# PASS WEBSITE UPGRADE



## Overview

The sections below highlight some of the important upgrade features and tips in the Pension Annual Statement System (PASS) upgrade release on 12/15/2014. Before using the upgraded site, it is highly recommended to review the upgrade information provided in this document. This is not intended to be an all-inclusive list, but does provide an overview of important changes to be aware of when using the new site. The Financial pages and Interrogatories are not mentioned in this document as those pages function primarily the same as before. Only small modifications were made to those pages.

## Browser Compatibility

Recommended browsers to use with this site are:

- Internet Explorer 9 or higher. Note: compatibility view should be turned off when using this site with Internet Explorer. If you notice menu item popups out of alignment or not centered, this is likely the issue. Please refer to this link for how to change the browser settings: http://windows.microsoft.com/en-us/internet-explorer/products/ie-9/features/compatibility-view
- Google Chrome.
- Firefox.

Screen resolution of 1024 by 768 is the minimum allowed. **Note: the higher the resolution the more information that will be available on each page to avoid scrolling. This is especially useful for the datasheet pages.*

It is recommended to allow popups from the PASS website. There are popup information messages that are displayed from time to time throughout the annual statement filing process. *Please refer to your browser's documentation for how to allow popups for this site.*

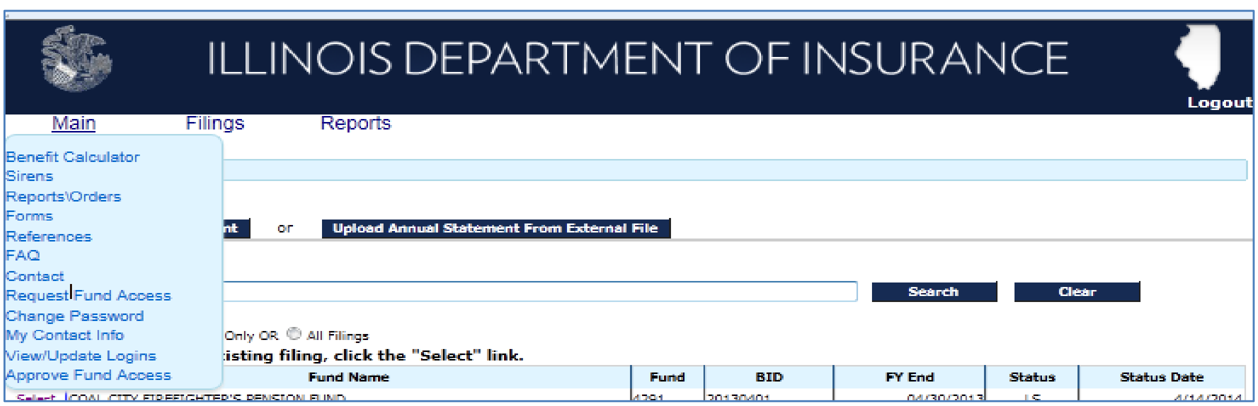
This site is not intended for use on a mobile phone.

## Login

- Users will utilize their existing credentials to log into the site at https://insurance2.illinois.gov/applications/pension/default.aspx.
- The same security access is applied as before with the upgraded PASS system. *Note:* ***It is highly recommended to always logout and close your browser when you are finished using the site****. The site will automatically time out after 20 minutes of no activity. The screen will display the standard error page forcing a new login if the website has timed out.*
- Users should never share login credentials and each user should be registered with their own login.

