

WELCOME TO CERF WEB FORMS!

Last year we created CERFweb, which provided counties with a secure, web-based application for uploading payroll reports directly to CERF. We had also planned to later add a second application to CERFweb giving counties the opportunity to complete and submit certain forms to CERF via this same secure website. We are very pleased that, beginning January 2010, this second application will be ready for counties to submit the following form types to the CERF Administrative Office (“CAO”):

- Form 1 – Enrollment Form
- Form 2N – Termination Non-Vested Form
- Form 4 – Change of Information Form

***Note:** Any required attachments can be scanned and sent as an attachment with the appropriate form online or faxed or mailed to the CAO. When sending the IDs, please note your county name and county number at the top of the page with the ID to help us get this information to the appropriate Benefits Specialist. However, if CAO already has on file an Enrollment Form ID for an employee who previously worked for your county, it will not be necessary to send the Enrollment Form ID again.*

Overview

It is strongly recommended that, if there are multiple users in your county who are authorized to upload payroll reports and submit forms to CERF, they are each assigned a separate user ID and password for security purposes. If you have already been set up as a user to upload payroll reports, you will log into CERFweb using the username and password you were previously given. In addition, you will now need to be set up with a new, second User ID and Password in order to log into Web Forms because the application for processing forms extracts information from our proprietary database. To request a User ID and Password for Web Forms, please contact Cynthia Campbell at our office (1-877-632-2373, Ext. 4120). If you are not currently a user for payroll report uploads, Cynthia will also be able to set you up for the first level of security on CERFweb in addition to the second level of security which enables you to access Web Forms. After you are set up, if you forget either of your passwords, Cynthia will be able to reset your CERFweb password. A Benefits Specialist can only reset your Web Forms password. If you forget either your username for uploading payroll reports or your User ID for Web Forms, Cynthia can provide that information to you.

In order to use this software, you must make sure your pop-up blocker is not activated for this CERFweb site. If a message appears regarding pop-up blockers, make sure to select “Always allow pop-ups from this site.”

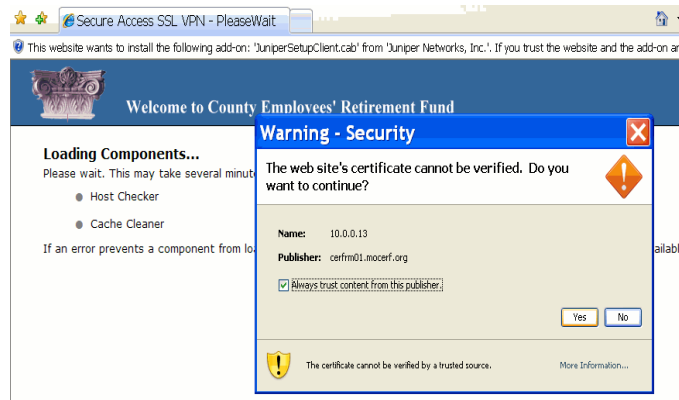
Finally, you will need to keep a copy of any forms submitted to CERF. Therefore, be sure to use a computer that is connected to a printer.

Instructions for Accessing Web Forms

- Open your Internet browser
- Go to the CERF web site, www.mocerf.org
- Click on the Web Forms link indicated in the second text box

The following process will need to be run initially on any computer being used for transmitting forms. (If your computer was already set up to submit payroll reports, this step has already been taken care of, so you may skip Instruction #1.)

1. After clicking on the “Web Forms” link, a new window will open with a security warning. Check the box, “Always trust content from Juniper Networks, Inc.” and click “Yes.”



The next box asks if you want to run the application. Click on “Run.” The appropriate application will be downloaded.

Note: If a firewall message pops up, click “Allow.”



The initial setup has been completed at this point.

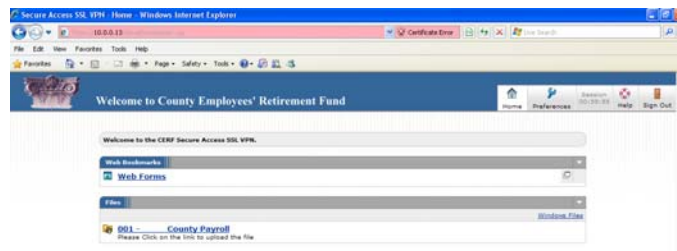
2. The next screen will appear with, “Welcome to CERFweb, Secure Access SSL VPN.”



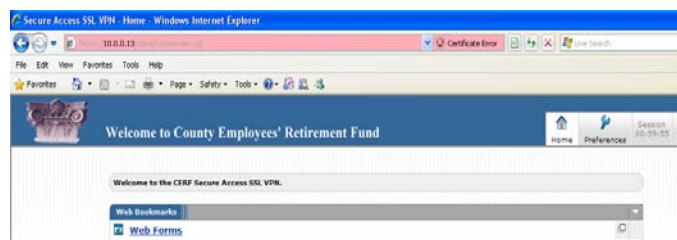
- Enter your Username as provided previously by CERF for payroll report uploads and your password. (If you were not previously authorized to upload payroll reports, type the Username assigned to you by Cynthia for the first level of security.)
- Select “County Employees” as the Realm
- Click “Sign In”

3. At one of the next screens, click on “Web Forms.”

Note: If you are already a user previously set up to submit payroll reports to CERF, the following screen will appear, giving you the options to either access Web Forms or Payroll reports:



Note: If you are NOT already a user previously set up to submit payroll reports to CERF, this screen will appear instead, giving only the option to access Web Forms:



On the “Welcome to Web Forms” screen, type in your Web Forms User ID (which contains the letter “F”) and Password assigned by Cynthia at CAO.

