



Employer Self Service (ESS) Instructions

www.strsoh.org/employer



Employer Self Service (ESS) Instructions

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www.strsoh.org/employer

Need assistance?

*Call us toll-free at
888-535-4050 or
view tutorials on
our website.*

Section 1

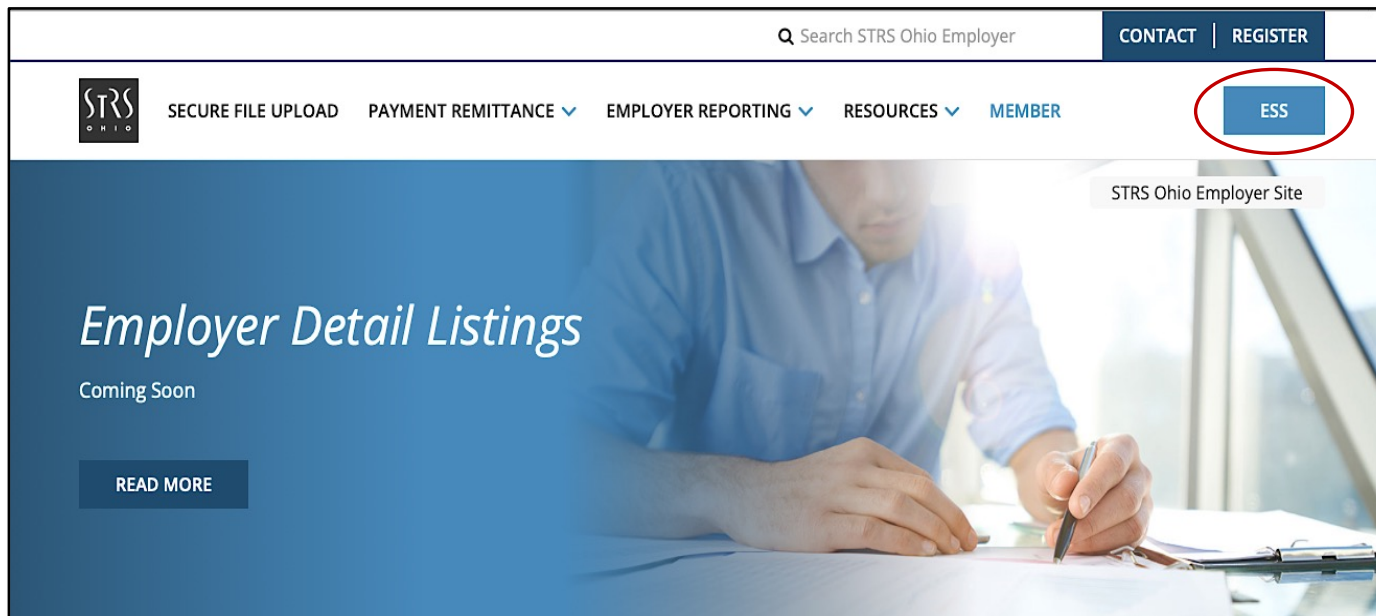
Getting Started

The following instructions explain how to log in, set up your account, change your password or security questions and navigate pages in ESS.

Logging In to ESS

1. Go to www.strsoh.org/employer. (Be sure to include [/employer](#) at the end of the address to avoid going to the STRS Ohio member site.)
2. Click “ESS” in the upper right corner of the home page.
3. The ESS login screen will appear. Enter your user name and password. Then click “Login.”

Note: You must have your own user name and password to use ESS. Do not use anyone else’s login credentials. Requests for new user accounts must be submitted by a current authorized user. See “Employer Contacts” in Section 20 for more information.



Tips!

- Look for “STRS Ohio Employer Site” under the ESS button to be sure you are on the employer website.
- Passwords are case sensitive. Make sure “Caps Lock” is not on.
- Your account may be automatically suspended (locked) if you have not accessed ESS in the past six months.
- If you cannot remember your user name or password, call STRS Ohio toll-free at 888-535-4050.

Setting Up Your Account (Initial Login)

When you log in to ESS for the first time, you will be asked to provide contact information, set up security questions and create a new password. This is a three-step process (identification, security setup and confirmation). Use the following instructions to set up your account.

Step 1

Complete all fields on the Identification screen. Then click “Next” to continue to the Security Setup screen.

The screenshot shows the 'Verify User Registration Wizard' window with the 'Identification' step selected. The form contains the following fields:

- User Name: TTEACHER
- First Name: TIMOTHY
- Last Name: TEACHER
- E Mail: tteacher@ohiolocal.org
- Account Code: Enter Account Code (circled in red)
- Business Phone: Enter Business Phone (circled in red) Ext: []

A red callout box points to the 'Enter Account Code' field with the text: "STRS Ohio will provide your account code in the verification email." The 'Next' button is visible at the bottom right.

Step 2

Enter all information on the Security Setup screen. Then click “Next” to continue to the Confirmation screen shown on the next page.

