

# Employer Training: RIO Overview



# PERA

Public Employees  
Retirement Association  
of New Mexico

**INVESTED IN TOMORROW.**



**PERA**

## **Employer Guide To RIO Self-Service Reporting**

- Always contact your PERA representative with questions.

# PERA Website



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RIO Login

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FOR MEMBERS

FOR RETIREES

FOR EMPLOYERS

DEFERRED COMPENSATION

NEWS & EVENTS

## Our job is your retirement.



FOR MEMBERS



FOR RETIREES



FOR EMPLOYERS



LIVE STREAMING

Live Streaming of PERA  
Meetings



NEWS & ANNOUNCEMENTS

Upcoming events, new and announcements




DEFERRED  
COMPENSATION

Information about PERA's  
Deferred Compensation Plan

1. Go to the PERA website at [www.nmpera.org](http://www.nmpera.org).
2. Click on the “RIO Login” tab at the top center of the screen.



# Logging in to RIO




Public Employees Retirement Association  
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RIO - Retirement Information Online

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WELCOME TO PERA'S SELF SERVICE WEBSITE



Mountain Stream, Santa Fe Ski Basin  
Photo by Patricia E. Thaxton

For questions concerning membership and retirement:  
1-800-342-3422 (Toll Free) or 1-505-476-9300  
Via email: [pera-memberservices@state.nm.us](mailto:pera-memberservices@state.nm.us)

For questions concerning this RIO Self Service website, including your User ID and password (please include your full name as well as the last four digits of your SSN and your birth date):  
Inside of New Mexico: 1-866-845-9029 (Toll Free)  
Outside New Mexico: 1-505-476-9420  
Via email: [PERA-RIOhelpdesk@state.nm.us](mailto:PERA-RIOhelpdesk@state.nm.us)

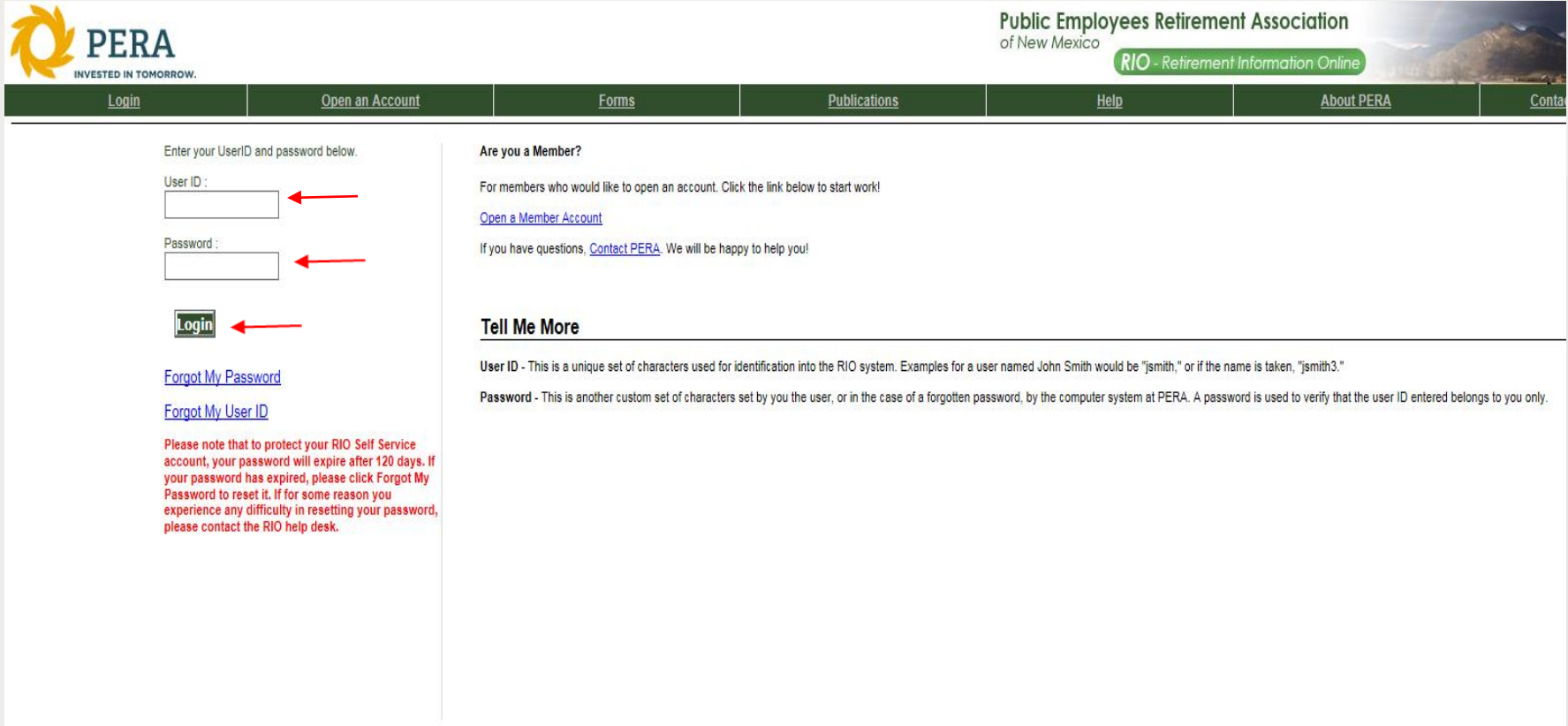
Click the link below to find out if you may have any unclaimed contributions left in your account:  
[Unclaimed Property Search](#)

