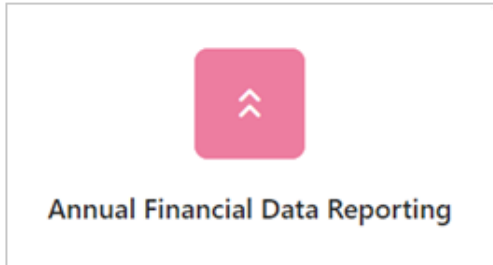# Fiscal Health Monitoring System
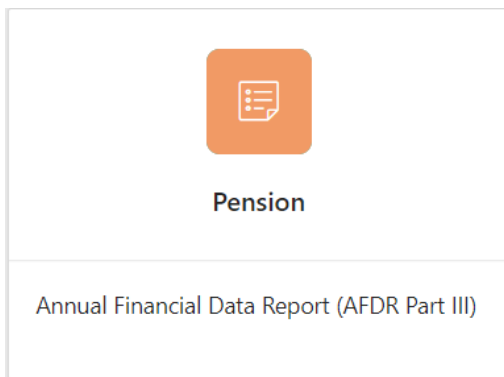# Pension Tile
Job Aid

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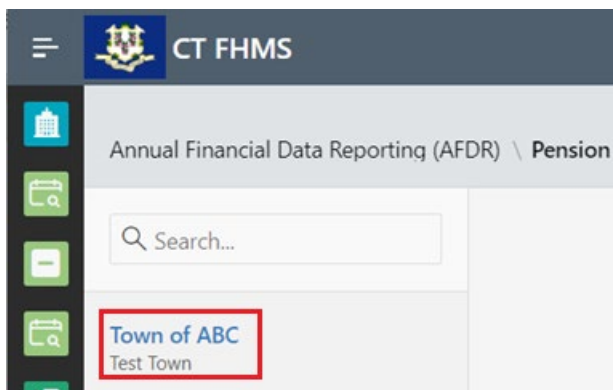

   Annual Financial Data Reporting page displays.

2. **Select Pension Tile**

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

   The Create button will display.

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 municiaplity has for the current fiscal year, and if your municipality participates in the CT MERS Plan**

6. **Click** Save and Continue

The Pension Plan Details page will display.

You can click   [✐ Edit]   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   [Save]   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** [Enter Plan Details]

   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	Entity Type	Entity Name
2020	TOWN	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.

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

	Pension Plans		☒
			Add New Plan
↑≡	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.

14. Enter the New Plan Name

15. Click [Save]

The Pension Plans page will display.

16. Click [×] **on the top right corner to return to the Pension Edit page or Click** [Add New Plan] **to enter another new Pension Plan**

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

Editing Pension Plan details already entered:

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

- 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

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

22. **Click** Save

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"*

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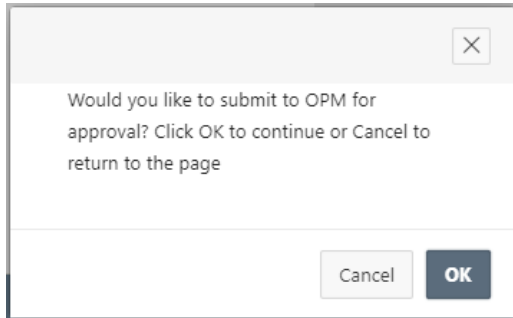
A message will display – *Would you like to submit to OPM for approval? Click OK to continue or Cancel to return to the page.*

25. **Click** OK

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

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

To return to the Pension Edit page – Click Year

Annual Financial Data Reporting (AFDR) \ **Pension**				

Q Search…
Town of ABC   Test Town

Pension				
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   [CT FHMS]   at the top left corner of the page

The Main Menu will display