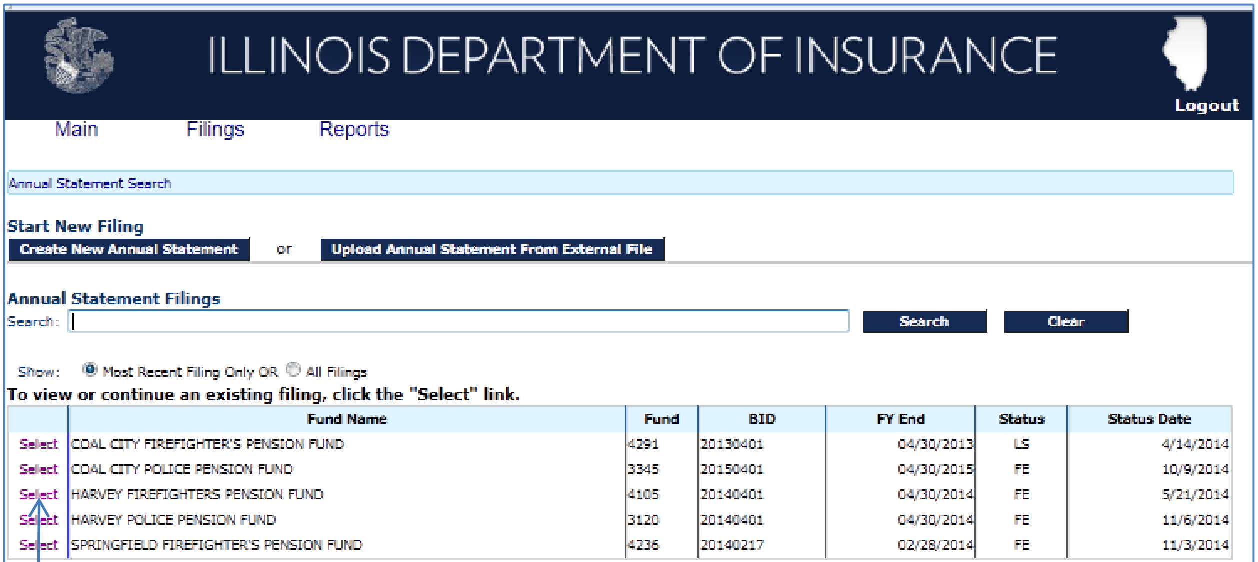
## Navigation Changes

- The left side menu has been removed from the PASS site to allow for more content area horizontally on the web pages in the site. The left menu has been replaced by a new menu underneath the page header.
- Menus and menu links are visible\enabled\disabled depending on the user's existing security access and whether an annual statement has been loaded from the Annual Statement Search page.
- After successful login the Benefit Calculator, Sirens, Reports\Orders, Forms, References, FAQ, Contact, Request Fund Access, Change Password, My Contact, View/Update Login, and Approve Fund Access pages will be available under the 'Main' menu item. ***See Below:***