The screenshot shows the 'Verify User Registration Wizard' window with the 'Security Setup' step selected. The form contains the following fields:

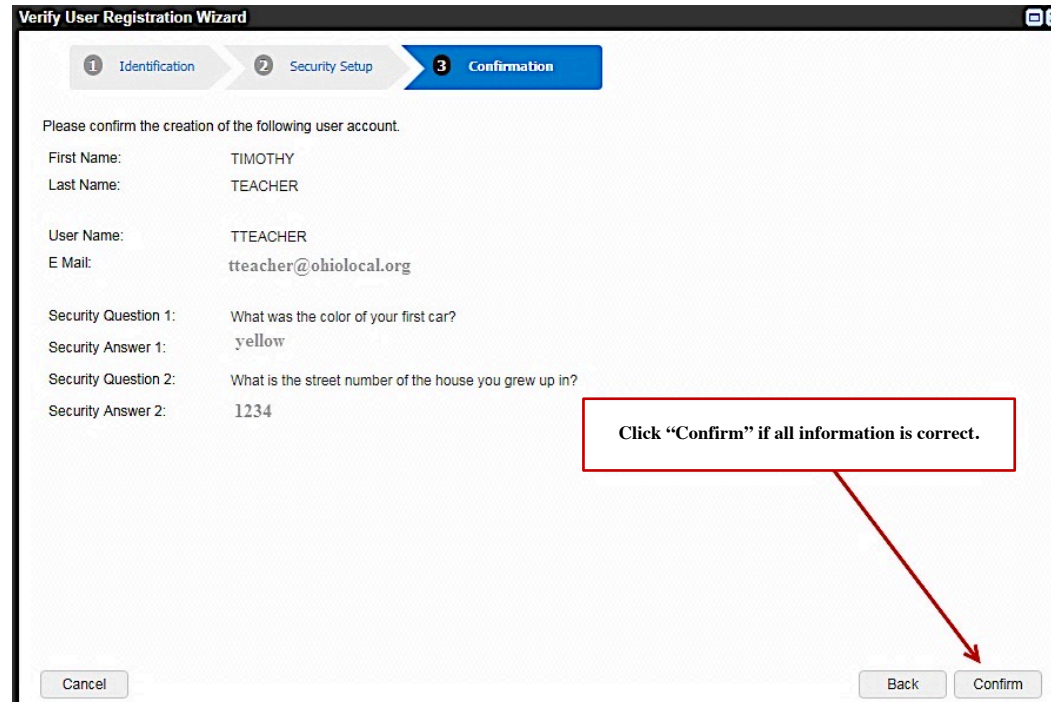
- Security Question 1: [] (dropdown menu circled in red)
- Security Answer 1: Enter your answer (circled in red)
- Security Question 2: [] (dropdown menu circled in red)
- Security Answer 2: Enter your answer (circled in red)
- Enter your new Password: Enter new password here (circled in red)
- Please confirm your password: Enter new password here (circled in red)

A red callout box points to the dropdown menus with the text: "Click the arrow to select a security question from the drop-down menu." The 'Next' button is visible at the bottom right.

Step 3

Review the information on the Confirmation screen.

- If all information is correct, click “Confirm.”
- If you need to correct any information, click “Back” to return to the previous screen(s).



The screenshot shows a window titled "Verify User Registration Wizard" with three steps: 1 Identification, 2 Security Setup, and 3 Confirmation. The Confirmation step is active. The screen displays the following information for confirmation:

Please confirm the creation of the following user account.

First Name:	TIMOTHY
Last Name:	TEACHER
User Name:	TTEACHER
E Mail:	tteacher@ohiolocal.org
Security Question 1:	What was the color of your first car?
Security Answer 1:	yellow
Security Question 2:	What is the street number of the house you grew up in?
Security Answer 2:	1234

At the bottom of the window, there are three buttons: "Cancel", "Back", and "Confirm". A red box with the text "Click 'Confirm' if all information is correct." has a red arrow pointing to the "Confirm" button.

Changing Your Password or Security Questions

If you want to change your password or security questions after your initial login:

1. Click on your name at the top of any page.
2. In the User Profile box, click “Change Password” or “Change Security Questions.”
3. The screen shown on the next page will appear for you to make the changes.

Note: You can also view your login history by clicking “View Login History.”

The screenshot displays the Ohio Local Schools (9599) user interface. At the top right, the user's name "Steve Smith" is circled in red, with a yellow box containing the number "1" and an arrow pointing to it. Below the navigation bar, there are three main sections: "Additional Tools", "Outstanding Reports", and "Current Obligations". A "User Profile" modal window is open in the center, showing the user's details: User Name: SteveS, Name: Smith, Steve, E Mail: (blank), and Last Logon Date: (blank). At the bottom of the modal, there are three buttons: "Change Password", "Change Security Questions", and "View Login History". A yellow box containing the number "2" and two red arrows points to the "Change Password" and "Change Security Questions" buttons. The "Current Obligations" section contains a table with the following data:

Due Date	Description	Amount
09/12/2023	Payroll-reported contributions due	\$515.78
09/13/2023	PSC employer cost-Kimberly K	\$5,719.60
09/15/2023	Monthly PSC deductions due	\$811.23
	Payment received - not yet applied	-\$276.65

Change Password

1. Enter your current password.
2. Enter your new password following the rules at the top of the page. Then confirm it.
3. Click "Change."

