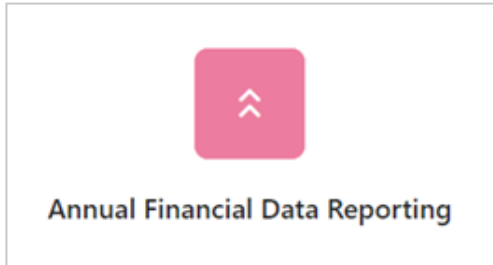


# Fiscal Health Monitoring System Pension Tile – FYE 2020 Job Aid

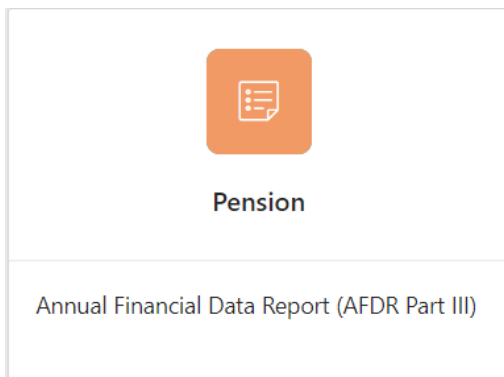


## 1. At the Main Menu – Select Annual Financial Data Reporting Tile

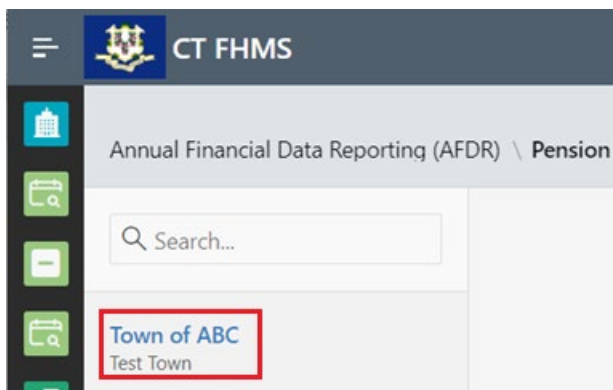


Annual Financial Data Reporting page displays.

## 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 – FYE 2020 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, 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" (2020), "Entity Type" (TOWN), and "Entity Name" (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 a red box around its input fields. The 2019 column has a radio button for "No" selected. At the bottom are "Cancel" and "Save and Continue" buttons.

Year	2020	Entity Type	TOWN	Entity Name	Town of ABC
Beginning Date:	July 01, 2019	End Date:	June 30, 2020		
		2020		2019	
# of single employer defined benefit plans		<input type="text"/>			
# of defined contribution plans		<input type="text"/>			
Participant in CT MERS Plan		<input type="radio"/> Yes	<input checked="" type="radio"/> No		

6. Click **Save and Continue**

The Pension Plan Details page will display.

A screenshot of the "Pension Plan Details" page in the CT FHMS system. The page shows a summary of the pension plan information. At the bottom, there are buttons for "Maintain Plans" and "Enter Plan Details".

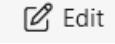
Town	Town of ABC
Year	2020 - 2019
Status	In Progress
Participant in CT MERS Plan	No -
# of Single Employer Defined Benefit Plans	1 - *
# of Defined Contribution Plans	1 - *


# Fiscal Health Monitoring System

## Pension Tile – FYE 2020

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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 – FYE 2020  
Job Aid**



10. Click 

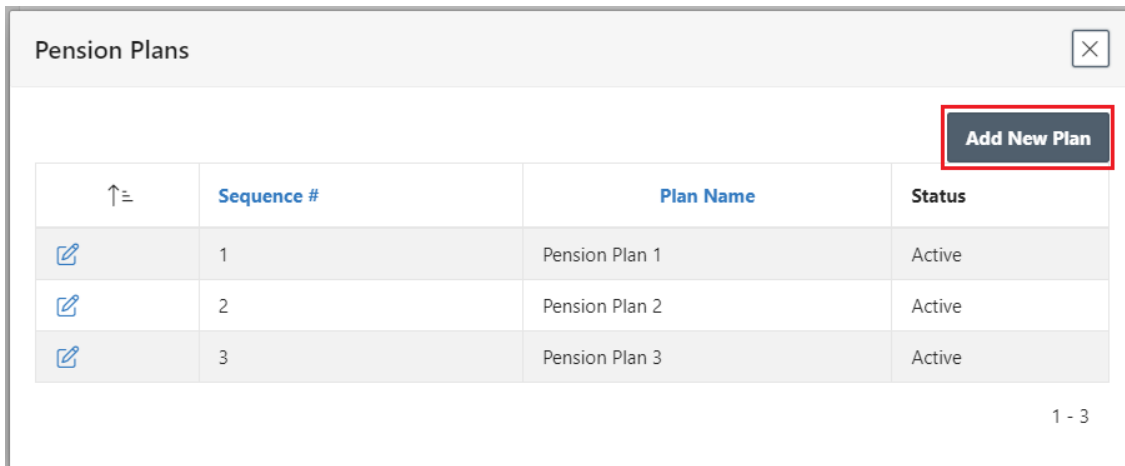
You will be returned to the Pension Plan Details page.

11. Return to Step 7 for every existing plan




**New Pension Plans:**

12. If you have a new Pension Plan, Click 

13. To add a new Pension Plan, Click 



The screenshot shows a web interface titled "Pension Plans" with a close button in the top right corner. Below the title is a table with four columns: a sorting icon, "Sequence #", "Plan Name", and "Status". The table contains three rows of data. To the right of the table is a button labeled "Add New Plan", which is highlighted with a red border. At the bottom right of the table area, it says "1 - 3".

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

The Add Pension Plan Edit page will display.

# Fiscal Health Monitoring System Pension Tile – FYE 2020 Job Aid



## 14. Enter the New Plan Name





A screenshot of a web application dialog box titled "Add Pension Plan Edit". The dialog has a close button (X) in the top right corner. It contains two input fields: "Entity Type" with the value "TOWN" and "Entity Name" with the value "Town of ABC". Below these is a "Plan Name" field, which is highlighted with a red rectangular border. Underneath is a "Status" dropdown menu currently set to "Active". At the bottom left is a "Cancel" button and at the bottom right is a "Save" button.

## 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

A screenshot of a web application table titled "Pension Plans". The table has a close button (X) in the top right corner. Below the title is an "Add New Plan" button, also highlighted with a red border. The table contains four rows of data. The first three rows have "Active" status, and the fourth row has "In Active" status. Each row has a blue edit icon in the first column.

	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	

[Download](#)

- 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

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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 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](mailto: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.

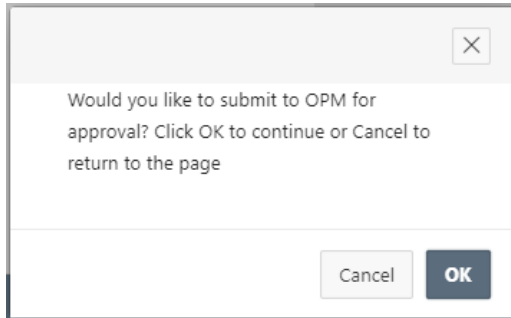
# Fiscal Health Monitoring System

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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 

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](mailto: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 – FYE 2020 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