Additional contact information is available here:  
[Contact Us](#)

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1. Click on the “Login” tab at the top left of the screen.

# Logging in to RIO



The screenshot shows the PERA RIO login page. At the top, the PERA logo is on the left, and the text 'Public Employees Retirement Association of New Mexico' and 'RIO - Retirement Information Online' are on the right. Below this is a navigation bar with links: Login, Open an Account, Forms, Publications, Help, About PERA, and Contact Us. The main content area is divided into two columns. The left column contains a login form with fields for 'User ID' and 'Password', a 'Login' button, and links for 'Forgot My Password' and 'Forgot My User ID'. A red arrow points to each of these elements. Below the links is a note about password expiration. The right column contains a section 'Are you a Member?' with a link to 'Open a Member Account' and a 'Contact PERA' link. Below this is a section 'Tell Me More' with definitions for 'User ID' and 'Password'.

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Enter your UserID and password below.

User ID :

Password :

[Login](#)

[Forgot My Password](#)

[Forgot My User ID](#)

Please note that to protect your RIO Self Service account, your password will expire after 120 days. If your password has expired, please click [Forgot My Password](#) to reset it. If for some reason you experience any difficulty in resetting your password, please contact the RIO help desk.

**Are you a Member?**

For members who would like to open an account. Click the link below to start work!

[Open a Member Account](#)

If you have questions, [Contact PERA](#). We will be happy to help you!

**Tell Me More**

**User ID** - This is a unique set of characters used for identification into the RIO system. Examples for a user named John Smith would be "jsmith," or if the name is taken, "jsmith3."

**Password** - This is another custom set of characters set by you the user, or in the case of a forgotten password, by the computer system at PERA. A password is used to verify that the user ID entered belongs to you only.

1. Enter the login ID and password and then click “Login”. You will go to the Employer Home Page.

**\*\*NOTE** - Your password will expire every 120 days. If you need to reset your password or if your password has expired, you can click on “Forgot My Password”.



# Employer Home Page

The screenshot shows the PERA Employer Home Page. At the top, there is a header with the PERA logo and navigation links. The main content area is divided into several sections. On the left, there is a sidebar with a 'Things to Do' section. The main content area has a 'Messages From PERA' section, a 'Missed reports' section, and a large 'Employer Information' section. At the bottom, there are two sections: 'Your Contacts' and 'Contribution Rates'.

**Annotations:**

- 1:** Points to the 'Messages From PERA' section.
- 2:** Points to the 'Employer Information' section.
- 3:** Points to the 'Work on Reports' link in the sidebar.