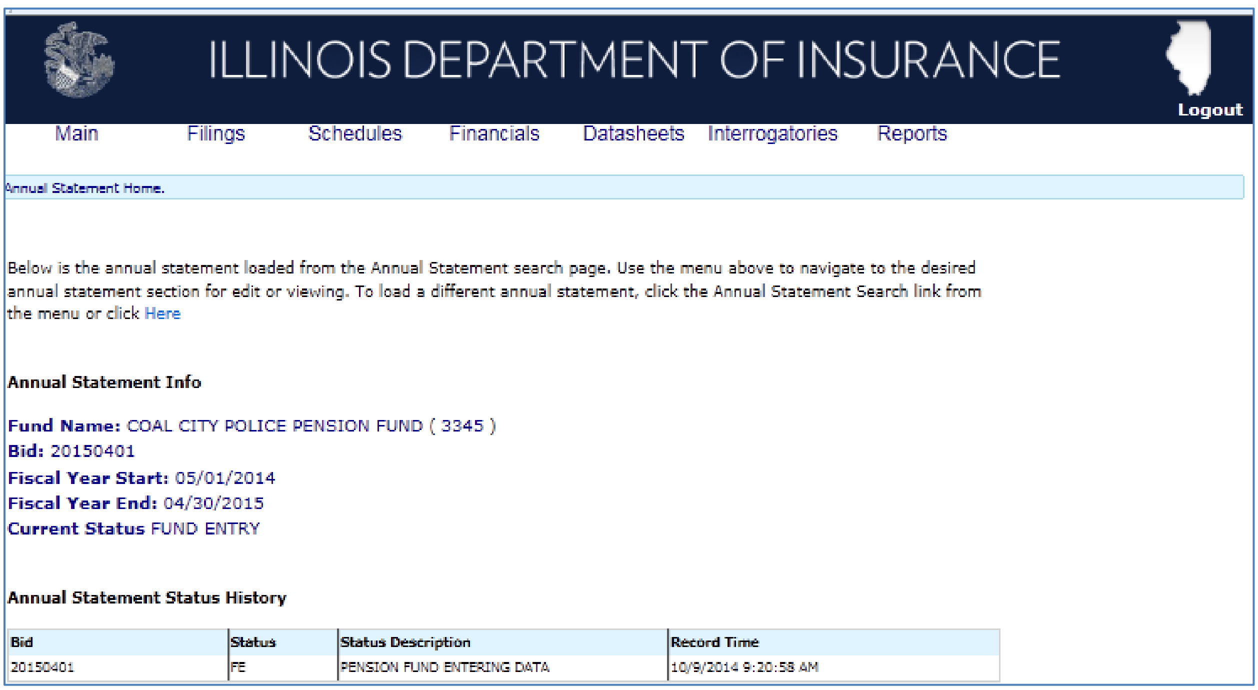

- The remaining menu items for an external user will be enabled and\or displayed after selecting an annual statement from the Annual Statement Search Page and existing user permissions. This page is displayed to external users after logging into the system. ***See the illustration on the next page.***

1. After successful login:




| | Fund Name | Fund | BID | FY End | Status | Status Date |
|---|---|---|---|---|---|---|
| Select | COAL CITY FIREFIGHTER'S PENSION FUND | 4291 | 20130401 | 04/30/2013 | LS | 4/14/2014 |
| Select | COAL CITY POLICE PENSION FUND | 3345 | 20150401 | 04/30/2015 | FE | 10/9/2014 |
| Select | HARVEY FIREFIGHTERS PENSION FUND | 4105 | 20140401 | 04/30/2014 | FE | 5/21/2014 |
| Select | HARVEY POLICE PENSION FUND | 3120 | 20140401 | 04/30/2014 | FE | 11/6/2014 |
| Select | SPRINGFIELD FIREFIGHTER'S PENSION FUND | 4236 | 20140217 | 02/28/2014 | FE | 11/3/2014 |

2. To work with an existing annual statement, select the fund from the above search list by clicking the 'Select' link next to the annual statement for viewing. The new "Annual Statement Home" page is displayed below:

