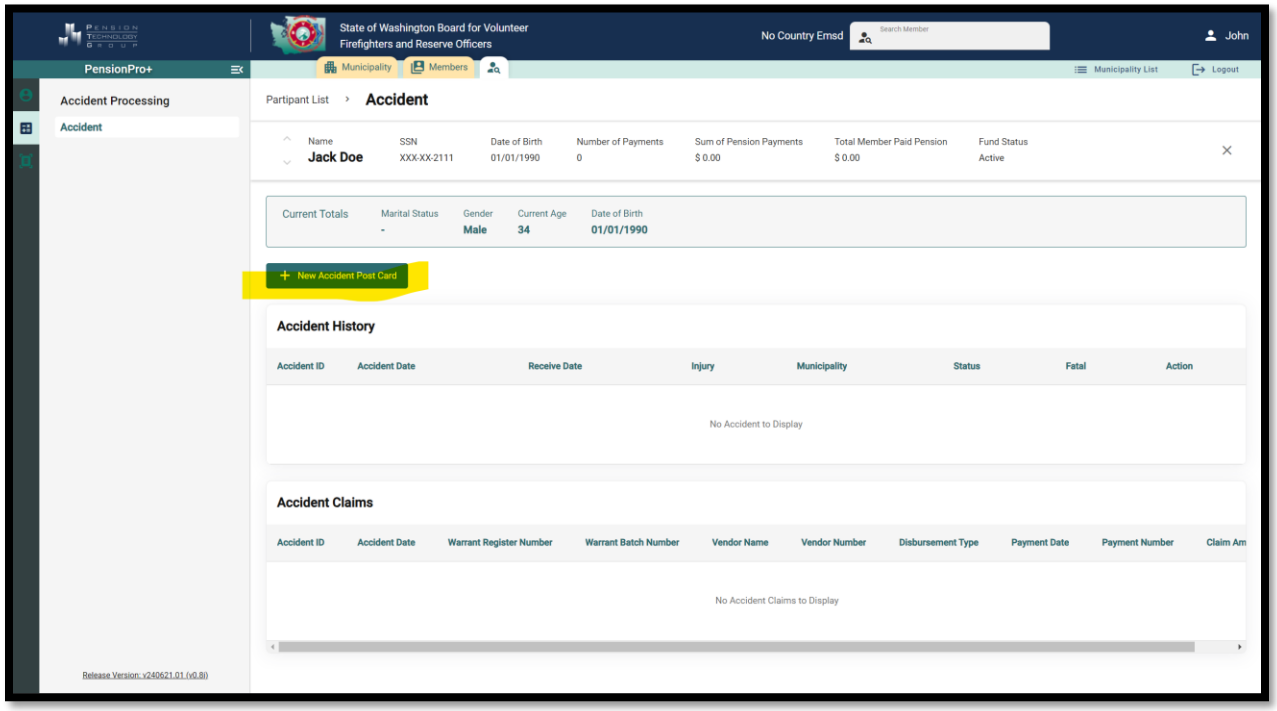


2. Users can view all accident claims on the **Accident Claims** card on the Accident Overview screen of the selected member.

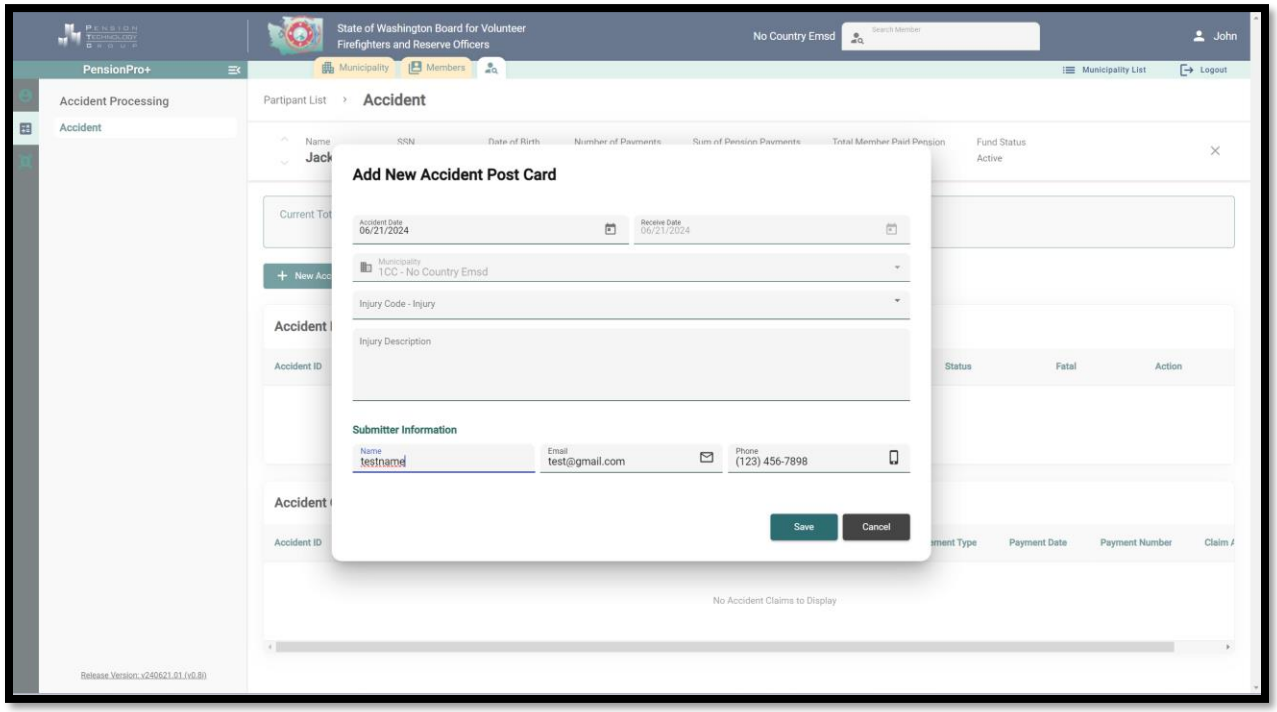


To Add New Accident Post Card

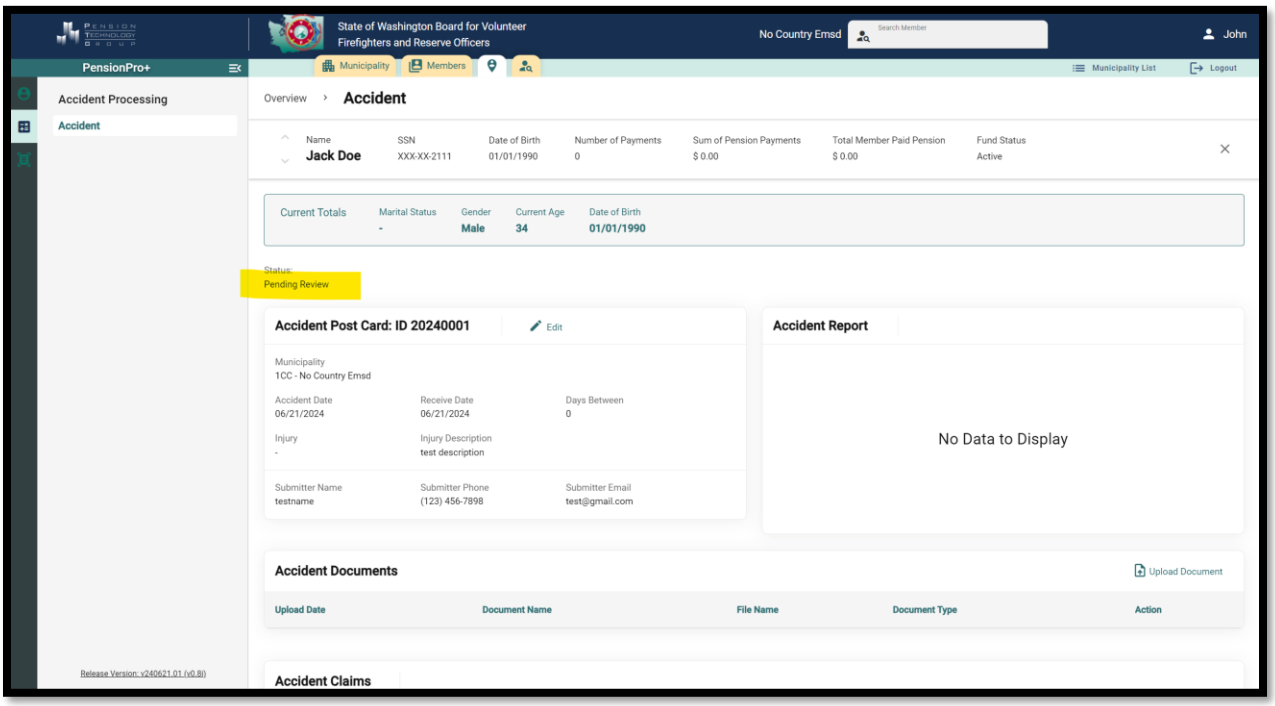
1. Click **+ New Accident Post Card** above Accident History.



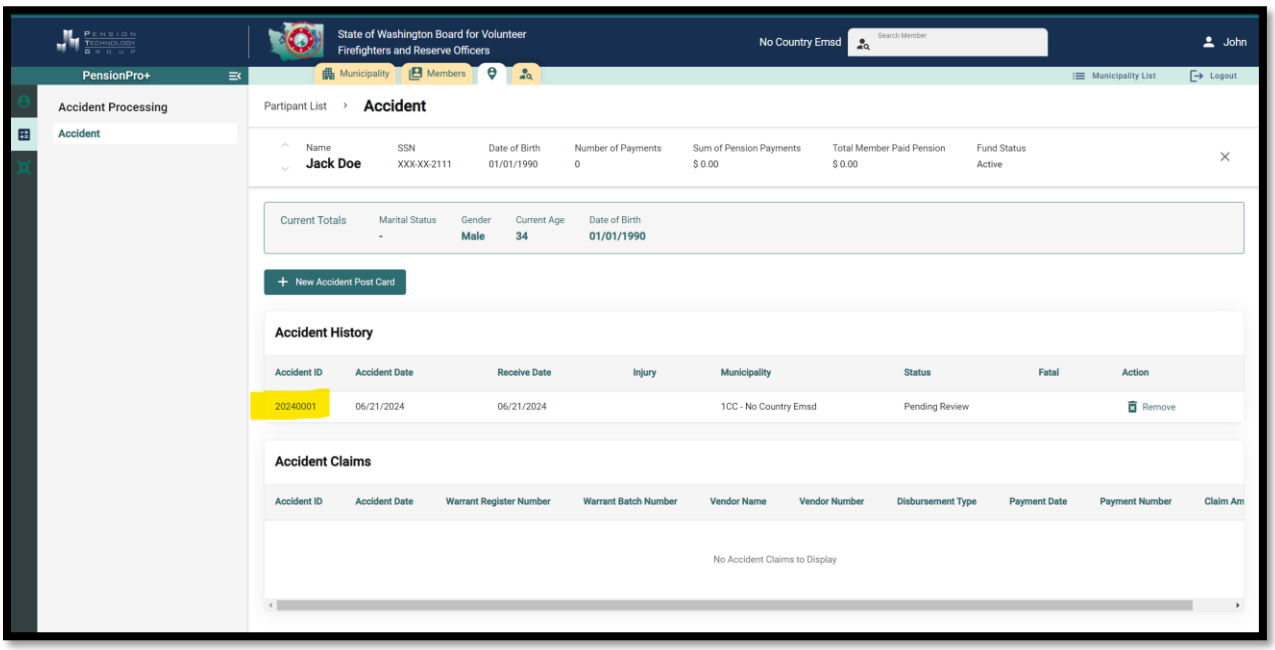
2. Fill in the required information. Click **Save** to add the new accident post card or **Cancel** to discard the action.



3. The post card will be added to the Accident screen with the status: Pending Review from BVFF.

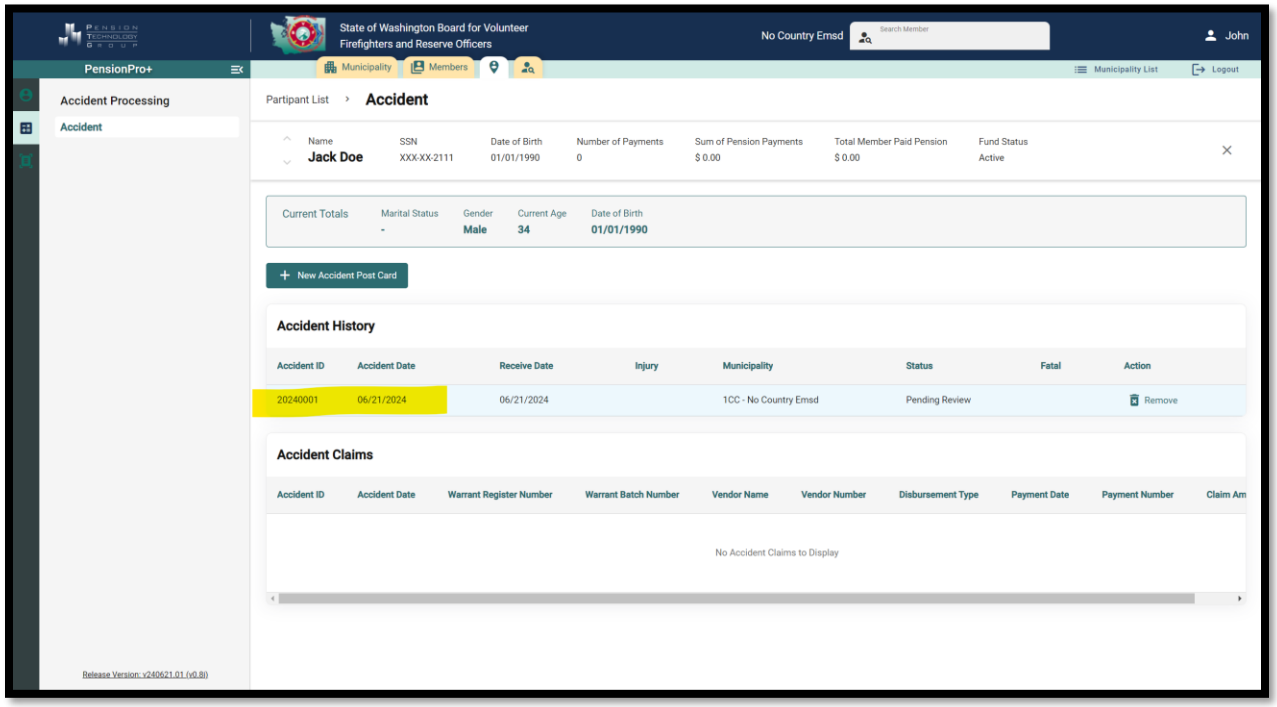


4. Additionally, the system will add the newly added record to the **Accident History** Section.

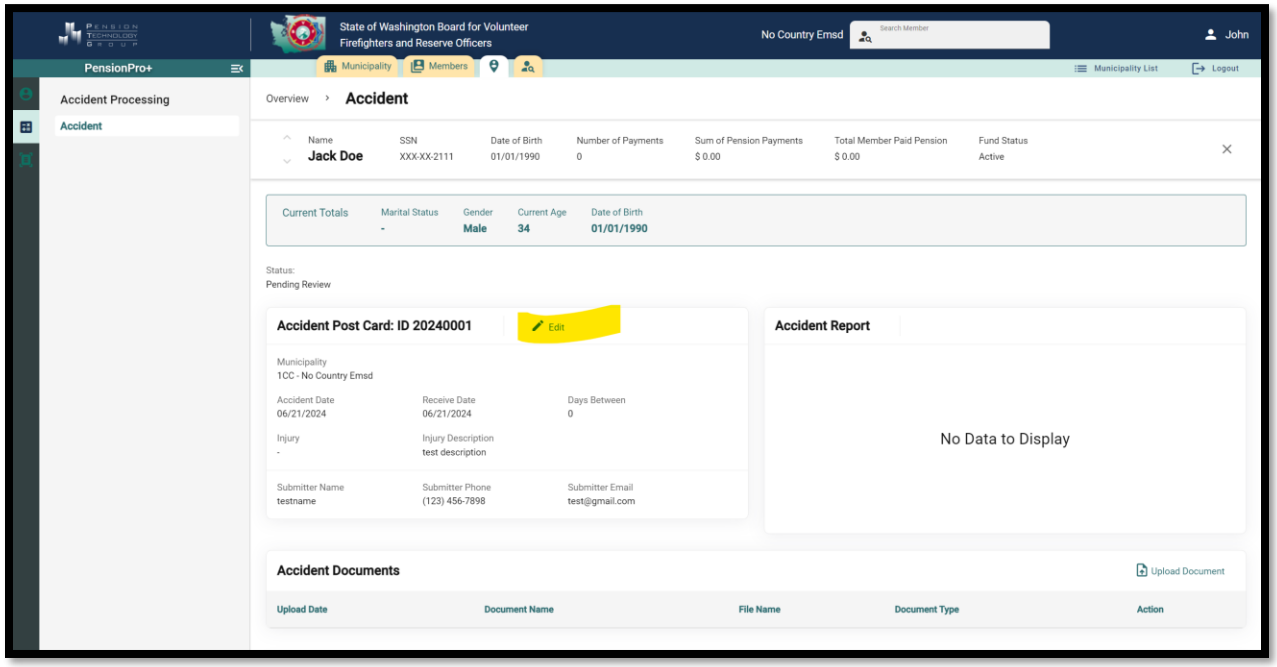


To Edit Accident Post Card

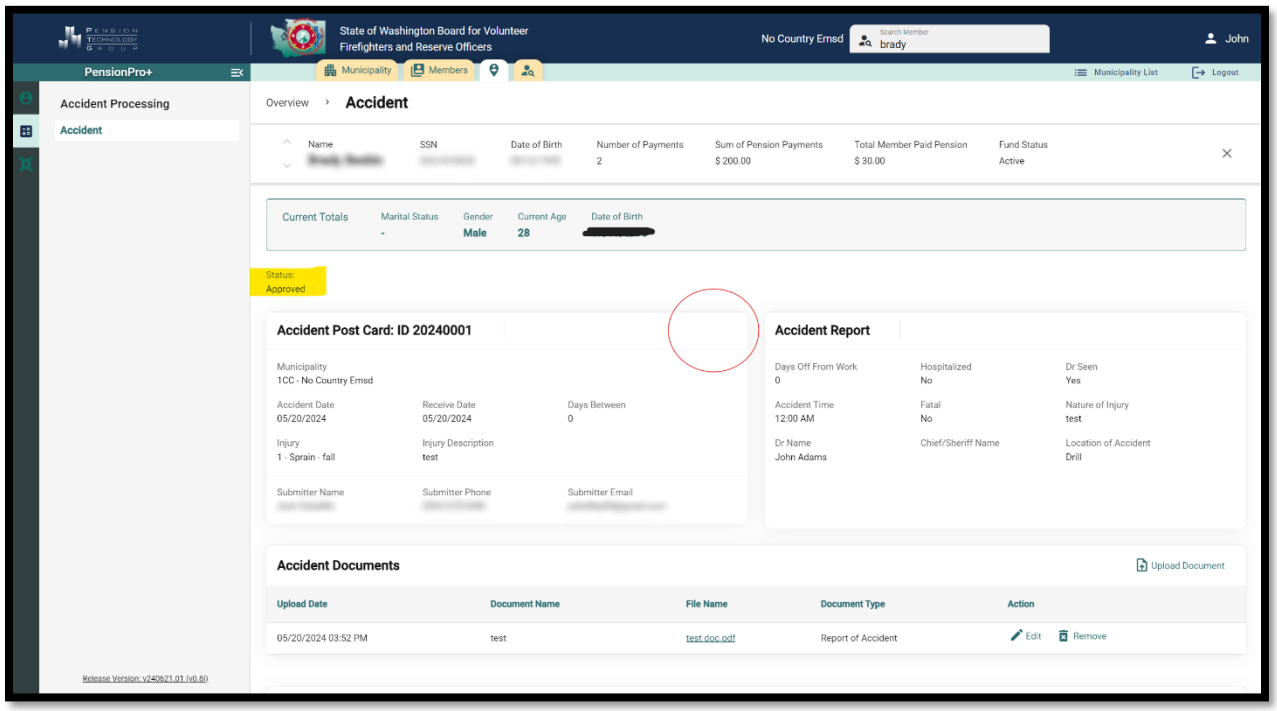
1. Select the accident record from the Accident History section.



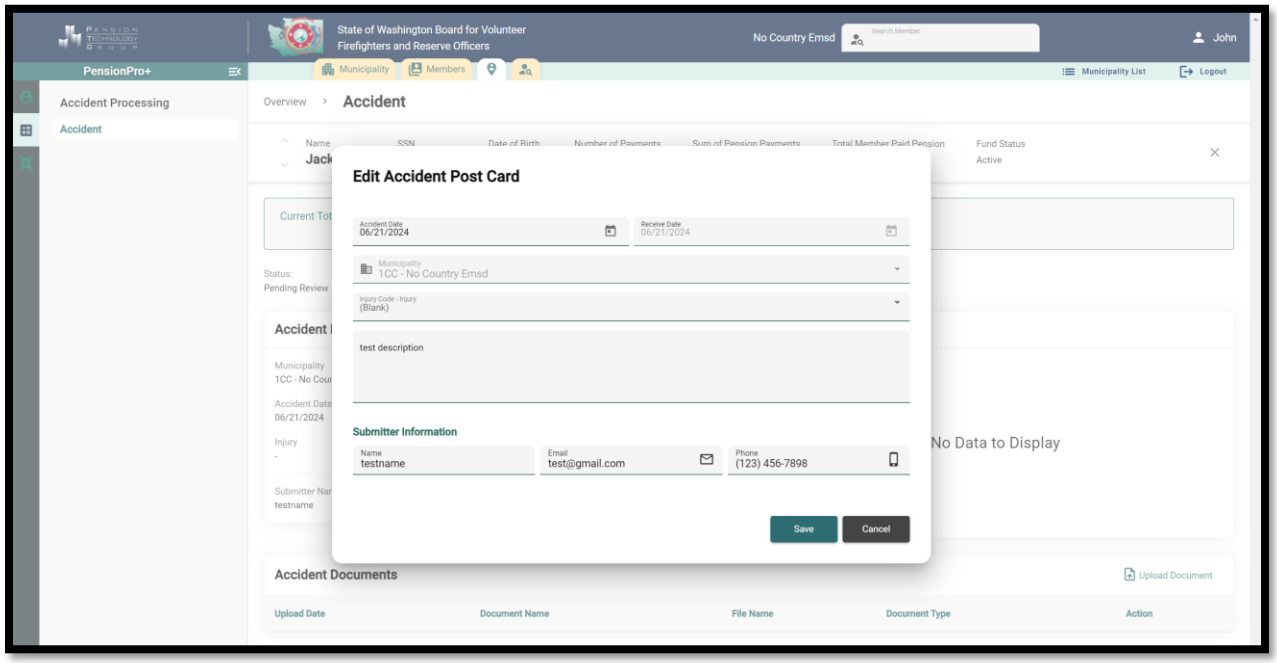
2. Click **Edit** on the Accident Post Card. Note: The Edit function is only available while the Status is Pending Review.



3. If the status is updated to Approved or Declined, the Edit function no longer appears.

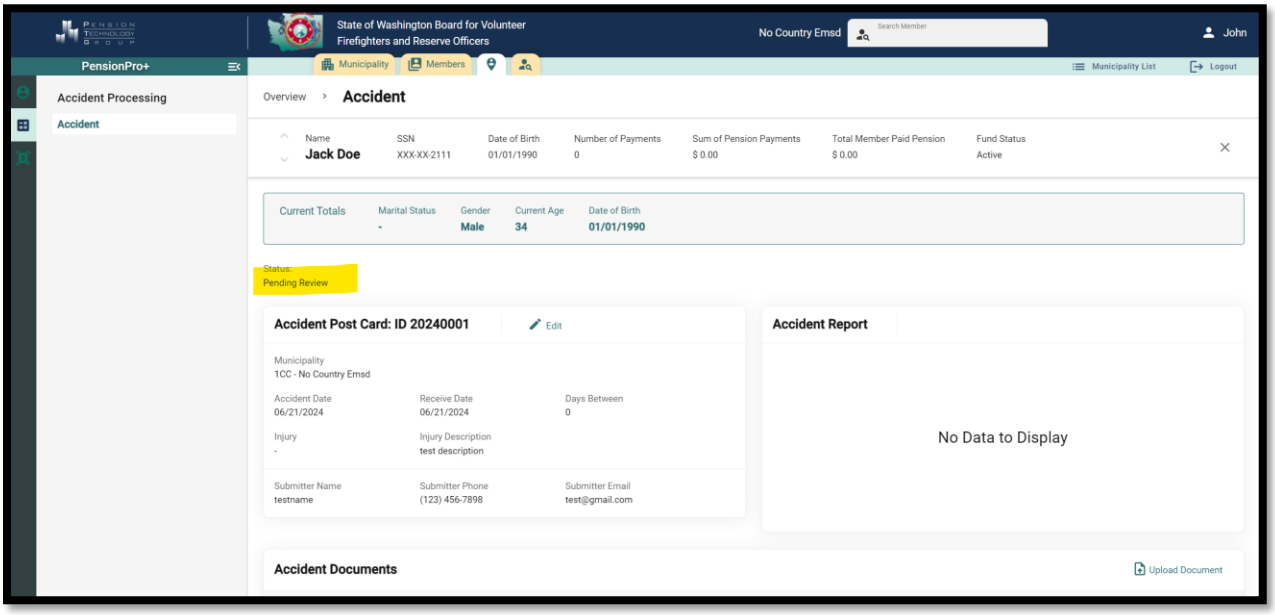


4. Enter the Information and click **Save**. Or click **Cancel**.

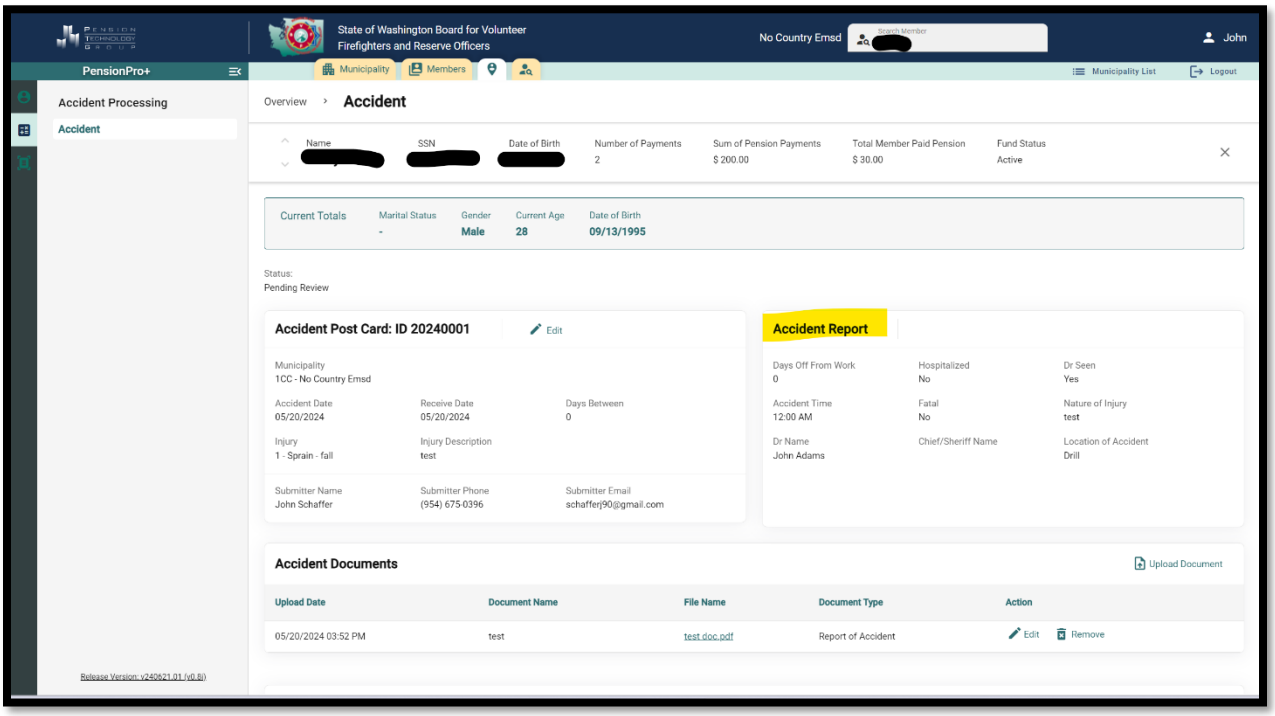


To View Accident Report/Claims

1. Accident Report/Claims are filled out by BVFF admins. The system will automatically update these sections with the details when completed. Status will be Pending Review until then.

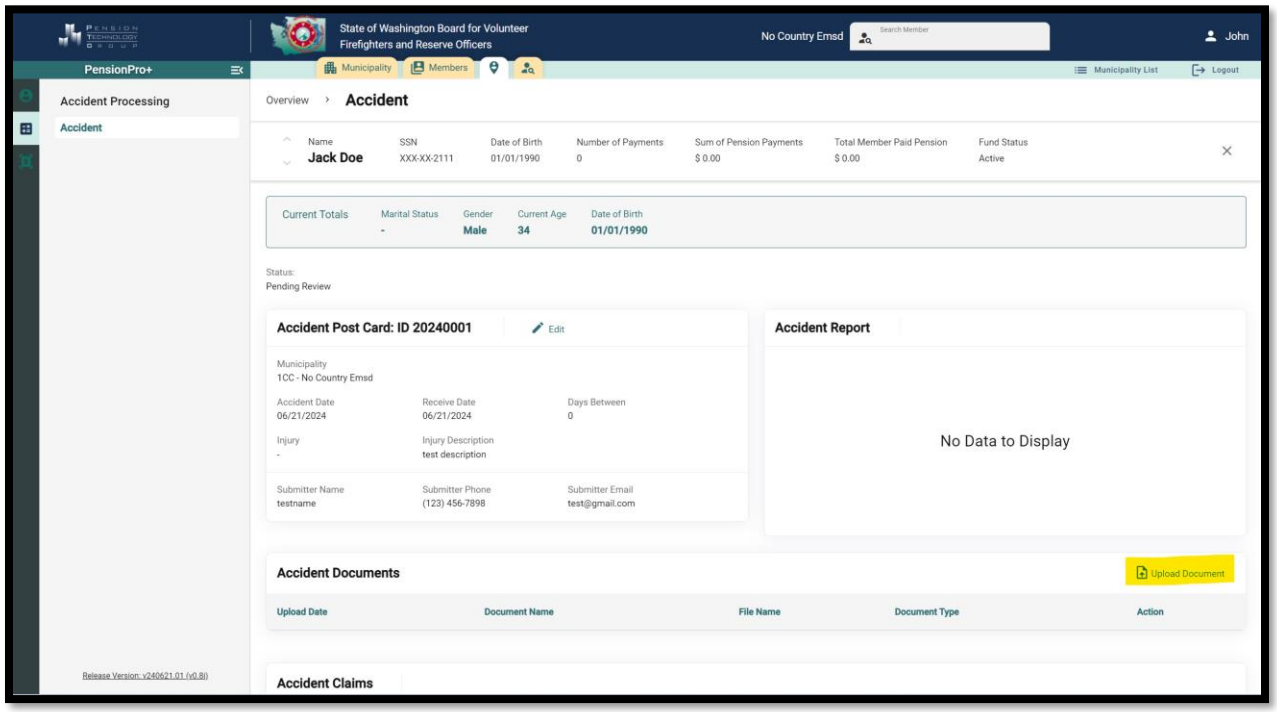


2. BVFF Admins have completed their review and updated the system on their end in this example

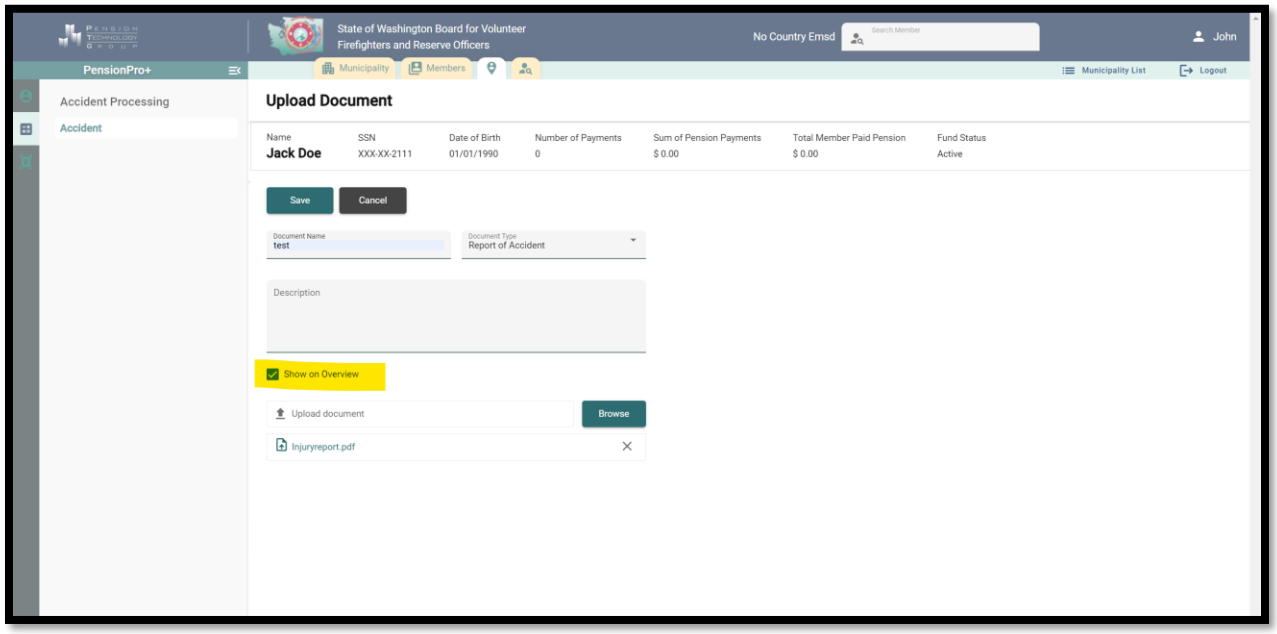


To Upload Accident Documents

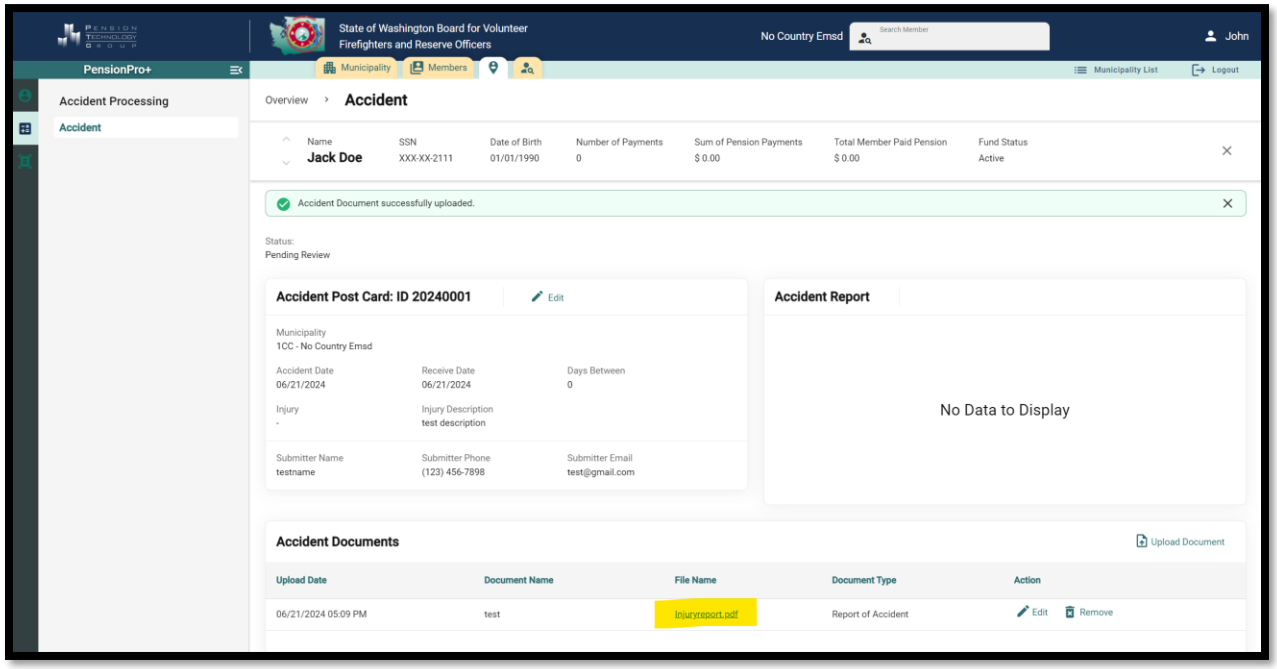
1. Click **Upload Document** on the Accident Document section.



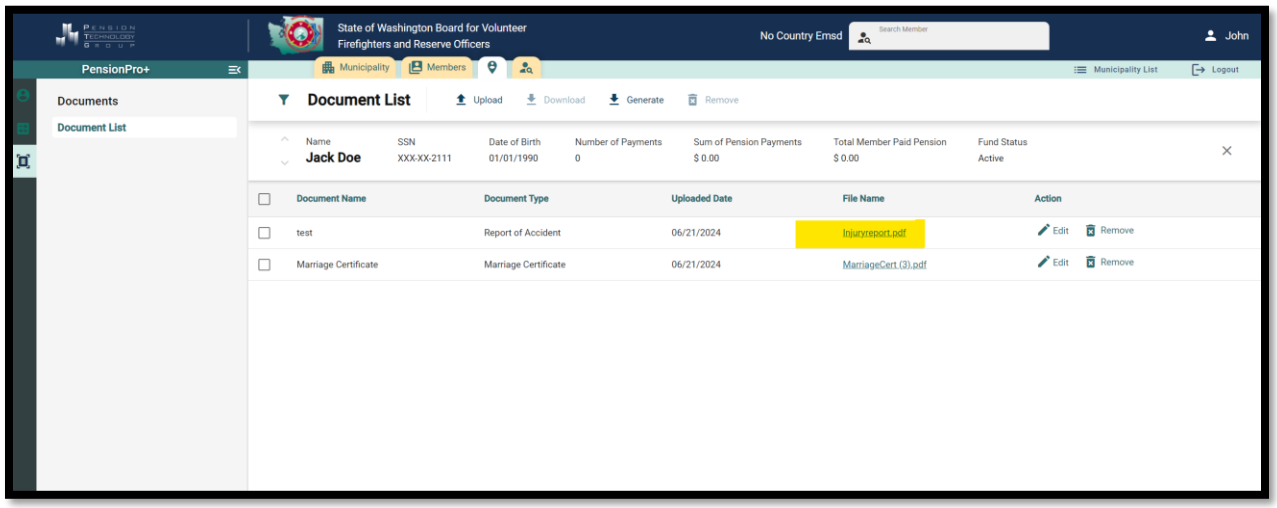
2. Enter the information. Browse and Upload the target document. Check the box to show this document on the Overview screen of the member's profile.



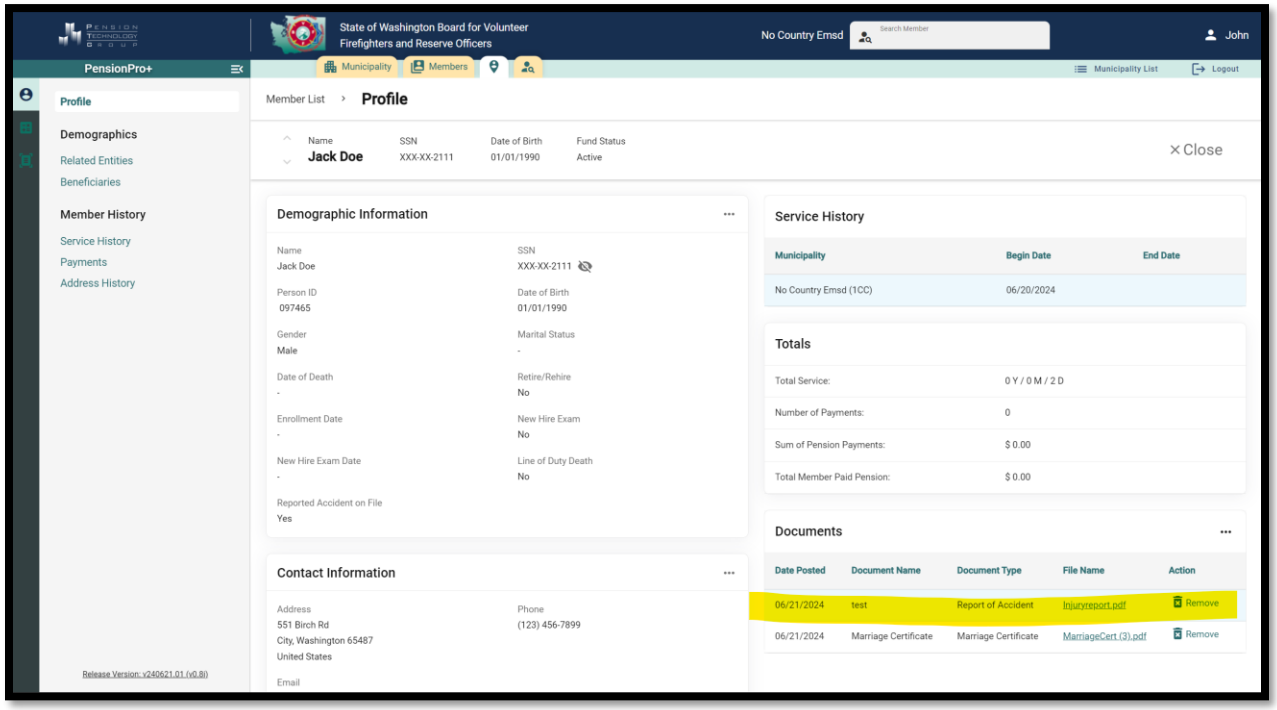
3. The document will then be displayed in 3 places.
    1. Accident Documents Card on the **Accident screen**.