The screenshot shows a dialog box titled "ESS Change Password". At the top, it lists password requirements: "Passwords must match the following rules: must be at least 8 characters long, cannot have more than 24 characters, must contain at least 1 letter, Password should have a minimum of 2 non alphabetic characters, must contain at least 1 number, use at least 1 special character (!, @, #, etc.), excluding: & < % \ . , > ' / () = | * ;". Below the rules are three input fields: "Current Password:" (marked with a yellow box '1'), "New Password:" (marked with a yellow box '2'), and "Confirm New Password:" (marked with a yellow box '2'). To the right of the "New Password" field is a "Strength" indicator with three bars. At the bottom, there are "Cancel" and "Change" buttons (the latter marked with a yellow box '3').

Change Security Questions

1. Select your preferred security questions from the drop-down menu.
2. Enter your answers to the questions.
3. Click "Change."

The screenshot shows a dialog box titled "Change Security Questions". It contains four input fields: "Security Question 1:", "Security Answer 1:", "Security Question 2:", and "Security Answer 2:". The "Security Question 1:" and "Security Question 2:" fields have drop-down menus (circled in red) and are marked with a yellow box '1'. The "Security Answer 1:" and "Security Answer 2:" fields are marked with a yellow box '2'. At the bottom, there are "Cancel" and "Change" buttons (the latter marked with a yellow box '3').

Navigation Tips

Navigation on the Home Page

To navigate ESS on the home page:

1. Click a topic in the banner menu at the top of the page, or
2. Click a topic in the Additional Tools menu.

Note: Options in the banner menu and Additional Tools menu may vary depending on the type of access granted.

Navigation on Any Page

To navigate ESS on any page:

1. Click "Home" in the upper left corner of the page to return to the home page, or
2. Click a topic in the banner menu at the top of the page.

The screenshot shows the ESS home page interface. At the top, a red double-headed arrow labeled "banner menu" spans across the navigation links: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The "Home" link is circled in red. Below the banner menu, there are three main content areas: "Additional Tools", "Outstanding Reports", and "Current Obligations". A red arrow points to the "Additional Tools" menu. The "Outstanding Reports" section contains a table with the following data:

Report Type	Number of Reports
Service Credit Verification	1
Accrued Verification	1
Employment Verification Reports	3
Annual Reporting	1
Withdrawal Certification	2
Pay Date Calendar	1
Violation Period Certification	1

The "Current Obligations" section contains a table with the following data:

Due Date	Description	Amount
09/12/2023	Payroll-reported contributions due	\$515.78
09/13/2023	PSC employer cost-Kimberly K	\$5,719.60
09/15/2023	Monthly PSC deductions due	\$811.23
	Payment received - not yet applied	-\$276.65

At the bottom of the page, there is a "News & Alerts" section which is currently empty.

Section 2

New Hire Notification

The following instructions explain how to submit a new hire notification in ESS and view or print it after it has been submitted.

Submitting a New Hire Notification

Step 1

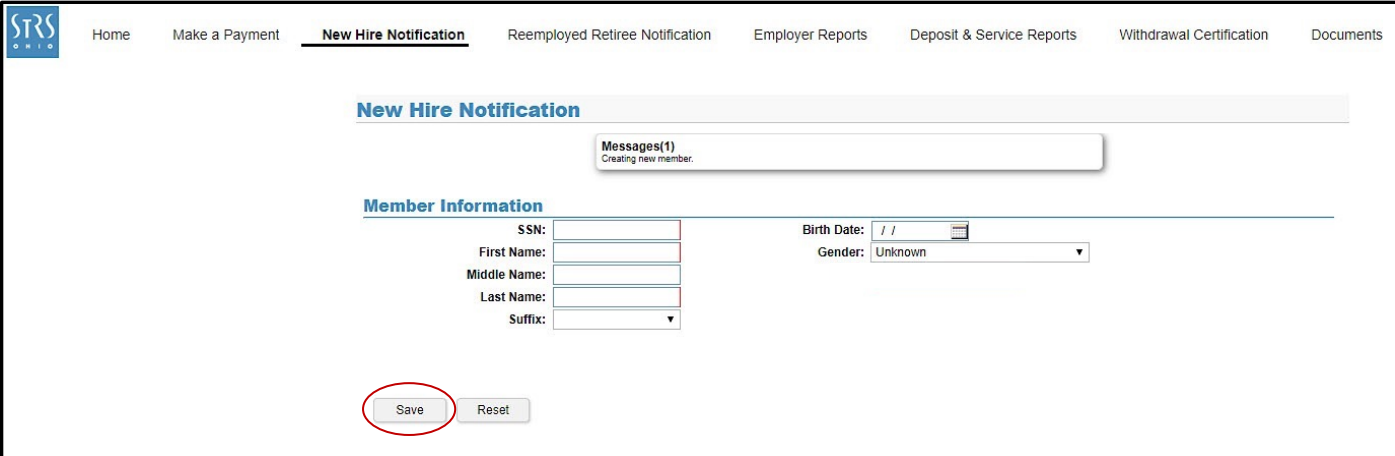
Click on “New Hire Notification” in the banner menu at the top of the home page. *(Screen not shown.)*

Step 2

Enter the following information for the member:

1. Social Security number (SSN)
2. First name
3. Last name
4. Birth date
5. Gender

Then click “Save.” The screen shown on the next page will appear.



