

## **GUIDE – How to e-File Your PERB Annual Report**

1. If you are not already a user of PERB’s electronic filing system, you must first request an eFlex account by visiting the e-filing portal-<https://perb.iowa.gov/efiling/>. When filling out the registration form, please remember the following:
  - a. Your user role will be “REPRESENTATIVE”;
  - b. Your organization should be available from the drop-down option on the next screen; and
  - c. Your selected username must be specific to you, such as John Smith or J.Smith.
2. Once you’re approved for an eFlex account, you will receive an email confirming your approval. Log in with your credentials by visiting the e-filing link above.
3. Click on “cases.” In the search box, enter the CEO number that been assigned to your organization exactly as provided on the notice of delinquency (CEO-XXXX). When you’re prepared to file the annual report and accompanying documents, follow these steps:
  - a. Find your organization and click “e-file.” Or, if you know your organization’s assigned CEO number, enter the CEO number in the search box and click “e-file”;
  - b. On the next screen, select “Annual Report, Financial Report and Audit”;
  - c. Click “browse” to locate the saved document on your computer and select it [please note: annual report, audit and financial report must be uploaded as one document];
  - d. Once you locate the document, click “add” to upload. Be sure your document contains all the required documents (i.e. annual report, financial report and audit).
  - e. Click “next” and then “submit the filing.”
4. Once you submit your report, you will receive an e-mail confirming that our eFlex system has received a submission. HOWEVER, this does NOT mean that your report is accepted. Once the filing is reviewed by PERB, you will receive another email indicating that the filing was either **ACCEPTED or REJECTED**. If the report is rejected, the message back to you will notify you what needs to be corrected before you re-file. **If your filing is rejected, you must REFILE in order to be in compliance with your filing requirements under Iowa Code section 20.25.**

ADDITIONAL NOTE: PERB uploaded your previous annual filings and you may view those by entering your CEO number and clicking “history.”

If you need assistance, don’t hesitate to call us at 515 281-4052.