    2. The **Document List** screen.

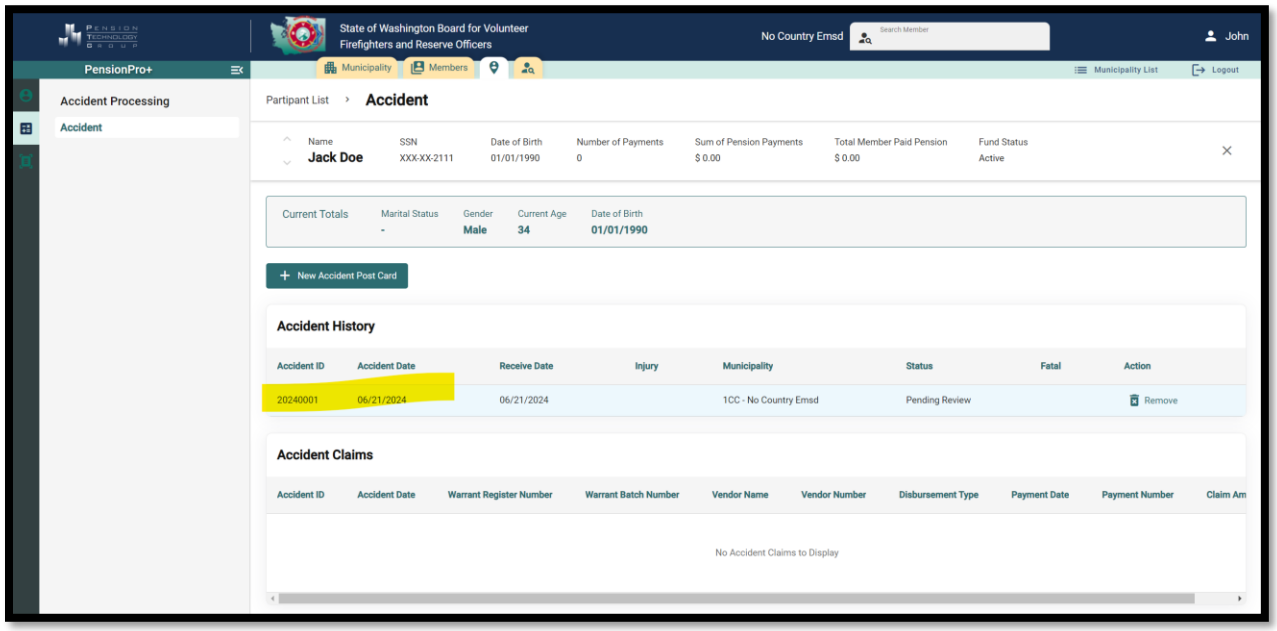


3. **Profile** screen Documents card. You can download the document by clicking the link located under the File Name header on all three screens.

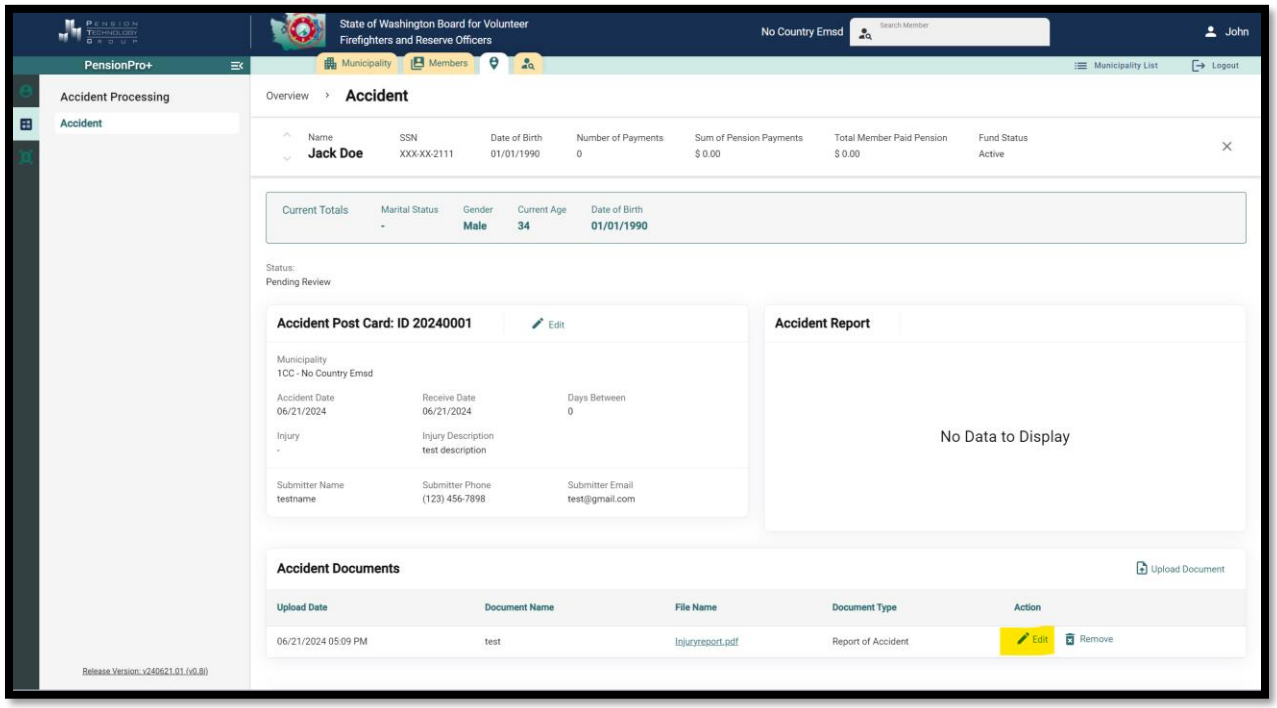


To Edit Accident Document

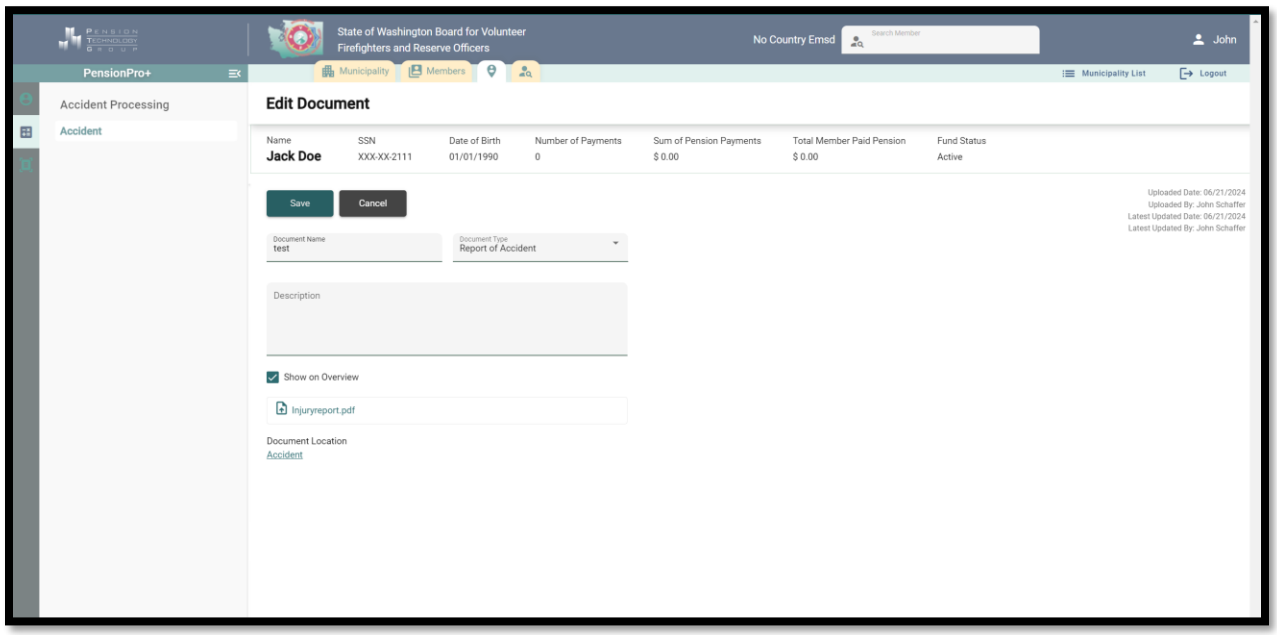
1. Select the accident from Accident History.



2. Click Edit on the document's record in the Accident documents section.

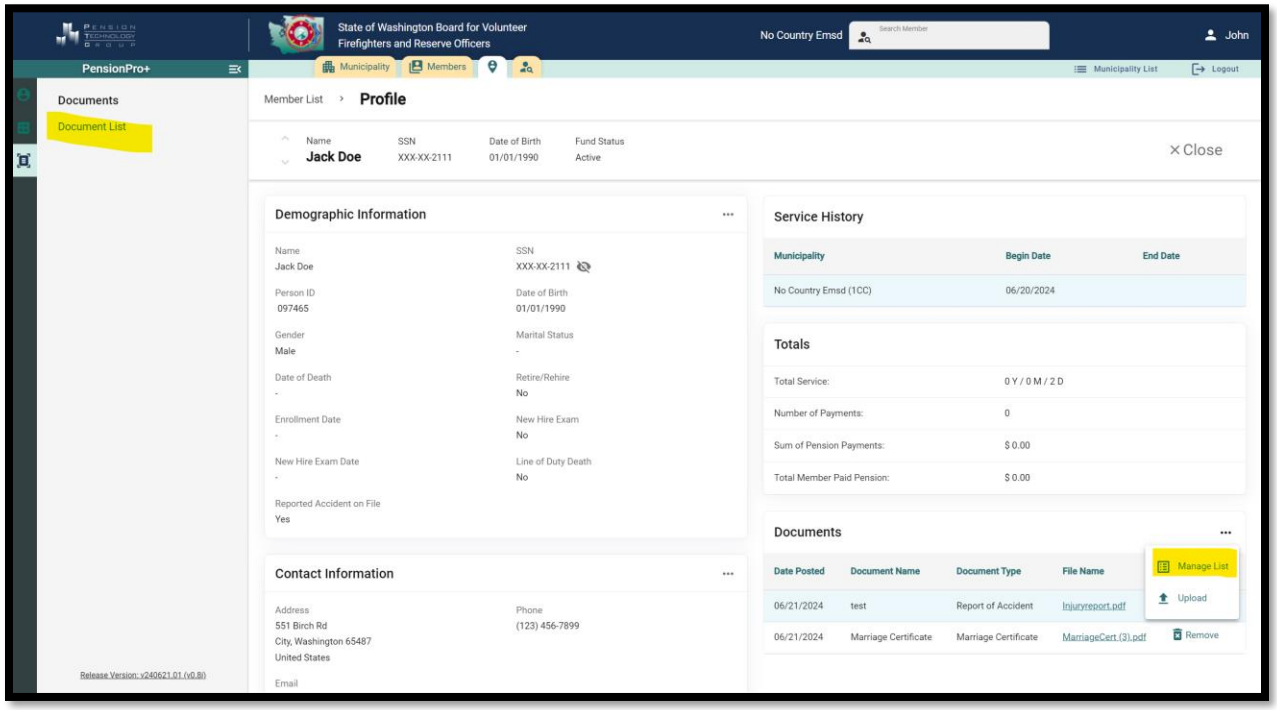


3. Enter the information. Click **Save** when done. Or click **Cancel**.



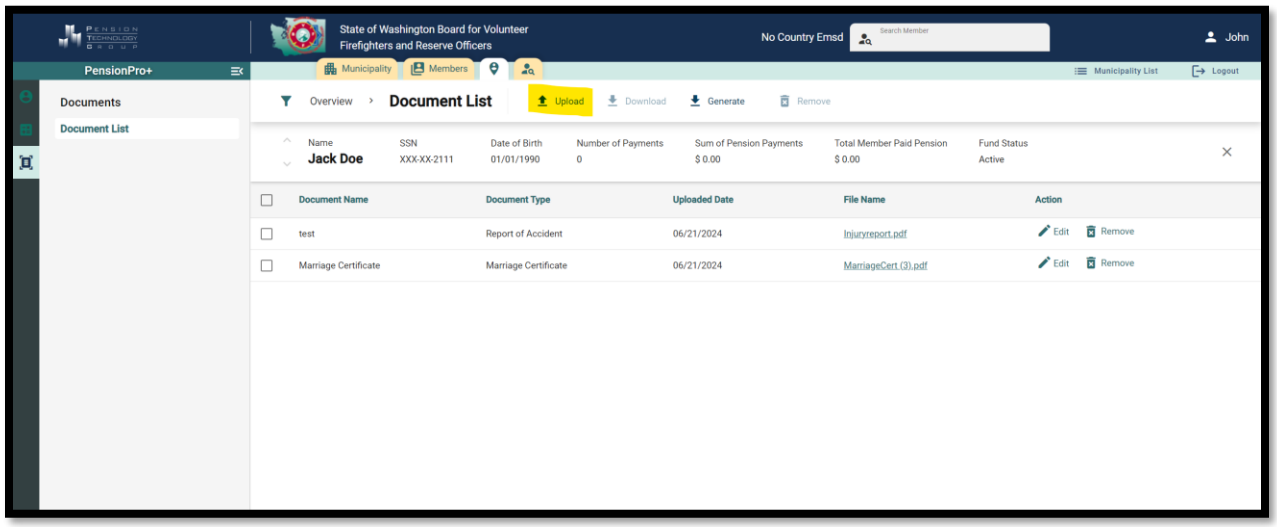
To View Member Document List

Either Select **Manage List** from the Actions list in the Documents section on the Profile screen OR open **Document List** from the Documents tab in the left menu.

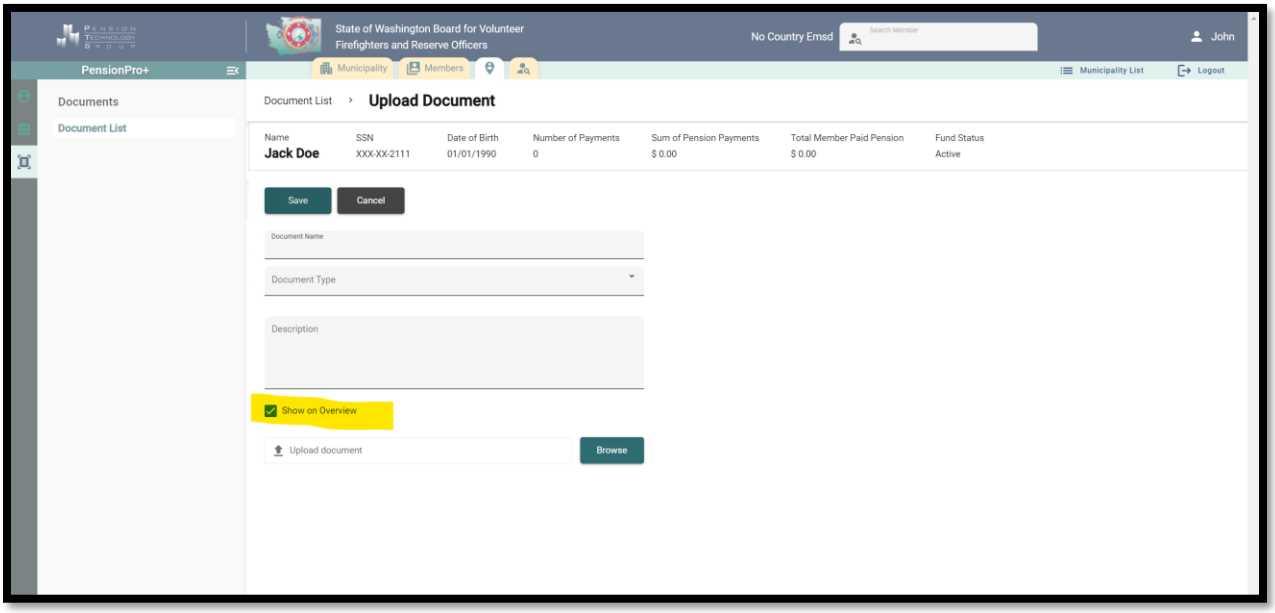


To Upload Documents

1. Click **Upload** located to the right of "Document List" screen header.

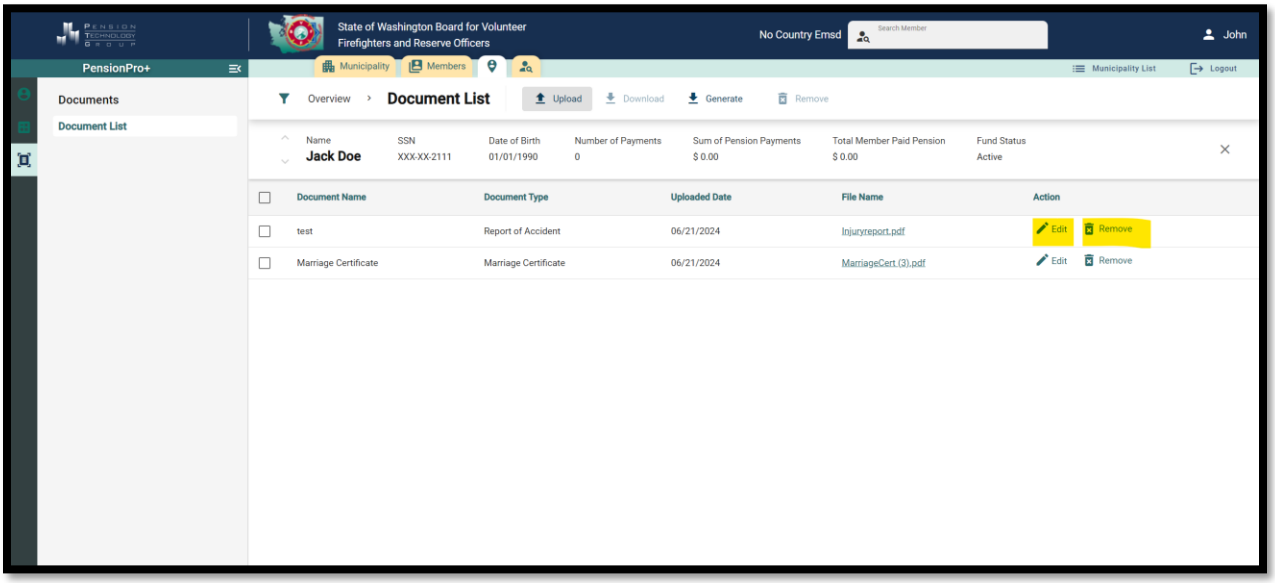


2. Fill in the details related to the uploaded document. Click **Save** to add the new document or click **Cancel** to discard the changes. If users choose the option **Show on Overview**, after successfully saving, the system will display the newly uploaded document at the top of the list in the Documents section on the Profile screen.



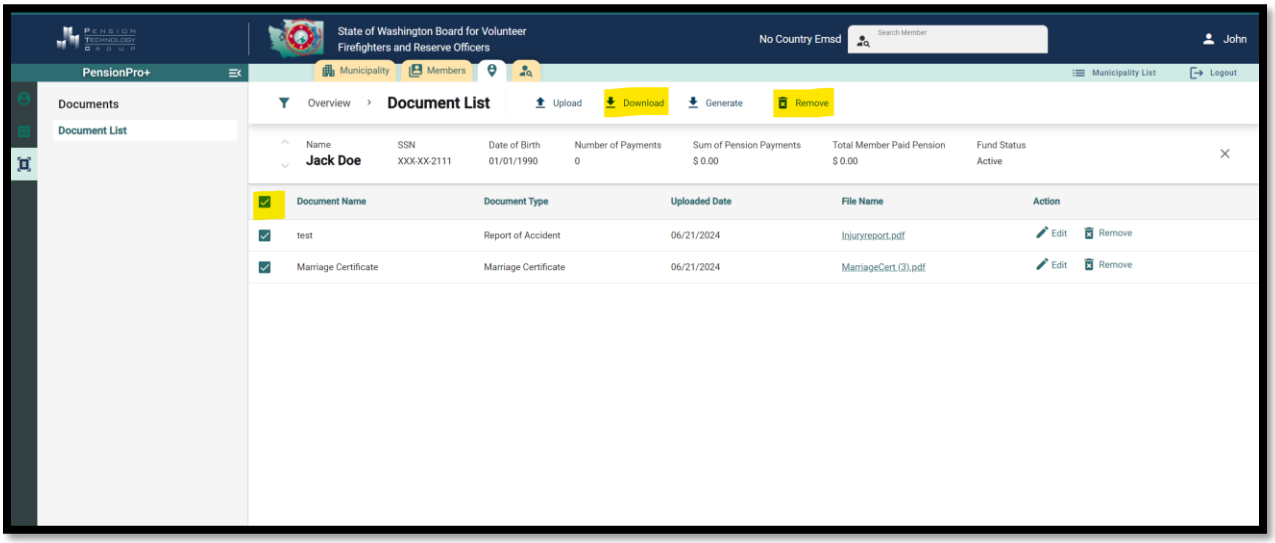
To Edit Documents

1. Click **Edit** to update the information related to a selected document in the list or Click **Remove** to delete the selected documents from the list.

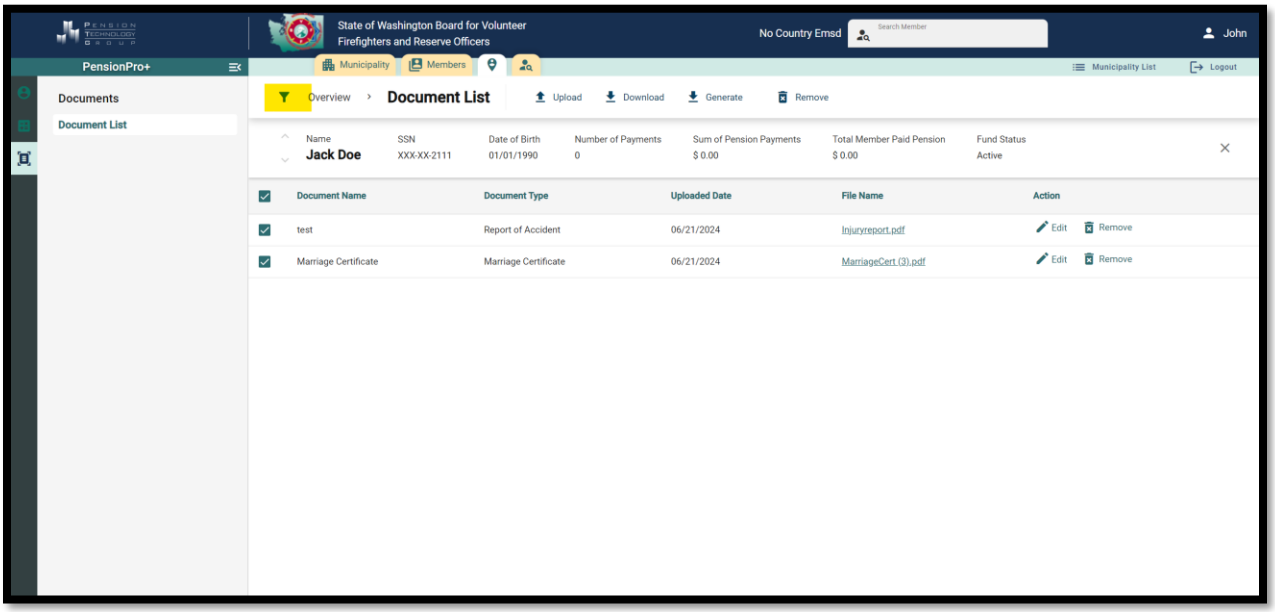


To Use Document List Functions

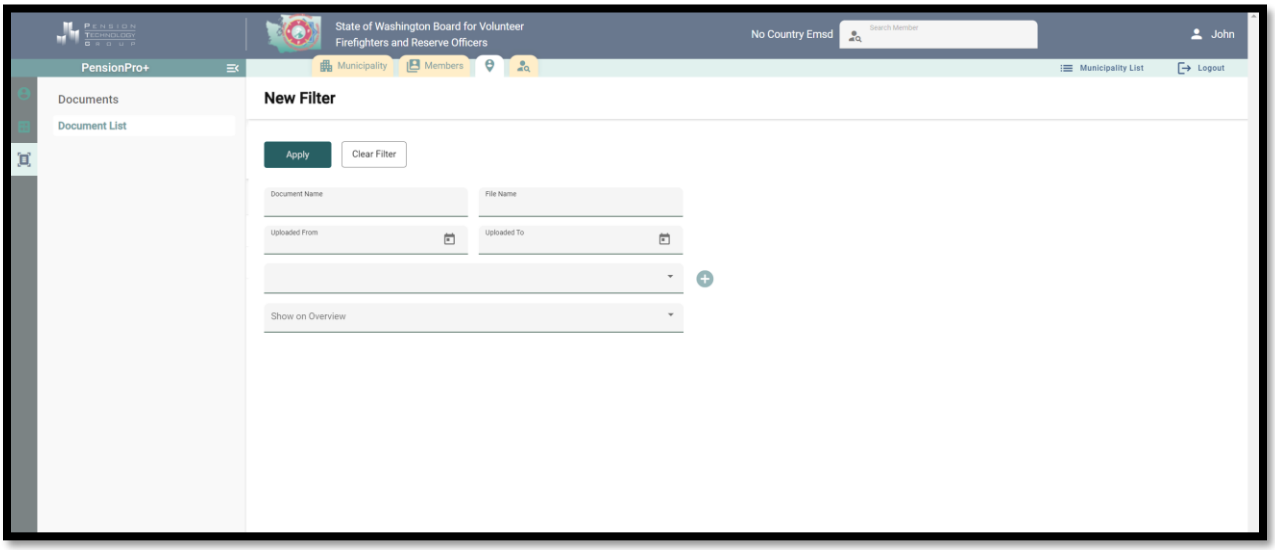
1. Users can select multiple documents by **checking the box** at the beginning of each row. Clicking Download or Remove at the header will then perform these functions in bulk.



2. Additionally, users can click the **Filter** icon at the top of the header of the Document List screen to filter the document list as needed for easy searching.

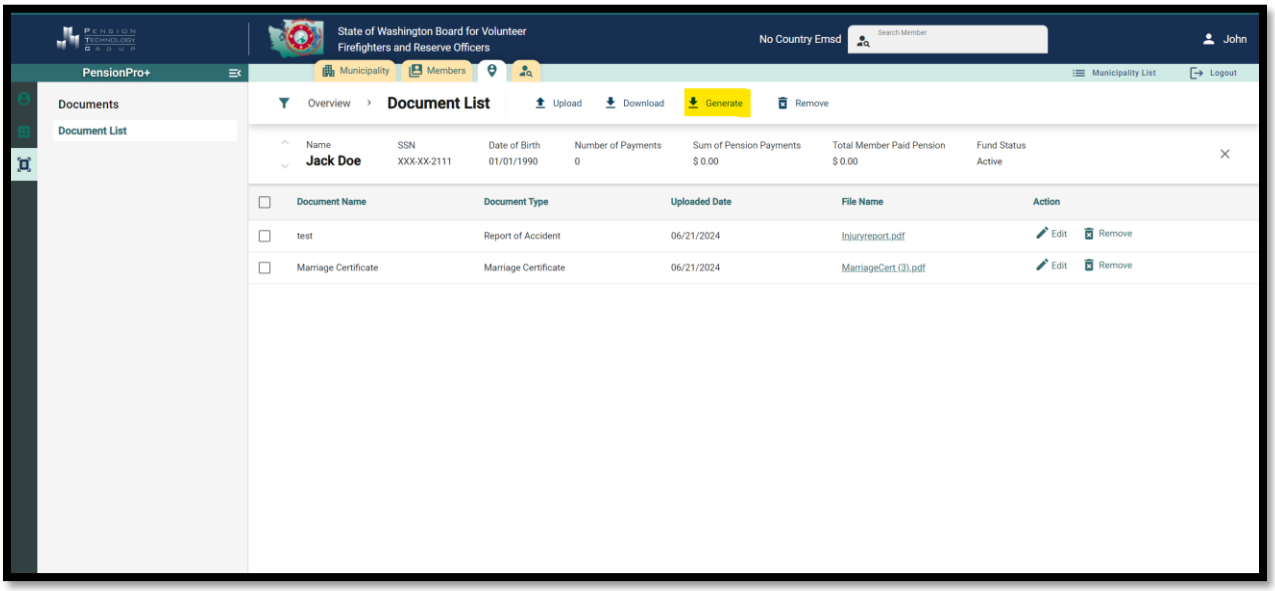


3. Enter the Information and click Apply.

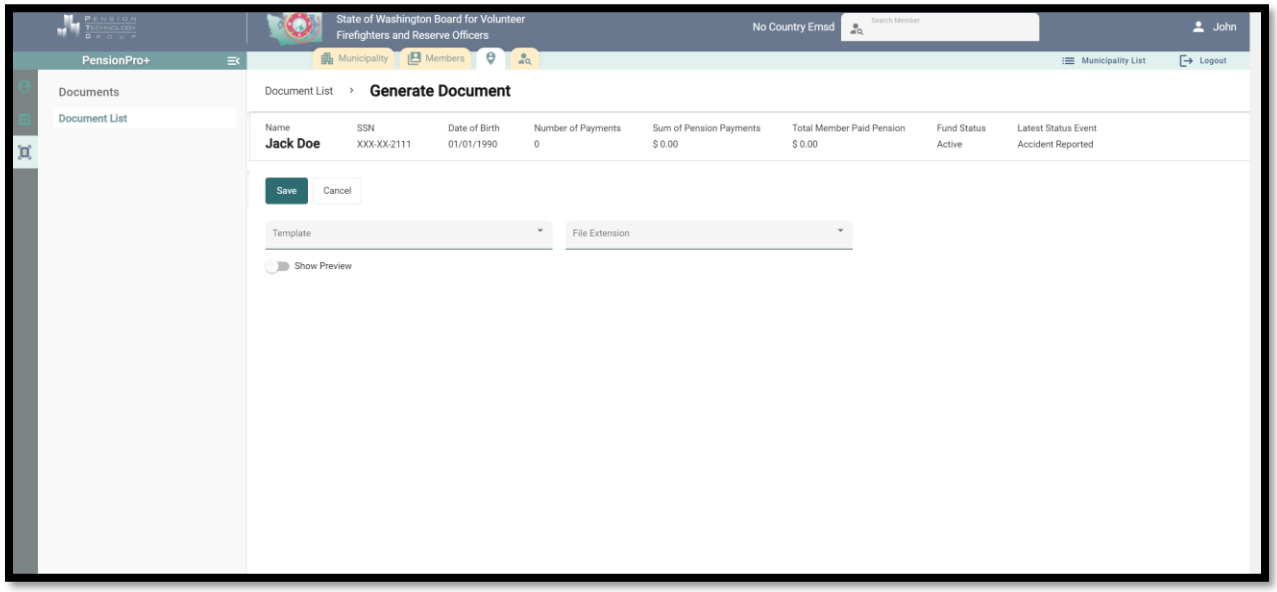


To Generate Document

1. Click Generate located to the right of the "Document List" screen header.

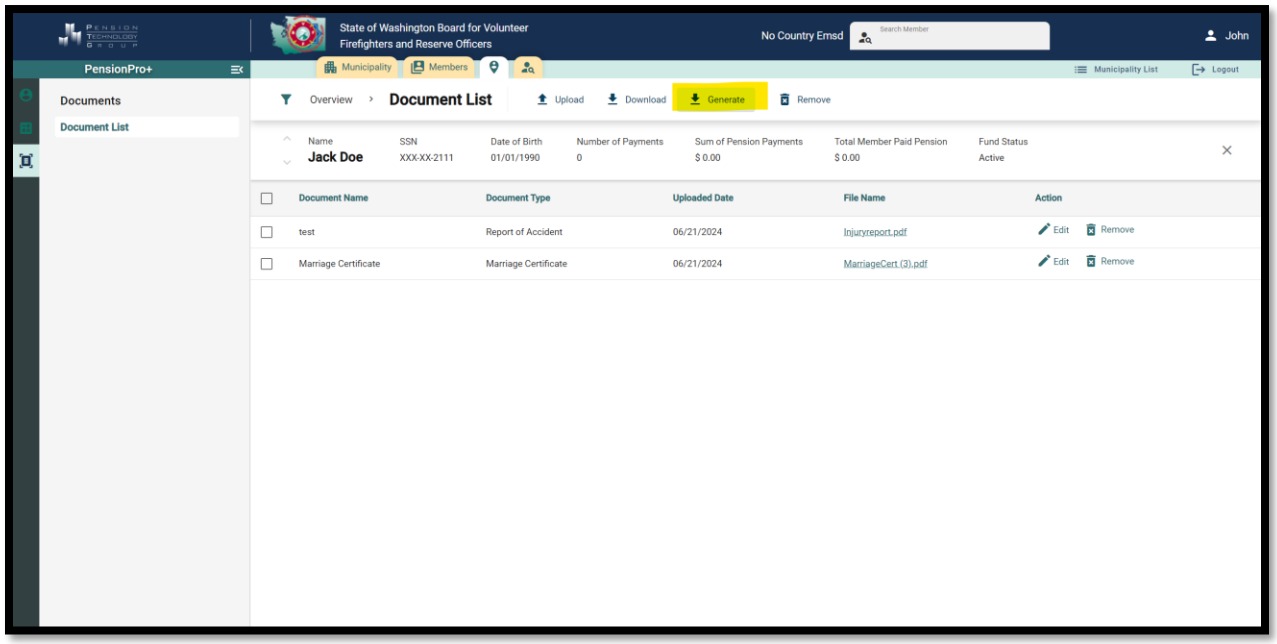


2. Select a document template and a file extension. Click the toggle-on to **Show Preview** of the document. Click **Save** when completed.

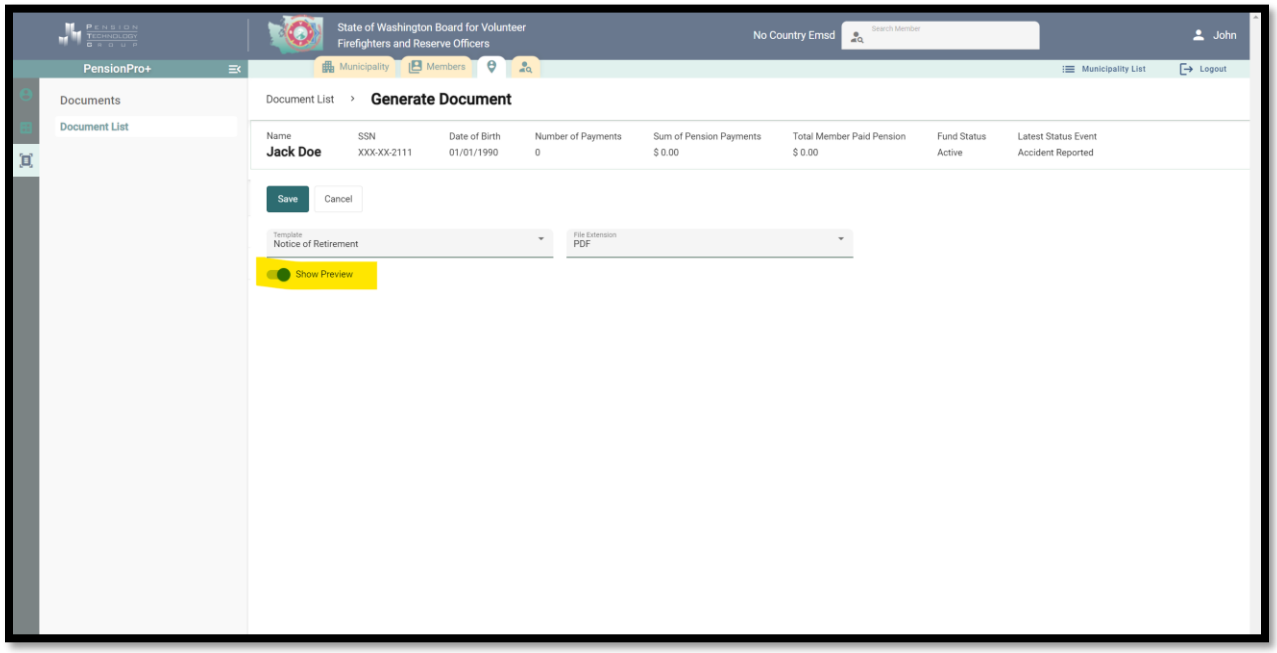


To Generate Notice of Retirement Document (Preview)

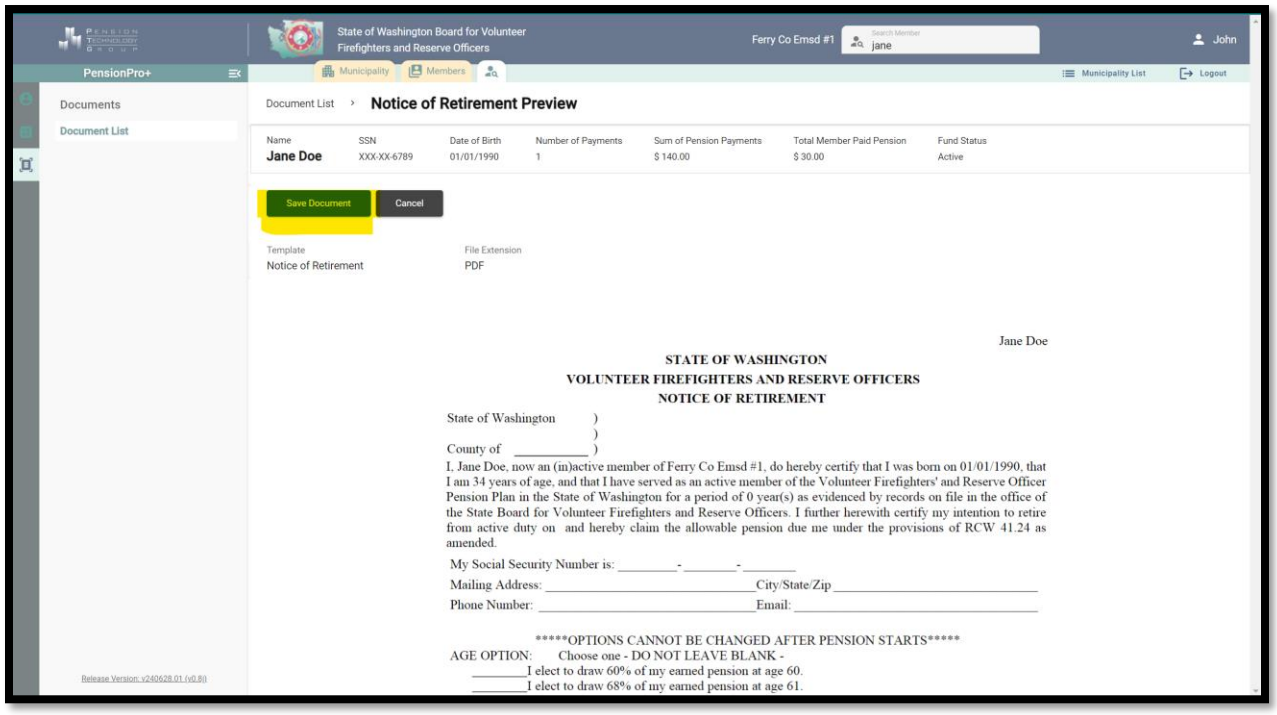
1. Click Generate.