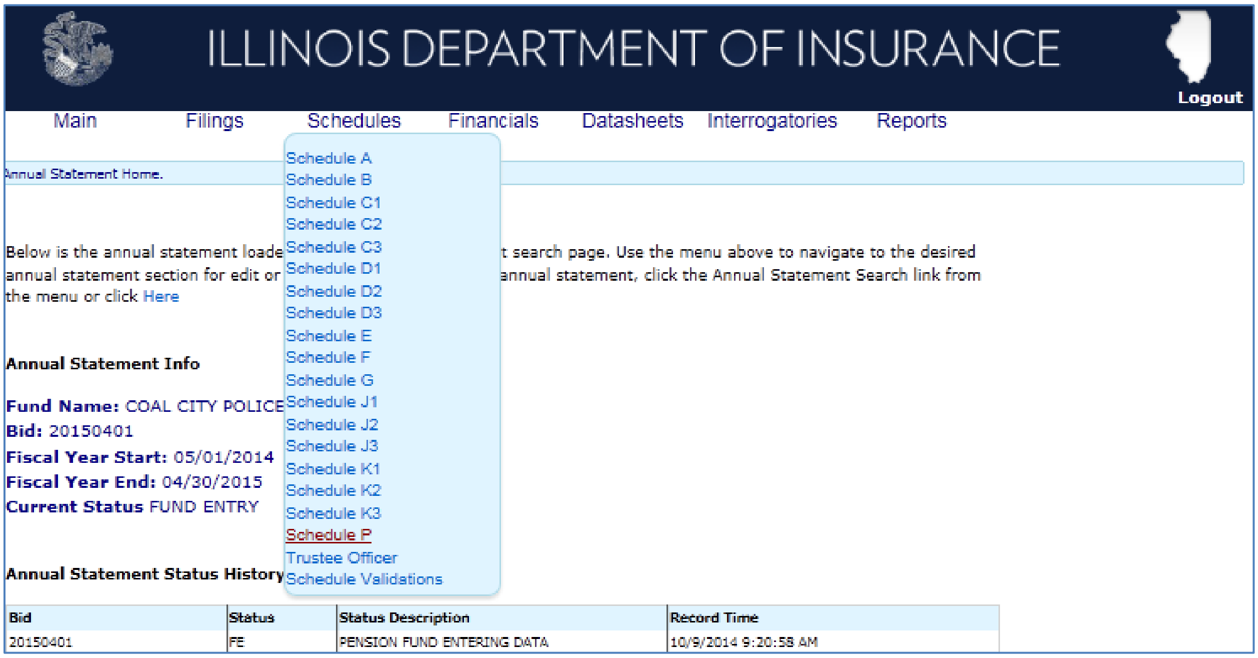



| Bid | Status | Status Description | Record Time |
|---|---|---|---|
| 20150401 | FE | PENSION FUND ENTERING DATA | 10/9/2014 9:20:58 AM |

3. Notice the new menu items are now across the top of the page after loading the annual statement from step 2. The menu item categories should look familiar to the previous versions of PASS as they have not changed as a result of this upgrade.

   To access a specific area of the annual statement that was loaded in step 2, simply hover your mouse pointer over the one of the menu items and click the page link available.

For example, to access the Schedule P page, hover the mouse pointer over the 'Schedules' menu item (*the menu items will pop open*) and click the *Schedule P* link while the mouse pointer is hovering within the menu popup area. When the mouse pointer is moved off the menu popup, it will close. All Annual Statement related pages are accessed in the same way. ***See the next page for an example:***




To load a different Annual Statement to work with, always return to the Annual Statement Search page via the menu. The Annual Statement Search page is accessed from the "Filings" menu item.

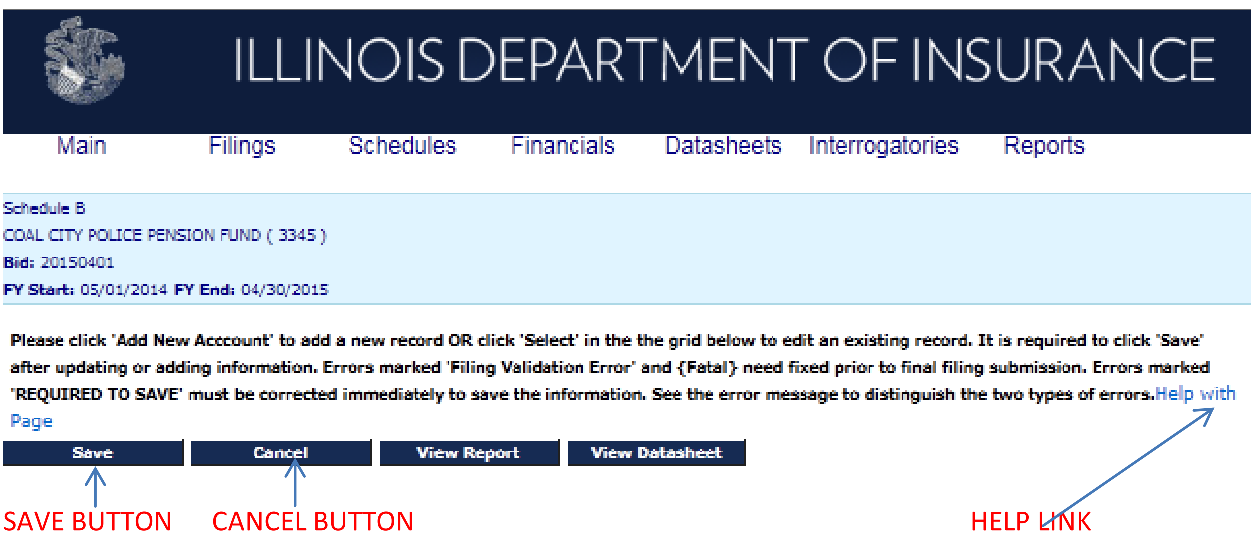
Once an Annual Statement is loaded you will be able to navigate to any Annual Statement page from any other annual statement page using the Menu. The page header will indicate the fund, fund number, and bid for the Annual Statement currently loaded for the Annual Statement related pages. The same rules apply as to a statement's status and being able to edit information. The Annual Statement must be in FE status and the user must hold the correct permissions to edit data.