The screenshot shows the 'New Hire Notification' form in the ESS system. The navigation menu at the top includes 'Home', 'Make a Payment', 'New Hire Notification' (which is the active page), 'Reemployed Retiree Notification', 'Employer Reports', 'Deposit & Service Reports', 'Withdrawal Certification', and 'Documents'. The main heading is 'New Hire Notification'. Below this is a 'Messages(1)' box containing the text 'Creating new member.'. The 'Member Information' section contains the following fields: 'SSN:' (text input), 'First Name:' (text input), 'Middle Name:' (text input), 'Last Name:' (text input), 'Suffix:' (dropdown menu), 'Birth Date:' (calendar icon), and 'Gender:' (dropdown menu with 'Unknown' selected). At the bottom of the form, there are two buttons: 'Save' and 'Reset'. The 'Save' button is circled in red.

Step 3a

If the member's information is already on file with STRS Ohio, some fields may be prepopulated. Prepopulated fields cannot be changed. The member must contact STRS Ohio if changes are needed.

1. Enter any missing information, such as phone numbers and a secondary email address.
2. Click "Save." The screen shown on the next page will appear.

Step 3b

If member information is not prepopulated, enter the following:

1. Street address
2. ZIP code. Then press "Enter" on your keyboard to automatically populate the city and county. If additional city/county options are listed, choose the correct city. (STRS Ohio does not currently track county.)
3. Phone numbers (optional)
4. Email addresses (primary is required; secondary is optional)

Click "Save." The screen shown on the next page will appear.

STRS OHIO

Home Make a Payment **New Hire Notification** Reemployed Retiree Notification Employer Reports Deposit & Service Reports Withdrawal Certification Documents

New Hire Notification

Messages(1)
Member has an active address.

Address

Address Type: Residence
Address Period: Feb 15, 2019 -
Address 1: 275 EAST BROAD ST
Address 2:
Address 3:
City: COLUMBUS
State: Ohio
County: FRANKLIN
Tip! Zip/Postal Code: 43215
Country: U.S. OF AMERICA
Home Phone:
Work Phone: 6142278659
Cell Phone:
Primary Email: wolfordt@strsoh.org
Secondary Email:

Ext 1:
Ext 2:

Save Reset

Tip! Once you insert the ZIP code, press "Enter" on your keyboard to automatically populate the city and county.

Step 4

1. Enter the first date the teacher worked.
2. College and university employers should click on the “ARP Eligible” box if the member is eligible for an alternative retirement plan. (This box will not appear for K–12 employers.)
3. Click “Save.”

The screenshot shows the 'New Hire Notification' form in the STRS system. The navigation menu includes Home, Make a Payment, **New Hire Notification**, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. A message box at the top right states: 'Messages(2) Address has been Standardized. Creating new employment record.' The form fields include 'First Date Worked:' with a date picker set to // and 'ARP Eligible:' with an unchecked checkbox. At the bottom are 'Save' and 'Reset' buttons.

Step 5

1. A new hire notification document will appear on your screen. Click “Print” to print a copy for your records.
2. To start a new hire notification for another member, click “Add New Record.” If you are finished entering new hire notifications, click “Home” in the banner menu to return to the home page.

The screenshot shows the 'New Hire Notification' document in the STRS system. The navigation menu includes Home, Make a Payment, **New Hire Notification**, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. A message box at the top right states: 'Messages(1) All the changes have been saved.' Below the message are 'Add New Record' and 'Print' buttons. A red arrow points to the 'Add New Record' button, and a red circle highlights the 'Print' button. The document content includes the STRS logo and the following information:

STATE TEACHERS RETIREMENT SYSTEM OF OHIO
275 East Broad Street
Columbus, OH 43215-3774
1-888-535-4050
www.stsoh.org/employer

New Hire Notification

Date Created:	02/15/2019
SSN:	010-93-2113
First Name:	TODD
Middle Name:	
Last Name:	TODD
Birth Date:	12/06/1984
Gender:	Male
Type:	Member
Address 1:	275 EAST BROAD ST
Address 2:	
Address 3:	
City:	COLUMBUS
State:	OH
Country:	US
Zip / Postal Code:	432150000

An 'Export' link is visible in the top right corner.

Viewing or Printing a Notification

If you forget to print a copy or you need to find a new hire notification at a later date:

1. Choose "Documents" from the banner menu at the top of any page.
2. A list of documents will appear. Find the notification you are looking for based on date created or document information. Then click on "New Hire\Reemployed Notification" in the Name column for that document.
3. A copy of the document will appear. Click "Print" to print a copy.

The screenshot shows the STRS Ohio website's "Documents" page. The navigation menu includes Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. The "Documents" section displays a table with columns for Date Create, Name, and Document Information. A document titled "New Hire \ Reemployed Notification" for "TODD, TODD - New Hire" is selected. A preview window is open, showing the document's content, which includes the STRS Ohio logo, contact information, and a "New Hire Notification" form with the following details:

Date Created:	02/15/2019
SSN:	010-93-2113
First Name:	TODD
Middle Name:	
Last Name:	TODD
Birth Date:	12/06/1984
Gender:	Male
Type:	Member
Address 1:	275 EAST BROAD ST
Address 2:	
Address 3:	
City:	COLUMBUS
State:	OH
Country:	US
Zip / Postal Code:	432150000

Section 3

Reemployed Retiree Notification

The following instructions explain how to submit a reemployed retiree notification in ESS and view or print it after it has been submitted.