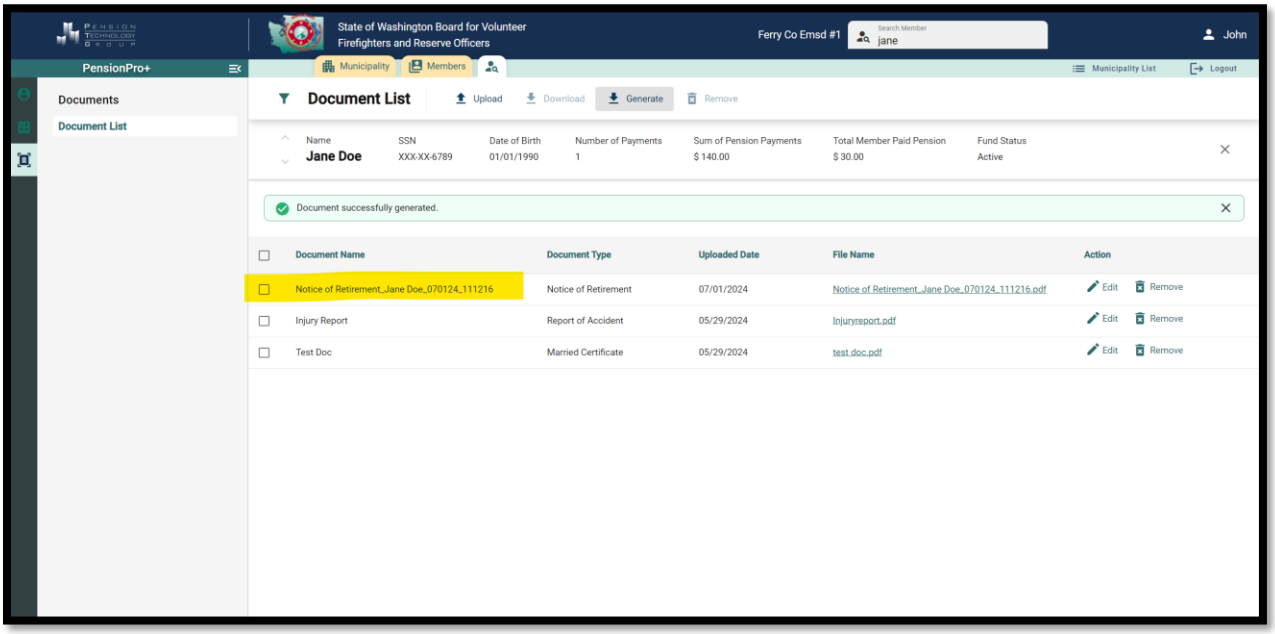
2. Select **"Notice of Retirement**" as a template and **PDF** as the extension. Click the toggle button to Show Preview of the document.



3. The document will appear on scree



4. Click Save Document to add the document to the list.

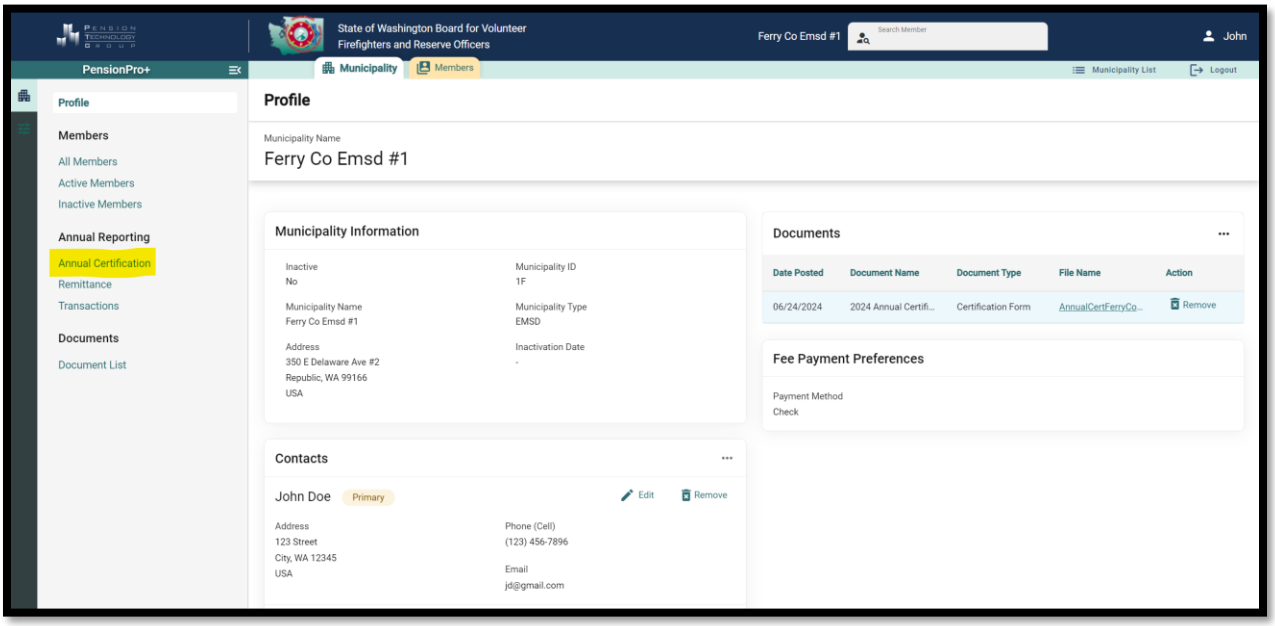


IV. Annual Reporting

Annual Certification

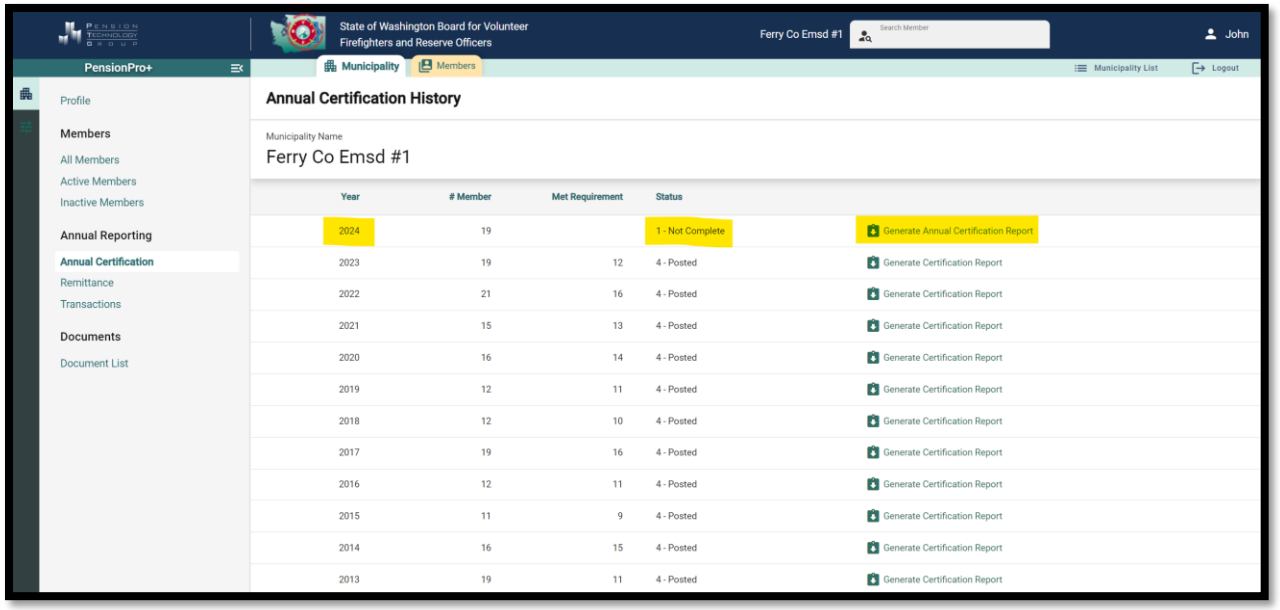
To View Annual Certification History

1. At the Municipality Profile screen, Choose **Annual Certification** on the left menu under Annual Reporting.

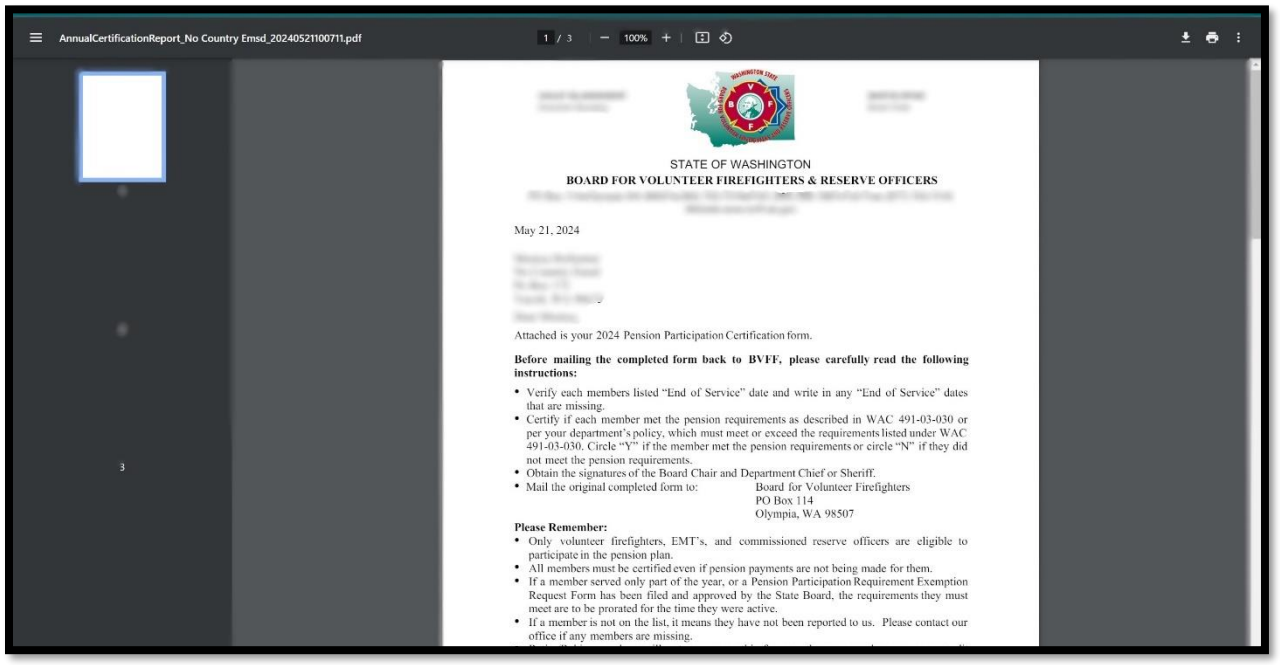


To Generate Certification Report

1. At the beginning of the calendar year, BVFF will send out a report to certify the prior remittance. (**2024** in this example). This report will appear at the top of the list. It will have a status of **1 - Not Complete**. Click the download icon to open the report in your browser.

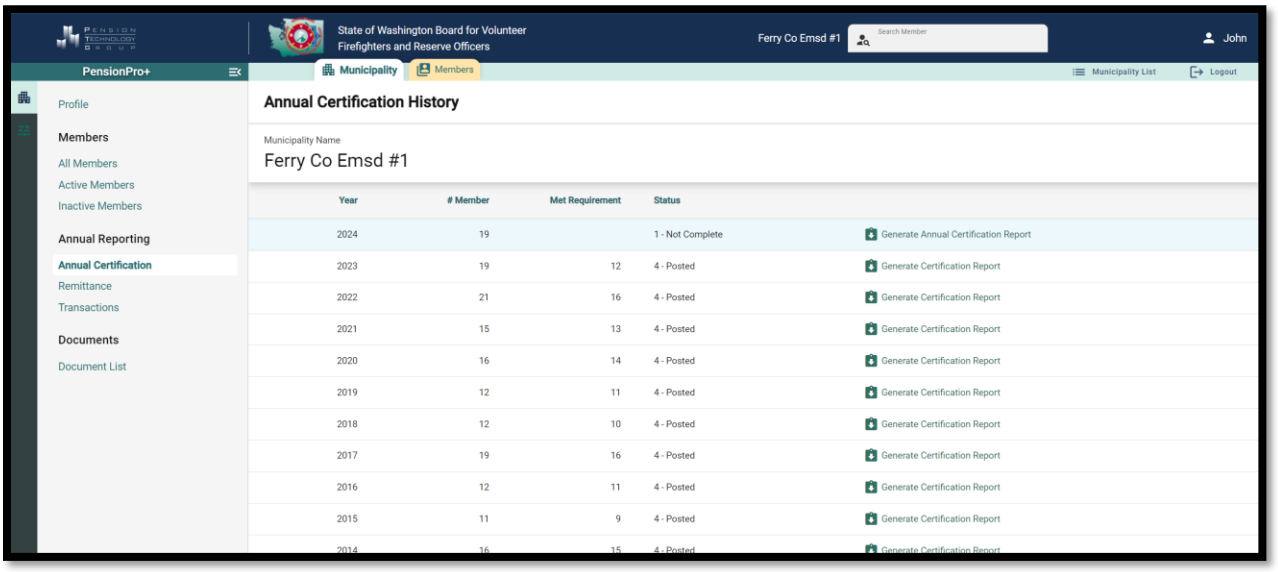


2. Scroll down to see the whole report. Use the action buttons to download.



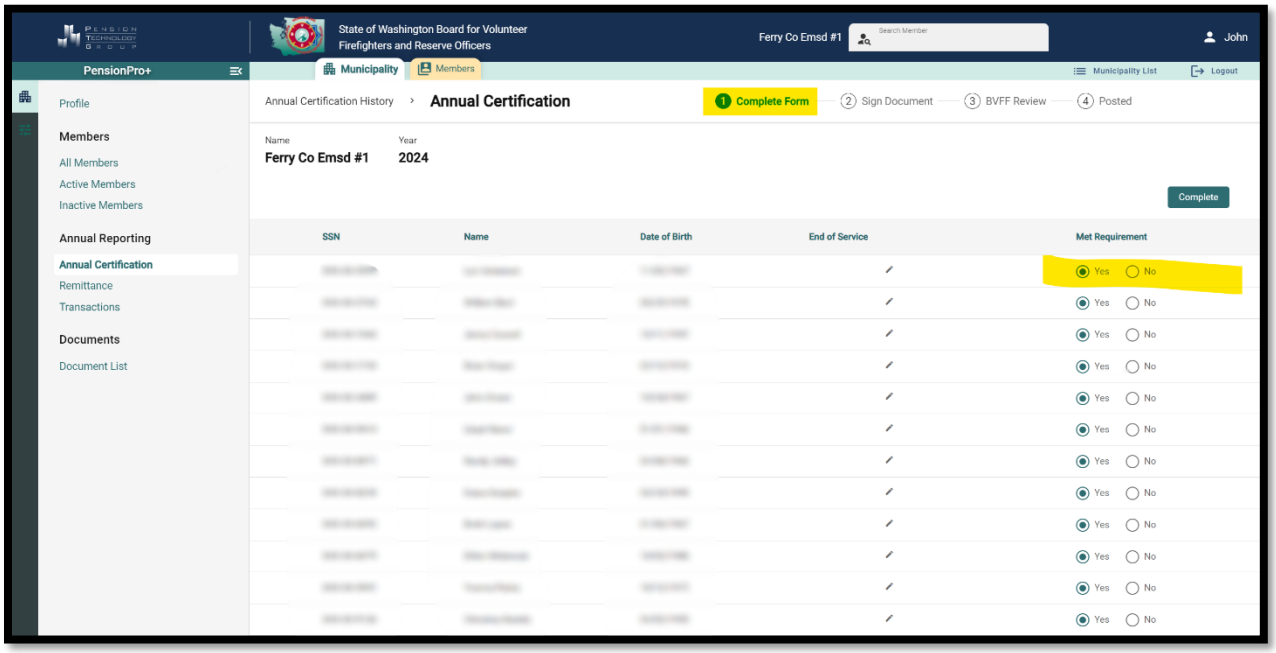
To Initiate Annual Certification

Click on the record with the status of 1 – Not Complete.

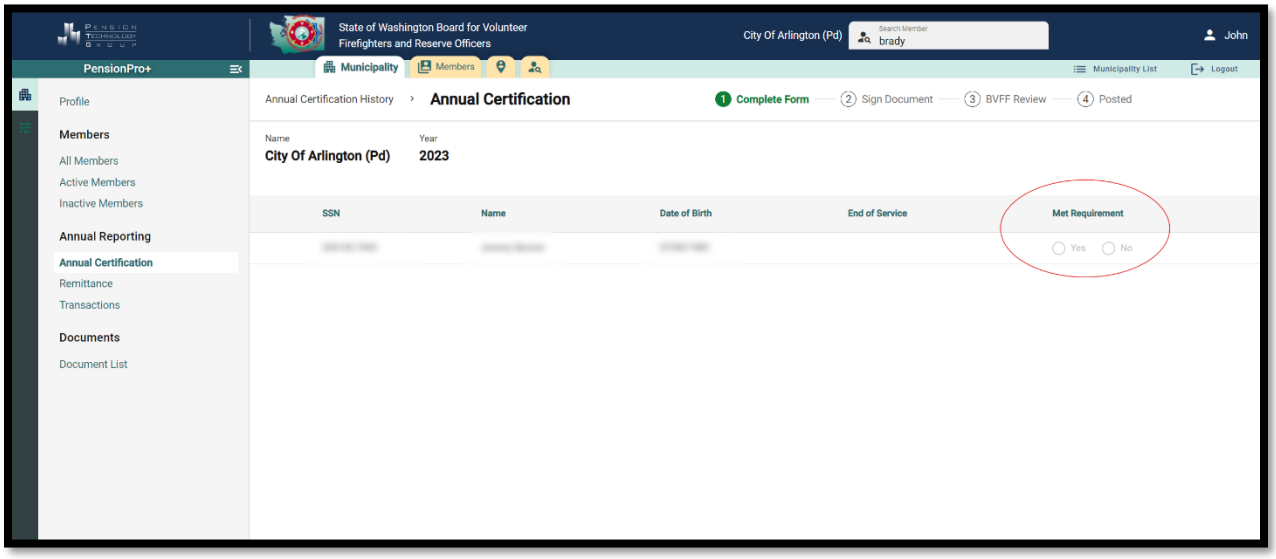


Step 1: Complete Form

1. Check the boxes next to each member. Select **Yes** if they "Met" the Requirements. Select **No** if they did not. Click **Complete** when done.



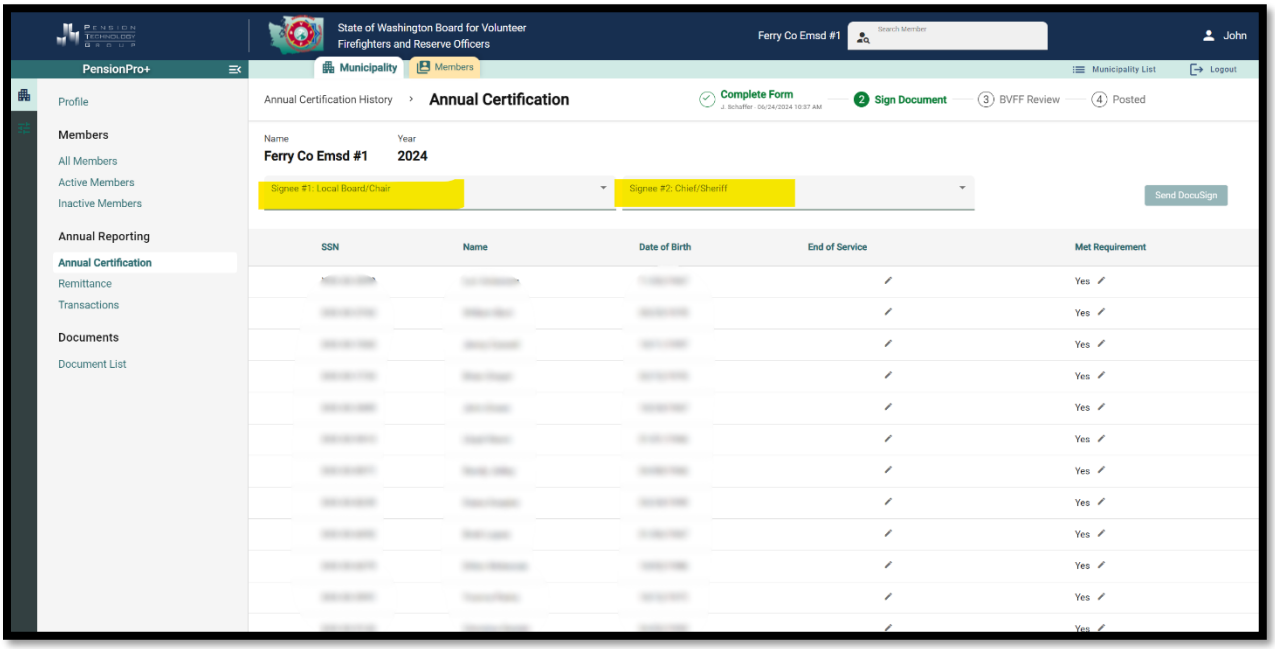
2. These Yes/No buttons will be deactivated for any users registered after the Annual Certification was initiated. Users will have to do fill out the list manually.



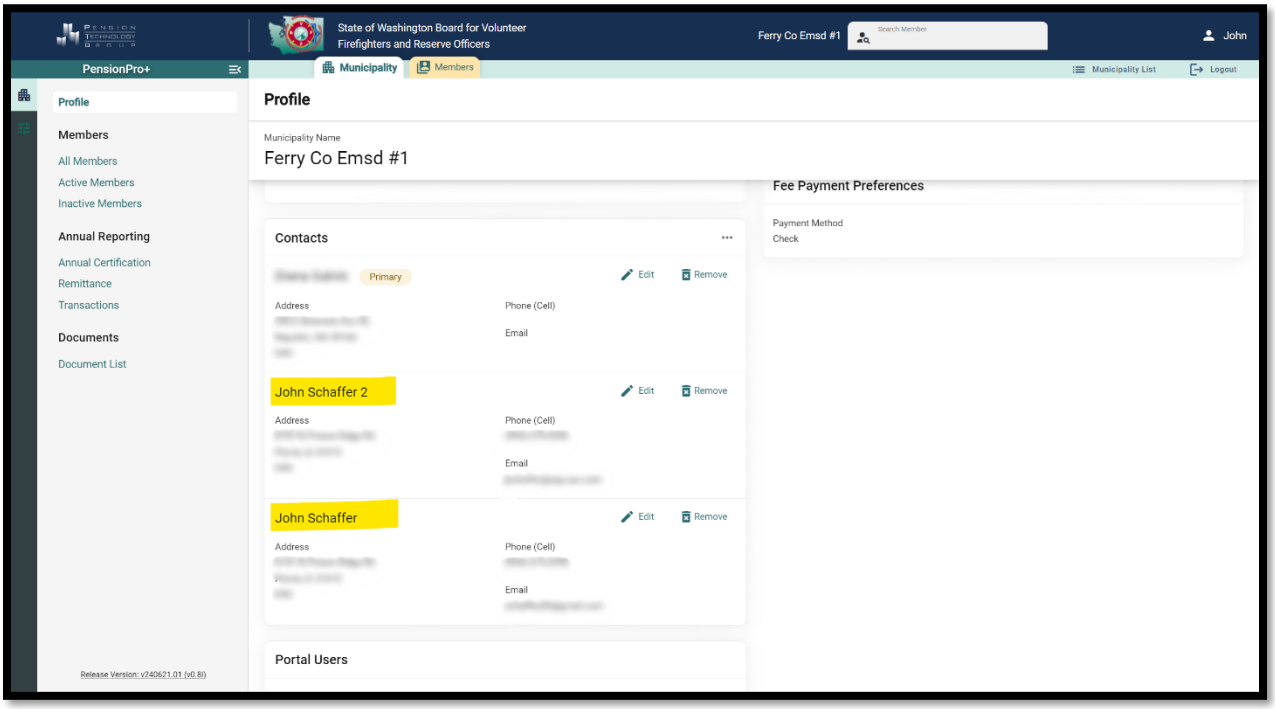
- Mandatory Met Requirement fields cannot be left blank.
- If the entered End of Service date is earlier than the Service Begin Date, the system will display an error message.
- If the entered End of Service date is prior to the year being certified, the system will show a flag icon next to the entered value.
- In addition, the system will automatically set the Met Requirement to No and prevent any further editing.

Step 2: Sign Document – DocuSign.

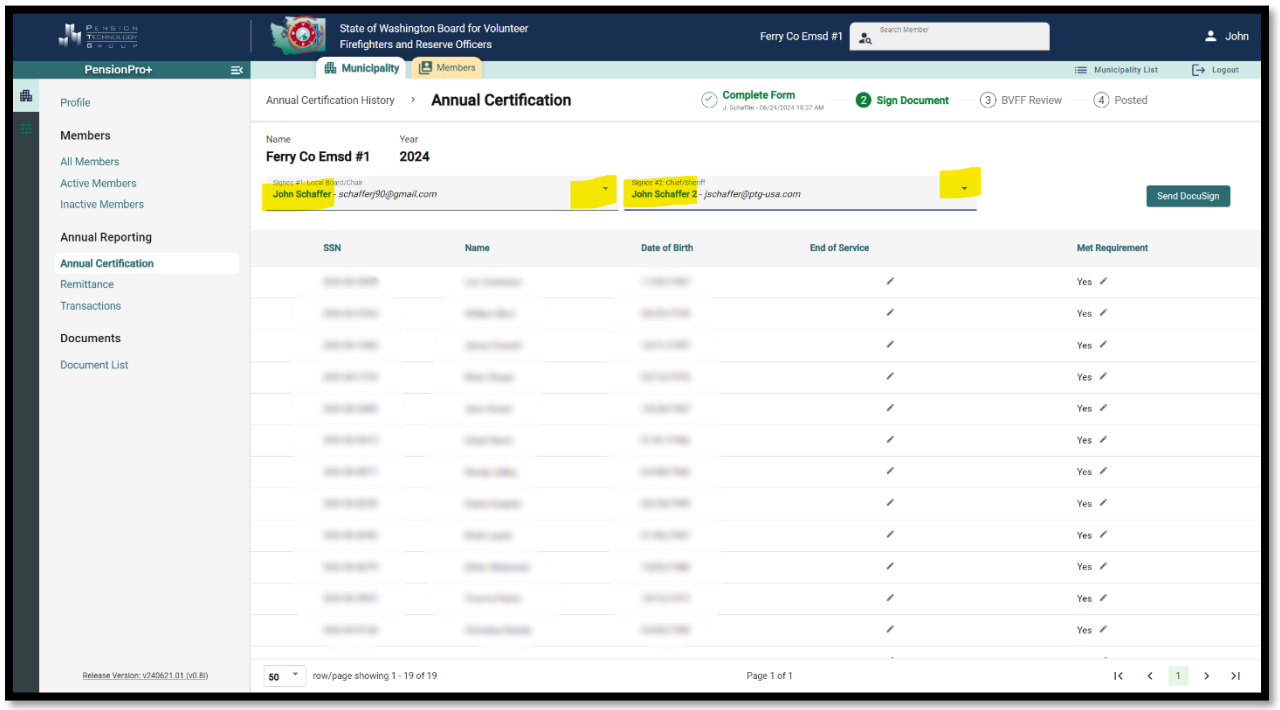
1. The 2 dropdown boxes indicate that a signee is required.



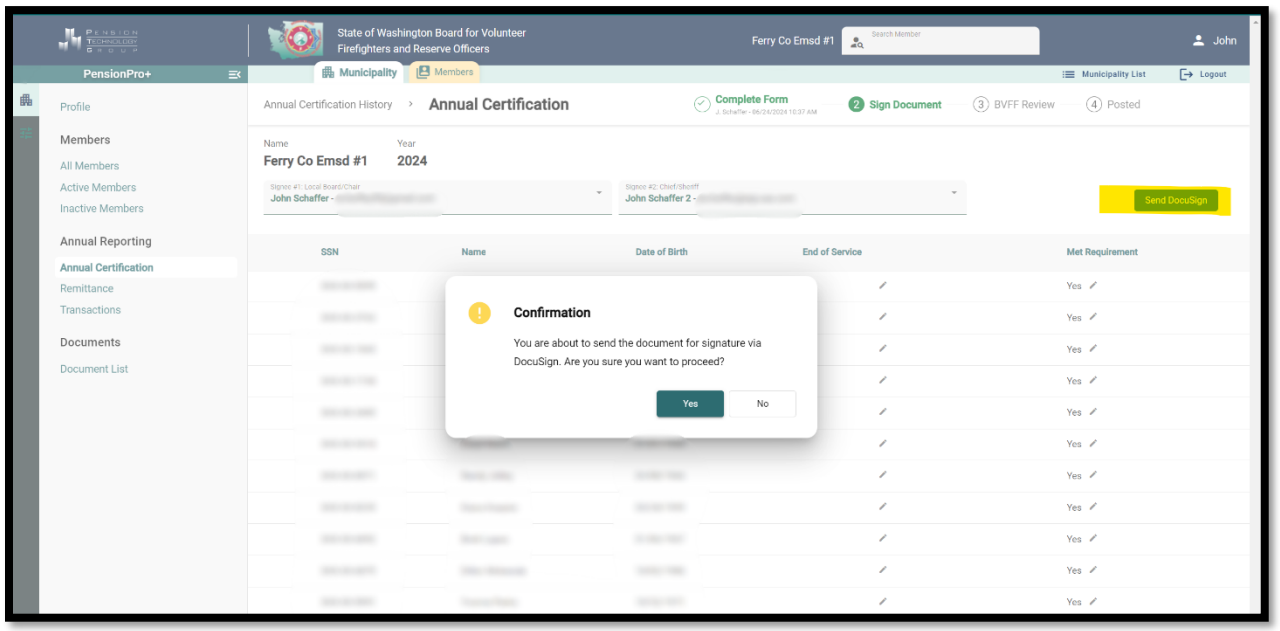
2. Signees are set up in the Contacts card on the Profile screen. Email addresses are required. John Schaffer and John Schaffer 2 have been set up with real email addresses for this example.



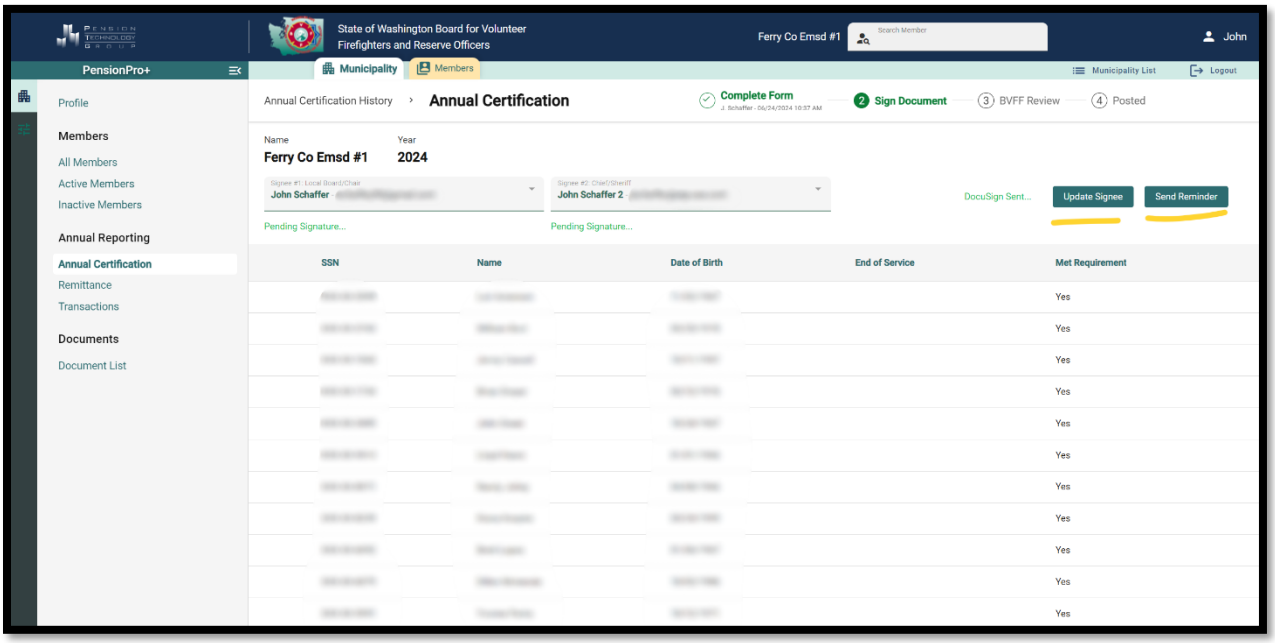
3. Click the arrows on the dropdown boxes to see and select your contacts. (If you do not see a name as an option, read the previous step.)



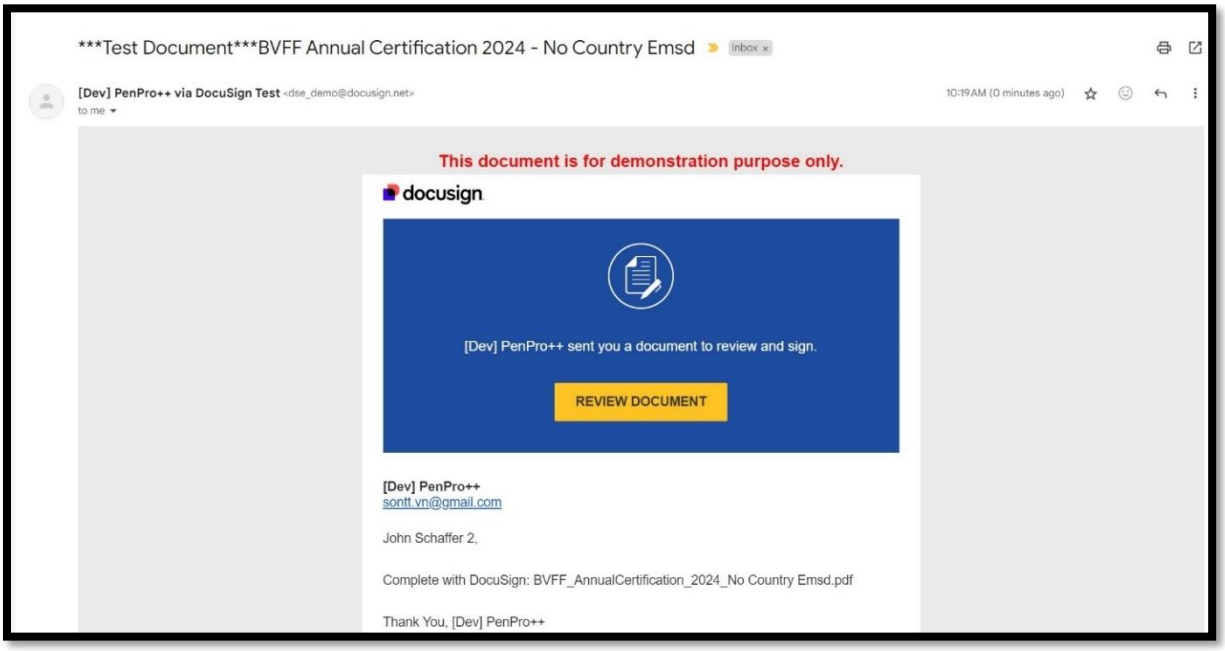
4. Click **Send DocuSign**. Click **Yes** to confirm.



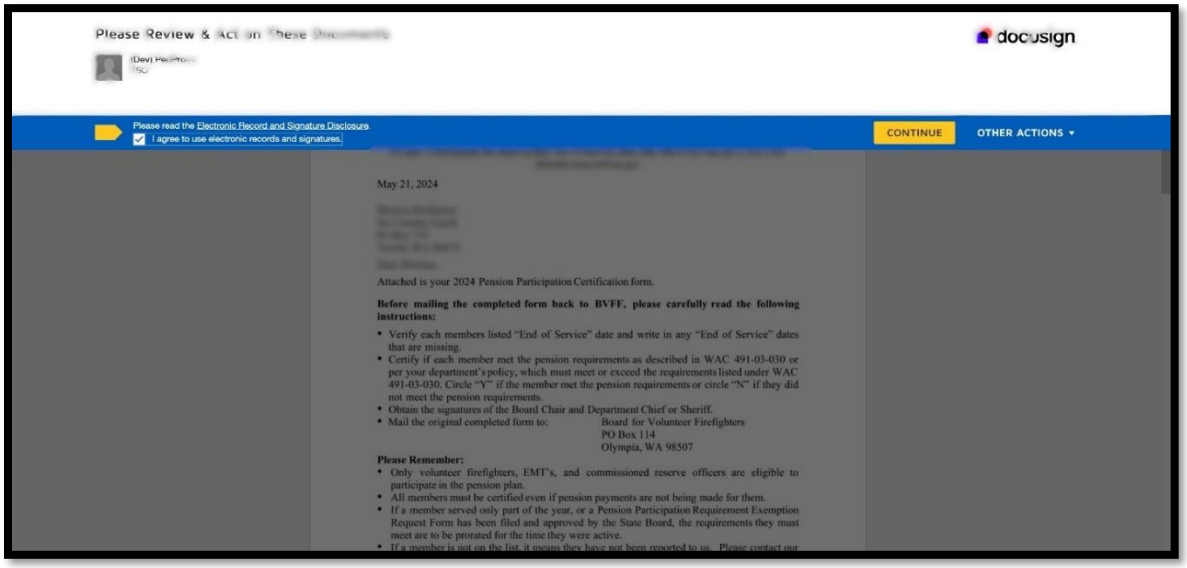
5. The document has been sent and is pending signatures. Click the underlined buttons if the user needs to update to signees and send again or just send the current document as a reminder



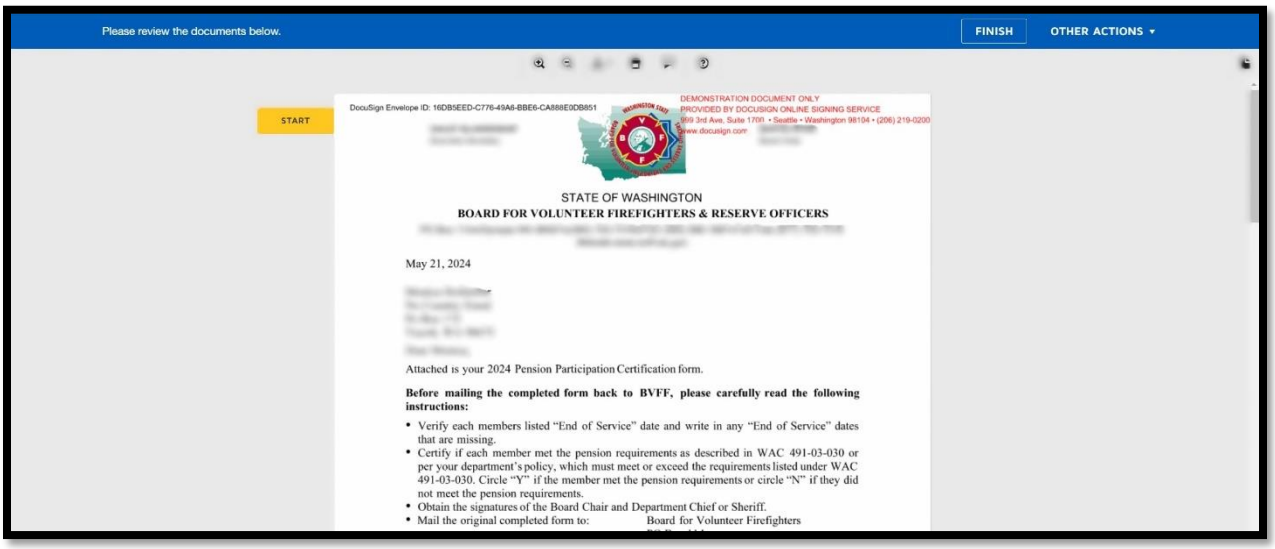
6. Both signees will receive the following email. Click **Review Document**.



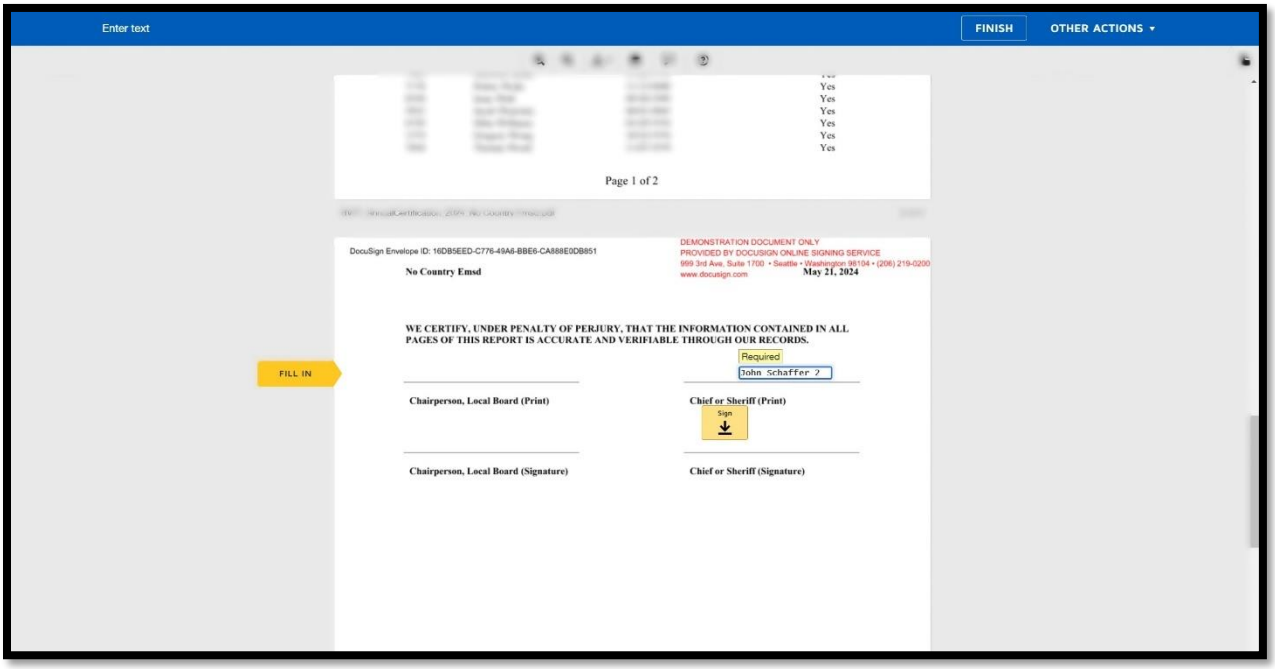
7. Click the **Check Box** to activate the Continue button. Click **Continue**.