Click “Login.”

Note: When you first log in to Web Forms, you should immediately change your password by clicking on the tab, “User Preferences.” To change your password, follow the instructions provided below, under the tab description, “User Preferences.”

- Once in Web Forms, there will be four tabs. Each tab is described below:

Main Menu -

1st - Enter the participant’s Social Security Number (“SSN”). *This is your employee’s SSN, whether a new employee or an existing employee.*

2nd - Select the appropriate option for the participant. *Click on which type of form you wish to submit to CERF (i.e. Enrollment, Termination, or Change Info). When you click on the type of form, you will be directed to the next tab, “Participant Info.”*

Note: *At the bottom of the Main Menu tab you can also see the status of forms previously sent by your county, under “Forms Submitted” (not yet processed), or “Forms Processed.” By clicking on the form types under each status headings, you can view the details of each form sent, as illustrated below. This screen also enables you to print another copy of the form submitted, if necessary.*

Select	SSN	First Name	Last Name	Date of Birth	Position	Date of Hired	Submitted User	Submitted Date	Print
Select	XX-XX-6789	Sam S.	Baker, Jr.	12/2/1975	Computer Tech	5/12/2009		12/29/2009	Print
Select	XX-XX-8553	Joe L.	Simmons	12/8/1976	Deputy Sheriff	12/12/2009		12/29/2009	Print

Participant Info –

One of the following screens will appear for completion, depending on which form type you choose on the Main Menu tab. If the employee is, or was previously, an employee in your county, some of the information CERF already has on file will appear on the form.

Enrollment Form

County Employees' Retirement Fund
CERFweb for Missouri County Clerk Offices

Welcome To County From A

Main Menu Participant Info County Info User Preferences

Enrollment - Form 1

For tele.#, use numbers only without - or /
For dates, use mmdyyyy

Participant Information SSN : XXX-XX-1111

* First Name: Initial: * Last Name: Suffix:
 * Address Line 1: Address Line 2: * City: * State: Missouri
 * Zip Code: Work Phone No: Home Phone No: Cell Phone No:
 * Date of Birth: * Gender: * Marital Status: * County of Employment: County
 * Required Field

Employment Information Enter data and when finished, click 'Submit & Print' to save.

* Date of Hire: * CERF Eligibility Date: * LAGERS:
 If difference in Original Date of Hire and CERF Eligibility Date, please explain:
 Employee Contribution%: 0 County Contribution%:
 * Current Employment Status: * Employee's Position: * Department: Select Department
 * Has this employee previously held another part-time or full-time county position?
 Yes No * If Yes, Which County: County * Date of Termination:
 ATT REQUIRED: Copy of employee's driver's license OR Copy of employee's Social Security Card OR state-issued ID AND birth certificate. * Required Attachments will be Sent via:
 Sending Required Attachments Online Browse... Browse...
 Submit & Print Clear All Back

Termination Form

County Employees' Retirement Fund
CERFweb for Missouri County Clerk Offices

Welcome To County From A

Main Menu Participant Info County Info User Preferences

Termination - Form 2N

For dates, use mmdyyyy

Participant Information Edit Details SSN: XXX-XX-4845

First Name: Last Name: Address Line 1: Address Line 2:
 John B. Baker, Jr. 3589 E. Dry Creek Apt F
 City: State: Zip Code: Home Phone No:
 Kirksville Missouri 63501 573-748-5690
 Cell Phone No: Gender: Date of Birth: Marital Status:
 123-456-7890 Male 9/9/1985 Married
 County of Employment: * Date of Hire: * CERF Eligibility Date: * LAGERS:
 County 12/12/2005 12/26/2005 Yes
 * Required Field

Contribution Information Make changes as needed. Click 'Submit & Print' to save.

* Date of Term/Ineligibility: * Department: Recorder * Position: Comp Tech
 12/12/2009
 * Reason for Termination (Select appropriate reason below):
 Death
 New position: County of Employment:
 * Employee Pre-Tax Contributions: * Employee After-Tax Contributions: * County Contributions:
 12.23 1,311.23 1,111.23
 Submit & Print Clear All Back

Note: If you are completing a Termination Form and any of the information that automatically displays is incorrect, click on “Edit Details” in the top blue bar of the Participant Information screen, which will automatically redirect you to a Change Info - Form 4 screen to fully complete a change of information form to submit to CERF. After you click on the “Submit & Print” button on the bottom of the Change Info screen, you will return to the Termination Form to continue completing the form.