Submitting a Reemployed Retiree Notification

Step 1

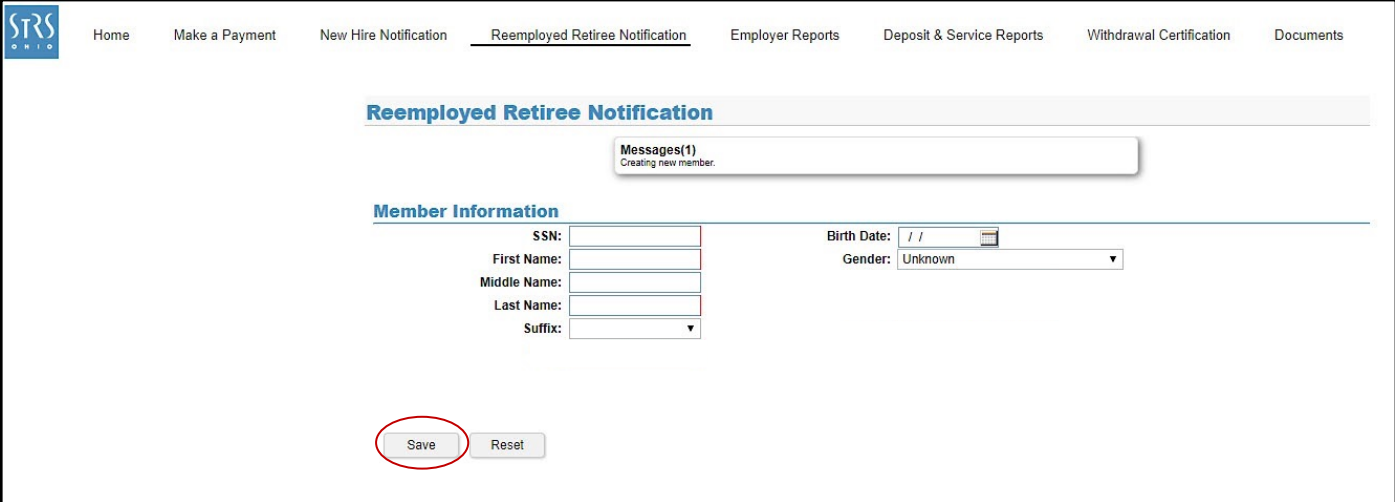
Click on “Reemployed Retiree Notification” in the banner menu at the top of the home page. *(Screen not shown.)*

Step 2

Enter the following information for the member:

1. Social Security number (SSN)
2. First name
3. Last name
4. Birth date
5. Gender

Then click “Save.” The screen shown on the next page will appear.



The screenshot shows the 'Reemployed Retiree Notification' form in the ESS system. The navigation menu at the top includes: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification (selected), Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. The form title is 'Reemployed Retiree Notification'. Below the title is a 'Messages(1)' box containing the text 'Creating new member.'. The 'Member Information' section contains the following fields: SSN (text input), First Name (text input), Middle Name (text input), Last Name (text input), Suffix (dropdown menu), Birth Date (date picker), and Gender (dropdown menu with 'Unknown' selected). At the bottom of the form, there are two buttons: 'Save' (circled in red) and 'Reset'.

Step 3a

If the member's information is already on file with STRS Ohio, some fields may be prepopulated. Prepopulated fields cannot be changed. The member must contact STRS Ohio if changes are needed.

1. Enter any missing information, such as phone numbers and a secondary email address.
2. Click "Save." The screen shown on the next page will appear.

Step 3b

If member information is not prepopulated, enter the following:

1. Street address
2. ZIP code. Then press "Enter" on your keyboard to automatically populate the city and county. If additional city/county options are listed, choose the correct city. (STRS Ohio does not currently track county.)
3. Phone numbers (optional)
4. Email addresses (primary is required; secondary is optional)

Click "Save." The screen shown on the next page will appear.

STRS Ohio

Home Make a Payment New Hire Notification Reemployed Retiree Notification Employer Reports Deposit & Service Reports Withdrawal Certification Documents

Reemployed Retiree Notification

Messages(1)
Member has an active address.

Address

Address Type: Residence ▾ ⚙️
Address Period: Feb 15, 2019 ▾

Address 1:
Address 2:
Address 3:
City:
State: Ohio
County:
Tip! Zip/Postal Code:
Country: U.S. OF AMERICA
Home Phone:
Work Phone:
Cell Phone:
Primary Email:
Secondary Email:

Ext 1:
Ext 2:

Tip! Once you insert the ZIP code, press "Enter" on your keyboard to automatically populate the city and county.