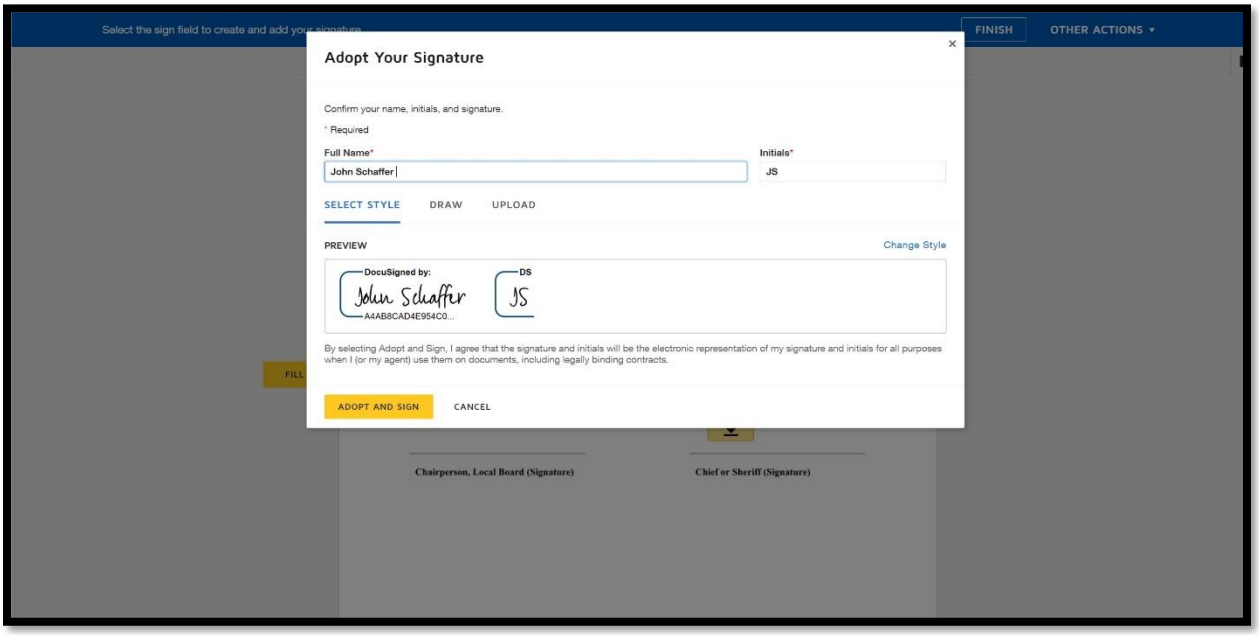
8. Click **Start.**



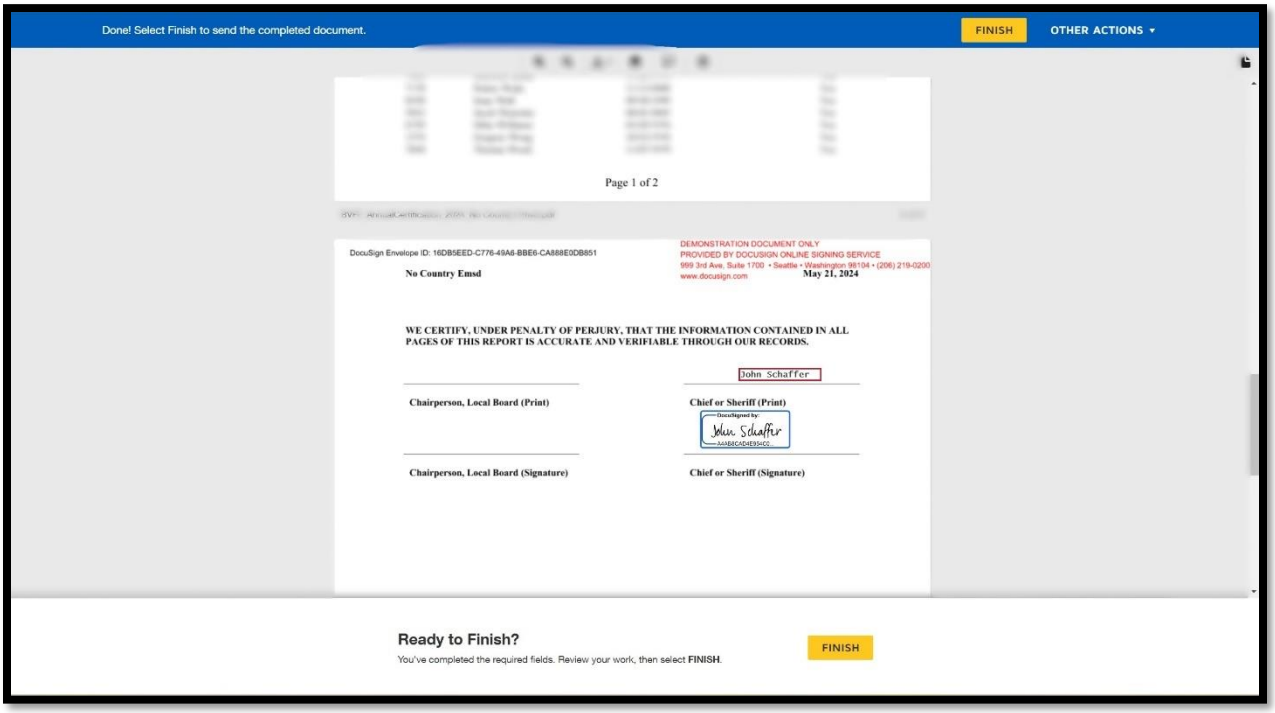
9. Fill in the required fields. Print your Name if it's not already populated. To sign, Click the highlighted box.



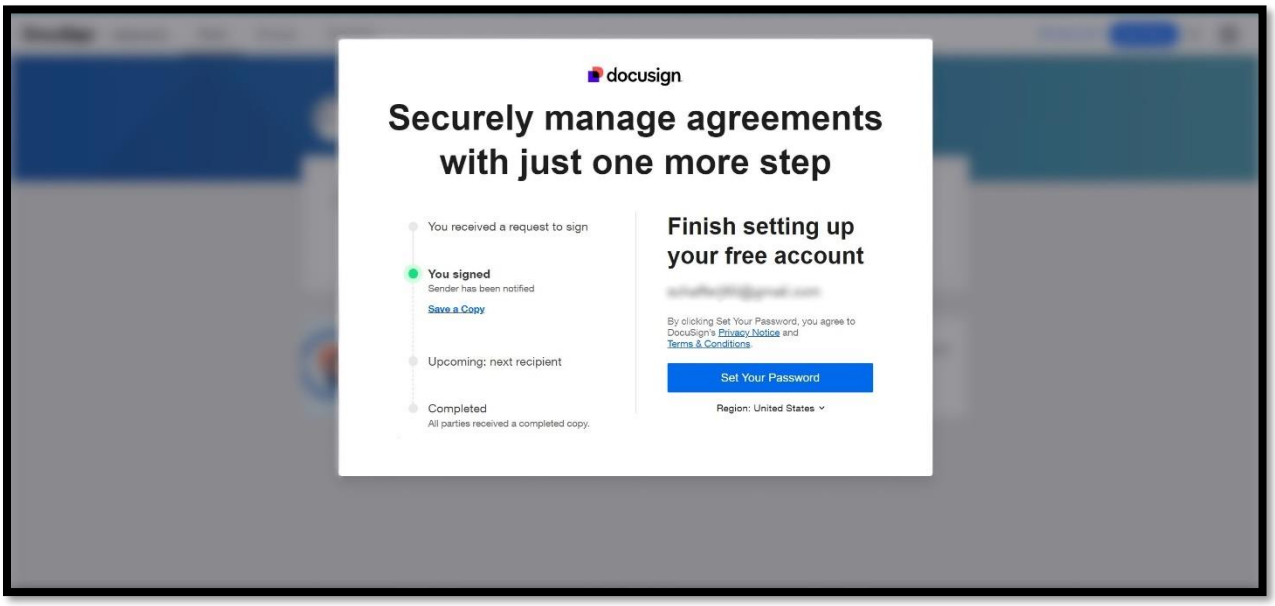
10. Select your signature. This example uses the Adopt and Sign function.



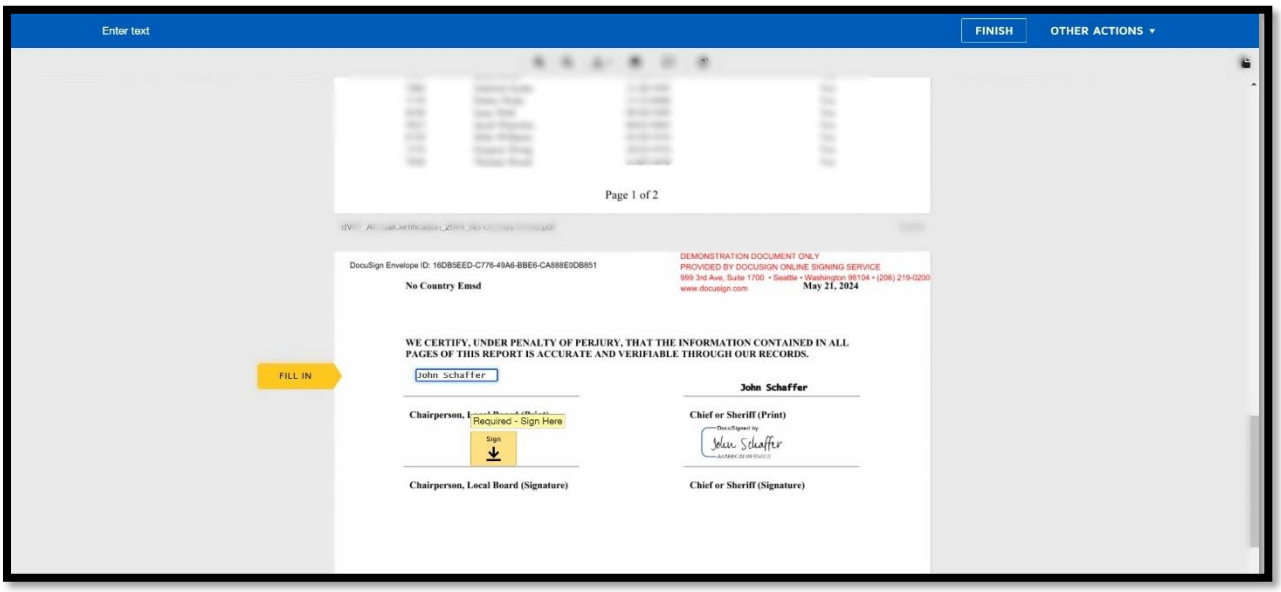
11. The signature will appear. Click **Finish** when done.



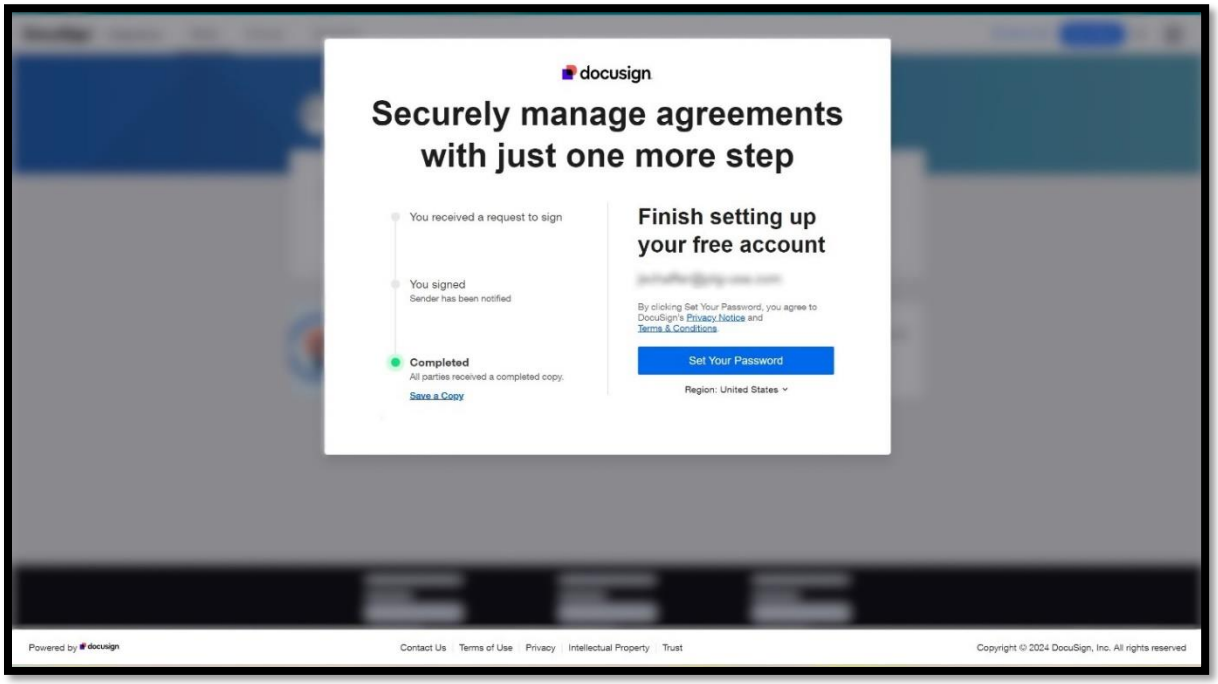
12. A popup box will indicate that 'You Signed' the document and that the next recipient is "Upcoming".



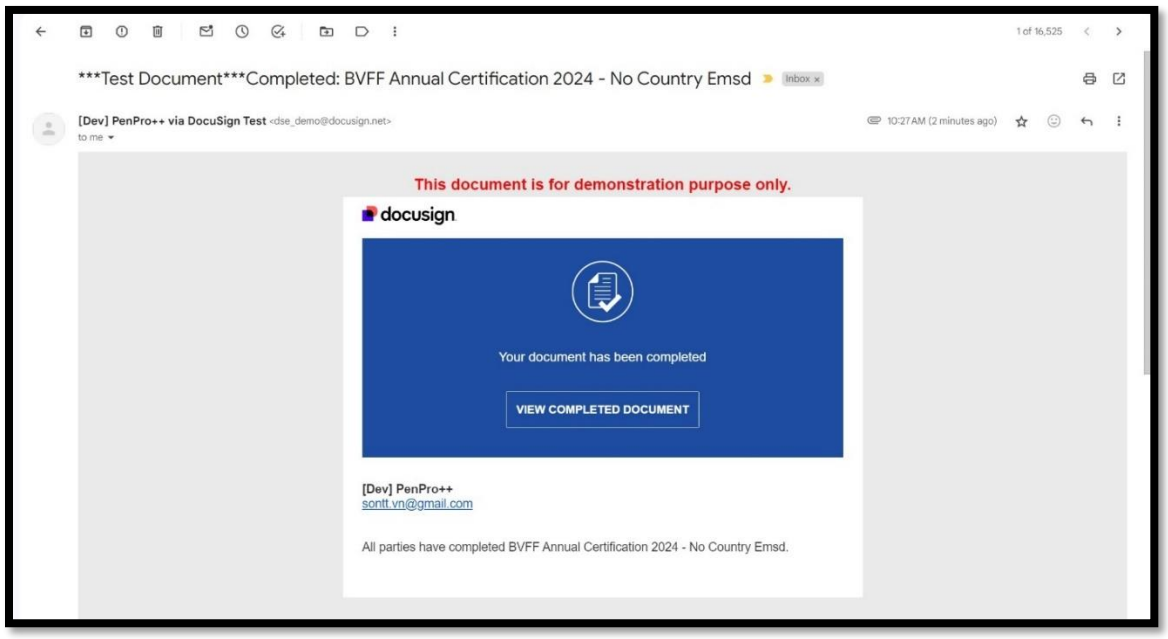
13. The second signee will open the same email. They will open the document that now includes the signature made prior. They will be prompted to fill in the required fields. Follow the same steps to print the name and sign.



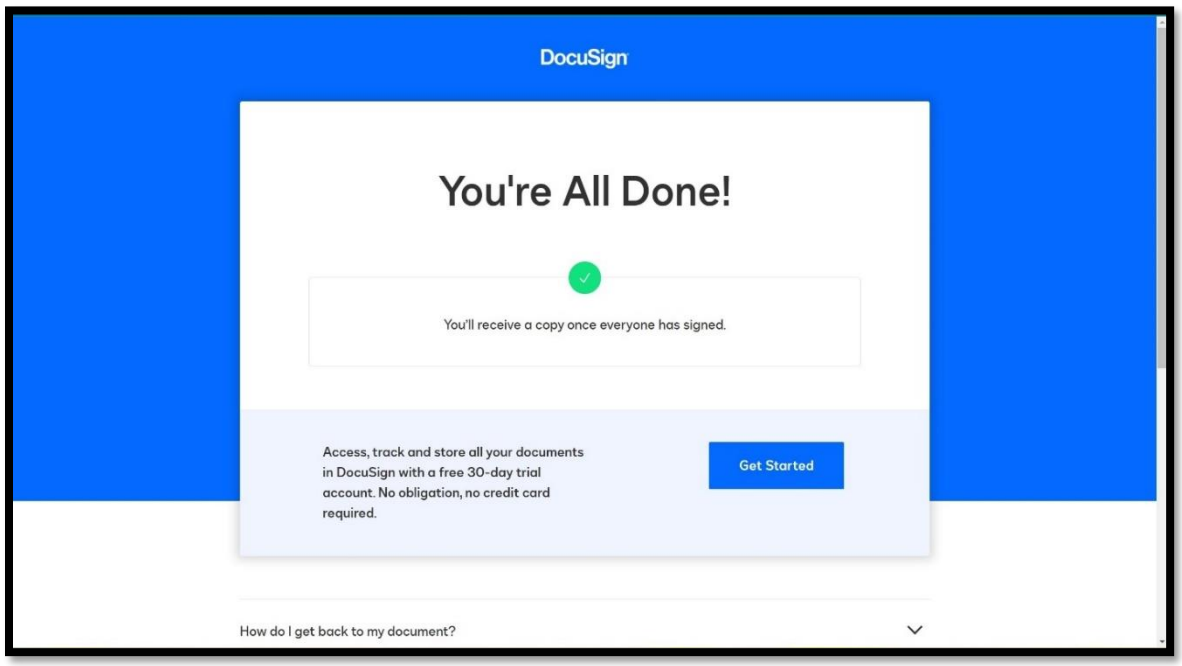
14. After the second signee has signed, a popup box will indicate that All parties have signed.



15. Both signees will then receive an email with the signed copy attached as a pdf. Click **View Completed Document** to open the signed copy.

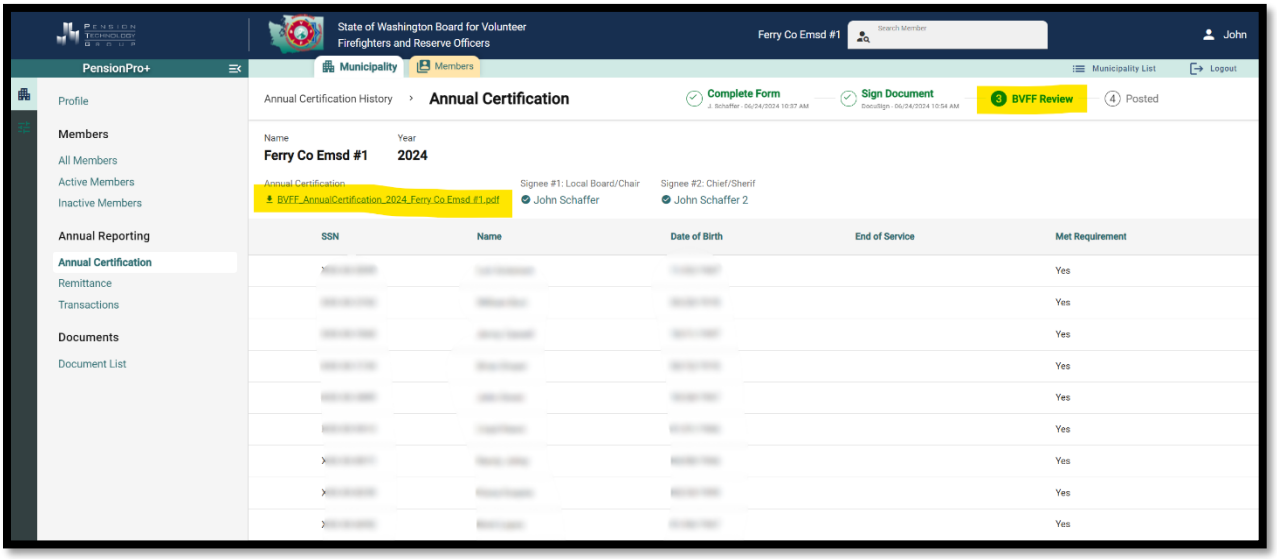


16. A popup document will appear when you review the signed copy.



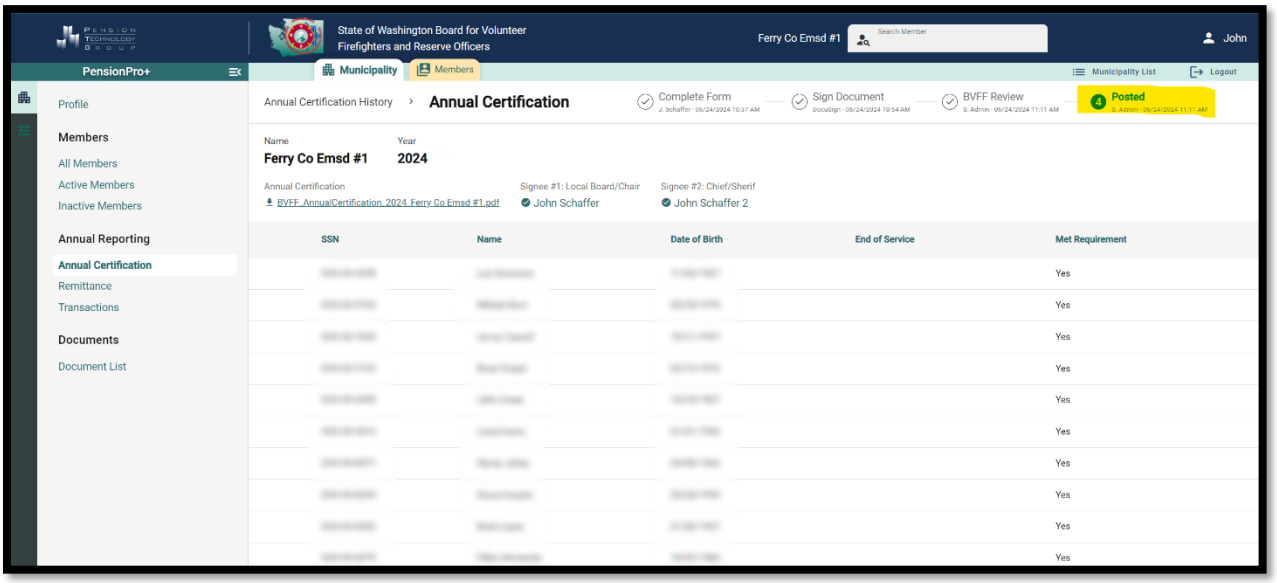
Step 3: BVFF Review

After the document is signed, the system will automatically initiate **Step 3 BVFF Review**. The signed document will appear in a hyperlink for the user to click and open in their browser. BVFF Administrators will take it from here. They will complete Step 3 by reviewing the document.

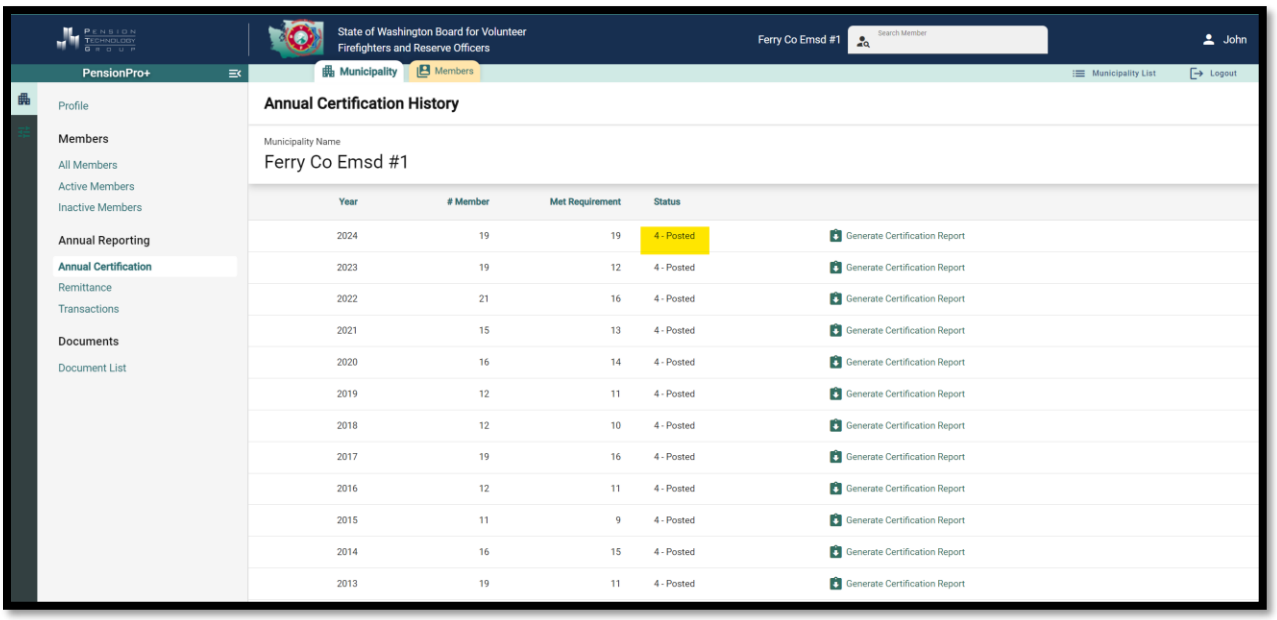


Step 4: Posted

1. After BVFF admins complete their review, the system will automatically initiate Step 4: Posted. BVFF admins will complete this step as well. When complete, the Annual Certification status will update to **4 – Posted.**



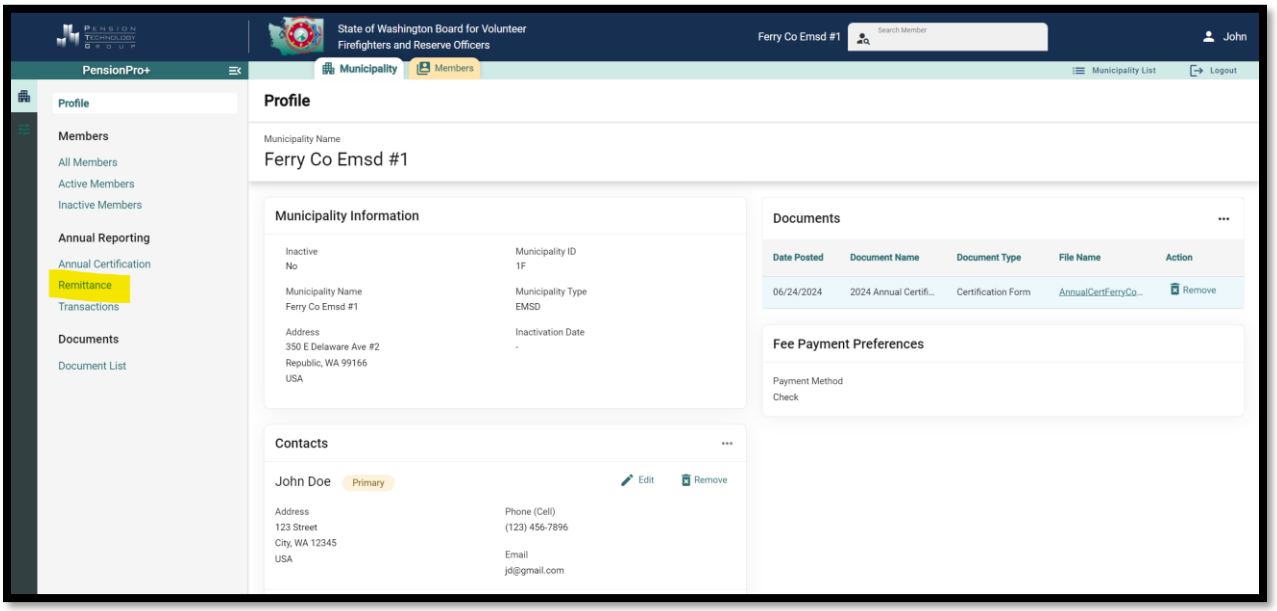
2. Additionally, the Annual Certification History screen will display the status update.



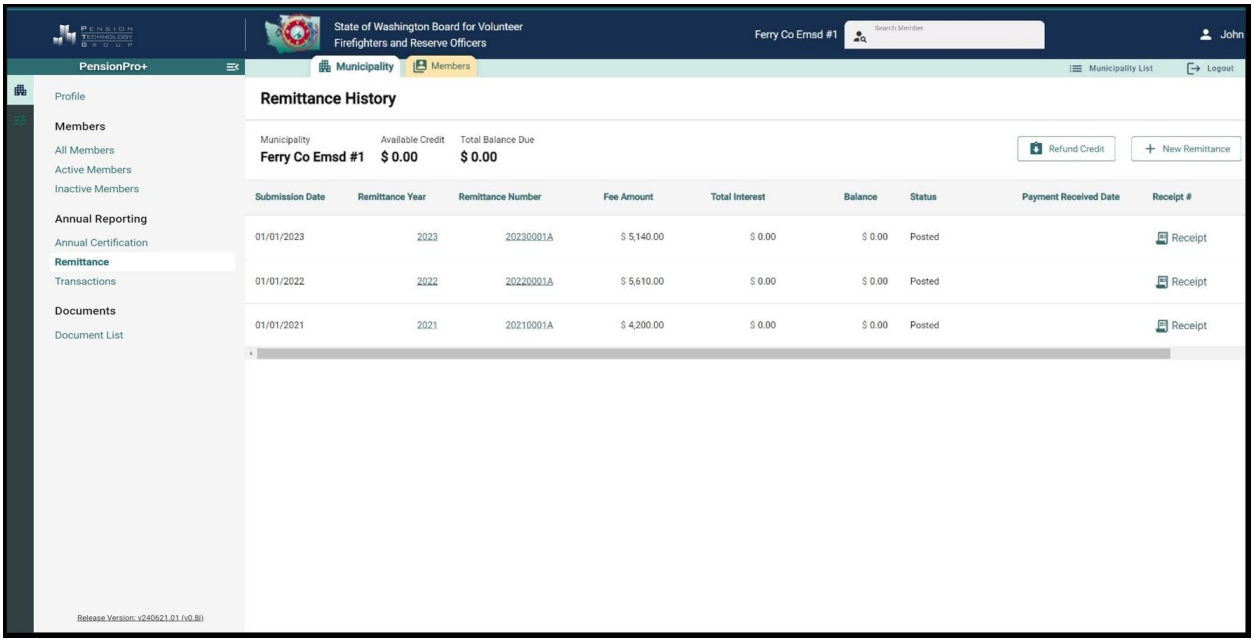
Remittance

To View Remittance History

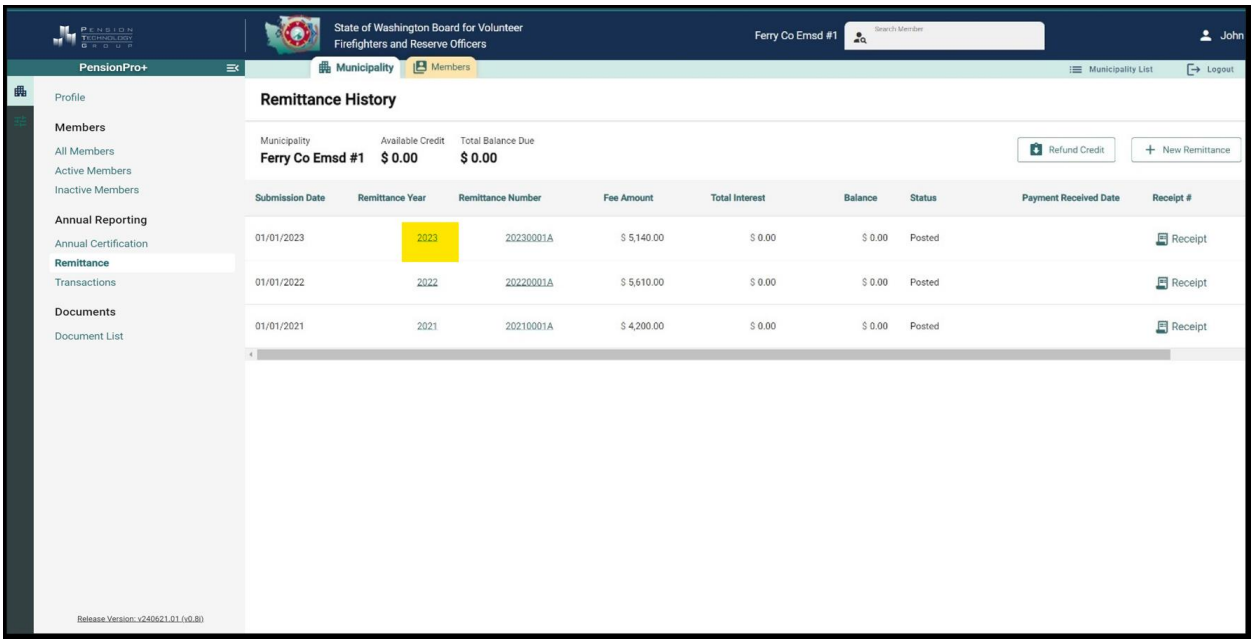
1. At the Municipality profile screen, click **Remittance** from the left menu.



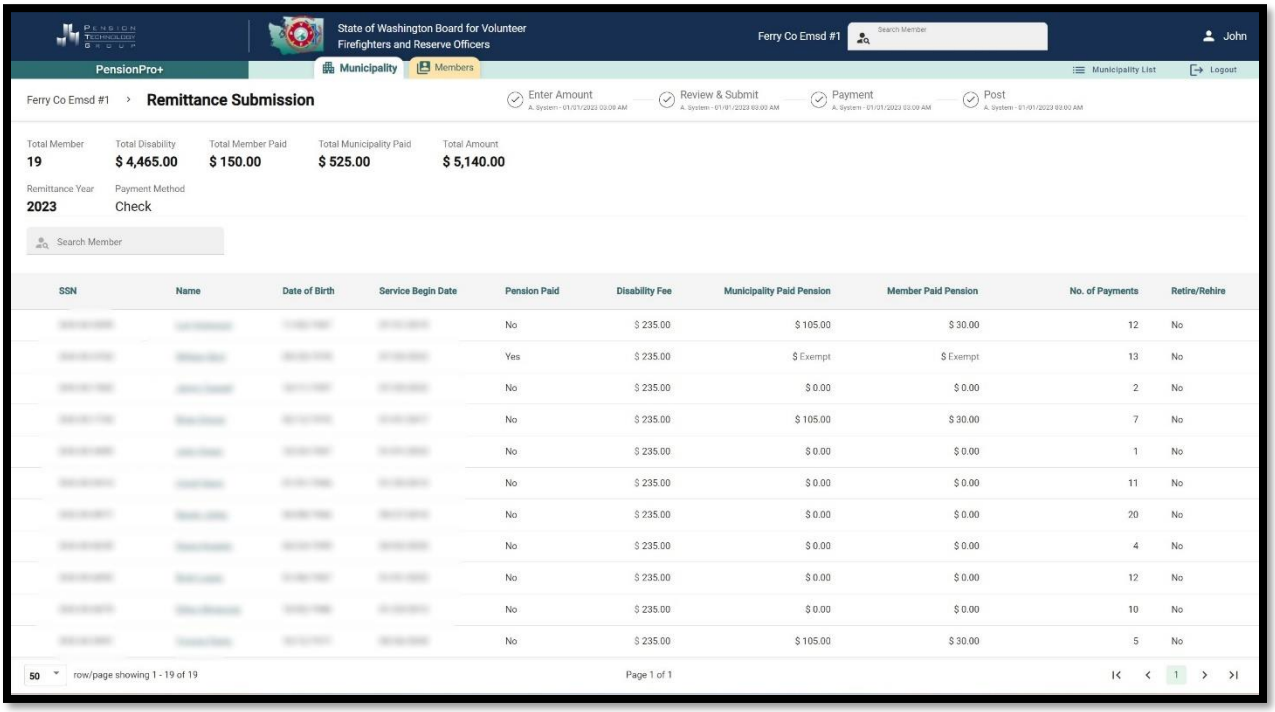
2. The list contains all prior Remittance. They have the status of **Posted**.



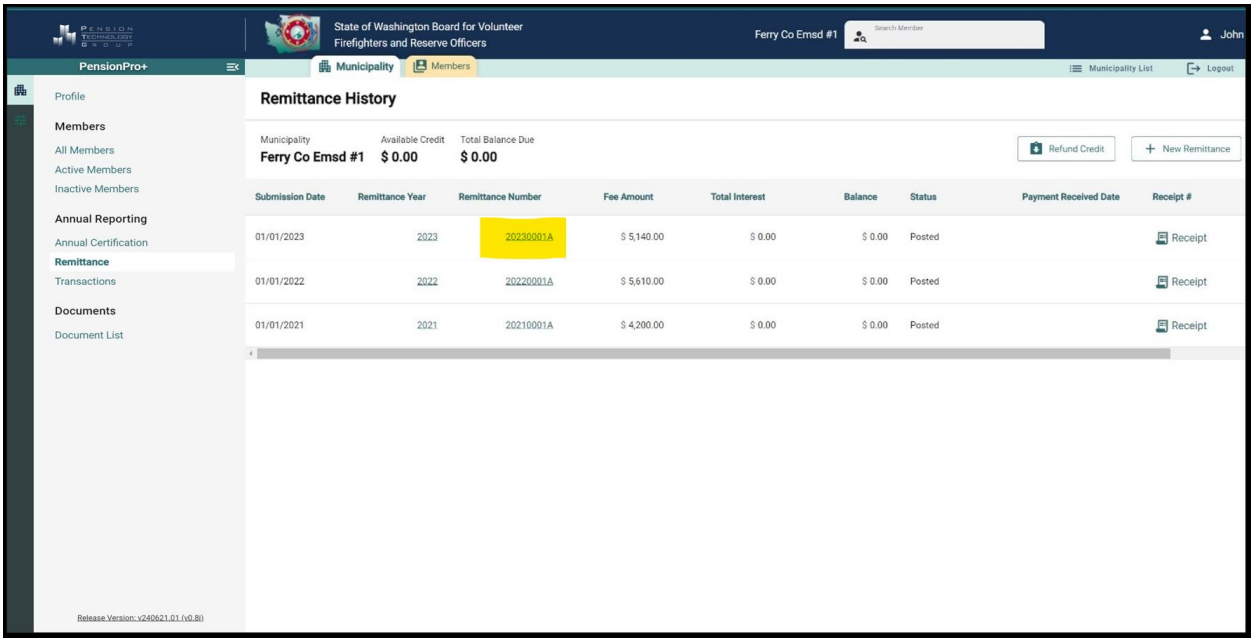
3. Click the **year** to open the Remittance Submission for that year. **2023**.