Change Info Form

County Employees' Retirement Fund
CERFweb for Missouri County Clerk Offices

Welcome To _____ From _____
County

Main Menu Participant Info County Info User Preferences

Change info - Form 4

For tele #, use numbers only without - or /
For dates, use mmdyyy

Participant Information SSN : XXX-XX-4845

* Change in Participant Info Change in Employment Info Change to Both

* First Name: Initial: * Last Name: Suffix:

* Address Line 1: Address Line 2: * City: * State:

* Zip Code: Work Phone No: Home Phone No: Cell Phone No:

* Date of Birth: * Gender: * Marital Status: * County of Employment:
 Male Married

* Required Field

Employment Information Make changes as needed. Click 'Submit & Print' to save

* Date of Hire: * Department: * Employee's Position: * Effective Date:
 Select Department

* Employee Contribution %: * County Contribution %: * Employment Status: * LAGERS:

Additional Information

Check the box if the updated participant address also affects beneficiaries who resided at the participant's previous address
 Must Fax/Mail/Scan copy of marriage certificate, if reporting change in status.

* Required attachment will be sent via:

Sending Required Attachment Online Browse...

Submit & Print Clear All Back

After you have completed all required information on the form, click the “Submit & Print” button at the bottom of the screen to print the form as submitted to CERF so you can retain a copy for your files.

The following will appear once you select "Submit and Print":

The record has been successfully posted.

Version 5.2
FORM 1 Close Window
ENROLLMENT

The County Clerk completes and signs this form upon an employee's commencement of county employment in an eligible position. The employee IS NOT required to sign this form. Proof of identity must accompany this form (see Required Attachments section below).

Form Submitted User: [User] h Form Submitted Date: 4/12/2010 9:33:23 AM

PARTICIPANT INFORMATION

Social Security Number: XXX-XX-1111 County of Employment: County
 First Name: Joe S Last Name: Daker, Jr.
 Address1: 1526 creek Dr Address2:
 City: Jeffersoncity State: Missouri Zip: 65109
 Work Position: Cell Phone: 123-456-9878
 Gender: Date of Birth: 12/12/1970

LAGERS: Yes

ee and cannot exceed 4%) 2

Yes

s the date of termination? 12/31/2010

Required Attachment will be sent Via : Mail

Once the form has been submitted to CERF, you may go back and view it on the Main Menu tab under the "Forms Submitted" section at the bottom of the page, by clicking on the appropriate form type. In the next window, all forms not already processed by CERF will appear in rows, where you can either view them and/or make changes to the already-submitted form.

	SSN	First Name	Last Name	Date of Birth	Position	Date of Hired	Submitted User	Submitted Date
Select	XXX-XX-6789	Sam S.	Baker, Jr.	12/2/1975	Computer Tech	5/12/2009		12/29/2009
Select	XXX-XX-8553	Joe L.	Simmons	12/8/1976	Deputy Sheriff	12/12/2009		12/29/2009

Click on "Select" adjacent to the form you wish to view. The details of your previously submitted form will appear for viewing. If you wish to print another copy of any of the forms displayed, simply click on "Print" adjacent to the form you wish to reprint. To change the information previously submitted, simply make the changes directly on the form you are viewing, click on the "Submit & Print" button on the bottom of the page. **BE SURE TO DESTROY THE PRINTED COPY OF THE FORM YOU PREVIOUSLY SUBMITTED AND REPLACE IT WITH THE COPY OF THE RECENTLY CHANGED FORM.** Note: Forms listed under the heading "Forms

Processed” may no longer be changed. If a form with incorrect information has already been processed, please call a Benefits Specialist at the CERF Office ASAP.

County Info – (Currently Under Construction)

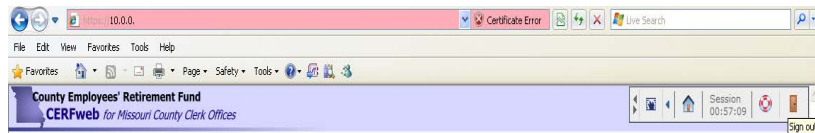
User Preferences – *This tab enables you to change your password and email address (for Web Forms only). After receiving your initial User ID and password from Cynthia, you should immediately change your password the first time you access Web Forms. Passwords should be 8 alphanumeric characters, including at least one number and at least one of the following special characters: # _ \$*



The screenshot shows the 'User Preferences' tab selected in the navigation bar. Below the navigation bar, there are two sections:

- Change your password**: This section contains three text input fields labeled 'Old Password', 'New Password', and 'Re-enter new Password'. Below these fields is a 'Submit' button.
- Change your e-mail address**: This section contains two text input fields labeled 'New Email' and 'Re-enter new Email'. Below these fields is a 'Submit' button.

When you are finished submitting forms to CERF, click on the “door” icon (sign out”) at the top right-hand corner of your screen and close your Internet browser.



For technical questions regarding log-in, contact Cynthia Campbell (1-877-632-2373, Ext. 4120). For questions regarding forms completion, contact a Benefits Specialist (1-877-632-2373).