**Employer Information Section:**

Employer Name	
Employer Number	
Email Address	
Address	
Deferred	
Deferred Effective Date	
Reporting Frequency	
Phone	
Tax ID Number	
Status	
Status Date	
Service Center	

**Your Contacts Section:**

Employer Reporting 1	
Employer Reporting 5	
Web Administrator	

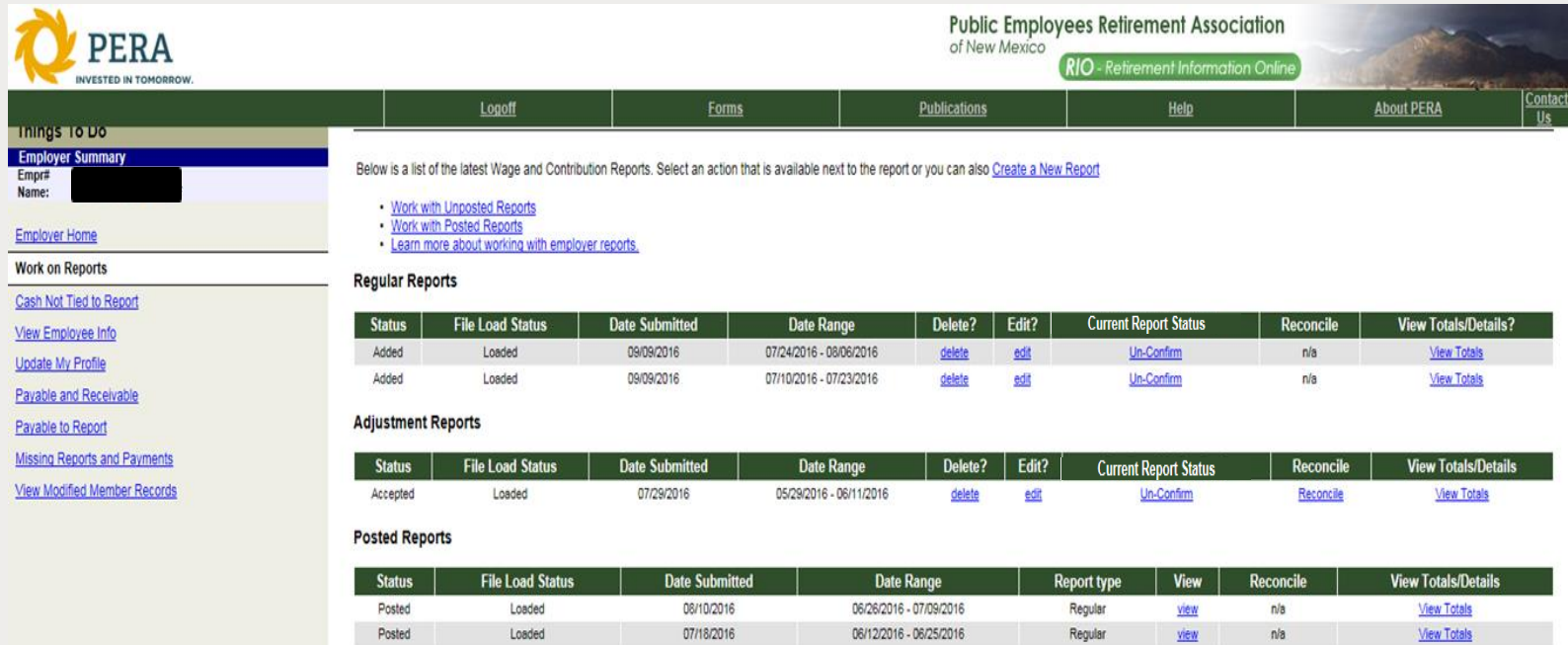
**Contribution Rates Section:**

State Fiscal Year:	7-1-2019 Employee Contribution Rate (Over \$20,000)	through Employer Contribution Rate (Under \$20,000)	6-30-2017 Employee Contribution Rate (Under \$20,000)	Employer Contribution Rate (Under \$20,000)
Municipal Plan 1	8.50	7.40	7.00	7.40
Municipal Plan 2	10.55	9.55	9.15	9.55
Municipal Plan 3	14.55	9.55	13.15	9.55
Municipal Police Plan 5	17.30	18.90	18.30	18.90
Municipal Fire Plan 5	17.70	21.85	18.20	21.85