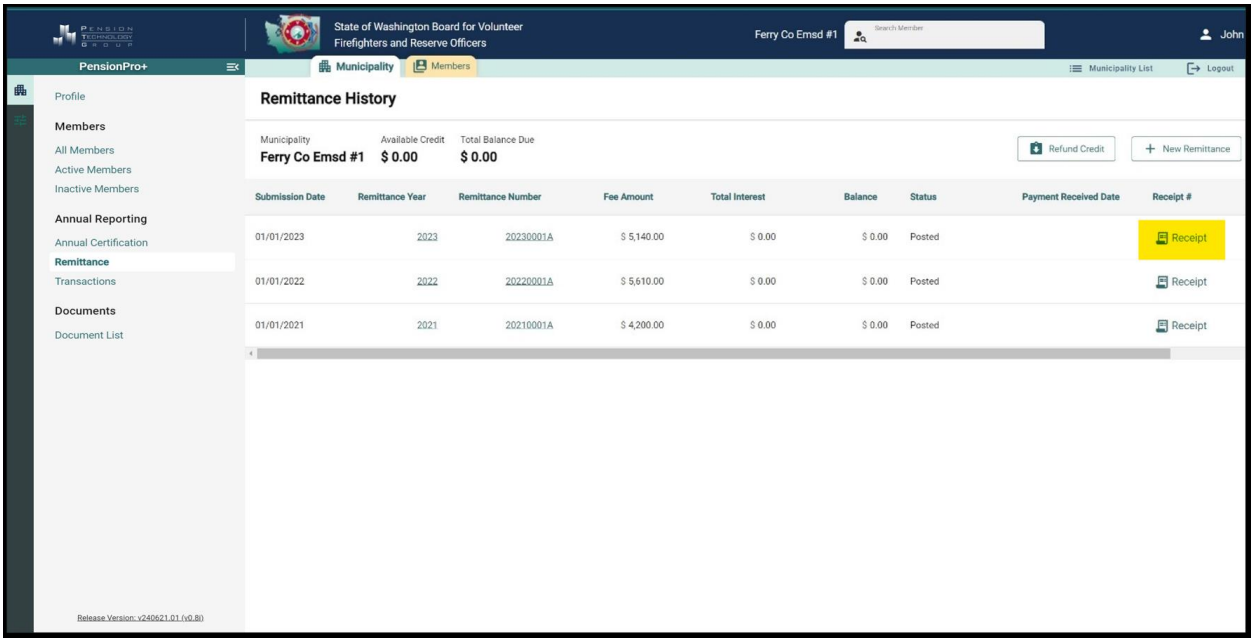
4. The user is navigated to the **2023** Remittance Submission.



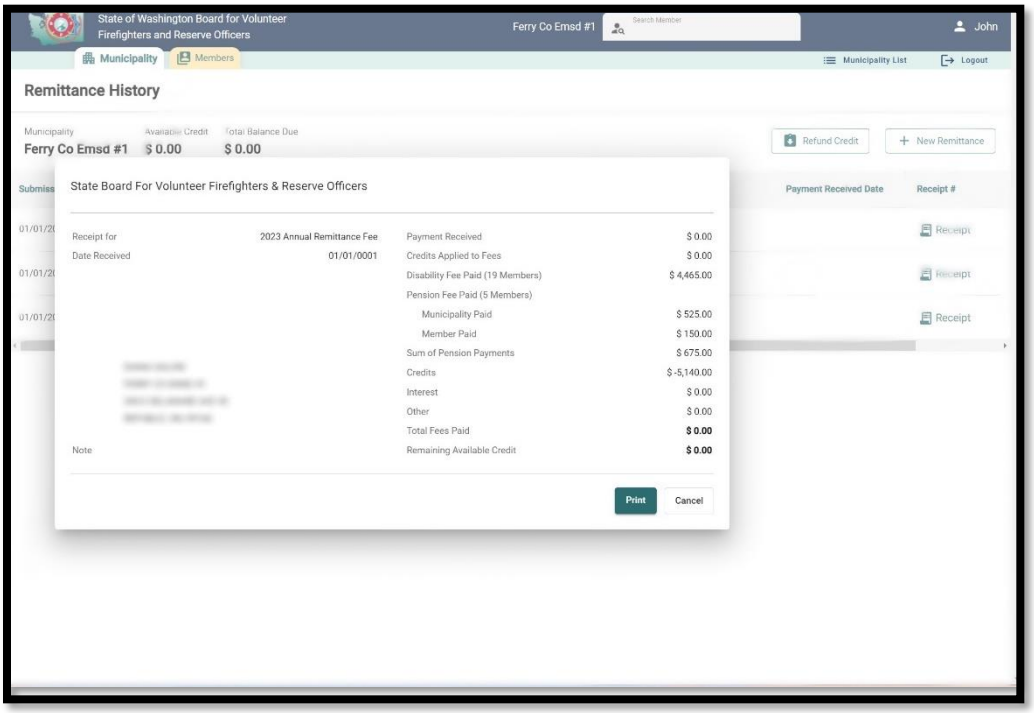
5. Click the **Remittance Number** and the user will be directed to the **Transactions** Screen.



6. Click the **Receipt** hyperlink to view Payment details.

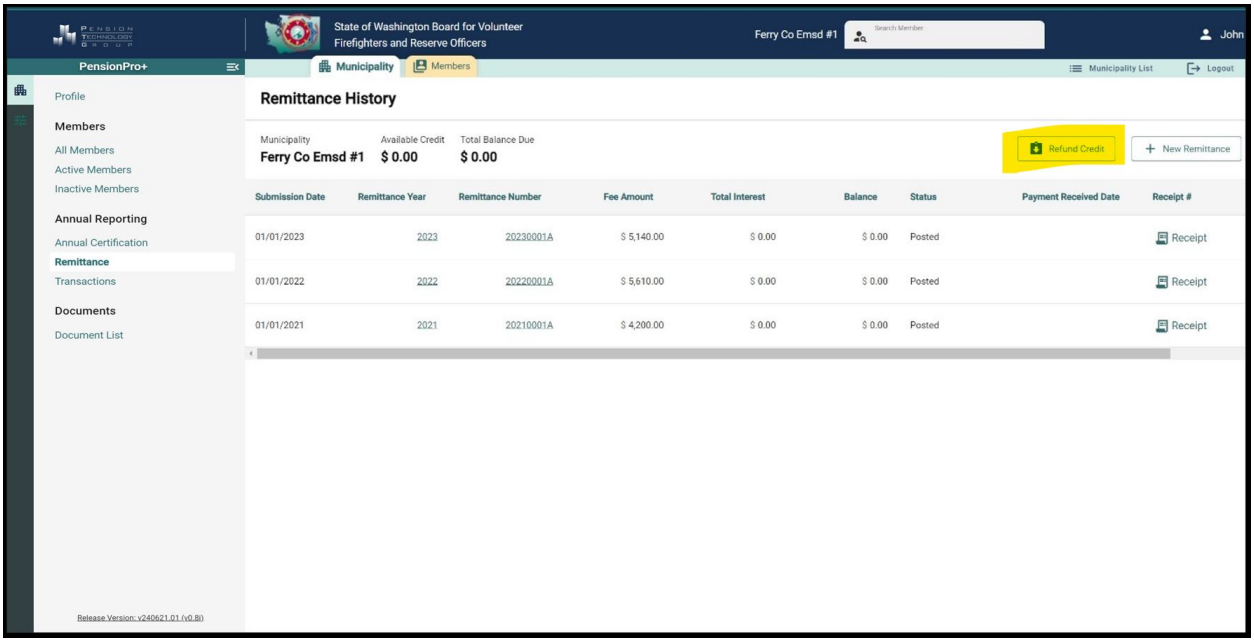


7. A popup box will include the payment details for 2023.

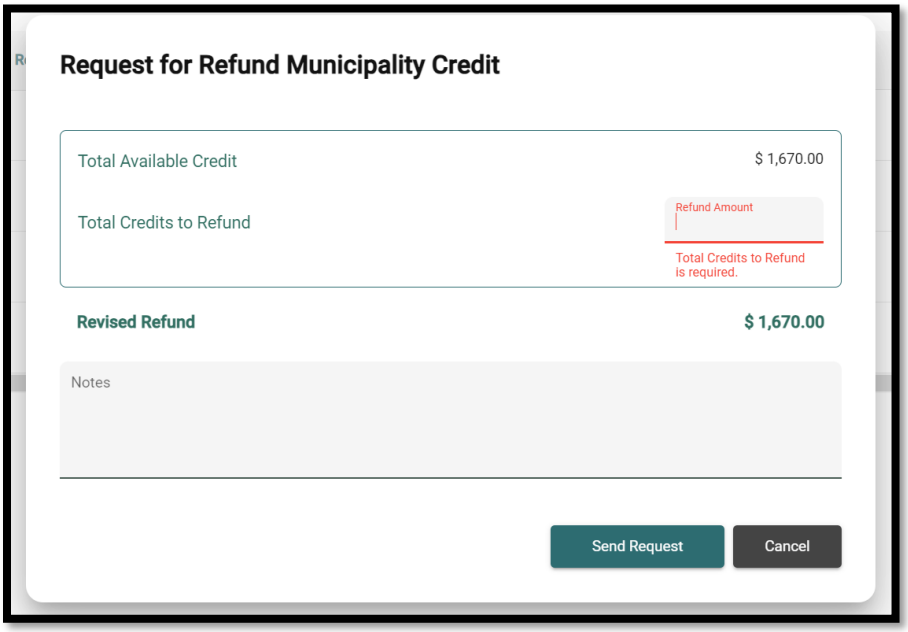


To Request for Refund Municipality Credit.

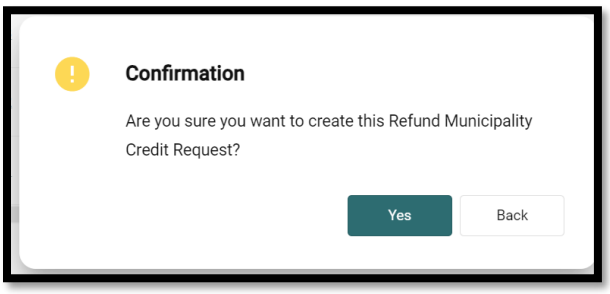
1. Click **Refund Credit** on the Remittance History screen.



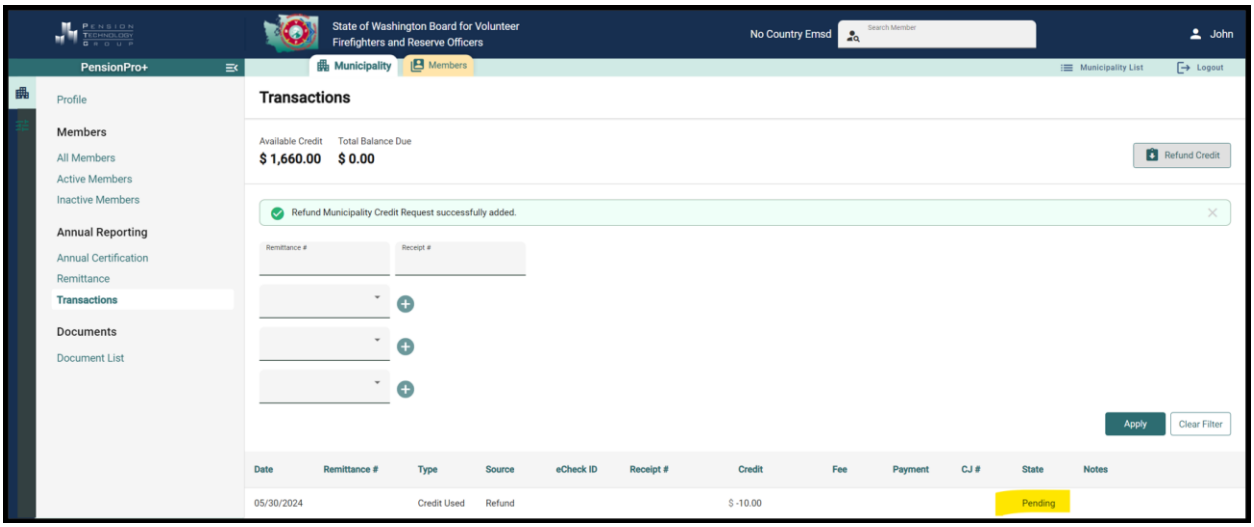
2. Enter the amount and note in the required fields. Click **Send Request** or click **Cancel** to undo.



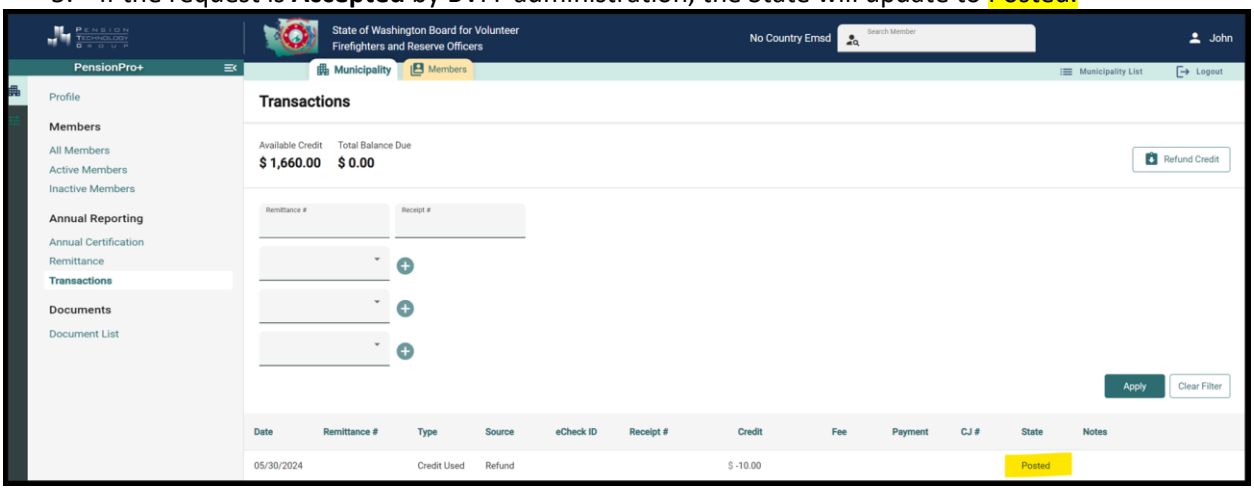
3. Click **Yes** to Confirm or click **Back**.



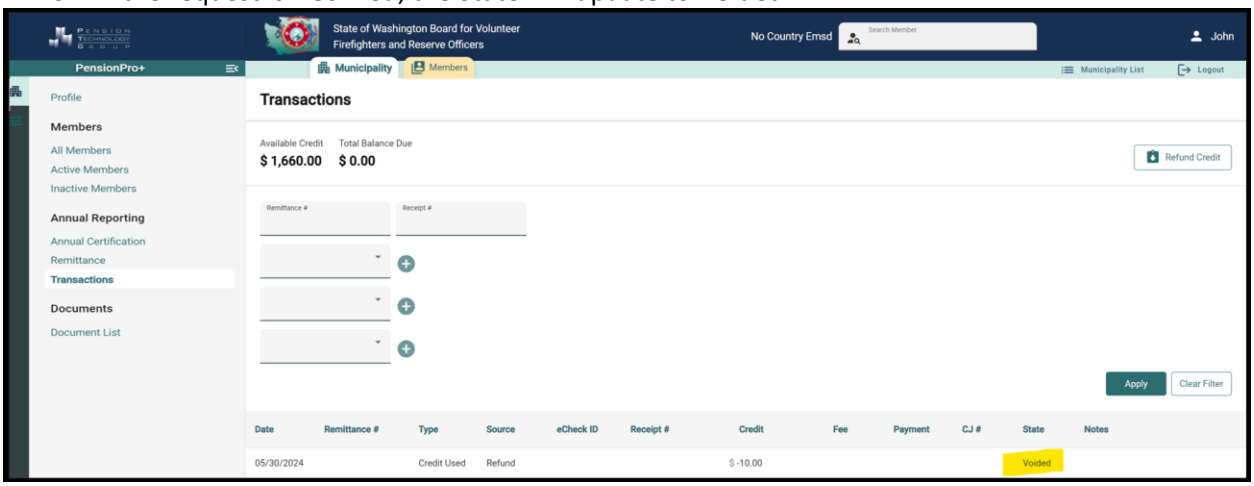
4. The Refund will appear on the **Transactions** screen with a State of Pending.



5. If the request is **Accepted** by BVFF administration, the State will update to Posted.

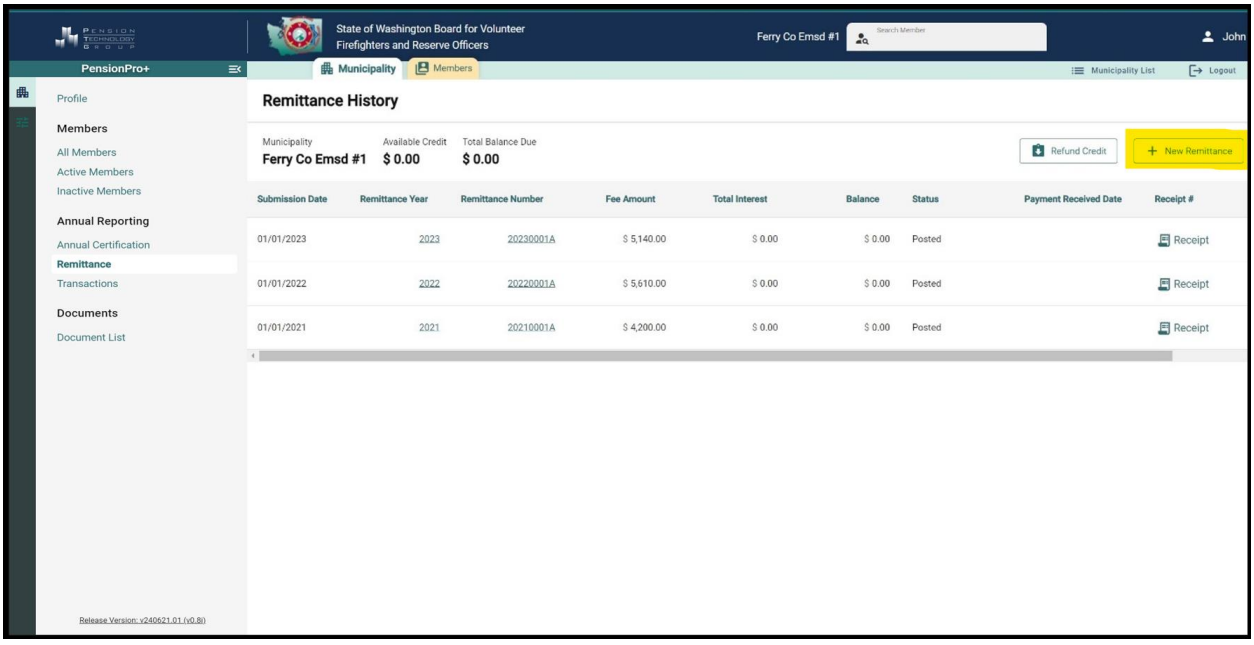


6. If the request is **Declined**, the State will update to **Voided**.

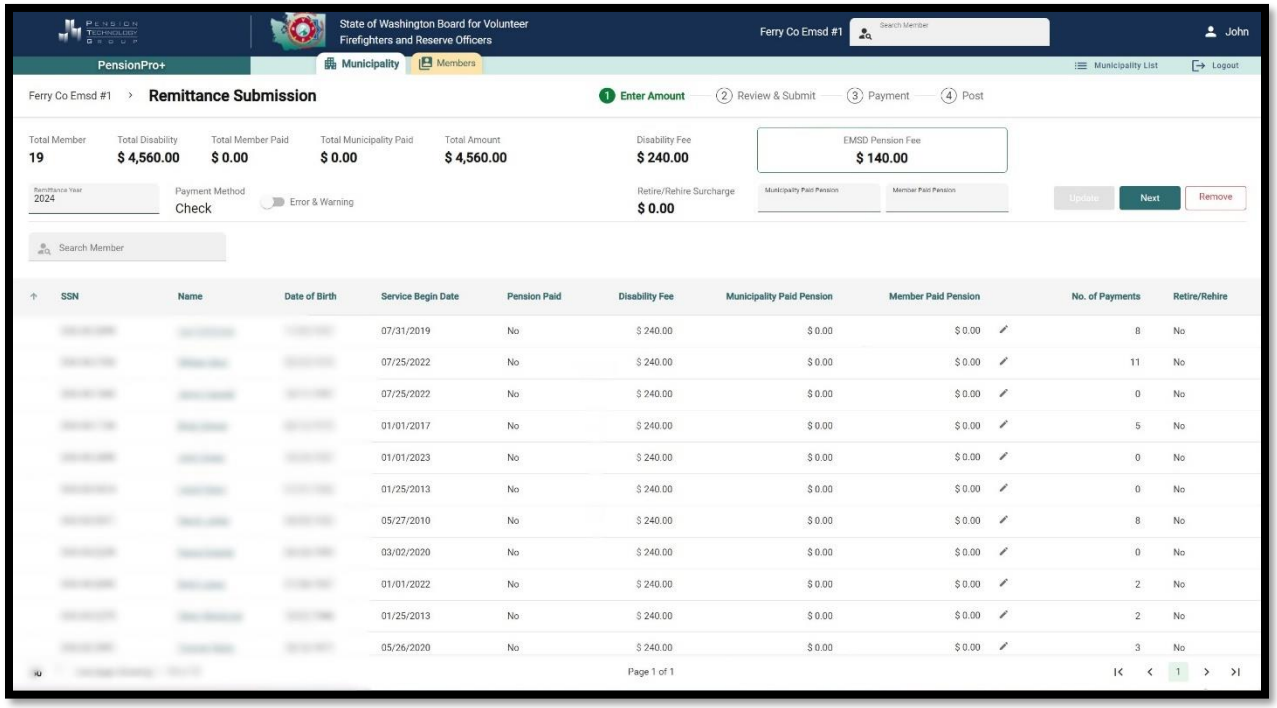


To Add New Remittance - 2024

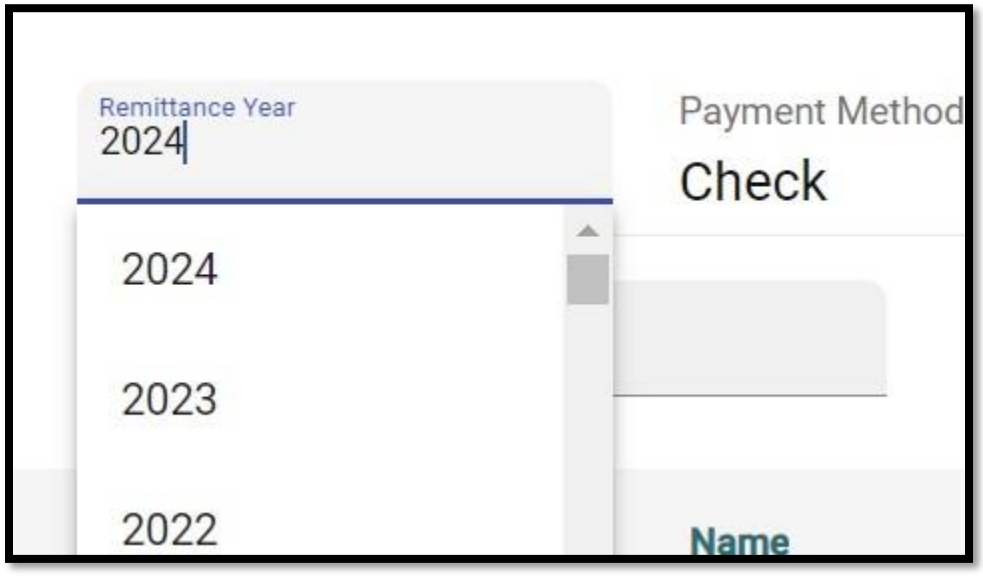
1. Click **+ New Remittance** to open **Remittance Submission.**



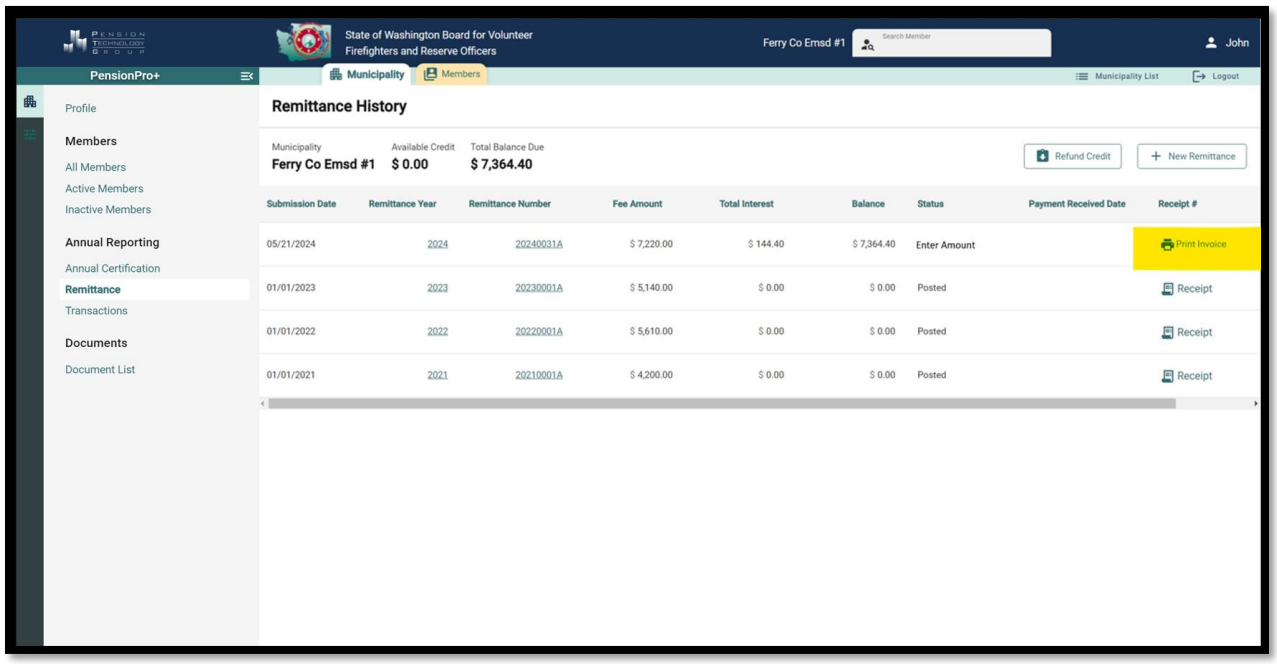
2. The system will open the **Remittance Submission** Screen. Users can exit this screen and return to it at any time.



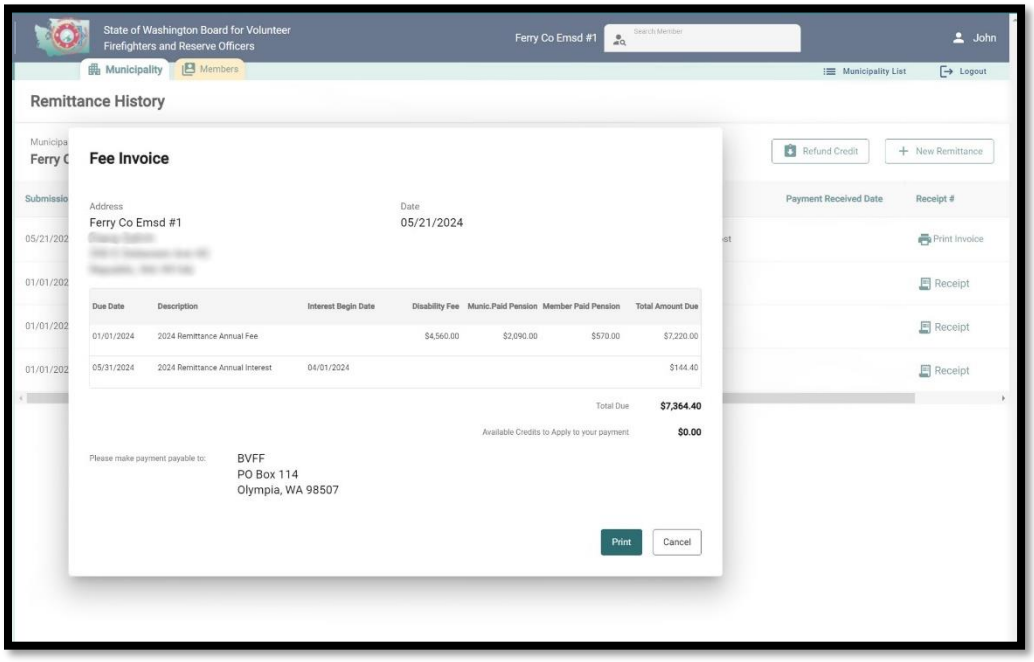
3. Select the Remittance Year. **2024.**



4. A new record will appear on the **Remittance History** screen. Click **Print Invoice** to view payment details.

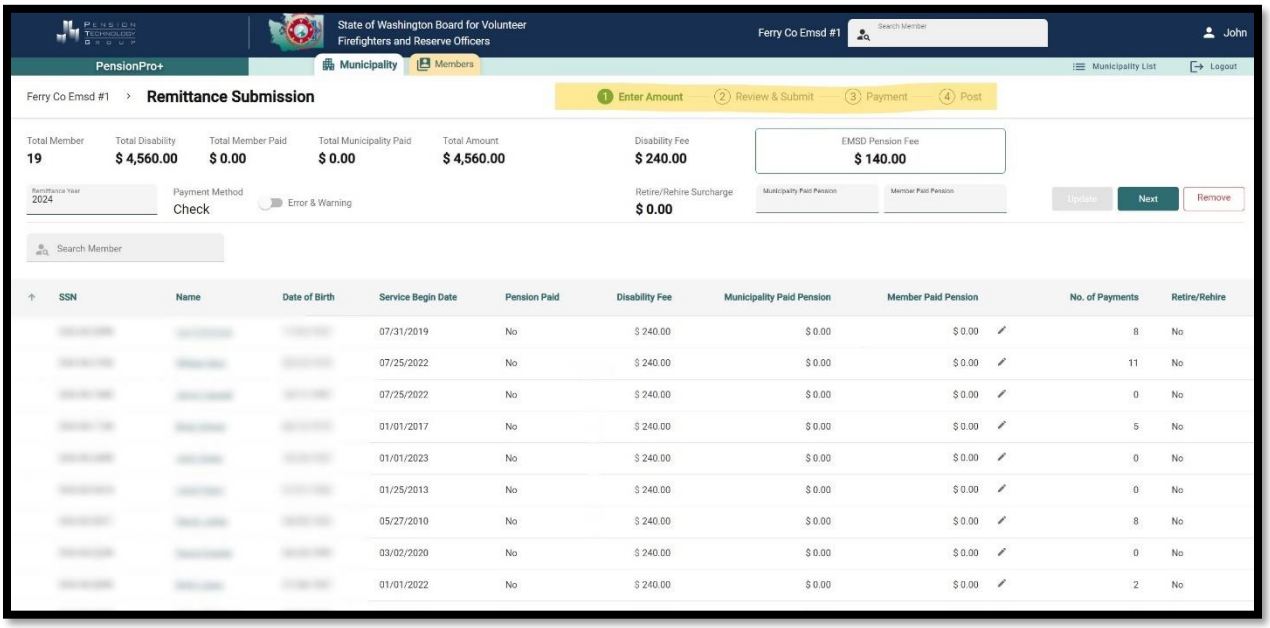


5. A popup box will appear with the invoice details.



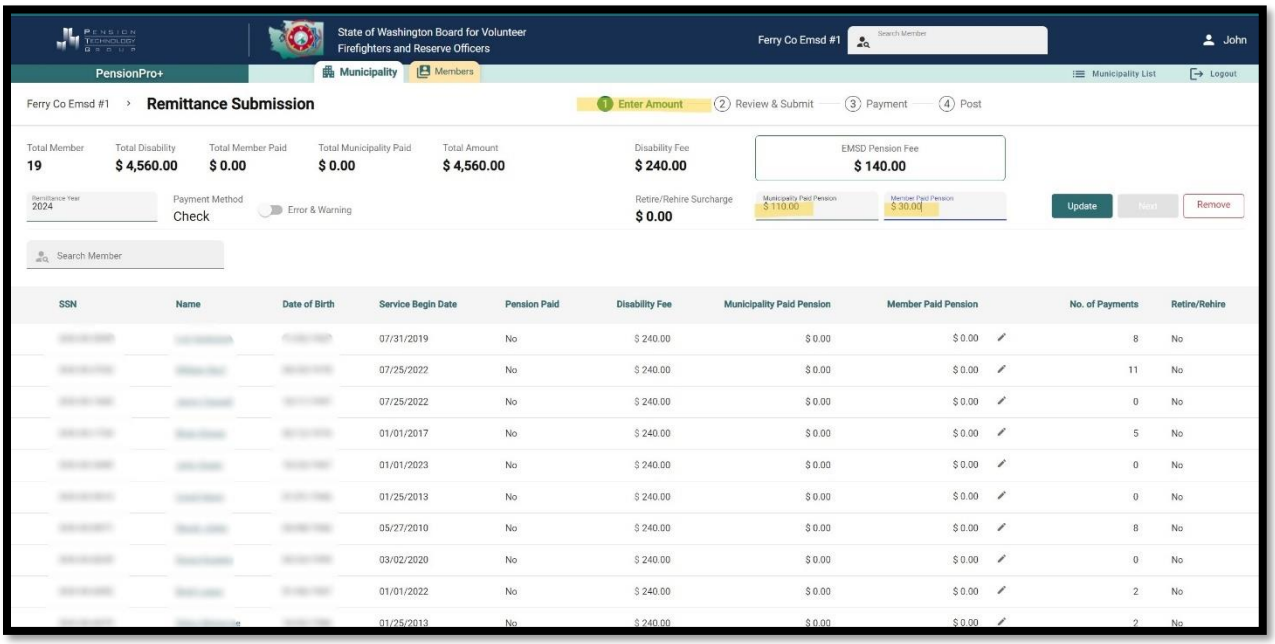
To Pay Annual Remittance - 2024

There are four steps displayed. These represent the 4 screens that the user is about to work through.

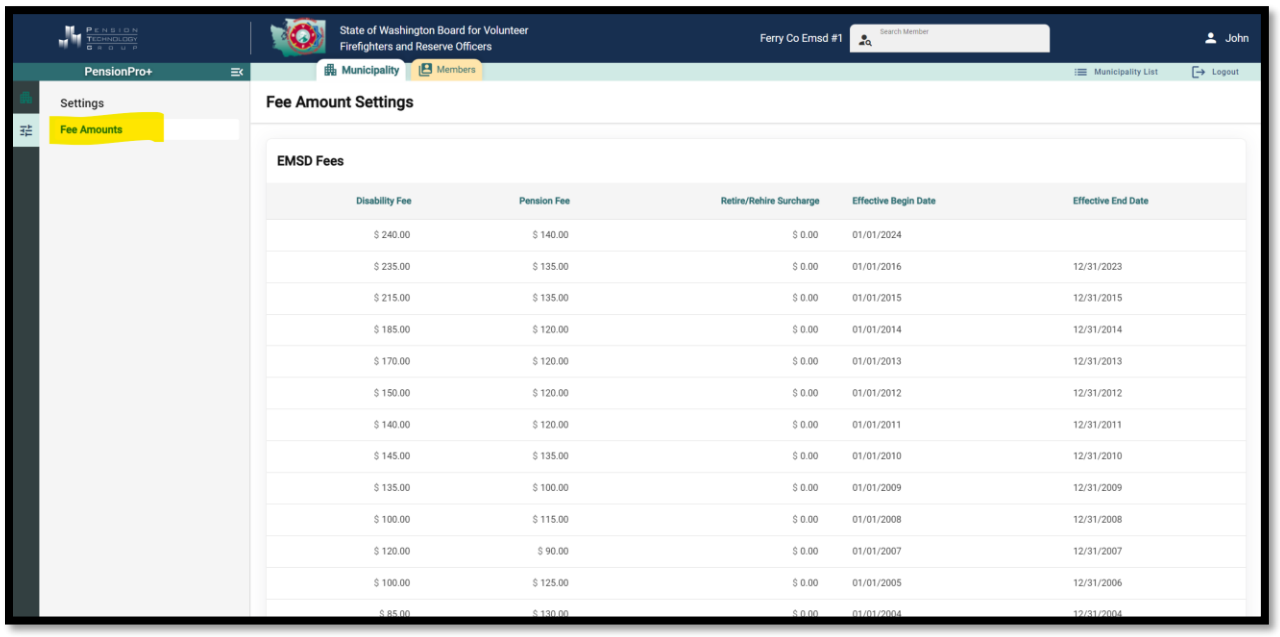


Step 1: Enter Amount

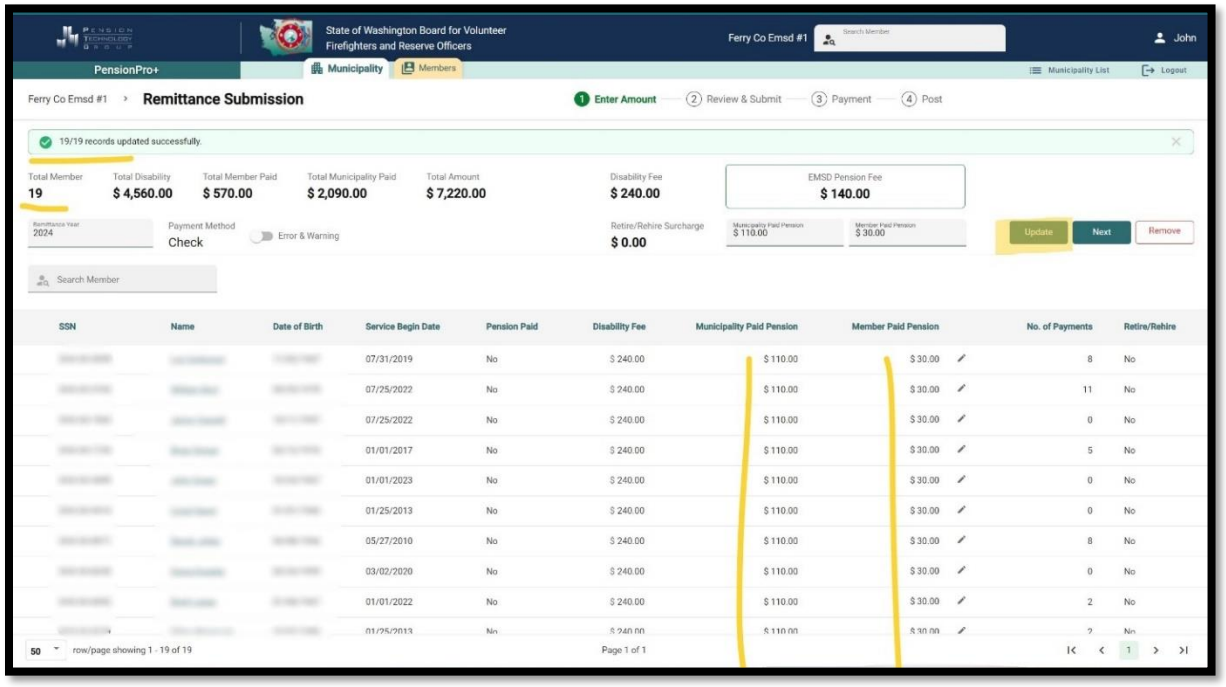
1. Enter the fee amount for both **Municipality Paid Pension** and **Member Paid Pension**



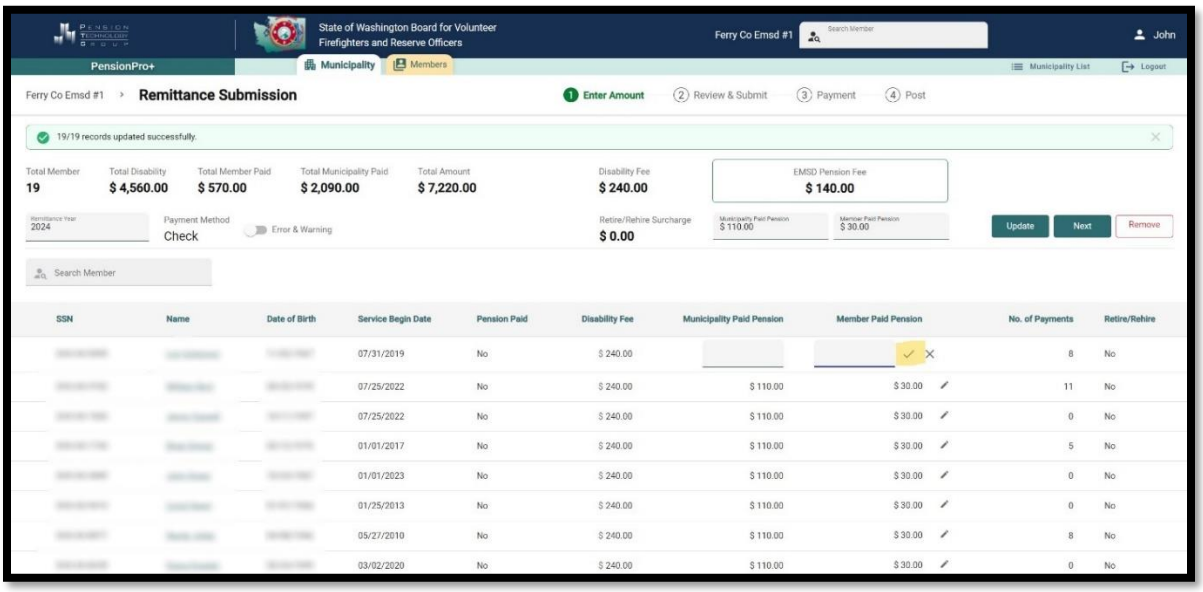
2. To view the fee amounts, click **Fee Amounts** from the Settings tab on the left menu.