Step 4

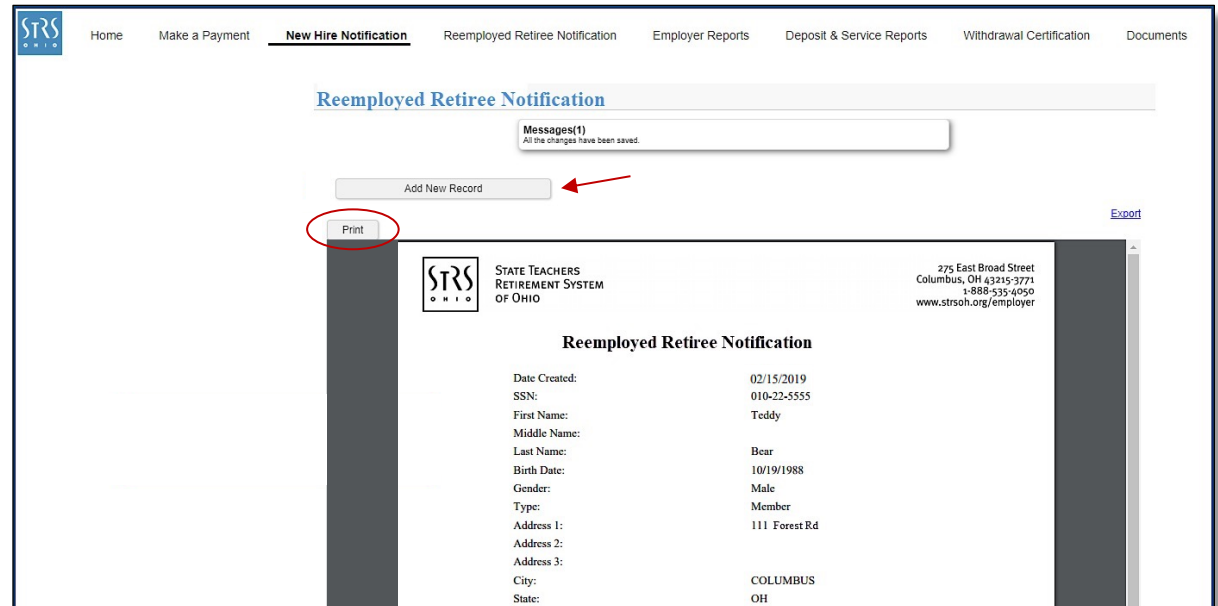
Enter the following information. (Some fields may be prepopulated if member information is already on file.)

1. First date of service with your school **after** retirement.
2. Retirement system paying the benefit. (Select OPERS, SERS, STRS, OP&F, SHP, CRS or ARP from the drop-down menu.)
3. Effective date of retirement. (If the member is an STRS Ohio retiree, the retirement date will always be the first day of the month in which the benefit became effective, e.g., 07/01/2018.)
4. Type of benefit. (Select disability retirement, service retirement or allowance from an ARP from the drop-down menu.)
5. College and university employers should check the box if the member is ARP eligible.
6. Answer the questions about public notices and meeting requirements set forth in Section 3307.353 of the Revised Code. More information about these requirements can be found on our website.
7. Click "Save."

The screenshot shows the 'Reemployed Retiree Notification' form on the STRS Ohio website. The navigation bar includes 'Home', 'Make a Payment', 'New Hire Notification', 'Reemployed Retiree Notification' (active), 'Employer Reports', 'Deposit & Service Reports', and 'Withdrawal Certification'. A message box at the top says 'Messages(1) Creating new employment record.' The form fields are: 'First date of service after retirement:' (calendar icon), 'Retirement System Paying the Benefit:' (dropdown menu), 'Effective Date of Retirement:' (calendar icon), 'Type of Benefit:' (dropdown menu), and 'ARP Eligible:' (checkbox). A red box highlights the first three fields with the text 'Complete all fields. (Some fields may be prepopulated.)'. Another red box highlights the ARP Eligible checkbox with the text 'Select if ARP eligible (college and university employers only.)'. Below these are two certification questions: 'This retiree was reemployed under Section 3307.353 Revised Code that requires public notices to be given and public meetings to be held for certain rehires:' and 'I certify that the requirements for reemployed retirement under Section 3307.353, Revised Code were met.:', each with 'Yes' and 'No' radio buttons. A red box highlights these two questions with the text 'Answer two questions.'. At the bottom, the 'Save' button is circled in red, next to a 'Reset' button.