1. Check “Messages From PERA” for the latest information.
2. The bottom half of the homepage has all of the employer information
3. The “Work on Reports” link on the left hand side will take you to the page where you can manage all of your PERA reports. This includes your regular, adjustment and posted reports.



# Self Service Overview



The screenshot shows the PERA Self Service Overview page. The header includes the PERA logo with the tagline "INVESTED IN TOMORROW." and the text "Public Employees Retirement Association of New Mexico" with a link to "RIO - Retirement Information Online". A navigation bar contains links for Logoff, Forms, Publications, Help, About PERA, and Contact Us.

On the left, a sidebar titled "Things To Do" includes links for Employer Summary, Employer Home, Work on Reports, Cash Not Tied to Report, View Employee Info, Update My Profile, Payable and Receivable, Payable to Report, Missing Reports and Payments, and View Modified Member Records.

The main content area displays a list of the latest Wage and Contribution Reports. Below this list, there are sections for Regular Reports, Adjustment Reports, and Posted Reports, each with a table of report details.

**Regular Reports**

Status	File Load Status	Date Submitted	Date Range	Delete?	Edit?	Current Report Status	Reconcile	View Totals/Details?
Added	Loaded	09/09/2016	07/24/2016 - 08/06/2016	<a href="#">delete</a>	<a href="#">edit</a>	<a href="#">Un-Confirm</a>	n/a	<a href="#">View Totals</a>
Added	Loaded	09/09/2016	07/10/2016 - 07/23/2016	<a href="#">delete</a>	<a href="#">edit</a>	<a href="#">Un-Confirm</a>	n/a	<a href="#">View Totals</a>

**Adjustment Reports**

Status	File Load Status	Date Submitted	Date Range	Delete?	Edit?	Current Report Status	Reconcile	View Totals/Details
Accepted	Loaded	07/29/2016	05/29/2016 - 06/11/2016	<a href="#">delete</a>	<a href="#">edit</a>	<a href="#">Un-Confirm</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>

**Posted Reports**

Status	File Load Status	Date Submitted	Date Range	Report type	View	Reconcile	View Totals/Details
Posted	Loaded	08/10/2016	06/26/2016 - 07/09/2016	Regular	<a href="#">view</a>	n/a	<a href="#">View Totals</a>
Posted	Loaded	07/18/2016	06/12/2016 - 06/25/2016	Regular	<a href="#">view</a>	n/a	<a href="#">View Totals</a>

This is the Work On Reports homepage that you are taken to after clicking the link.

# Self Service Overview Cont.

**Information Message**  
The report has been un-confirmed and will not be included in tonight's processing.

Below is a list of the latest [Reports](#) and Contribution Reports. Select an action that is available to the report or you can also [Create a New Report](#).

[Link with Unposted Reports](#)  
[Link with Posted Reports](#)  
[View more about Reports with employer reports](#)

Status	File Load Status	Date Submitted	Date Range	Delete?	Edit?	Current Report Status	Reconcile	View Totals/Details?
Suspended	Loaded	03/14/2017	02/19/2017 - 03/04/2017	<a href="#">delete</a>	<a href="#">edit</a>	Unconfirmed	N/A	<a href="#">view totals</a>

Adjustment Reports

Let's go over the common fields in the work on reports main page. Please see the green header bar circled in red, we'll start with the first column from the left and go right.