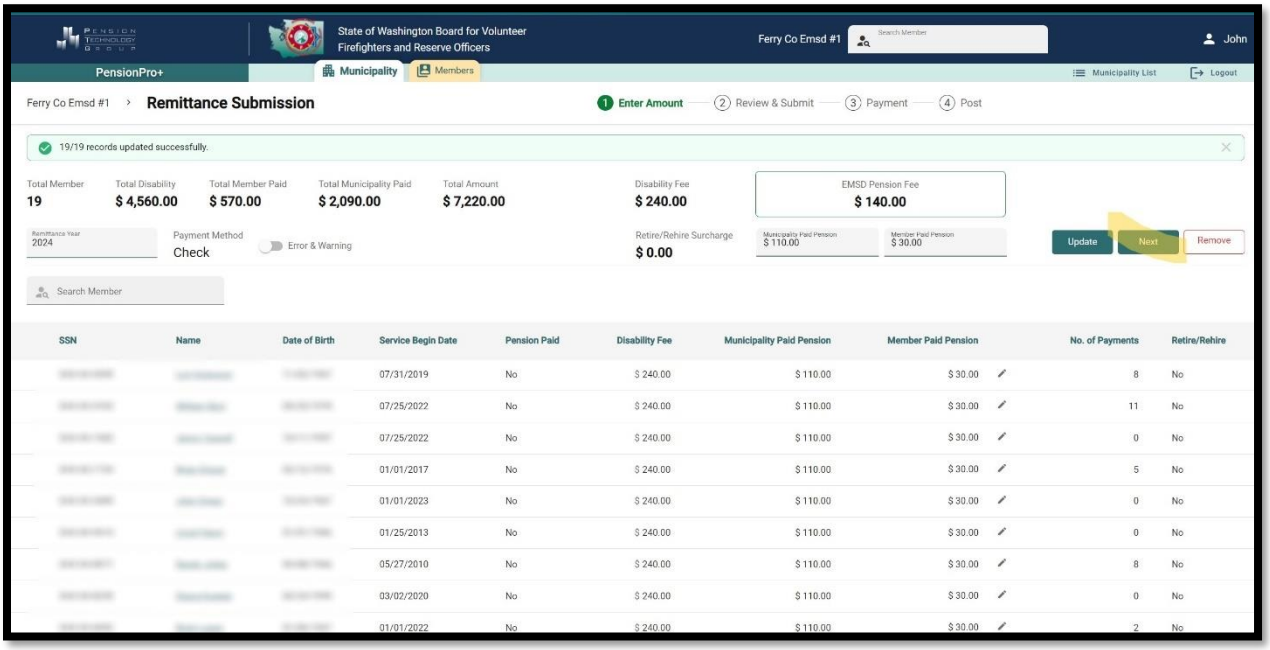
3. Enter the fee amounts into the boxes and Click **Update**. The amounts will be applied to all members in the list.



4. Adjust the fee amounts for the <u>individual</u> members by clicking the **pencil** icon. IF YOU CLICK THE UPDATE BUTTON afterward, it will undo the adjustments made to the individual and replace the adjustment with the amounts entered in the boxes.

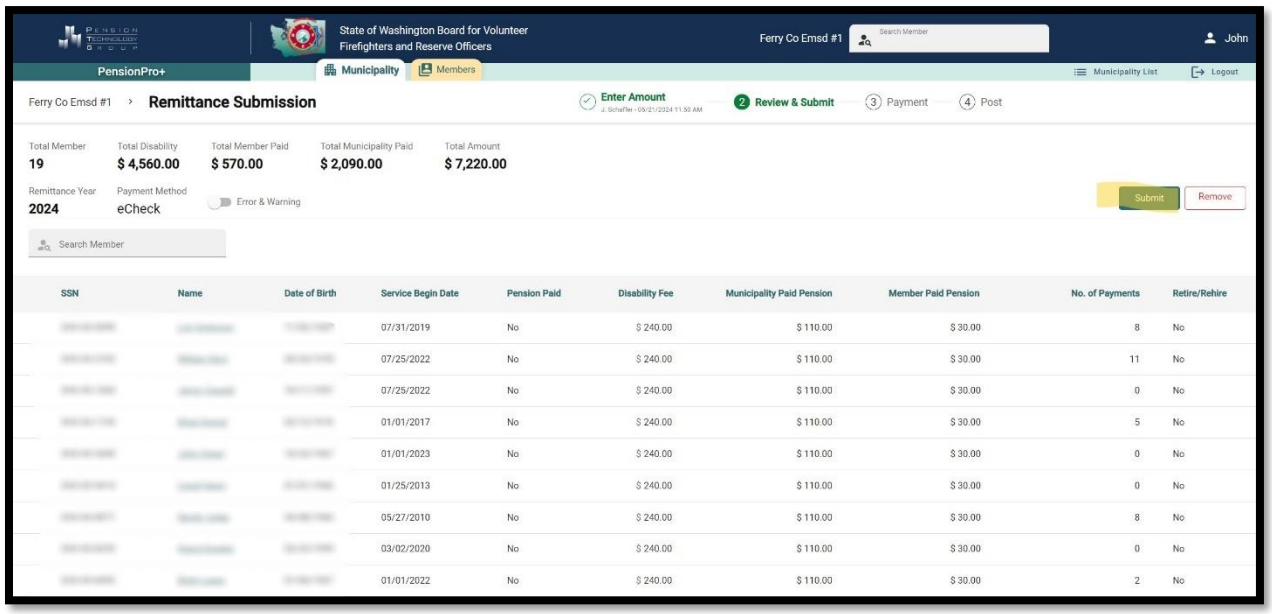


5. Click **Next** when complete. This will initiate Step 2.

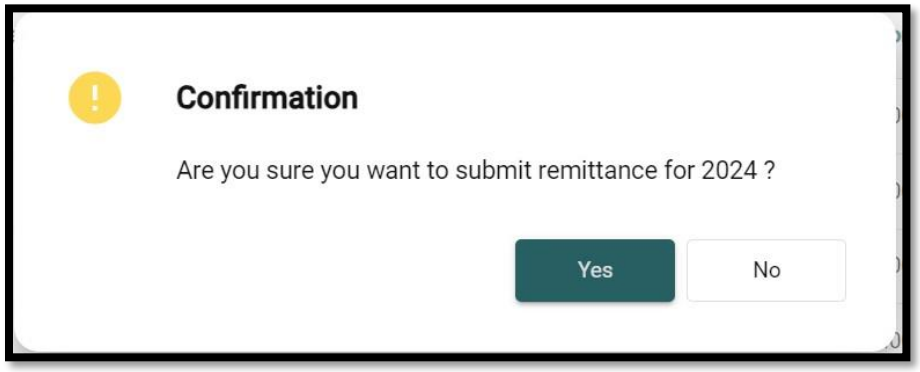


Step 2: Review and Submit

1. This step has been highlighted green. You can go back to any previously completed steps by clicking them. Click **SUBMIT** when the review is complete.

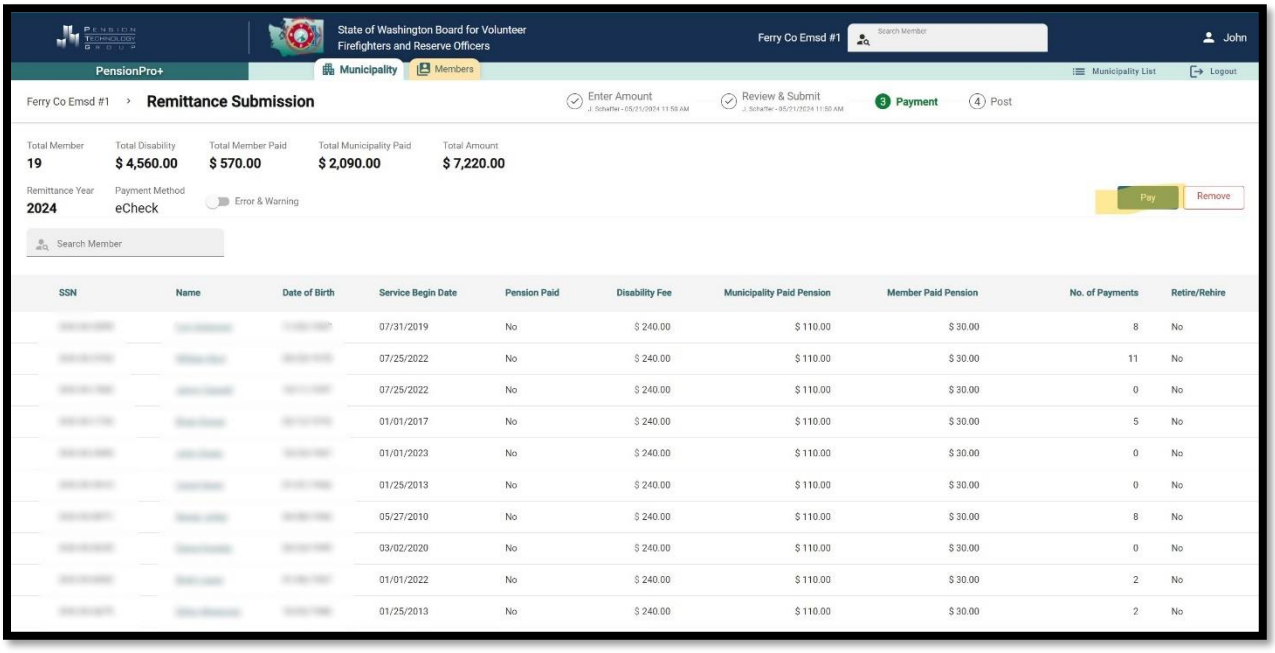


2. Click Yes to Confirm. This will initiate Step 3.

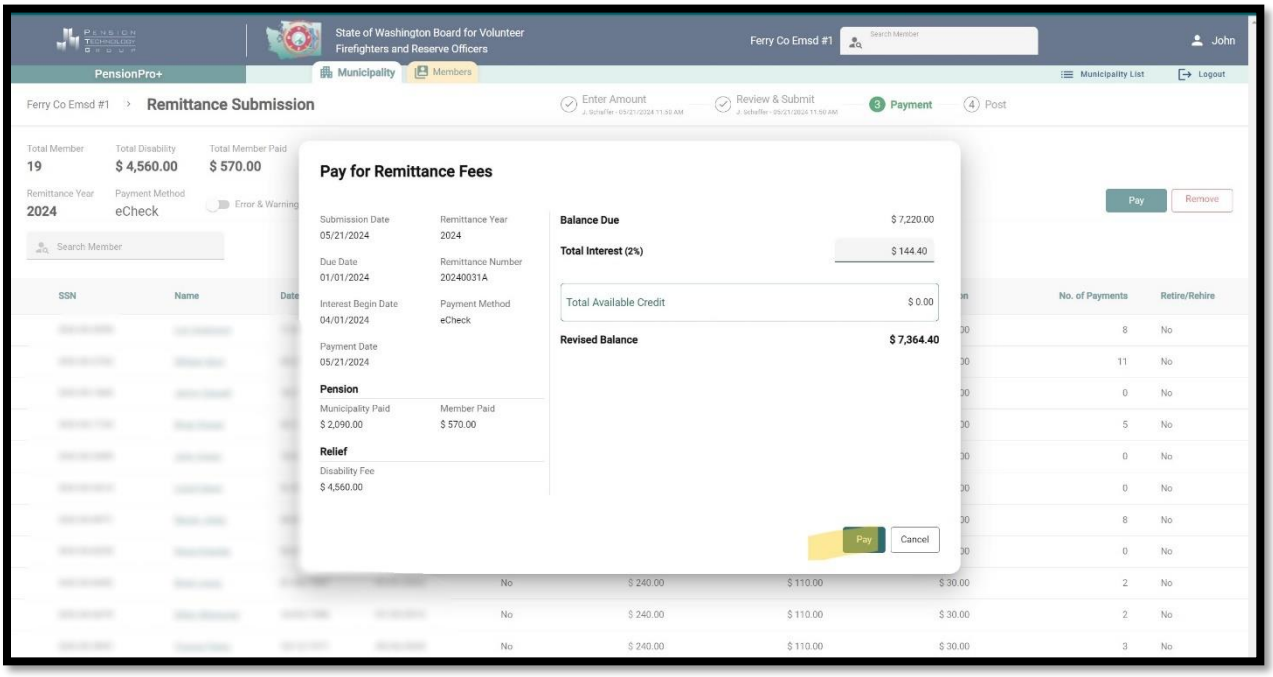


Step 3: Payment

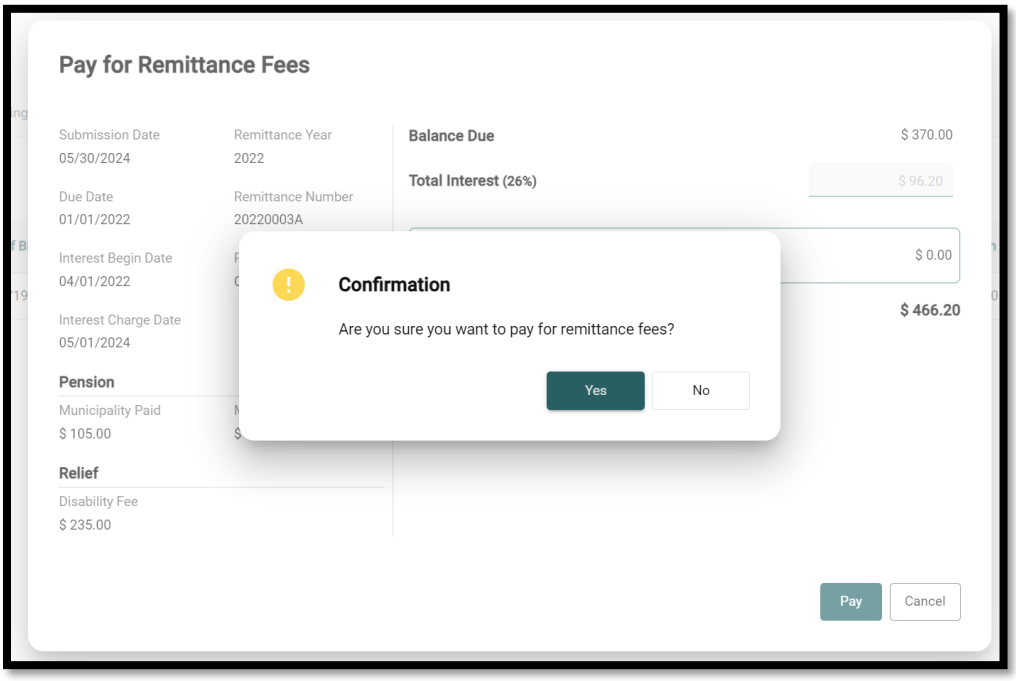
1. Step 3- Payment has been highlighted green. Click Pay when ready to proceed.



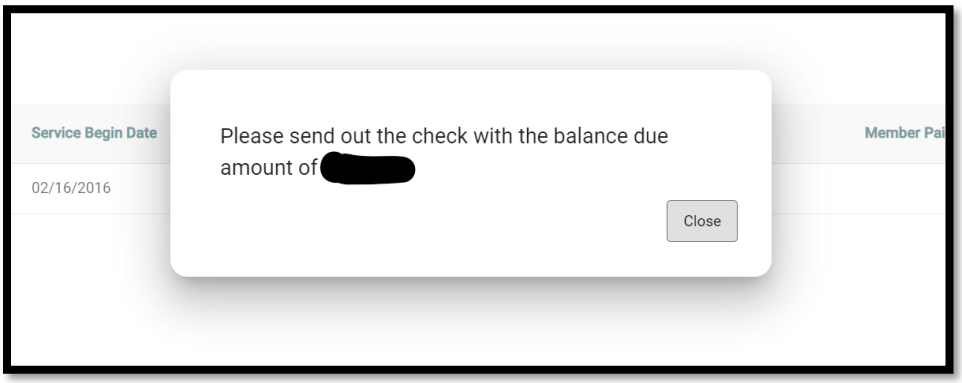
2. A popup box called Pay for Remittance Fees will display the payment details for a final review. Click **Pay**.



3. Click Yes to Confirm or click No to go back.

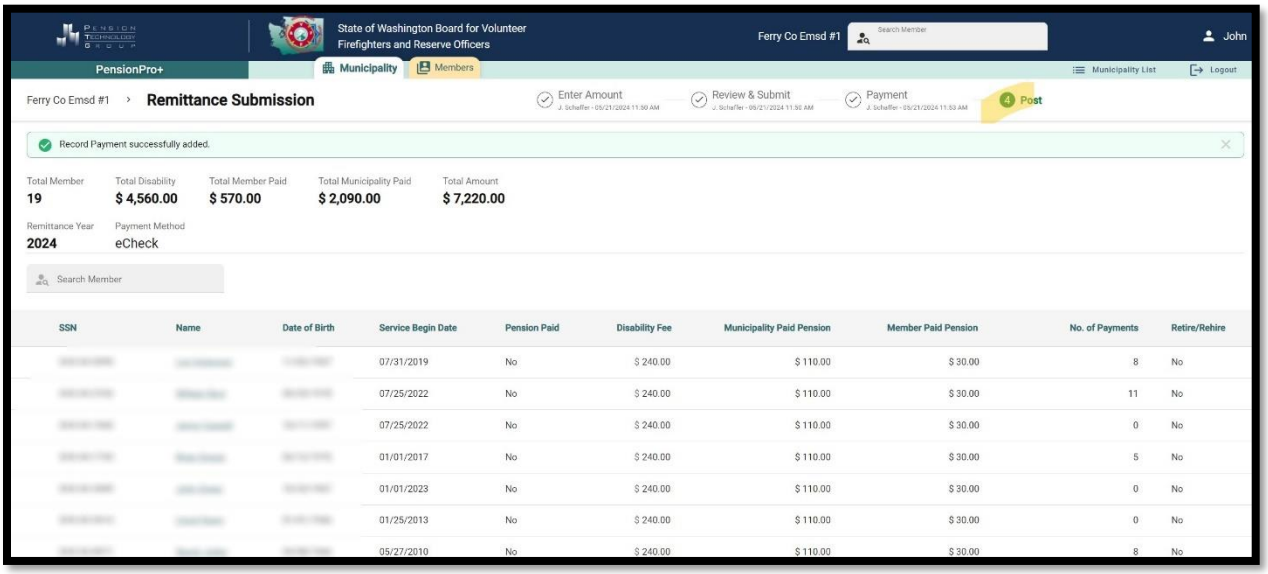


4. If the user Paying with **Check**, they will be prompted to send a check.

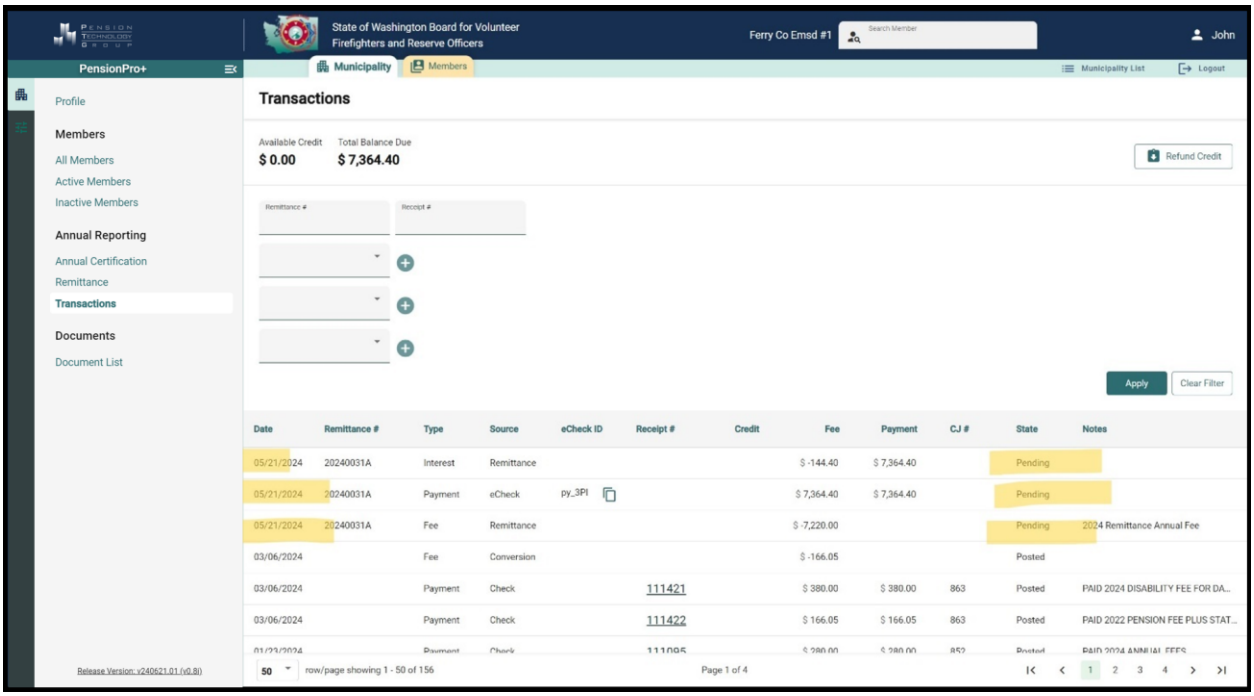


Step 4: Post

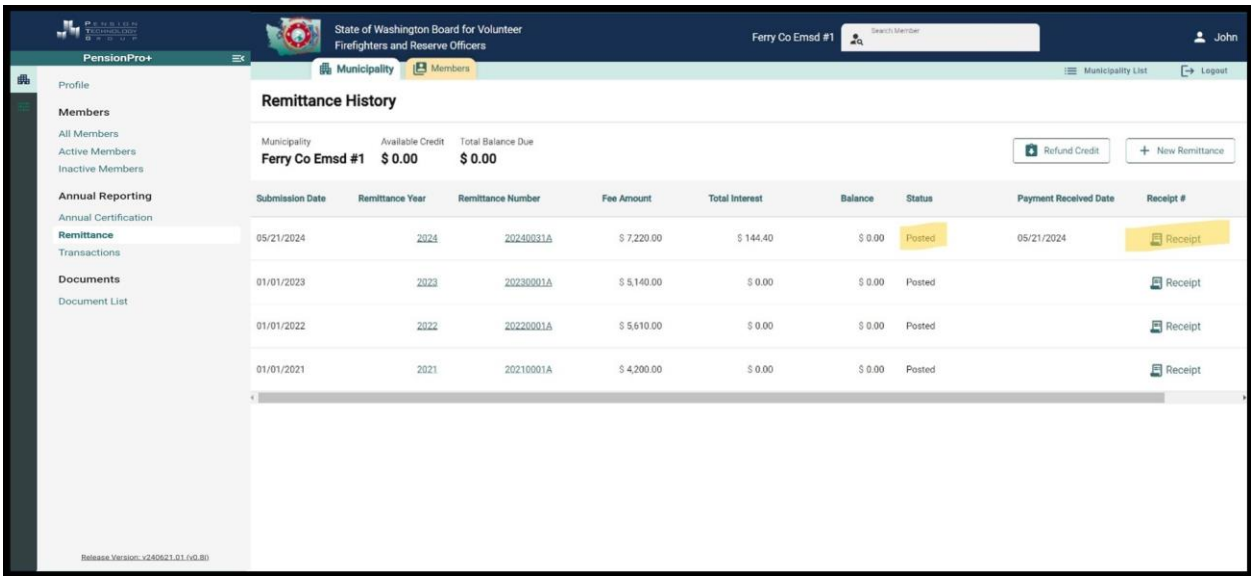
1. Step 4 **Post** is now highlighted green on the submission screen.



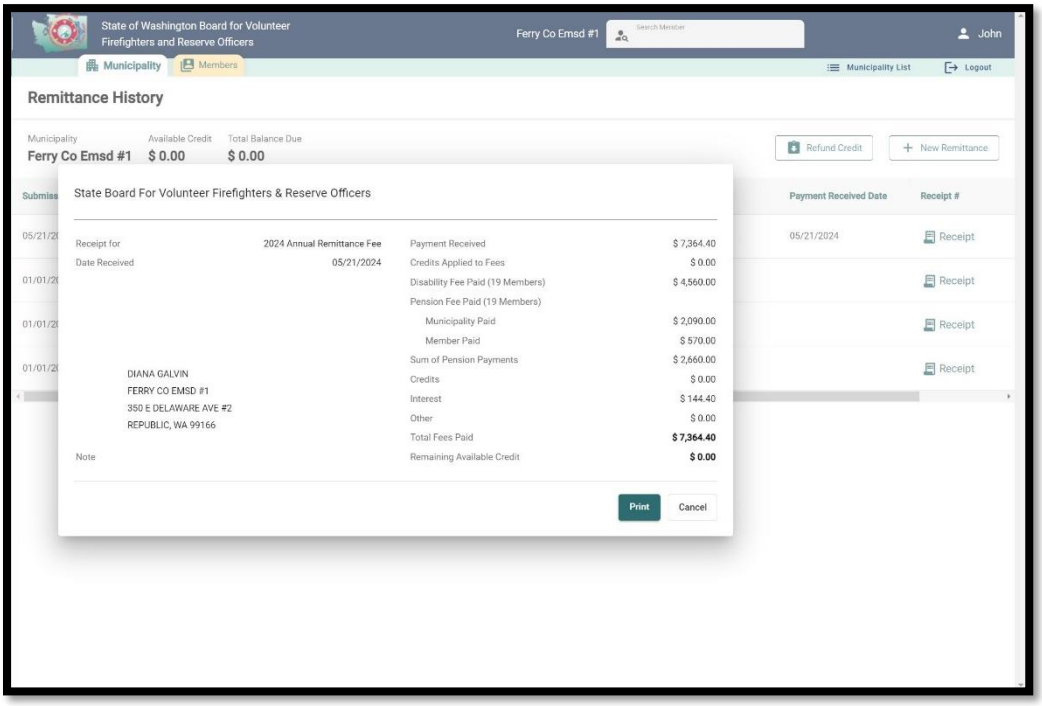
2. Additionally, this payment has been added to BVFF records for final authorization. BVFF Admins will complete Step 4 to Post.



3. When BVFF completes Step 4, the status will update to Posted. Click the “Receipt” hyperlink to View or Print the payment details.

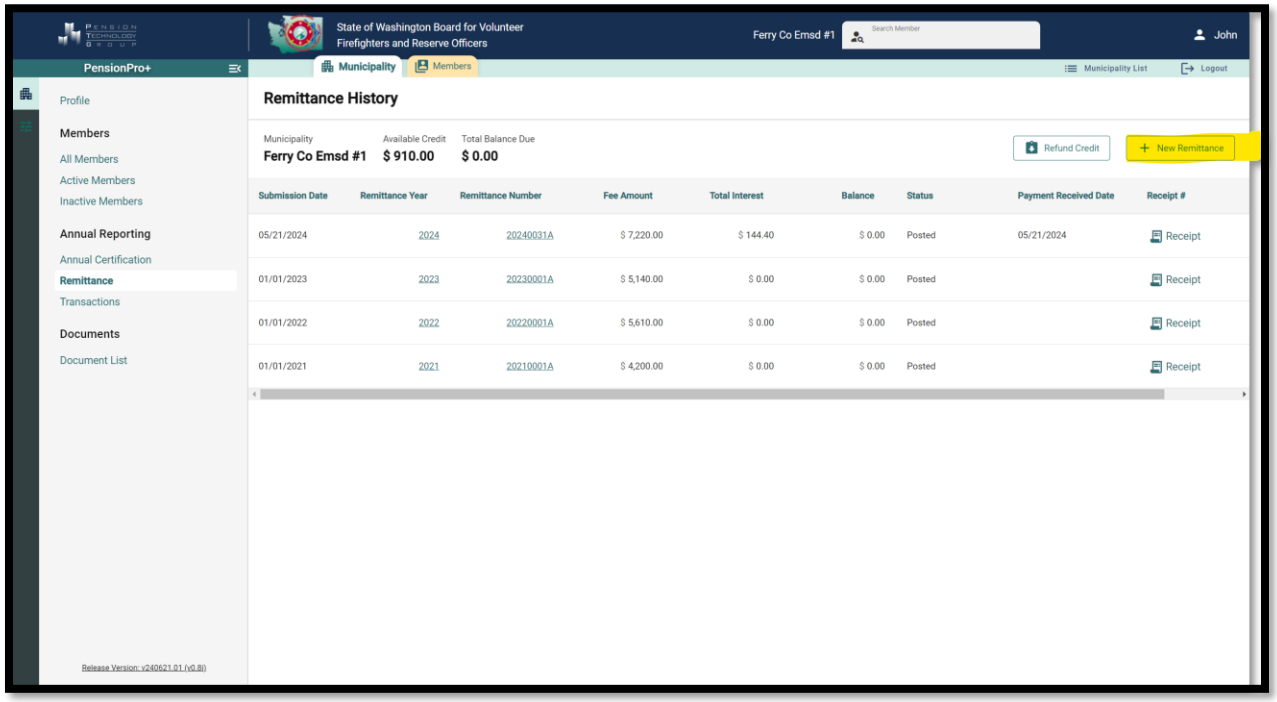


4. A popup box will appear and display the payment details.

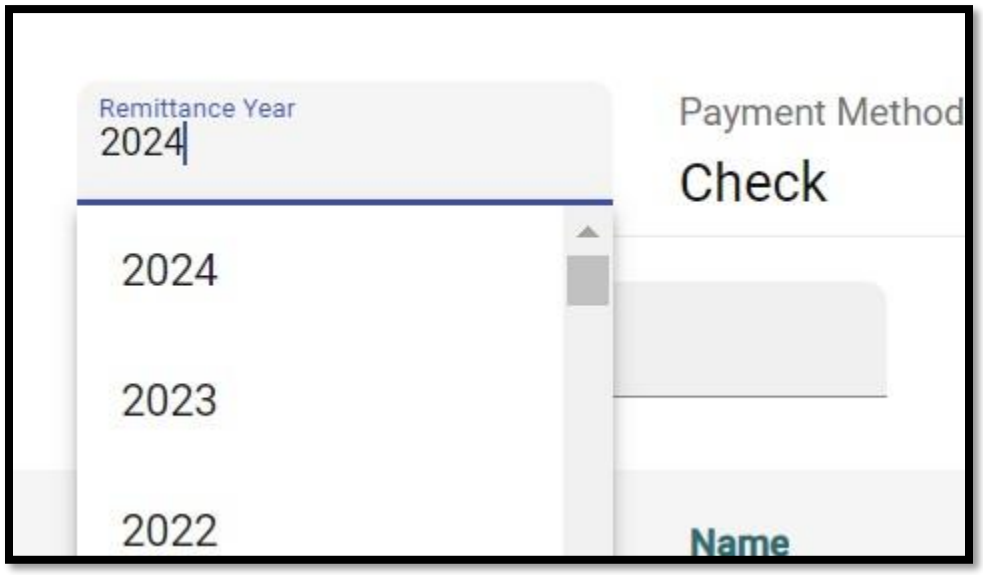


To Pay Supplemental Remittance – 2024

1. Click "+ New Remittance".

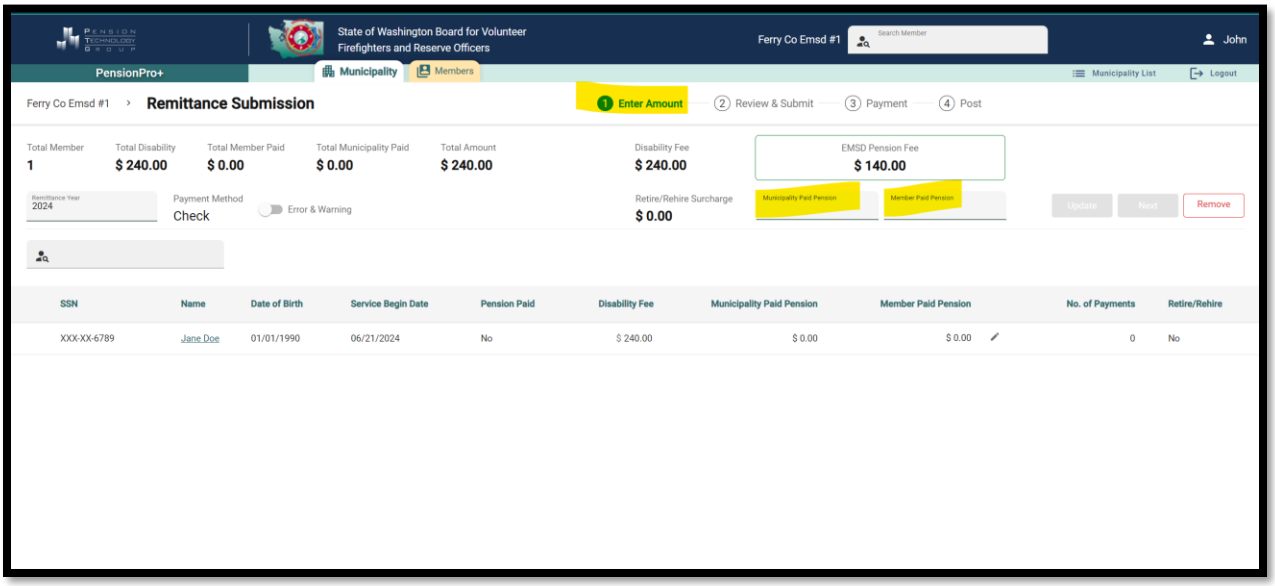


2. Select the Remittance Year.

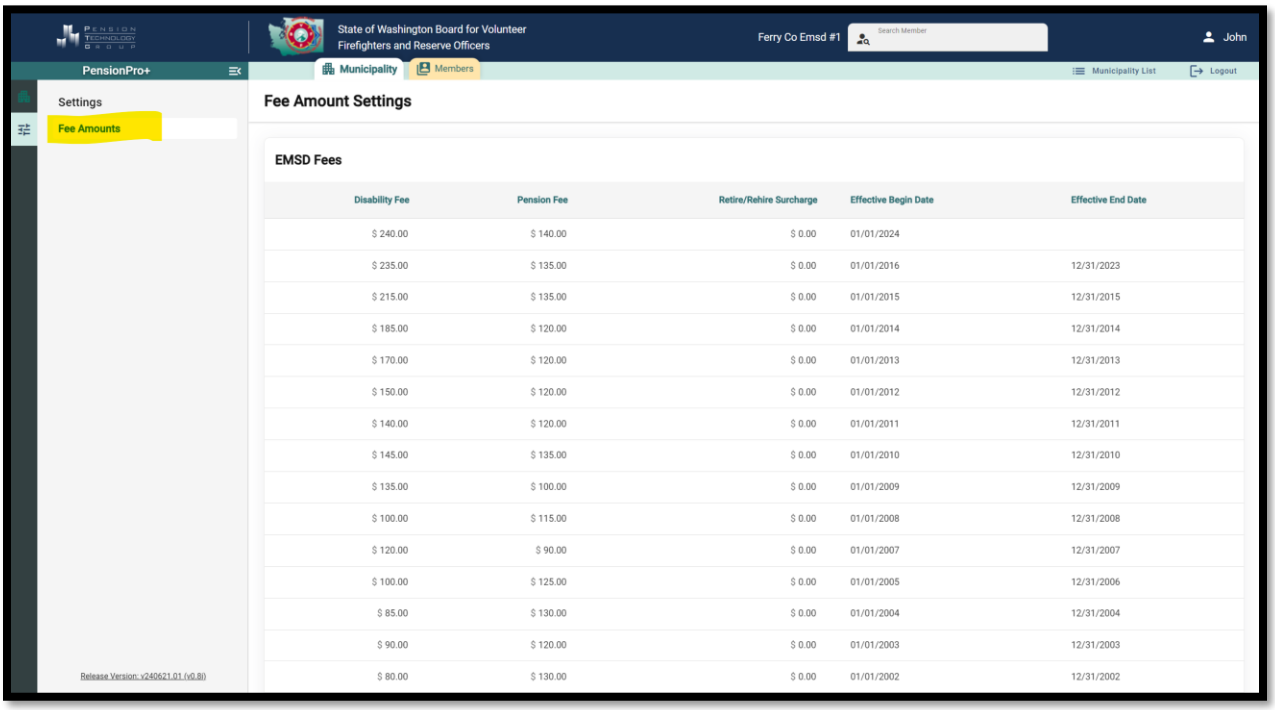


Step 1: Enter Amount

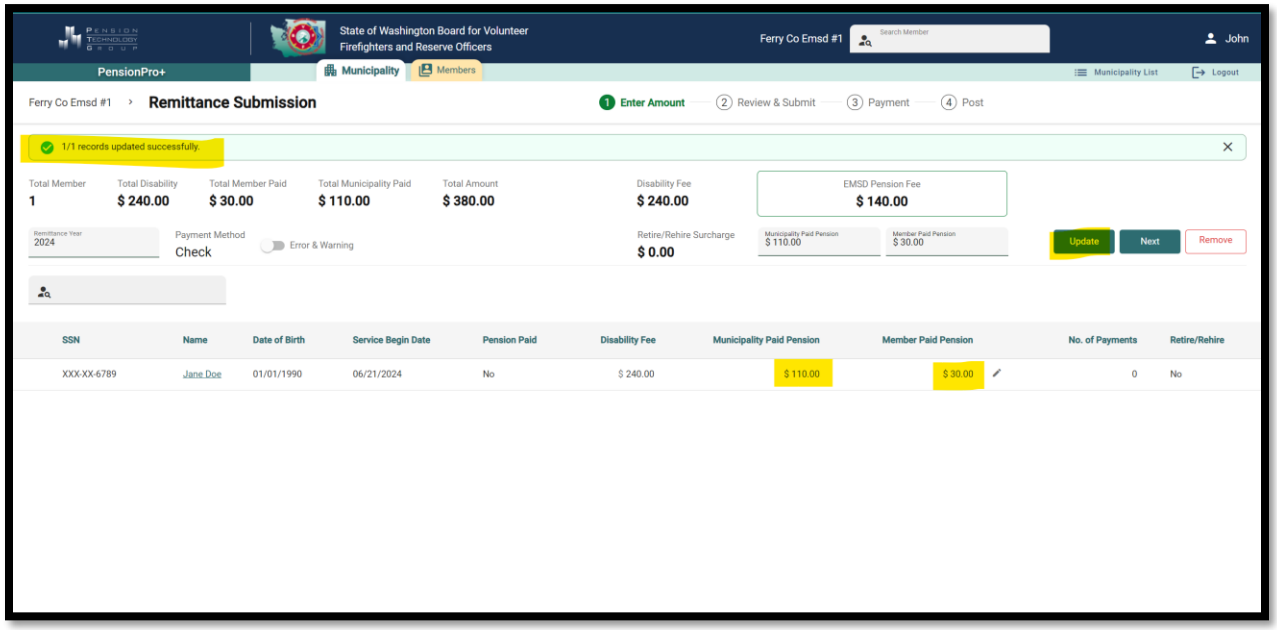
1. The newly added member is listed. Enter the fee amount for both **Municipality Paid Pension** and **Member Paid Pension**



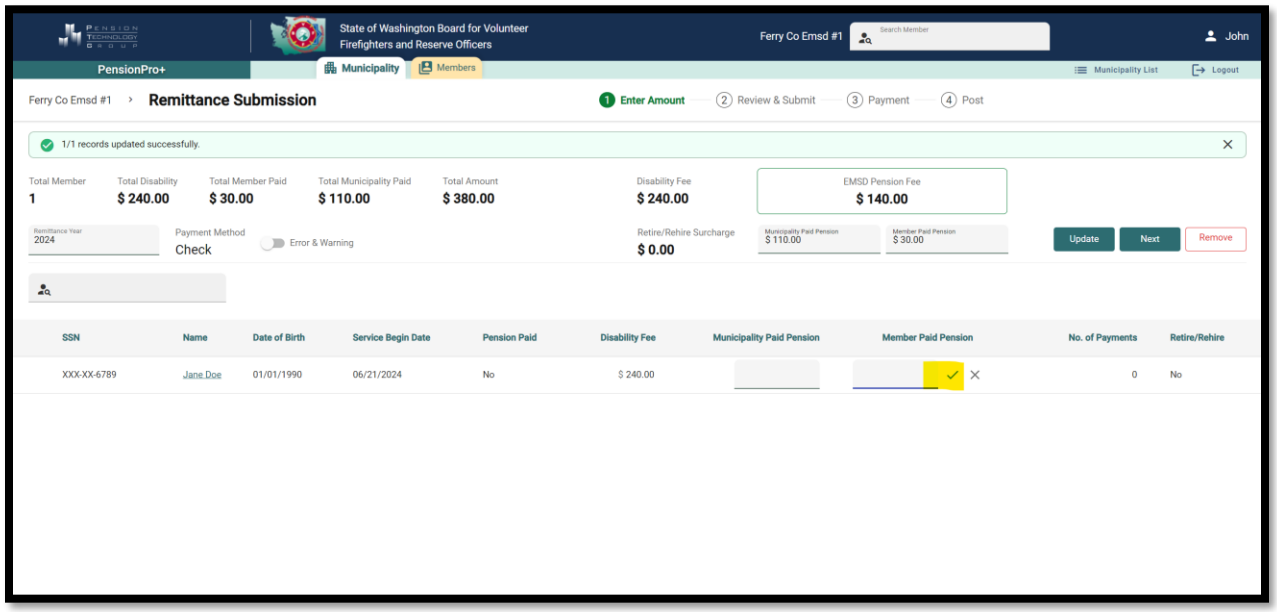
1. To view the fee amounts, click **Fee Amounts** from the Settings tab on the left menu.