## Schedule Page Changes and Tips (Note that Schedule P has its own section in this document)

When using the upgraded site, please note the following when using the schedule pages:

1. Please read the page instructions when available at the top of the page before using the page. There is an additional help page link available on each schedule page with additional information and the validation rules applicable to each respective schedule.
2. When a "Save" button is available on a page, **ALWAYS REMEMBER TO CLICK SAVE** for the system to accept the changes you made.
3. There is now a "Cancel" button on the schedule web pages. This is to be used if you enter information but decide NOT to save the data to the database. *DO NOT CONFUSE THIS COMMAND WITH UNDO. ONCE YOU CLICK SAVE THE DATA HAS BEEN SAVED TO THE DATABASE*. "Cancel" is used before clicking "Save" to put the data back in its original state if desired.
4. Validation Errors are listed in a scrollable box above the data entry area. Please review the validation section of this document for how validation rules work.
5. When clicking new, all the validation rules that must be satisfied for a particular schedule area are displayed so the user will know what is needed before final filing.

Below is a Sample schedule page. *Note that corresponding data sheets have similar buttons and links. They all behave and function the same way.*




## Schedule P Page Changes

The Schedule P page has been changed with this upgrade. The following documentation highlights some of the changes to the page. Please read the page instructions for additional help in entering data on that page. **ALWAYS REMEMBER TO CLICK SAVE to save all information entered or updated on the page.**

- **Member address** is no longer required and has been removed.
- After selecting a record for editing, all necessary data fields are immediately available to enter information. There are no longer "sub tabs" to move to different areas of Schedule P. Every

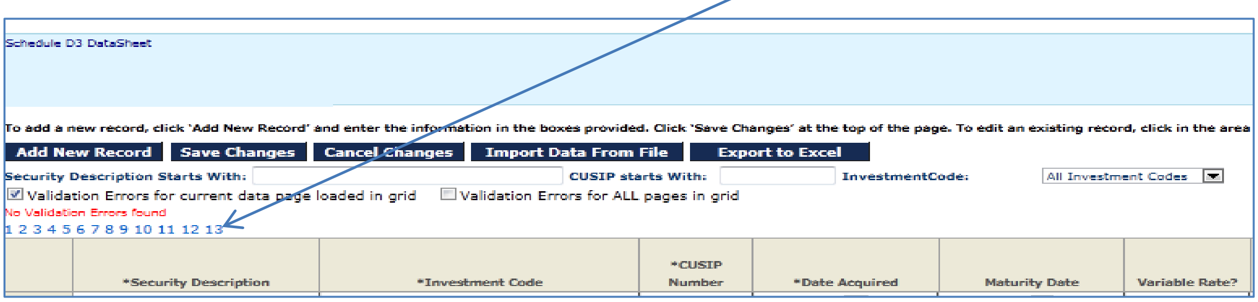
data element that is required is immediately available to enter data after selecting a status for the participant. *Remember to scroll vertically if necessary.*

- The ***Status Class Code*** is a key data element for how the Schedule P page works to edit or add new information. The types of information and validation rules required are dependent on the Status Class Code selected via the combo box.
- Full page post backs have been eliminated for a better user experience. A spinner icon will occasionally be displayed for longer running operations when working with the page.
- Always enter dates in ***mm/dd/yyyy*** format in the new site.
- The page now supports the entry of **multiple statuses** when necessary. When a member has multiple statuses assigned, the user is required to 'Select' the status from the status data grid provided on the page to work with the appropriate Schedule P record after selecting the participant.  To add a second status for a member, click "Add Status", add the information specific to that status, and click "Save".