Step 5

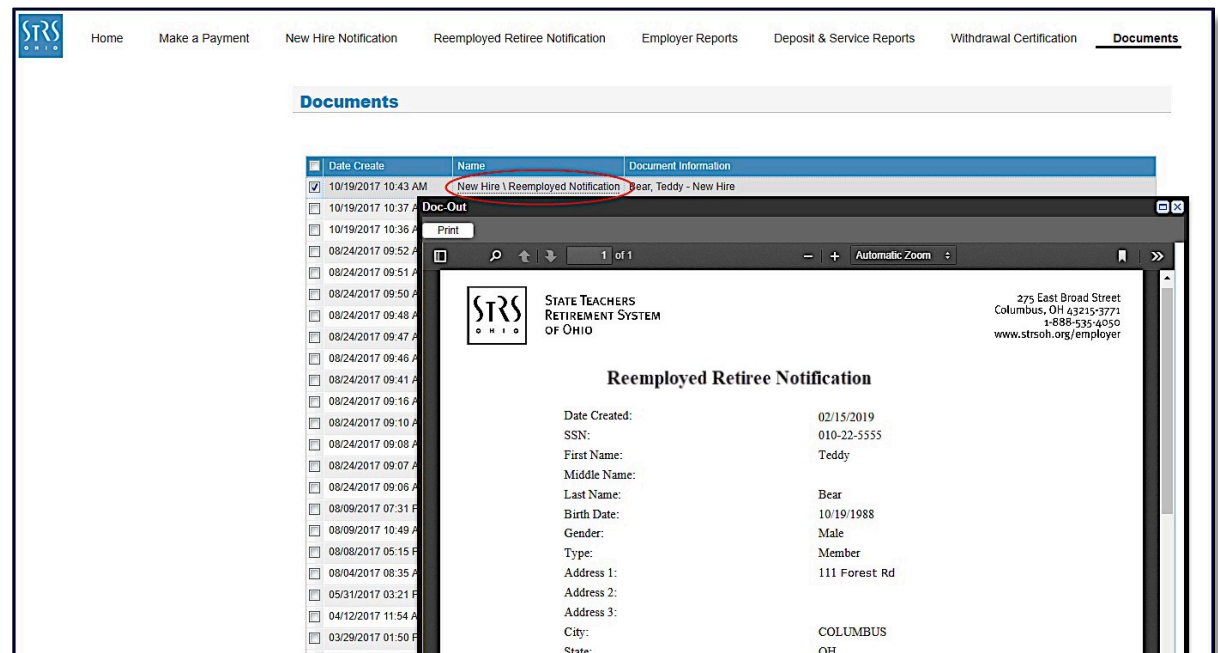
1. A reemployed notification document will appear on your screen. Click "Print" to print a copy for your records.
2. To start a new reemployed retiree notification for another member, click "Add New Record." If you are finished entering reemployed retiree notifications, click "Home" in the banner menu to return to the home page.



Viewing or Printing a Notification

If you forget to print a copy or you need to find a reemployed retiree notification at a later date:

1. Choose "Documents" from the banner menu at the top of any page.
2. A list of documents will appear. Find the notification you are looking for based on date created or document information. Then click on "New Hire\Reemployed Notification" in the Name column for that document.
3. A copy of the document will appear. Click "Print" to print a copy.



Section 4

Navigating Employer Reports

The following instructions explain how to access, sort and print reports in the Employer Reports section of ESS.

Types of Reports

The Employer Reports section of ESS contains a variety of reports you can view and complete as needed:

- Payroll report (Section 5)
- Payroll adjustment (Section 6)
- Backposting (Section 7)
- Annual report (Section 8)
- Service credit verification report (Section 9)
- Accrued verification report (Section 10)
- Purchase service credit report (Section 11)
- Pay date calendar (Section 14)
- Violation period certification (Section 17)

Accessing Reports

To access a report from the home page:

1. Click on “Employer Reports” in the banner menu, or
2. Click on the report in the Outstanding Reports section.

The Employer Reports screen shown on the next page will appear.

The screenshot shows the ESS Employer Reports page. The top navigation bar includes links for Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports** (circled in red), Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three columns:

- Additional Tools:** A list of tools with expandable arrows: Direct Debit Set Up, Employer Contacts, Employment Verification Reports, Estimated Payroll, GASB Reports, Online Death Notification, Pay Date Calendar, Payroll Summary, Pickup Plan Information, Request Access, Training Registration, and Violation Period Certification.
- Outstanding Reports:** A table listing report types and their counts.
- Current Obligations:** A table showing due dates, descriptions, and amounts for various obligations.

Report Type	Number of Reports
Service Credit Verification	1
Accrued Verification	1
Employment Verification Reports	3
Annual Reporting	1
Withdrawal Certification	2
Pay Date Calendar	1
Violation Period Certification	1

Due Date	Description	Amount
09/12/2023	Payroll-reported contributions due	\$515.78
09/13/2023	PSC employer cost-Kimberly K	\$5,719.60
09/15/2023	Monthly PSC deductions due	\$811.23
	Payment received - not yet applied	-\$276.65

3. The Employer Reports screen shows a list of work reports. Reports vary by status listed in the Report Status column:
- **Initial** — This means a report has been posted for the employer to review, edit and complete.
 - **Submitted** — This means the employer has completed the report and submitted it to STRS Ohio for review and processing.
 - **Complete** — This means STRS Ohio has reviewed the report and all processing has been completed.

Employer Reports

Trans Type: All

Status: All

Work Report Status: Initial

New Report

Payment History

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report T...
Actions	07/06/2021	Regular	Initial	Service Credit ...		06/30/2021	2020-21 Service Credit Verification	228852429	\$0.00

Help

To open report:

1. Click "Actions" in the Tools column for the report you want to open.
2. Select "Edit" from the drop down menu.

To print report:

1. Click "Actions" in the Tools column for the report you want to print.
2. Select "Edit" from the drop down menu
3. Once the report appears, click on the "Tools" column heading.
4. Select "Reports" from the dropdown menu.
5. Click "View Work Report".
6. The report will appear. Click "Print" in the top left corner of the screen.
7. Report defaults to printing in alphabetical order by last name.