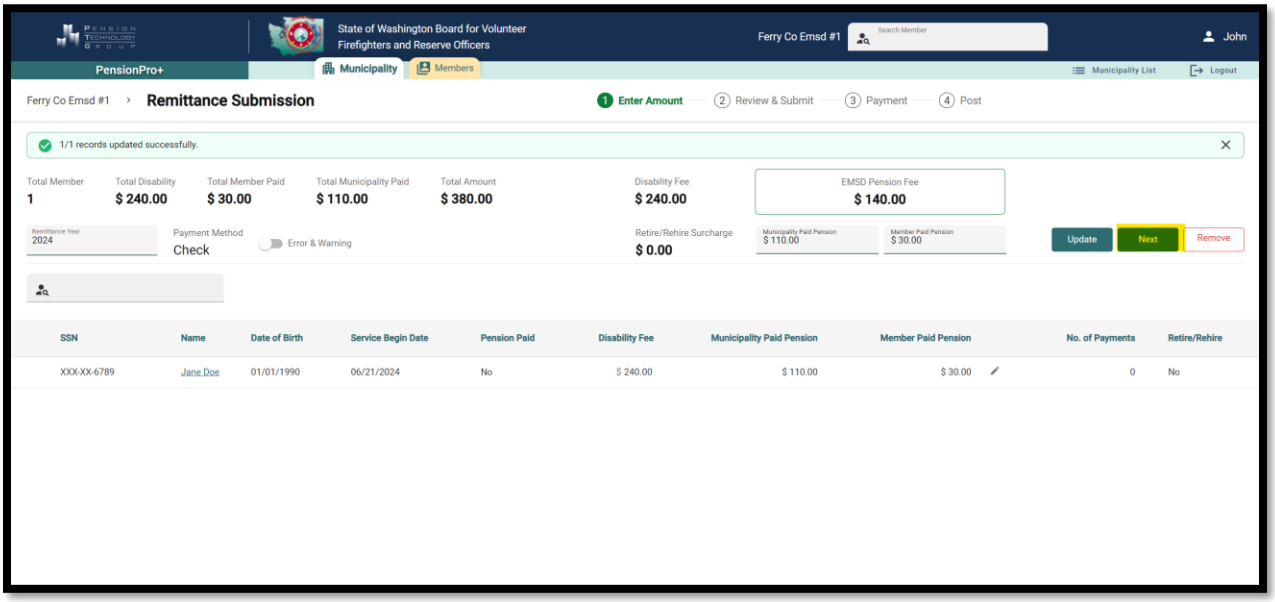
1. Enter the fee amounts into the boxes and Click **Update**. The amounts will be applied to all members in the list.



1. Adjust the fee amounts for the <u>individual</u> members by clicking the **pencil** icon. IF YOU CLICK THE UPDATE BUTTON afterward, it will undo the adjustments made to the individual and replace the adjustment with the amounts entered in the boxes.

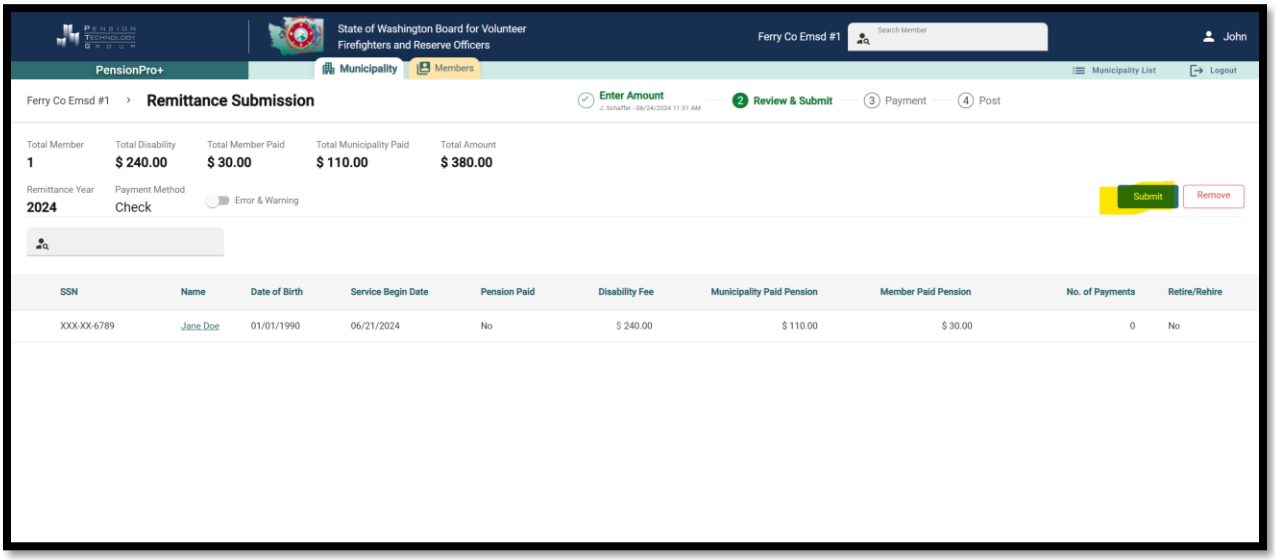


Click **Next** when complete. This will initiate Step 2.

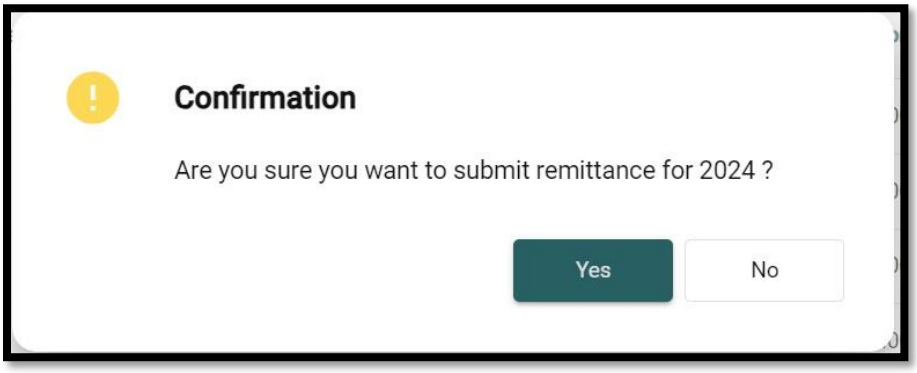


Step 2: Review and Submit

1. This step has been highlighted green. You can go back to any previously completed steps by clicking them. Click **SUBMIT** when the review is complete.

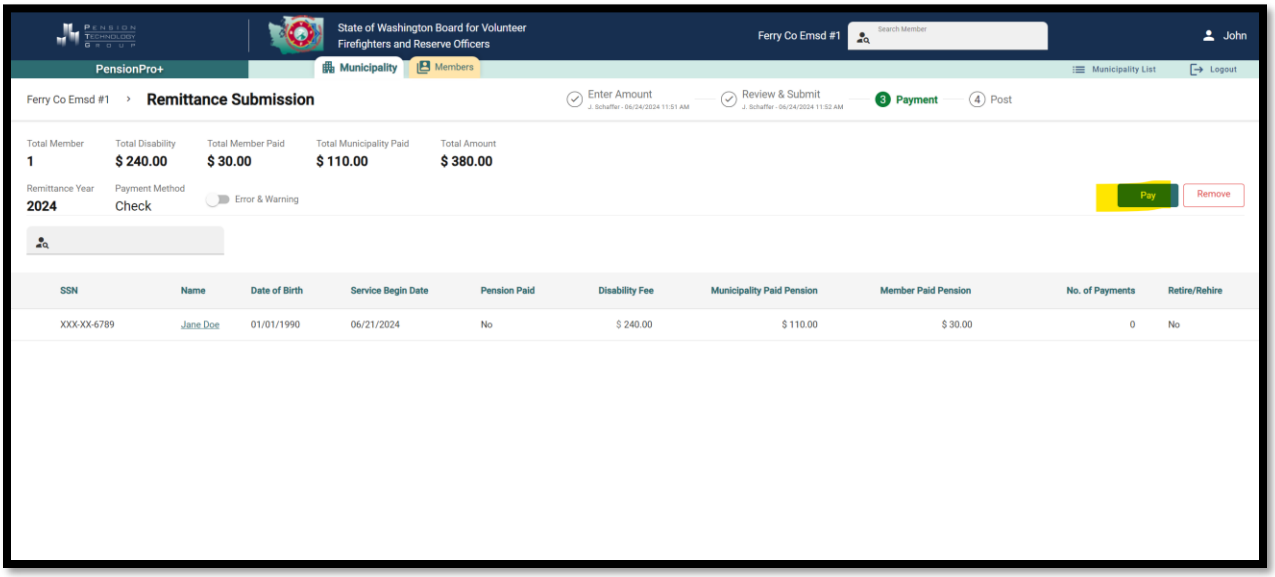


2. Click Yes to Confirm. This will initiate Step 3.

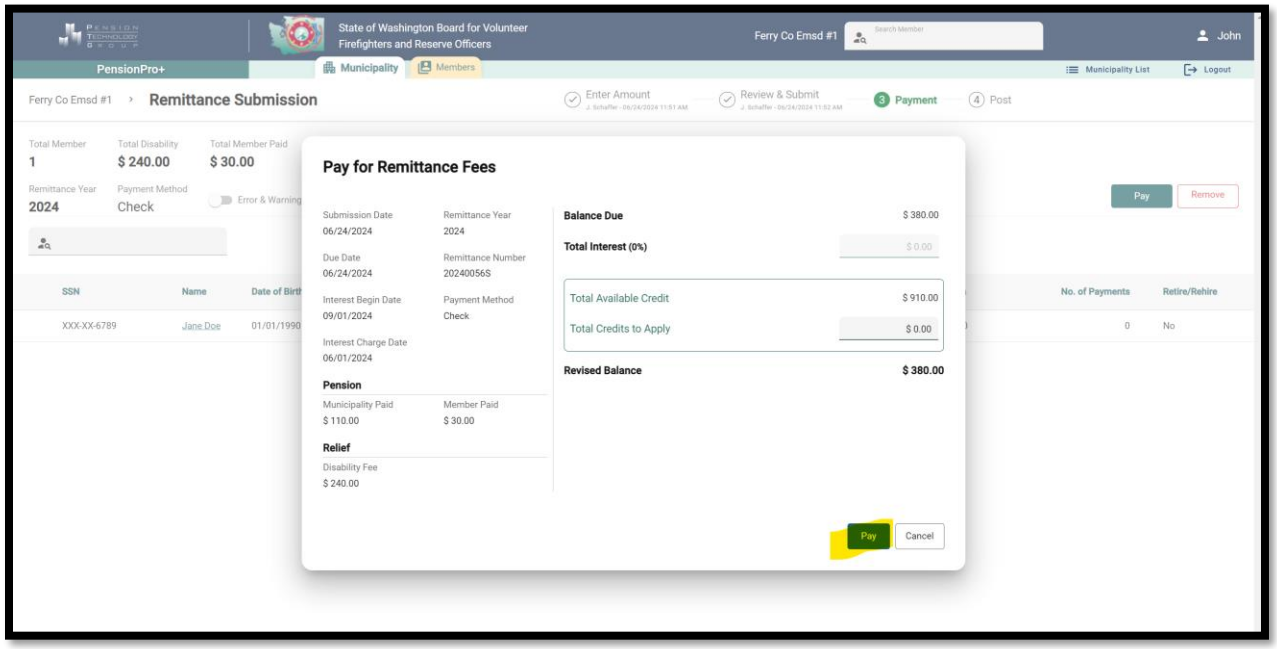


Step 3: Payment

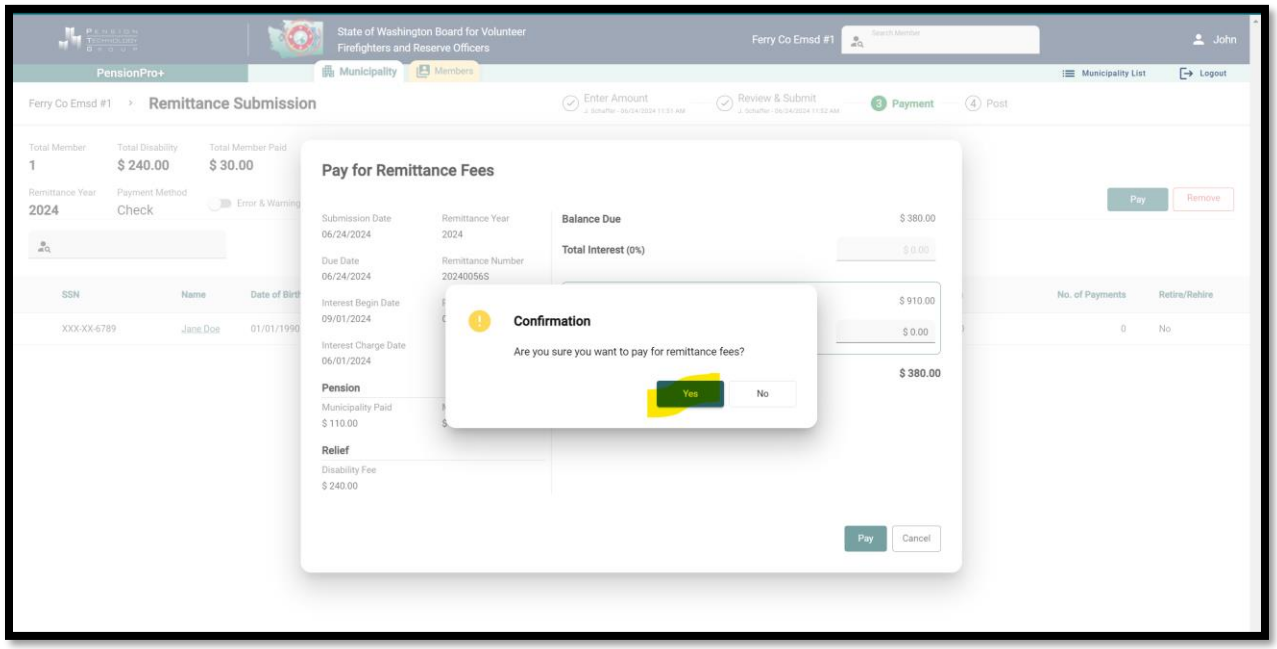
1. Step 3- Payment has been highlighted green. Click Pay when ready to proceed.



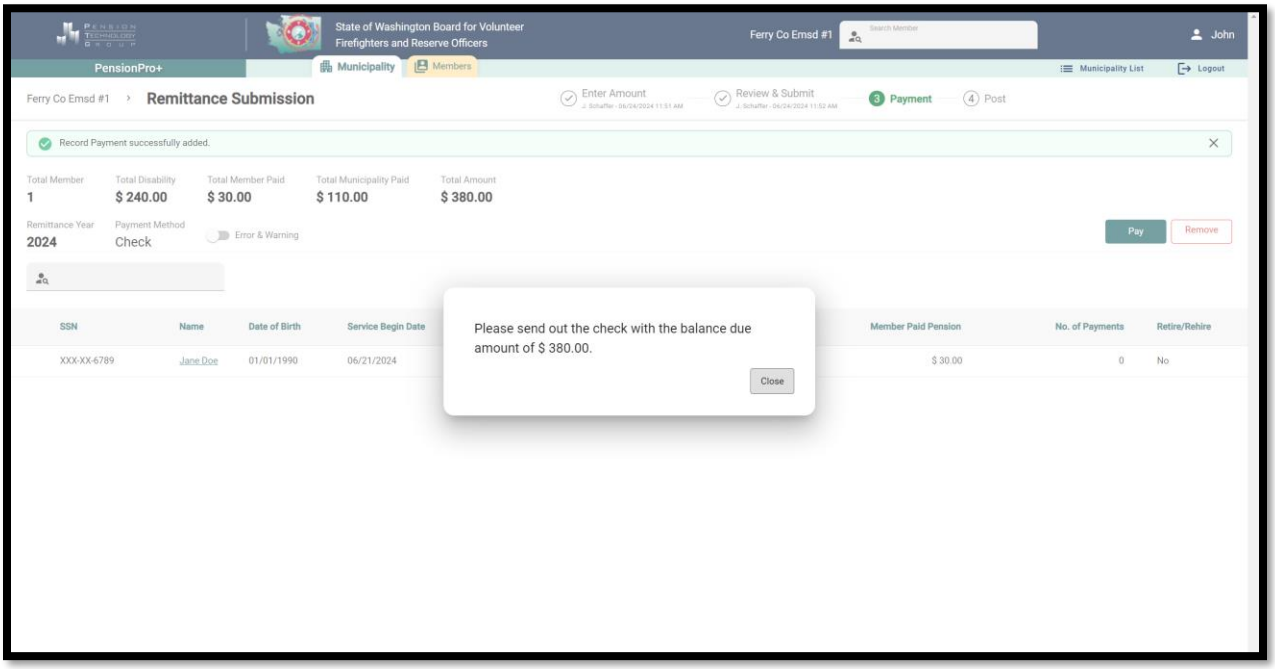
2. A popup box called Pay for Remittance Fees will display the payment details for a final review. Click **Pay**.



3. Click Yes to Confirm or click No to go back.

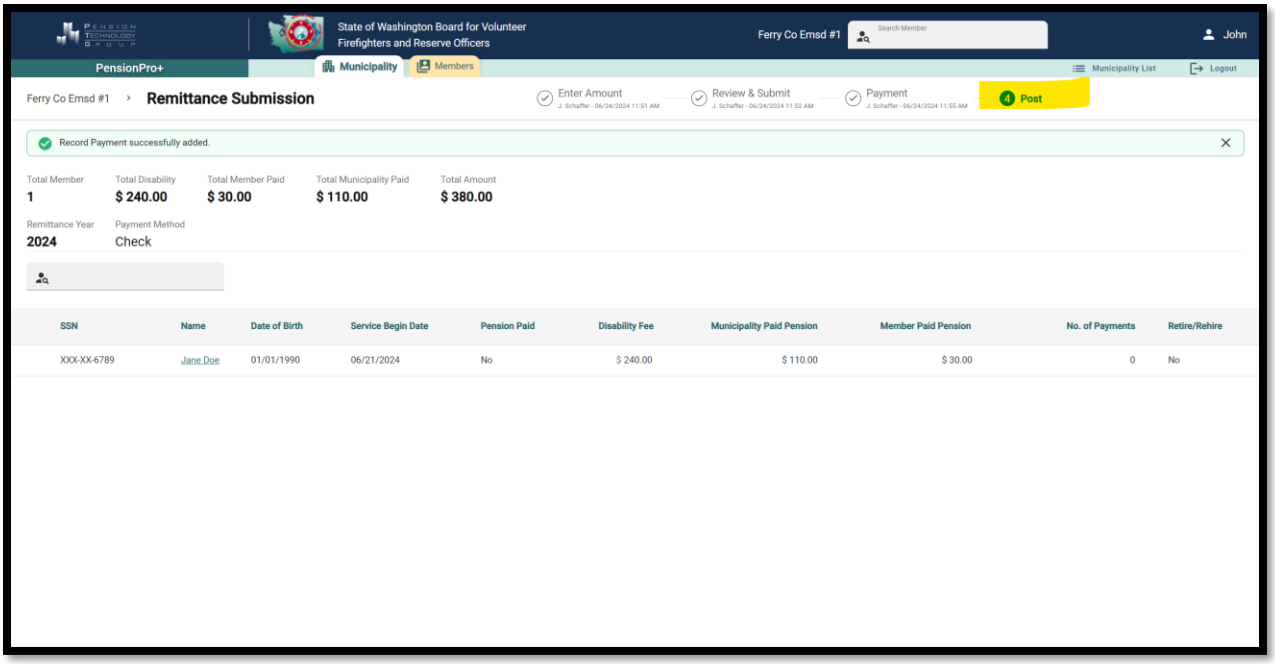


4. If the user is paying with a **Check**, they will be prompted to send a check.



Step 4: Post

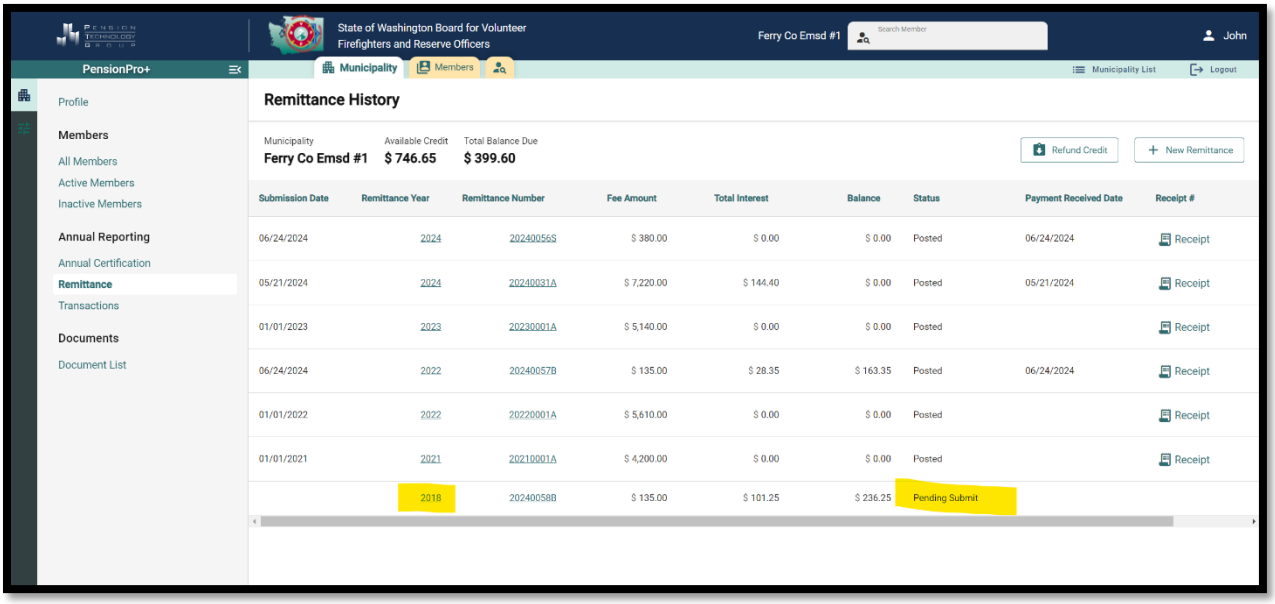
1. Step 4 Post is now highlighted green on the submission screen.



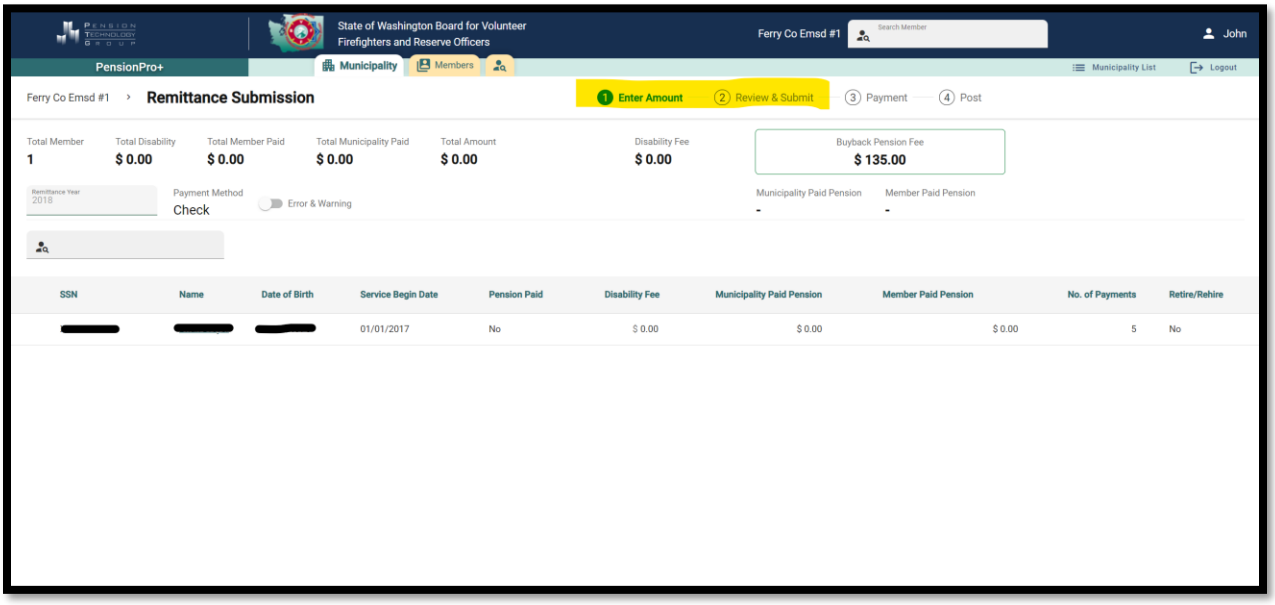
To Buyback Remittance - 2018

After BVFF Administrators initiate a buyback for a member, the system will update the Municipality Portal by including a new record in the Remittance History.

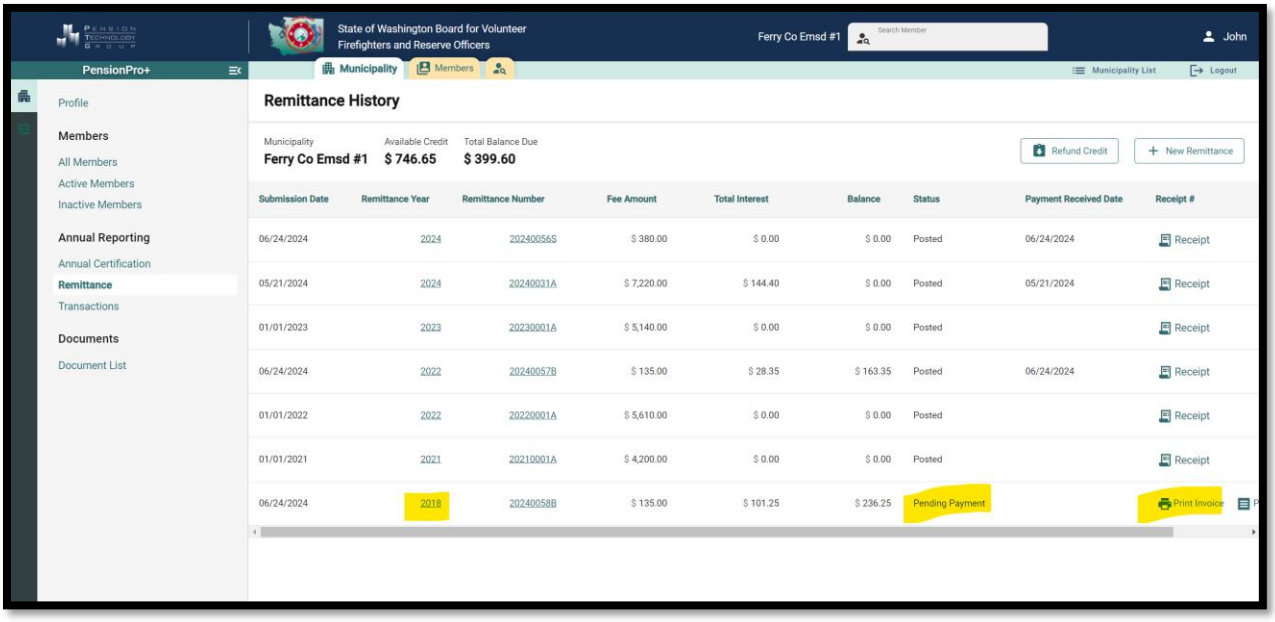
1. Open the Remittance History screen. The record will have a status of “Pending Submit”. Click **2018** to open.



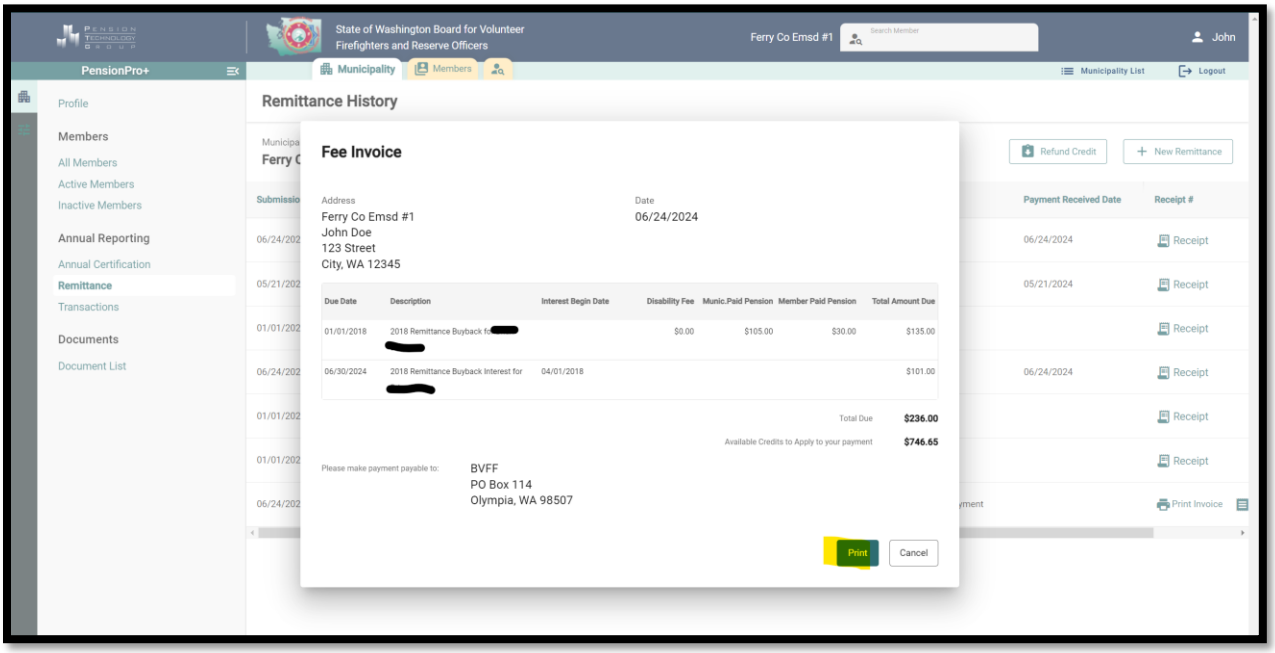
2. BVFF Administrators will complete both Step 1 and Step 2.



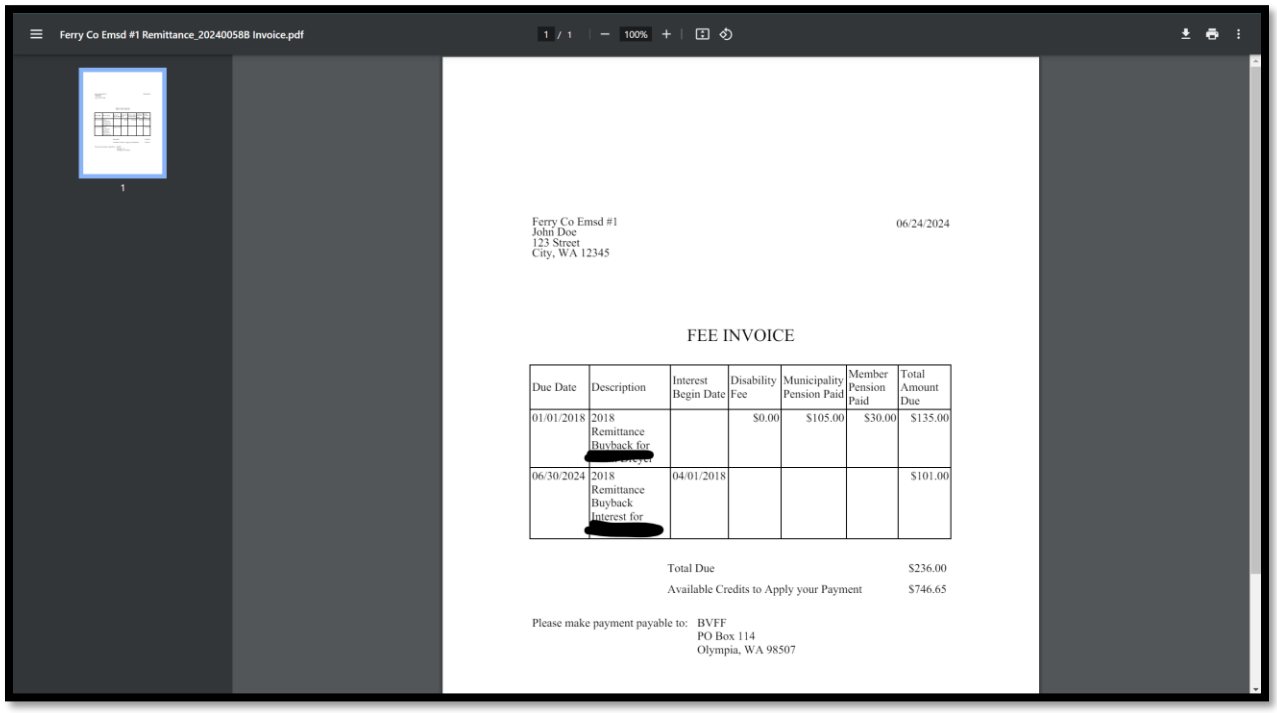
3. After BVFF Admins complete steps 1 and 2, the Status will update **to Pending Payment**. Click Print Invoice to view payment details.



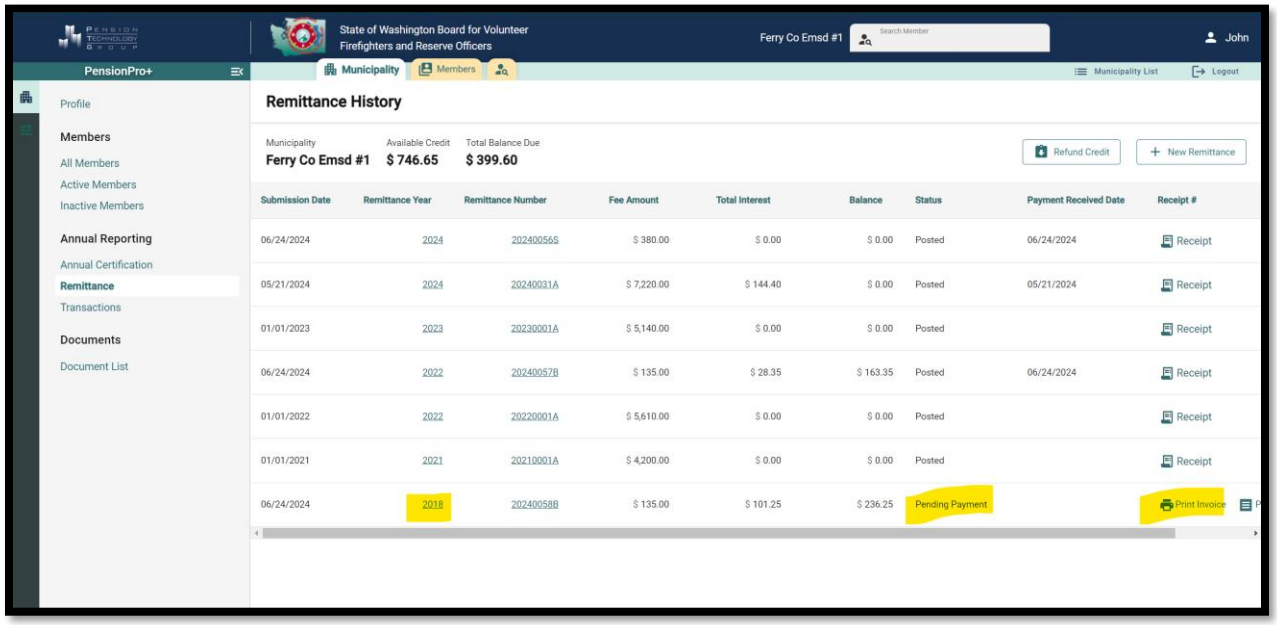
4. A popup box will display the invoice. Click **Print** to print this invoice to your browser.



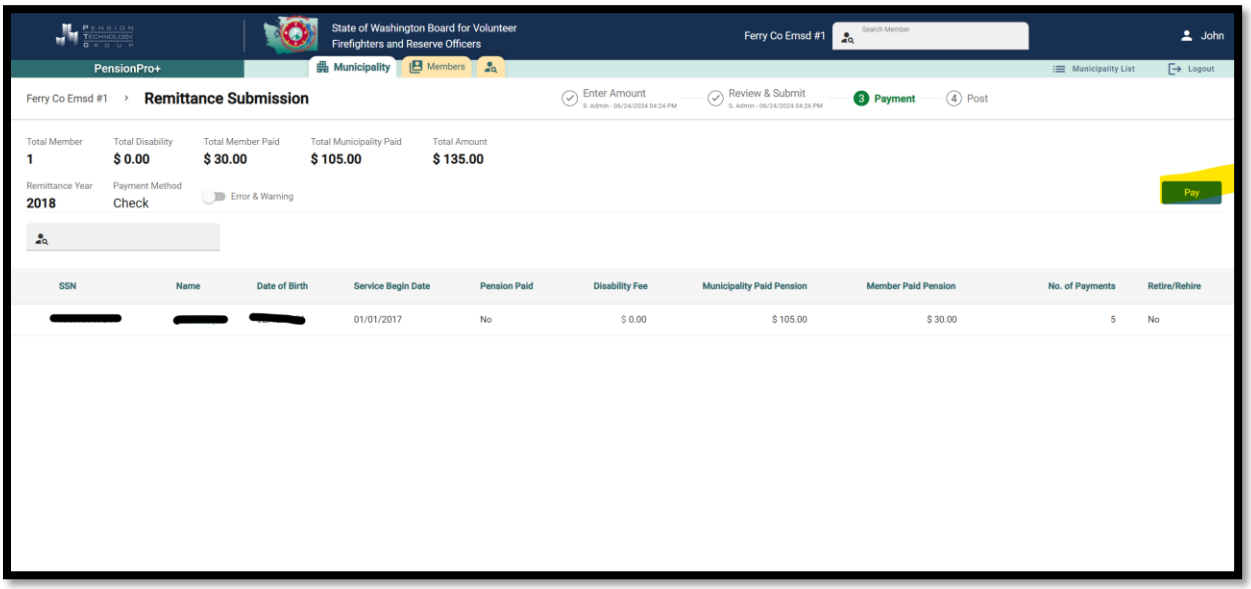
5. The printed invoice will appear in your downloads.



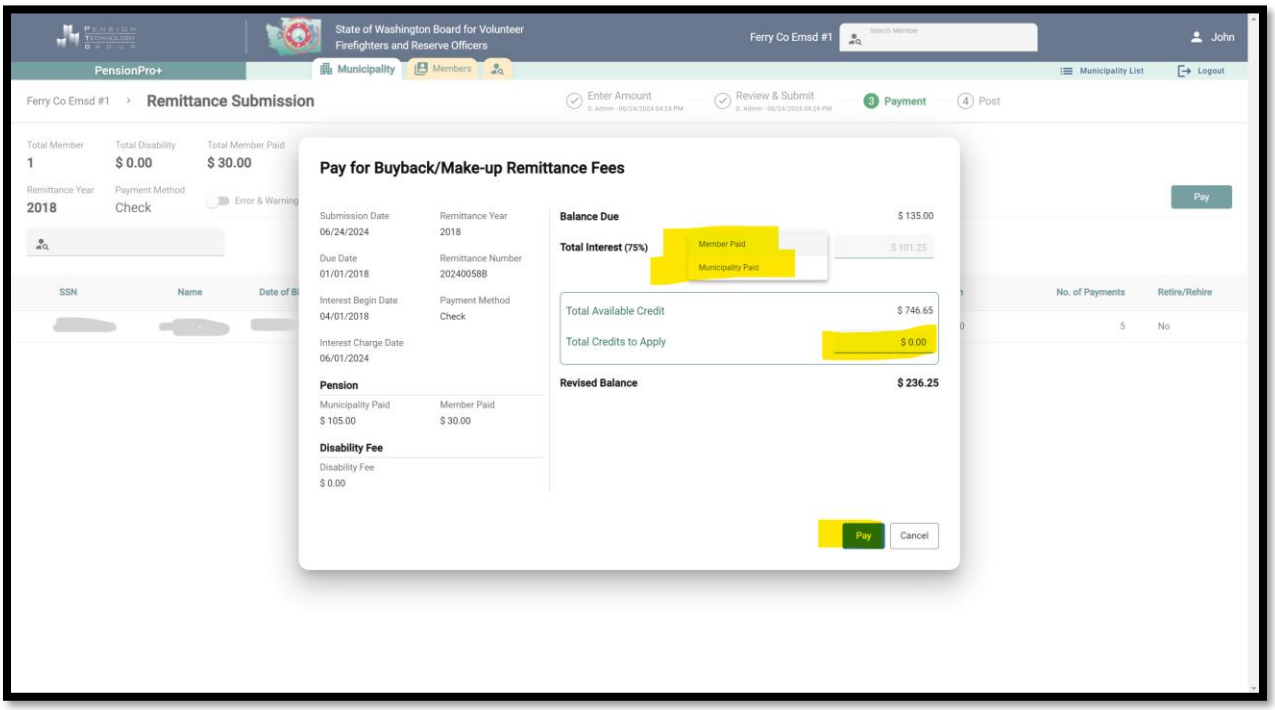
6. Return to Remittance History. Click **2018** to open the Buyback Remittance.



