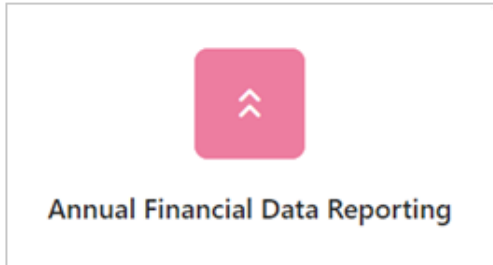


Fiscal Health Monitoring System Pension Tile Job Aid

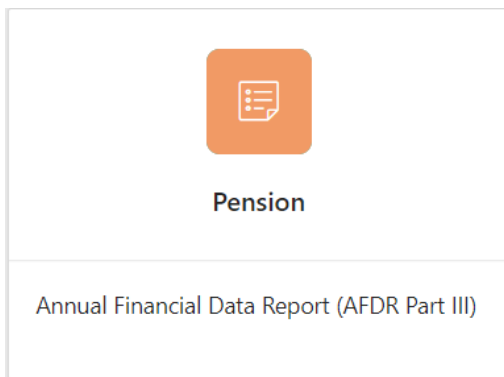


1. At the Main Menu – Select Annual Financial Data Reporting Tile

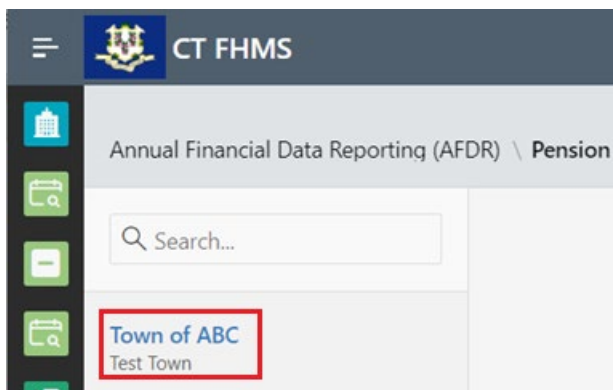


Annual Financial Data Reporting page displays.

2. Select Pension Tile



3. Select the Entity (Town or City) on the left side



The Create button will display.

Fiscal Health Monitoring System Pension Tile Job Aid



4. Click **Create** on the top right of the page
5. Enter the number of Single Employer Defined Benefit Plans and Defined Contribution Plans your municipality has for the current fiscal year, and if your municipality participates in the CT MERS Plan

A screenshot of a web form titled "Pension". The form contains several input fields: "Year" with the value "2020", "Entity Type" with the value "TOWN", and "Entity Name" with the value "Town of ABC". Below these are "Beginning Date" (July 01, 2019) and "End Date" (June 30, 2020). There are two columns of input fields for the years "2020" and "2019". The "2020" column has two input fields: "# of single employer defined benefit plans" and "# of defined contribution plans", both of which are highlighted with a red rectangular box. Below these is a radio button selection for "Participant in CT MERS Plan" with "Yes" and "No" options, where "No" is selected. At the bottom of the form are "Cancel" and "Save and Continue" buttons.

6. Click **Save and Continue**

The Pension Plan Details page will display.

A screenshot of the "Pension Plan Details" page in the system. The page header shows "CT FHMS" and a user profile for "TESTTEST@TOWNOFABC.GOV". The main content area displays a table with the following data:

Pension		
Town	Town of ABC	
Year	2020 - 2019	
Status	In Progress	
Participant in CT MERS Plan	No -	
# of Single Employer Defined Benefit Plans	1 - *	
# of Defined Contribution Plans	1 - *	

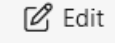
At the bottom of the page, there is a section titled "SINGLE EMPLOYER DEFINED BENEFIT PLAN" with two buttons: "Maintain Plans" and "Enter Plan Details".


Fiscal Health Monitoring System

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Job Aid



You can click  at the top right of the page to edit the number of plans and the CT MERS Plan information.


**Note:* At any time, you may click the  button on the bottom right corner of the form to save your data. We recommend saving often.

Entering Existing Pension Plan Information:

7. To add details for an existing Pension Plan, Click 


The Single Employer Defined Benefit Plan detail page will display.

8. Select a Pension Plan by clicking the drop down arrow on the right side of the page

Single Employer Defined Benefit Plan detail 

Year 2020	Entity Type TOWN	Entity Name Town of ABC
--------------	---------------------	----------------------------

Start Date **July 01, 2019** End Date **June 30, 2020**

Plan Name
Pension Plan 2 

- Pension Plan 2
- Pension Plan 3
- Pension Plan 1

All Eligible Employees Yes No
General Town Yes No

9. Enter the information in each field

Use the Pension Tile Manual if you need help finding accurate information for each field.

Fiscal Health Monitoring System

Pension Tile

Job Aid



10. Click **Save**

You will be returned to the Pension Plan Details page.

11. Return to Step 7 for every existing plan

New Pension Plans:

12. If you have a new Pension Plan, Click **Maintain Plans**

13. To add a new Pension Plan, Click **Add New Plan**

The screenshot shows a web interface titled "Pension Plans" with a close button in the top right. Below the title is a table with four columns: a sorting icon, "Sequence #", "Plan Name", and "Status". The table contains three rows of data. A button labeled "Add New Plan" is located in the top right corner of the table area and is highlighted with a red border.