  *If popups are enabled on the browser, any participant that has multiple statuses will be notified with an informational message.  This message will provide simple instructions on how to work the participant record with multiple statuses on the page after selecting the participants.*
- **SSN** is now masked in the data grid.
- There is now a **Cancel button** on the pages. This is to be used if you enter information but decide not to save the data to the database. *Do not confuse this with Undo.  Once data has been saved to the database, it cannot be undone.  "*Cancel" is used before clicking "Save" to put the data back in its original state if desired.
- The following data elements have been removed from the page as they are not required data elements in the upgraded system.
  - *All related rehire information.*
  - *All related Annual Increase information.*
  - *QILDRO SSN*
  - *Attained age.*

## Datasheet Changes

When the term 'data page' is used below in this section, it refers to this control on the datasheet page. Data is organized in the datasheet by 'data pages' as it was previously..




- The **member address datasheet** is no longer required and has been removed.
- Always enter dates in ***mm/dd/yyyy*** format in the new site.

- **Validation errors** are displayed in a scrollable box above the datasheet grid on each page. There is a control to click through the 'data pages' for each respective datasheet.
- Validation errors are only displayed for the current 'data page' displayed in the grid on each Datasheet page by default. There is an additional check box available to show a full list of errors for all 'data pages' if desired. However, it is recommended to use the default option (as displayed in the above screen shot) for better page performance. Simply click through the page controls above the datasheet grid (if necessary) to move to different 'data pages' to see the validation errors for that respective data sheet.
- Read the page instructions at the top of the page before using the datasheet.
- Remember to click **"Save Changes"** after adding or updating information for a 'data page'. If you update data and move to a different page in the website or click 'Delete' to remove a record and do not click 'Save Changes' the changes will be **lost**. However, it is allowed to update multiple data elements within a 'data page' prior to clicking 'Save Changes'. It is recommended to click 'Save Changes' often when editing data on datasheets.
- VERY IMPORTANT REMINDER: **The Participant Service, Participant Breaks, Participant Benefits and Member Terminations** datasheets are dependent on entering the participant name and participant status first in the upgraded site. Before using these pages, please read the instructions on the top of each page. The "Schedule P" page will allow a user to update all required information for a participant at once if the user prefers that data entry method.
- **SSN** has been removed as a data entry element from the Participant Service, Participant Breaks, Participant Benefits, Member Terminations, and Participant Status datasheets. *SSN is still required on the imports/exports from Excel and text file to relate back to the participant when those processes are performed in the system to move data.*
- **SSN** is masked where possible and is required to select the participant when applicable from a dropdown box.
- There is a **"Cancel" button** now on the datasheet pages. This is to be used if you enter information but decide not to save the data to the database. Do not confuse 'Cancel" with "Undo". Once you click "Save", the data will be saved to the database. "Cancel" must be used before clicking "Save" to put the data back in the original state.

## Trustee and Officer (Board) Page

Trustee and Officer data can only be edited or viewed from the ***Filings > Trustee Officer*** menu item. The corresponding datasheet link for this page has been removed from the "Datasheets" menu. The SSN and address fields have also been removed.

## Validation Rules

### Overview

- **Centralized validation rules** are applied from the "Schedule" pages, the "Datasheet" pages, the "Schedules Validation" page, the "Validate\Submit Filing" page, and the "Financials Validate" page. Each schedule page and datasheet page will have a help link that, if clicked, contains a pdf document with the validation rules listed. Refer to the website and to these links to obtain the relevant rules in the system. Validation rules have changed with this upgrade in the architecture, the messages, and the validation rules performed for each respective area.

There are two "levels" of validation:

- **Pre-Validation\Filing rules** allow records to be saved to the database from a web page.
- **Filing Validation rules** allow the submission of the Annual Statement in the system.
    - **Filing Validation** messages can be further classified into "**Fatal"** errors and "**Warning"** errors.
    - All validation errors except "**Warnings"** must be successfully fixed to file an Annual Statement.

## Key

- **Validation Level:**
    - **Pre-Validation\Filing** - Applies validation when data is saved to the database from a data input screen and is applied during filing. *A user cannot save a record from the website if the rule is violated.*
    - **Filing** – An annual statement filing cannot be completed without the rule being satisfied. However, the validation will allow data to be saved to the database. The rule validation issue is still displayed to the user but does not stop them from saving the data.

**Fatal\Warning:**

- **Fatal –** The annual statement cannot be filed unless the issue is fixed.
- **Warning –** The validation rule is applied, but the user can still file without fixing the issue.