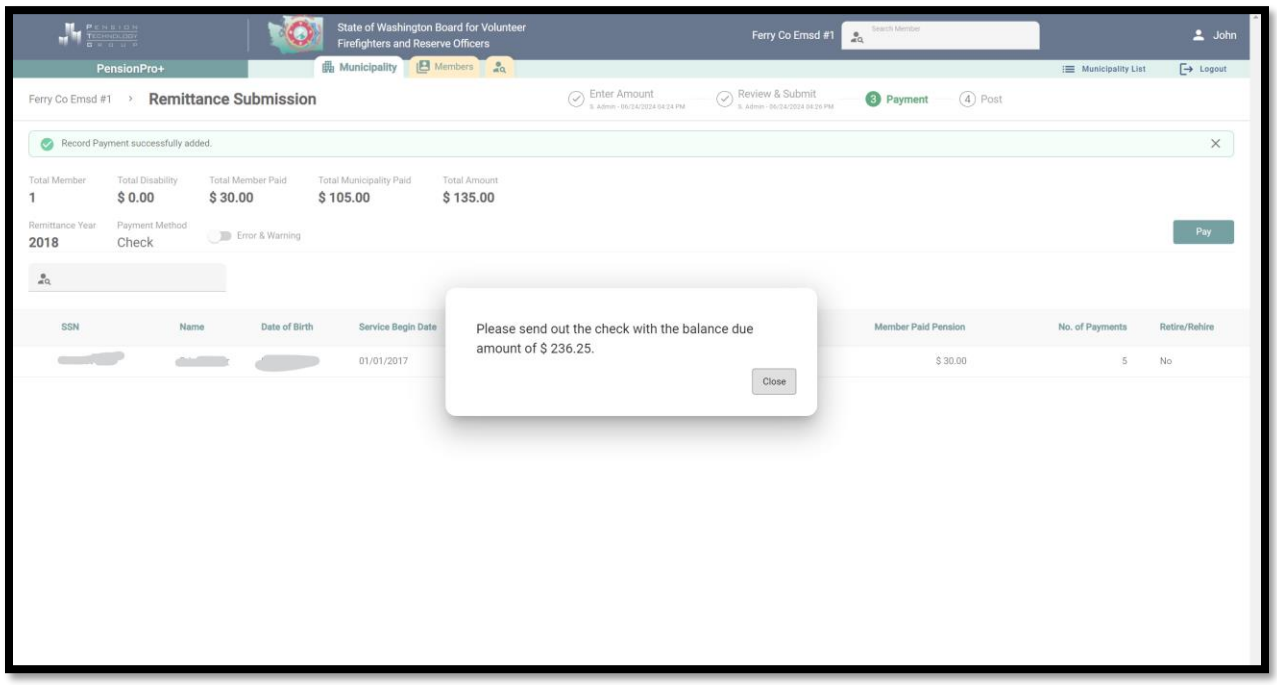
7. Click **Pay** to proceed.



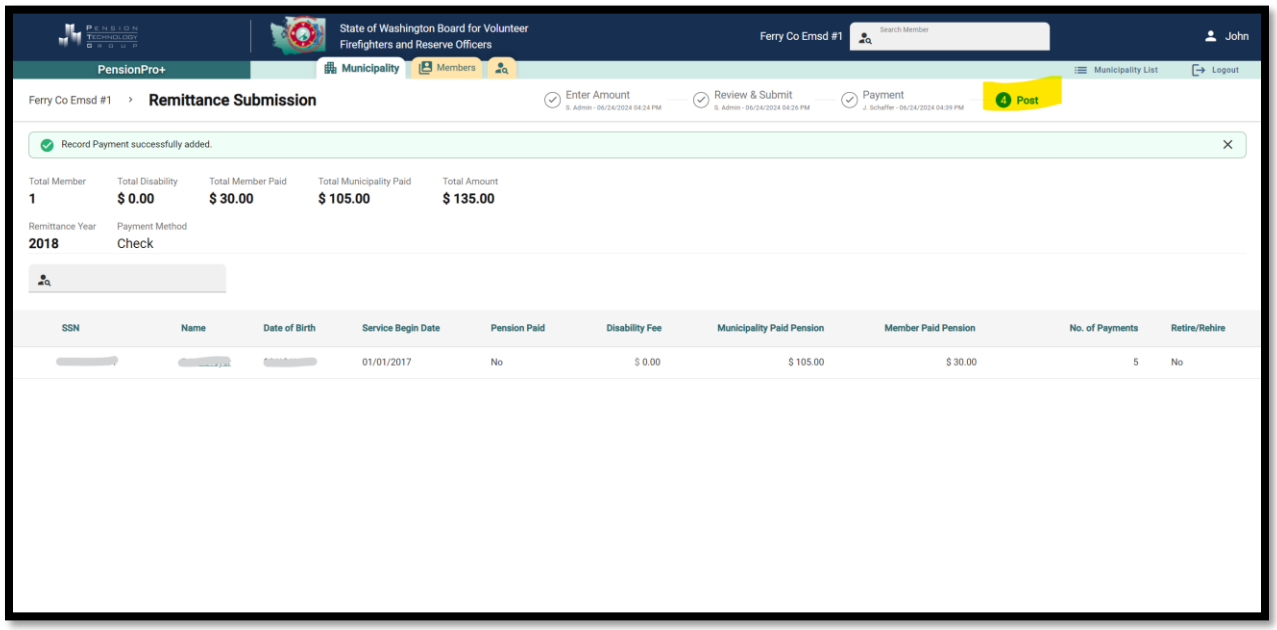
8. Enter the payment information. Including who is paying the Interest, Member or Muni. Click Pay when complete.



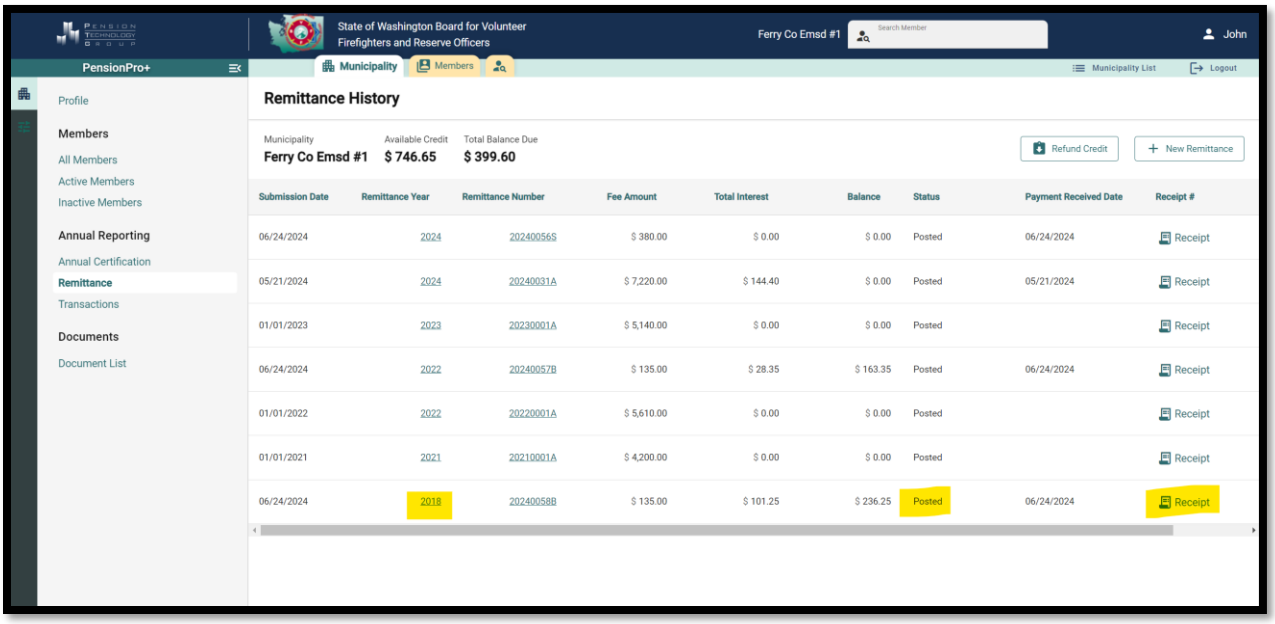
9. The user will be notified to send a check to the member to cover the balance.



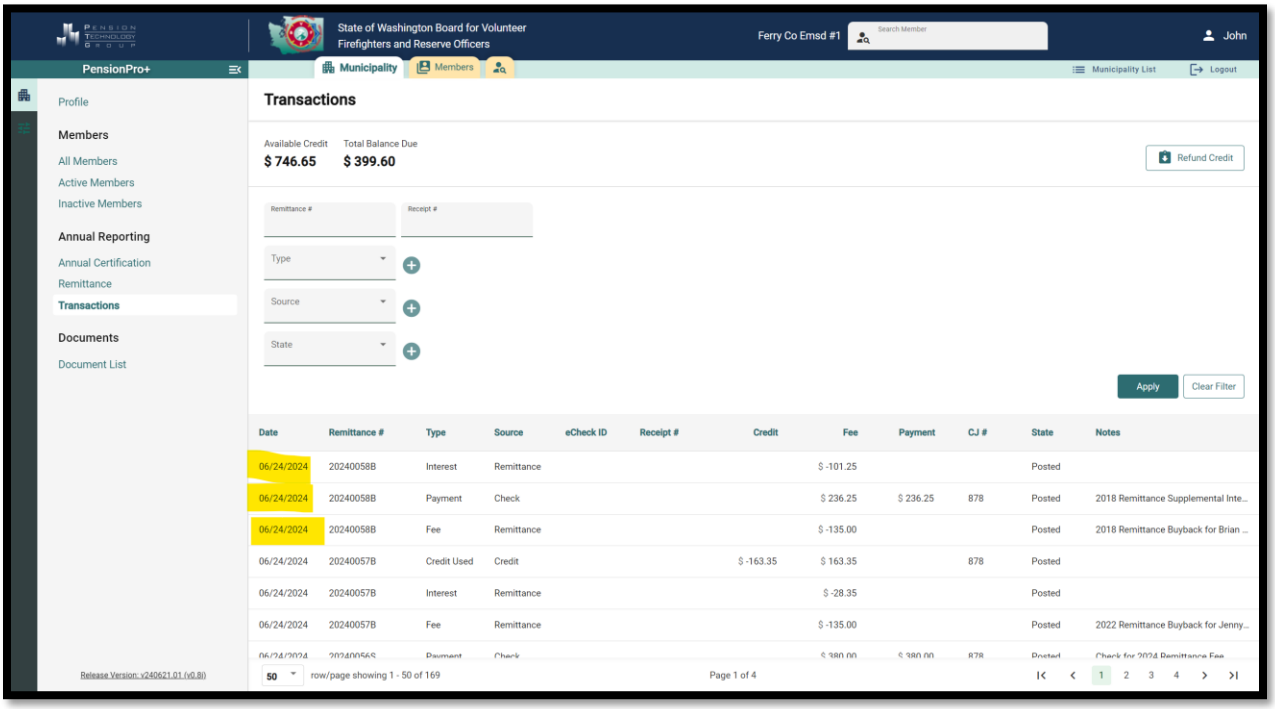
10. The system will update to **Step 4: Post.** BVFF Admins will take care of step 4.



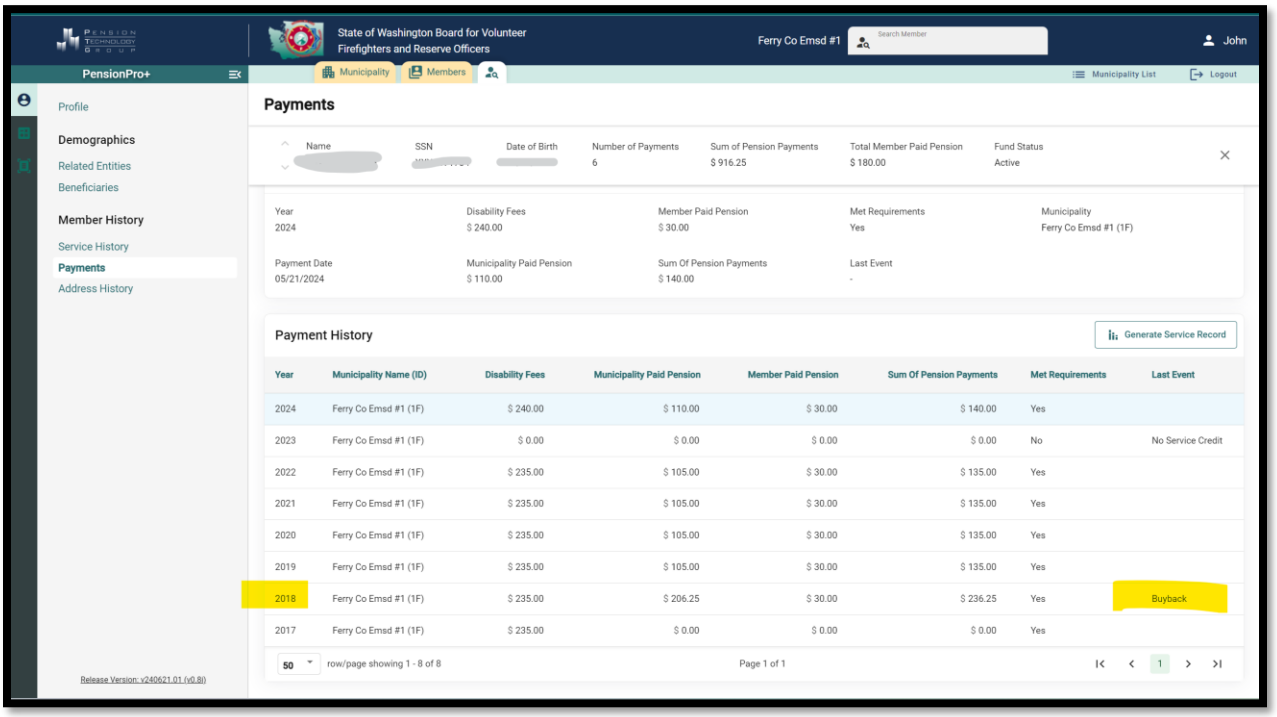
11. After BVFF Admins post the payment, the Status will update to “Posted” on the Remittance History Screen. Click the Receipt hyperlink to view the payment details.



12. This payment can be found on the Transaction Screen.

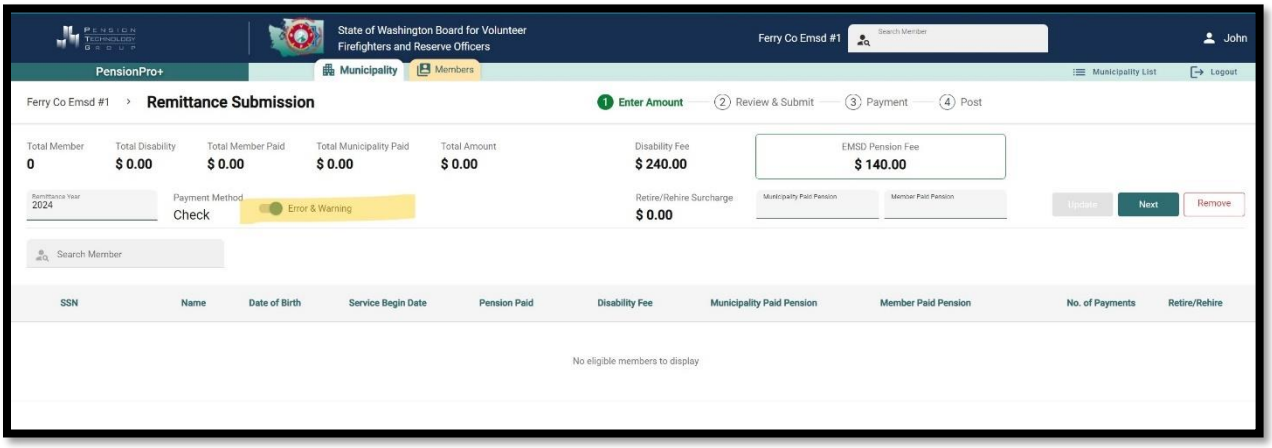


13. As well as the Payment Screen on the member's profile.



Errors and Warnings – Remittance

1. Users can use the **Error & Warning** toggle to filter member records with errors or warnings from the member list within the current remittance record. Users can view details of error/warning content (if any) by clicking on the Error/Warning icon.

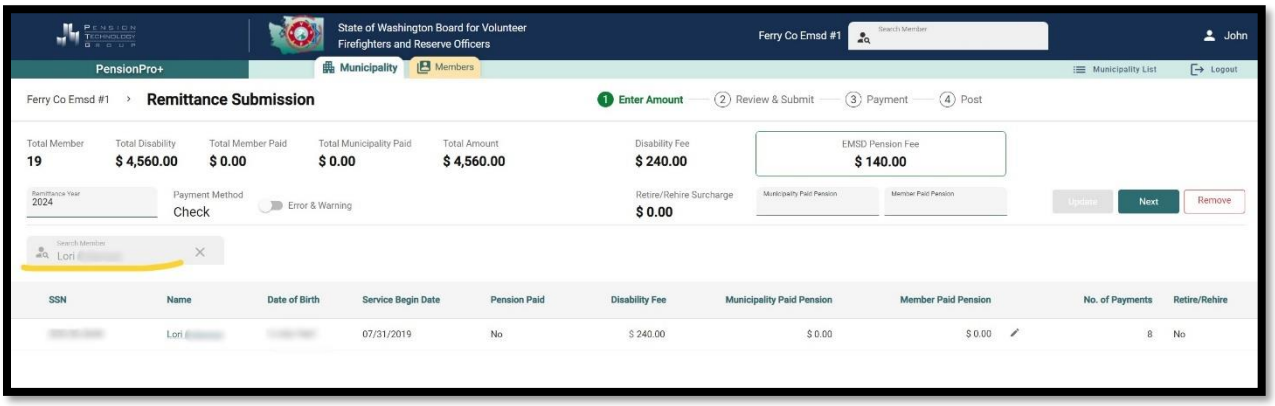


- The types of **Errors** include:
  - The member is deactivated in the current calendar year.
  - The member is terminated in the prior calendar year.
  - The member's Service Begin Date has changed, making the participant ineligible for the current remittance submission.
- The types of **Warnings** include:
  - The "Retire/Rehire" value in member's profile is updated to "Yes".
  - The member made a payment to another municipality for the Remittance Year, and the "Pension Paid" value has been updated to "Yes".
  - The "Number of Payments" value is updated to "25".

After these are resolved, the user will have to **Remove** this Remittance Submission and start over by Adding a New Remittance for 2024. The new remittance will now contain no errors/warnings and the user will be allowed to proceed. See the next page for steps **To Remove Remittance.**

To Search Members – Remittance

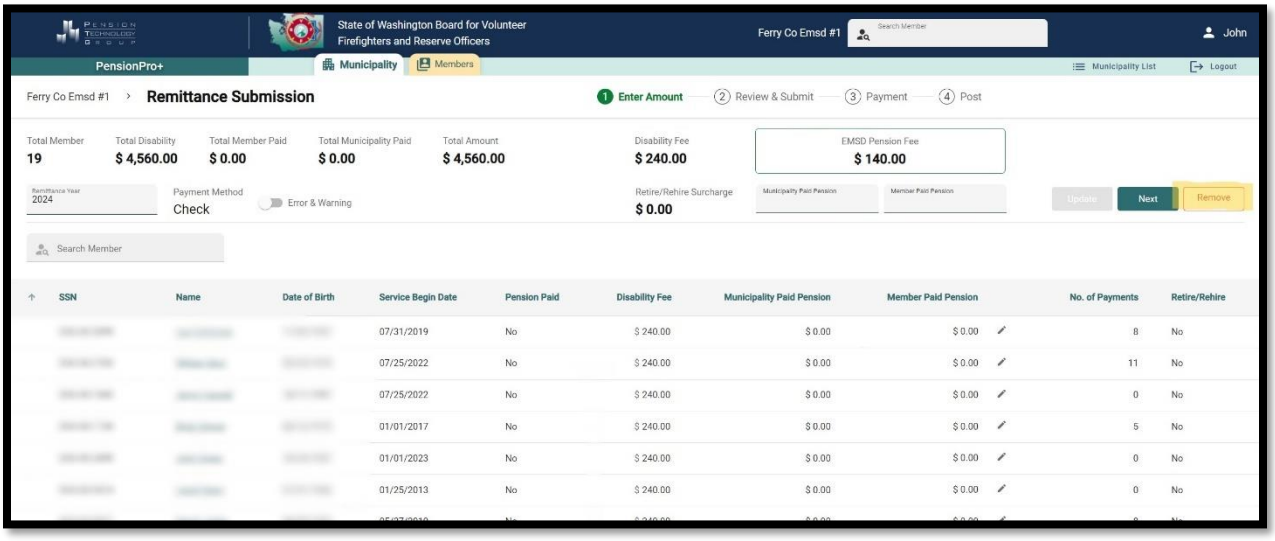
Use the search box to find information about a specific member within the current remittance record. Criteria for searching include SSN (full and last 4 numbers), member name, and person ID. Note that for the system to perform a search, users must enter at least 2 characters.



To Remove Remittance

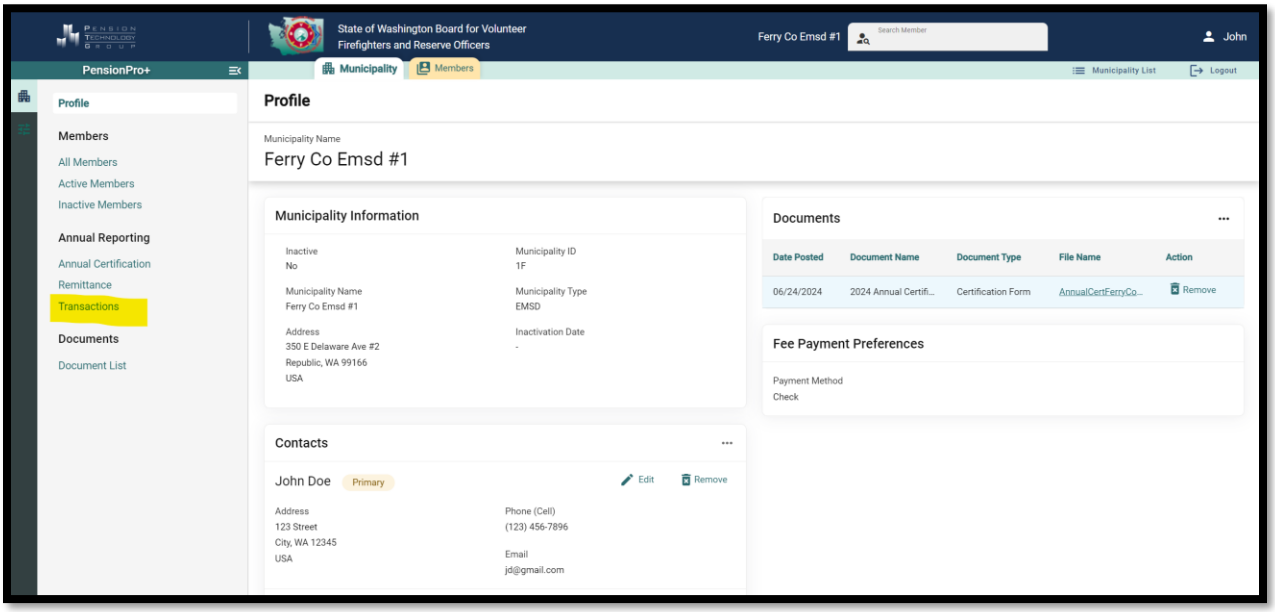
Note: This function is used in the case where the current remittance submission has errors. Users need to remove and submit a new remittance.

To remove a remittance submission, users can click the **Remove** button in the top right corner of the **Remittance Submission** screen header. Users can remove remittance submissions with statuses other than **Posted** or **Ready to Post**.

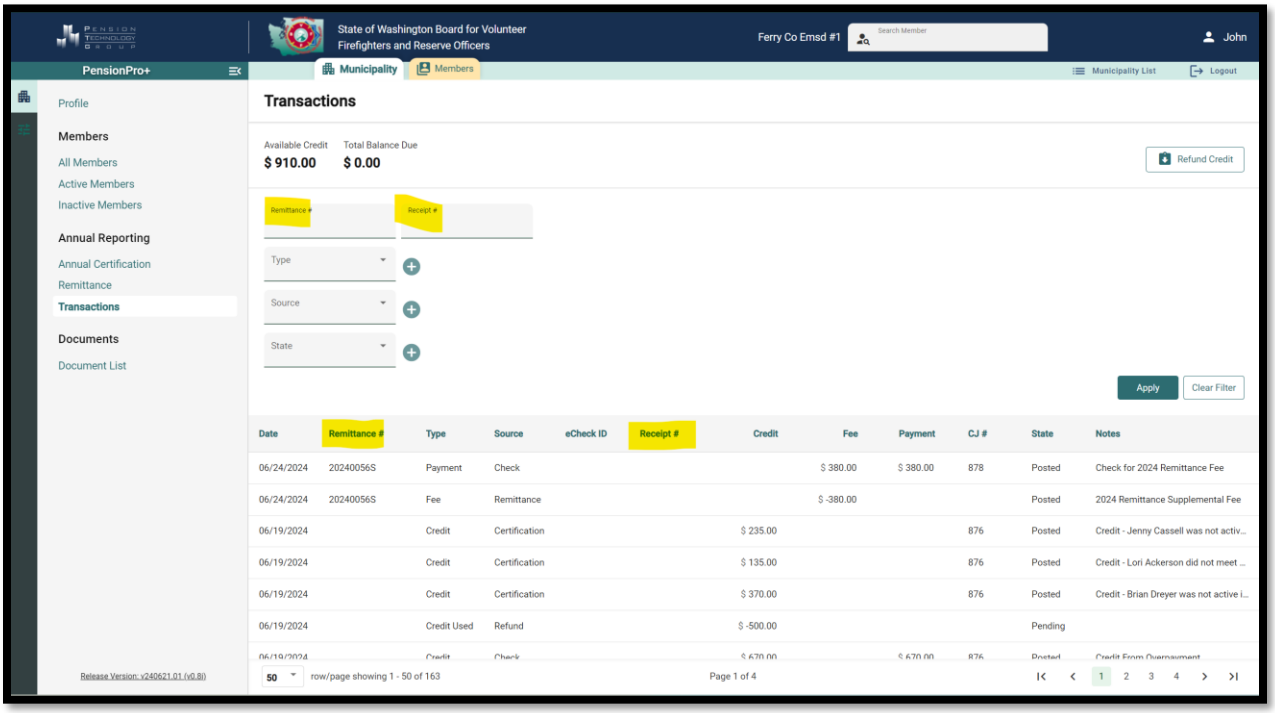


To View Transactions

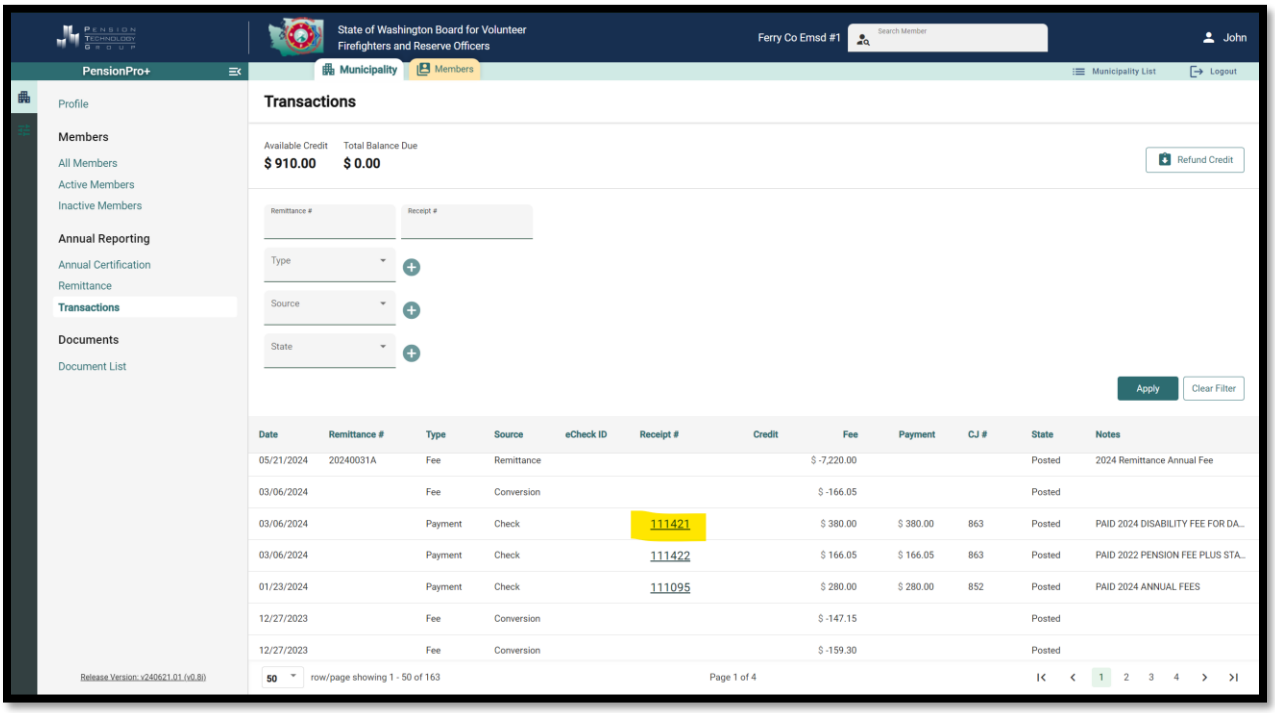
1. From the Muni Profile screen, click Transactions on the left menu.



2. Search for specific transactions by entering the Remittance # or Receipt #.



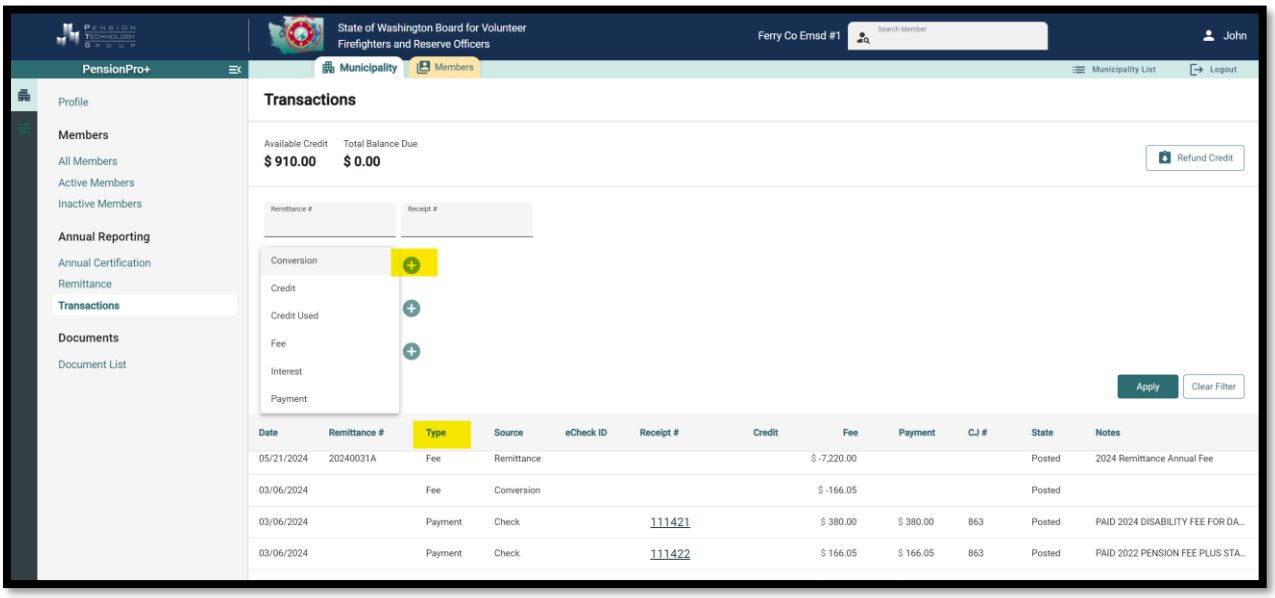
3. Additionally, users can click the Receipt hyperlink to view the payment details.



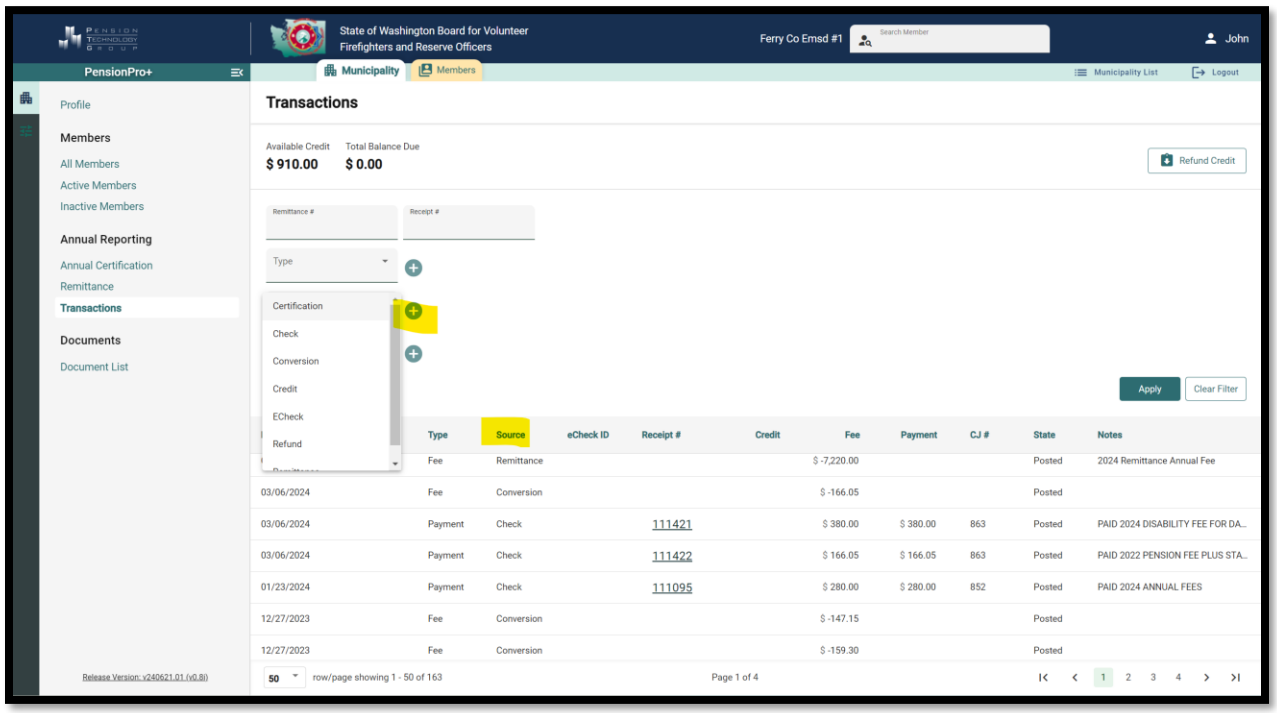
To Use Filters – Transactions

Select a tag from the 3 drop down boxes. Each box corresponds with a column located on the table below: **Type, Source, and State.**

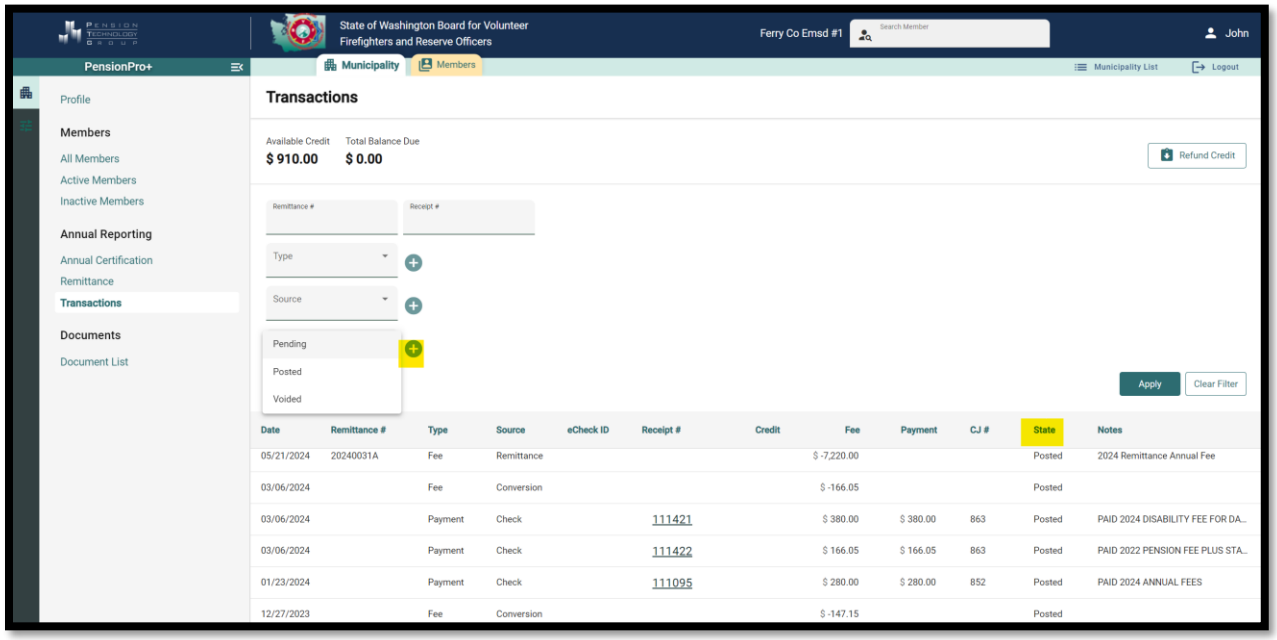
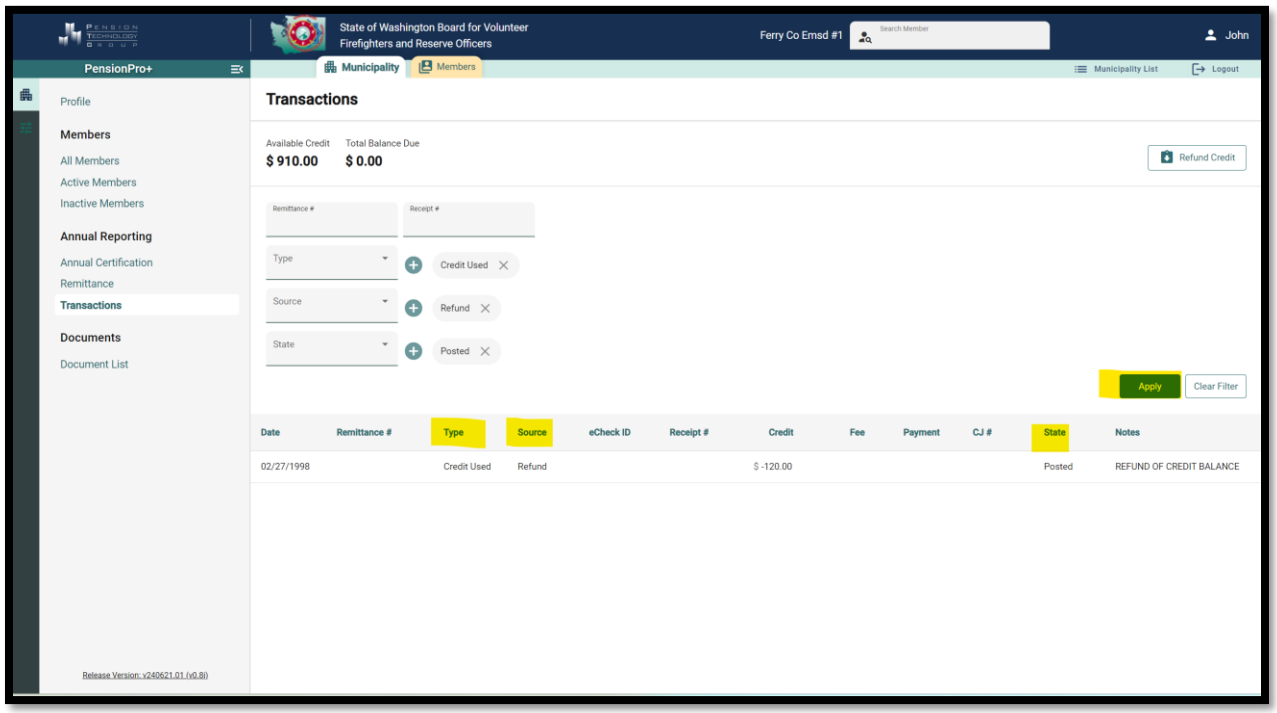
1. First box = Type. Select a type and click the "+" symbol.



2. Second box = Source.



3. Third box = State.



4. Click Apply to view the filtered list.