- **Status** – This is the status of your report, there are 4 different status's:
  - a. **Added** – You have created a report, but it has not been sent to PERA.
  - b. **Suspended** – Your report has issues and will not post until you correct outstanding items.
  - c. **Accepted** – Your report will be sent through PERA validations for checking. A report in this status may still have issues. Please be sure to check for errors.
  - d. **Posted** – Your report has posted and cannot be edited.
- **File load status** – This tells you if your report has loaded information or not. Does not denote completeness.
- **Date Submitted** – The date you created the report.
- **Date Range** – The pay period of the report you created.
- **Delete** – You can delete a report and all of its contents
- **Edit** – This is where you can edit your report. We'll give more detail on editing in subsequent trainings.
- **Current Report Status** – This tells PERA when you are ready to submit your report and have it run through our validations and processed. Your file should read CONFIRM to run through the nightly batch. If you do not complete your edits you can change your report to read UNCONFIRMED and it will not run through PERA's validations. Always remember to change back to CONFIRM.
- **Reconcile and View Totals/Details** – This selection will allow you to view your entire PERA report. It should be used to reconcile what is in your system vs. what you have reported to PERA to ensure accuracy with transmittal.



# Self Service Overview Cont.

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**Things to Do**  
**Employer Summary**  
Empr#  
Name:  
[Employer Home](#)

**Work on Reports**  
[Cash Not Tied to Report](#)  
[View Employee Info](#)  
[Update My Profile](#)  
[Payable and Receivable](#)  
[Payable to Report](#)  
[Missing Reports and Payments](#)  
[View Modified Member Records](#)

Below is a list of the latest Wage and Contribution Reports. Select an action that is available next to the report or you can also [Create a New Report](#)

- [Work with Unposted Reports](#)
- [Work with Posted Reports](#)
- [Learn more about working with employer reports.](#)

**Regular Reports** ← 1

Status	File Load Status	Date Submitted	Date Range	Delete?	Edit?	Current Report Status	Reconcile	View Totals/Details?
Added	Loaded	09/09/2016	07/24/2016 - 09/09/2016	<a href="#">delete</a>	<a href="#">edit</a>	<a href="#">Un-Confirm</a>	n/a	<a href="#">View Totals</a>
Added	Loaded	09/09/2016	07/10/2016 - 07/23/2016	<a href="#">delete</a>	<a href="#">edit</a>	<a href="#">Un-Confirm</a>	n/a	<a href="#">View Totals</a>

**Adjustment Reports** ← 2

Status	File Load Status	Date Submitted	Date Range	Delete?	Edit?	Current Report Status	Reconcile	View Totals/Details?
Accepted	Loaded	07/29/2016	05/29/2016 - 06/11/2016	<a href="#">delete</a>	<a href="#">edit</a>	<a href="#">Un-Confirm</a>	<a href="#">Reconcile</a>	<a href="#">View Totals</a>

**Posted Reports** ← 3

Status	File Load Status	Date Submitted	Date Range	Report type	View	Reconcile	View Totals/Details?
Posted	Loaded	06/10/2016	06/26/2016 - 07/09/2016	Regular	<a href="#">view</a>	n/a	<a href="#">View Totals</a>
Posted	Loaded	07/19/2016	06/12/2016 - 06/25/2016	Regular	<a href="#">view</a>	n/a	<a href="#">View Totals</a>

1. Regular Reports – These are all the regular reports that you have created, but have not posted yet.
2. Adjustment Reports – These are all of the adjustment reports that you have processed that are not posted yet.
3. Posted Reports – This is a history of all of your reports that have posted.

# Payables and Receivables



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## Things To Do

### Employer Summary

Empr#

Name:

[Employer Home](#)

[Work on Reports](#)

[Work with Contacts](#)

[View Employee Info](#)

[Update My Profile](#)

[Admin Web Accounts](#)

[Payable and Receivable](#)

[Payable to Report](#)

[Missing Reports and Payments](#)

[View Modified Member Records](#)

## Payable and Receivable

### Excess Amount:

Include	Check #	Pay Period End Date	Date	Fund	Transaction Type	Original Amount	Excess Amount
<input type="checkbox"/>	0	11/07/2014	02/17/2015	PE	Account Payable	\$258.73	\$258.73
Total Selected Excess:						\$	0.00

### Outstanding Receivables:

Include	Pay Period End Date	Report/Due Date	Fund	Transaction Type	Original Amount	Unpaid Amount
Total Selected Receivable:					\$	0.00

Apply


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- Review your “Payable and Receivable” tab after each submission. If you see any balances, please contact your Contribution Accounting representative.