↑≡	Sequence #	Plan Name	Status
	1	Pension Plan 1	Active
	2	Pension Plan 2	Active
	3	Pension Plan 3	Active

1 - 3

The Add Pension Plan Edit page will display.

Fiscal Health Monitoring System Pension Tile Job Aid



14. Enter the New Plan Name

The screenshot shows a dialog box titled "Add Pension Plan Edit". It contains the following fields:

- Entity Type: TOWN
- Entity Name: Town of ABC
- Plan Name: (This field is highlighted with a red border)
- Status: Active (with a dropdown arrow)





At the bottom of the dialog, there are "Cancel" and "Save" buttons.

15. Click

The Pension Plans page will display.

16. Click on the top right corner to return to the Pension Edit page or Click to enter another new Pension Plan

The screenshot shows a table titled "Pension Plans". The table has the following columns: Sequence #, Plan Name, and Status. There are four rows of data. The "Add New Plan" button is highlighted with a red box, and the close button in the top right corner is also highlighted with a red box.

	Sequence #	Plan Name	Status
	1	Pension Plan 1	Active
	2	Pension Plan 2	Active
	3	Pension Plan 3	Active
	4	New Pension Plan 1	In Active

1 - 4

17. Return to Step 7 to enter the detail information for the New Pension Plans

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Editing Pension Plan details already entered:




18. At the Pension Plan Details page, click  next to the plan you want to edit

Annual Financial Data Reporting (AFDR) \ Pension \ Pension Plan Details

of Single Employer Defined Benefit Plans 1 - *

of Defined Contribution Plans 1 - *

SINGLE EMPLOYER DEFINED BENEFIT PLAN Maintain Plans Enter Plan Details ↗


	Plan Name	All Eligible Employees	Town	Police	Fire	Non Certified Board of Education	Other	Brief Description (if other)	Closed to New Members	Volunteer Plan	
	Pension Plan 2	Y	N	N	N	N	N		N	N	
	Pension Plan 3	Y	N	N	N	N	N		N	N	
	Pension Plan 1	Y	N	N	N	N	N		N	N	

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- Change/Add information to the plan and click Save on the bottom right bottom of the page.
- You can click Delete to remove the entire entry. This will put the plan back into the “Enter Plan Detail” drop down list. You can return to Step 5 to re-enter information for the deleted plan.

Changing the Active Status of a Pension Plan:

19. Click Maintain Plans

20. Click  next to the plan you want to edit

Fiscal Health Monitoring System

Pension Tile

Job Aid



21. Select the desired status for the Pension Plan by clicking the drop down arrow on the right side of the page

A screenshot of a web form titled "Add Pension Plan Edit". The form contains several input fields: "Entity Type" with the value "TOWN", "Entity Name" with the value "Town of ABC", and "Plan Name" with the value "Pension Plan 3". Below these is a "Status" dropdown menu currently set to "Active". A red box highlights the downward-pointing arrow on the right side of the status dropdown. Below the dropdown, a scrollable list shows "Active" and "Inactive" as options.

22. Click 

23. Click  on the top right corner to return to the Pension Plan Details Page

24. Entity Certification:

Click the checkbox- *"I certify that the information that has been entered into this form is accurate to the best of my knowledge"*

A section titled "Entity Certification" with a dark blue header. Below the header is a light yellow background containing a checkbox (highlighted with a red box) and the text: "I certify that the information that has been entered into this form is accurate to the best of my knowledge." Below this text is a smaller line of text: "Please allow 10 business days to process this form from date of receipt. If you have any questions, please contact us at OPM-FHMS@ct.gov."

**Note:* Only the primary contact has the ability to certify the data. If you are not the primary, you can save the information and have your primary go into the system and certify the data.

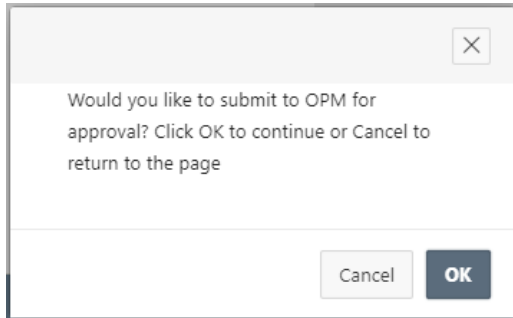
Fiscal Health Monitoring System

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A message will display – *Would you like to submit to OPM for approval? Click OK to continue or Cancel to return to the page.*



25. Click **OK**

A page displays that shows you the status of your submission.

Annual Financial Data Reporting (AFDR) \ Pension

Search...

Town of ABC
Test Town

Year ↓	Status	Entity Certification	Auditor Confirmation	OPM Approval
2020	In Progress	No	No	No

1 - 1

26. Email Notifications:

You will be sent an email from OPM-FHMS@ct.gov letting you know that you have entered and certified your data and it is ready to be looked over by OPM.

End of Process

Fiscal Health Monitoring System Pension Tile Job Aid



To return to the Pension Edit page – Click Year

Annual Financial Data Reporting (AFDR) \ Pension

Search...


Town of ABC
Test Town

Year ↓	Status	Entity Certification	Auditor Confirmation	OPM Approval
2020	In Progress	No	No	No

1 - 1

The Pension Edit page will display.

To get back to the main screen:

Click  at the top left corner of the page

The Main Menu will display