# Missing Reports and Payments



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**Things To Do**  
**Employer Summary**  
Empr#  
Name: XXXXXXXXXX  
[Employer Home](#)  
[Work on Reports](#)  
[Work with Contacts](#)  
[View Employee Info](#)  
[Update My Profile](#)  
[Admin Web Accounts](#)  
[Payable and Receivable](#)  
[Payable to Report](#)  
[Missing Reports and Payments](#)  
[View Modified Member Records](#)

## Missing Reports And Payments

Report Begin Date	Report End Date	Missing Days	Missing Type
10/10/2015	10/23/2015		0 Contributions

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- Check the “Missing Reports and Payments” tab to ensure you are up to date. If you are missing reports or payments be sure to submit to PERA as soon as possible.

NOTE: Please be sure to check RIO Self Service after each payroll to ensure posting of your reports and that they are reconciled.



# Contact Information

## PERA Contribution Accounting Contacts



### Renee Baros

[renee.baros@state.nm.us](mailto:renee.baros@state.nm.us)

505-476-9321

Bloomfield	02090
Cibola (County)	03040
DFA (All State)	01341
East Rio Arriba	02240
El Dorado Area Water and Sa	04470
Espanola	02290
Gallup (City)	02330
Gallup Housing	04140
Los Alamos (County)	03170
McKinley (County)	03200
North Central NM Econ.Dev.	02520
North Central Regional Trans	03450
North Central Solid Waste	04310
Rio Arriba County Housing A	03400
Rio Arriba (County)	03240
San Juan Water	04390
San Juan (County)	03260
State Fair Commission	08003

### **Karlo Cantu**

Contribution Accounting Bureau  
Chief

[Karlo.Cantu@state.nm.us](mailto:Karlo.Cantu@state.nm.us)

### Nicole Tapia

[nicole.tapia@state.nm.us](mailto:nicole.tapia@state.nm.us)

505-476-9345

ABQ Housing Auth	04560
Alamogordo	02010
Arch Hurley Conservancy Di	02030
Artesia	02980
Belen, City of	02060
Bosque Farms	02100
Carlsbad	02110
Carlsbad Irrigation Dist	04340
Carlsbad Soil and Water Cons	02120
Chaves (County)	03030
Chaves Soil and Water Cons.	03390
Cloudcroft	02170
Clovis	02180
De Baca (County)	03070
De Baca Family Practice Clini	03360
Dexter	02230
Eddy (County)	03100
Edgewood	04290
Edgewood Soil and Water Co	04070
Elida	02270
Eunice	02850
Fort Sumner (Village)	02320
Ft. Sumner Housing Auth.	04130
Hagerman	02960
Hobbs	02370
Jal (City)	02380
Lea (County)	03150
Los Lunas (Village)	02440
Loving (Village)	04040
Lovington (City)	04370
Milan	02490
Northwest NM Regional Solid	02870
Otero (County)	03220
Otis Mutual Domestic Water	04400
Portales	02550
Region IV Housing Authority	02600
Regional Emerg. Dispatch Au	04480
Roosevelt (County)	03250
Roswell	02630
Santa Fe (City) Civic Housing	04260
Santa Fe (County)	03290
SNMEDD	02670
Timberon Water and Sanitatio	02910
Town of Peralta	04245
Tularosa	04440
Valencia (County)	03350

### Ryan Serrano

[ryans.serrano@state.nm.us](mailto:ryans.serrano@state.nm.us)

505-476-9320

Animal Service Center of the	04460
Anthony Water and Sanitatio	04030
Anthony, City of	04500
Bayard	02050
Bayard Housing Auth	04090
Camino Real Regional Utility	04510
Capitan	04300
Carrizozo	04430
Carrizozo Soil and Water Con	04410
Catron (County)	03020
Chama	02130
Columbus	04350
Deaf School F/T	08002
Denning	02210
Dona Ana (County)	03090
Dona Ana Mutual Domestic V	04550
Elephant Butte	04020
Elephant Butte Irrigation Dist	03460
Grant (County)	03110
Grants (City)	02350
Greentree Solid Waste Auth	03440
Hatch	02360
Hidalgo (County)	03140
Las Cruces	02400
Lincoln (County)	03160
Lordsburg	02430
Lordsburg Housing Auth	04160
Luna (County)	03180
Mesilla (Town)	02470
Mesilla Valley Public Housin	04150
Region V Housing Auth.	02590
Reserve	02610
Ruidoso	02660
Ruidoso Downs	02650
Santa Clara	02970
Santa Clara Housing Auth	04200
Sierra (County)	03300
Sierra Soil and Water Cons. D	03420
Silver City	02720
Sunland Park	02950
SW NM COG	02740
T or C	02760
T or C Housing Auth	04180
Upper Hondo Soil and Water	04420
Visually Handicap School	08010
Williamsburg	02840

### Rosemary Rodriguez

[Rosemary.Rodriguez@state.nm.us](mailto:Rosemary.Rodriguez@state.nm.us)

505-476-9337

Alb/Bern Wa Auth	04380
Angel Fire	02900
Cimarron	02140
Clayton	02160
Clovis Housing Auth	04100
Colfax (County)	03050
Curry (County)	03060
Des Moines	02220
Eagle Nest	02930
El Prado Water and Sanit. Dis	04060
El Valle De Los Ranchos Wat	04320
Grady (Village)	02340
Guadalupe (County)	03120
Harding (County)	03130
Logan	02420
Maxwell	02990
Maxwell Housing Auth	02995
Melrose	02880
Mora (County)	03210
Mora Mutual Domestic Water	04530
Mosquero	02920
Northern Regional Housing A	04215
Pecos Valley Cons Dist	02540
Pojoaque Valley Irrigation Di	04330
Quay (County)	03230
Raton	02570
Raton (City) Housing Auth	04170
Raton Public Service	02580
Roy	02640
Santa Rosa	02710
South Central Council of Gov	04010
Southwest Solid Waste	03370
Springer	02750
Springer Housing Auth	04520
Taos (County)	03320
Taos (Town)	02770
Taos Ski Valley	04490
Taos Soil and Water Conserv	03410
Texico	02780
Town of Kirtland	03000
Tucumcari	02810
Union (County)	03340
Vaughn	04050
Wagon Mound	02830
Western Mora Soil and Conse	04450

### Valerie Hayas

[valerie.hayas@state.nm.us](mailto:valerie.hayas@state.nm.us)

505-476-9342

Albuquerque	02020
AMAFCA	04580
Aztec	02040
Bernalillo (County)	03010
Bernalillo (Town)	02080
Ciudad Soil and Water Cons.	03480
Claunch Pinto Soil and Water	02150
Corrales	03490
Cuba (Village)	02190
Cuba Housing	04110
Cuba Soil & Water Cons. Dist	02200
Disciplinary Board of the NM	08012
East Torrance Soil and Water	02250
EMW Gas Assoc.	02940
Estancia	02300
Estancia Valley Solid Waste A	03430
Farmington	02310
Jemez Springs	02390
Las Vegas	02410
Los Ranchos de Albq	02450
Magdalena	02460
MID. Rio Grande Cons Dist	02480
Mid-Region Council Of Gove	04570
Moriarity	02500
Mountainair	02510
NW NM Council of Govrnmts	02860
Pecos (Village)	02530
Questa	02560
Red River	04250
Rio Rancho	02620
San Miguel (County)	03270
San Ysidro	02680
Sandoval (County)	03280
Santa Fe (City)	02690
SF Solid Waste	04270
Socorro (City)	02730
Socorro (County)	03310
Socorro Soil and Water Dist	03470
SSCAFCA	03380
Tierra y Montes SWCD	02790
Tijeras	02800
Torrance (County)	03330
Willard	04000