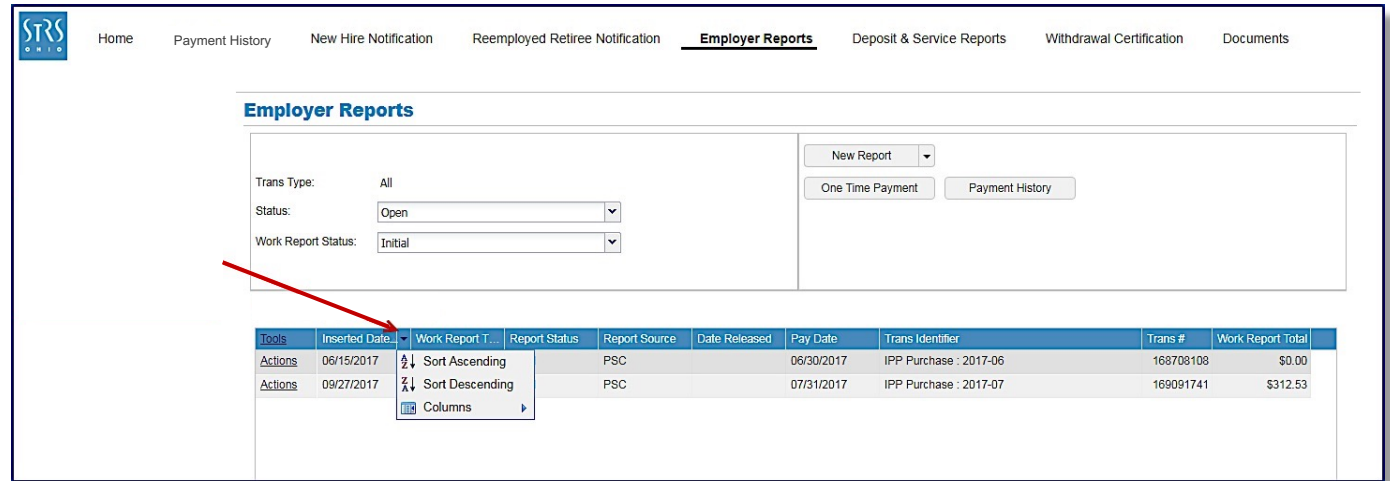
Tip! The Employer Reports screen automatically displays reports in initial status. To view all reports (initial, submitted and complete), change the Work Report Status to "All."

Sorting Reports

Documents listed on the Employer Reports page vary by status. To find the report you're looking for, you can sort the list in ascending/descending order, by work report status or by report type.

Sort in Ascending/ Descending Order

1. Place the cursor over the column you want to sort by.
2. Click the drop-down arrow that appears next to the column or click the column heading.
3. Choose "Sort Ascending" or "Sort Descending" from the drop-down menu.

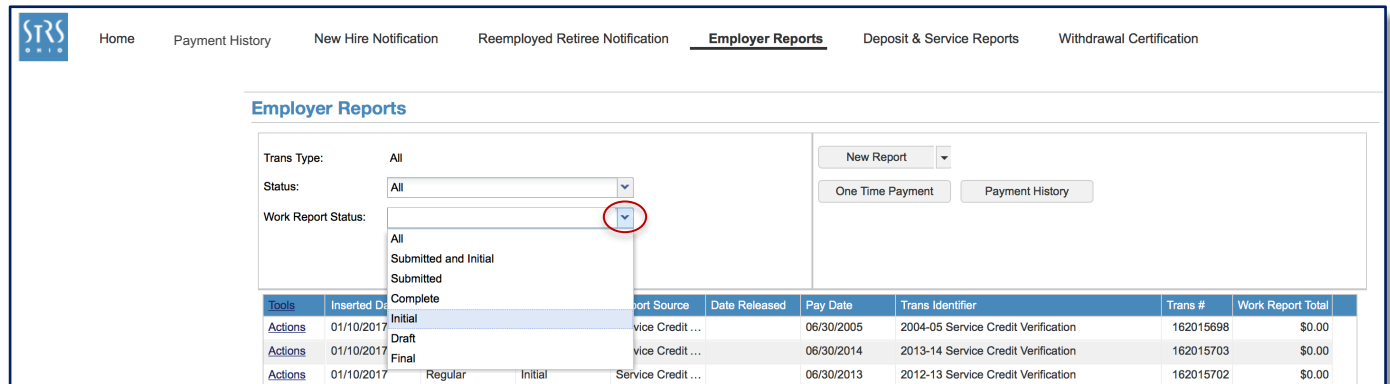


The screenshot shows the 'Employer Reports' page with a table of reports. The 'Work Report T...' column header is highlighted, and a dropdown menu is open, showing options for 'Sort Ascending', 'Sort Descending', and 'Columns'. A red arrow points to the 'Work Report T...' column header.

Tip! Sort the Inserted Date column in ascending order to find the most recent reports first.

Sort by Work Report Status

1. Click the down arrow in the "Work Report Status" field.
2. Select the status you want to search by. Once sorted, only reports in that status will appear.



The screenshot shows the 'Employer Reports' page with a table of reports. The 'Work Report Status' dropdown menu is open, showing options: All, Submitted and Initial, Submitted, Complete, Initial, Draft, Final, and Regular. A red circle highlights the dropdown arrow.

Tip! Sorting work reports by initial status is the quickest way to find reports ready to complete.

Sort by Report Type

1. Place the cursor over the column you want to sort by. Then click the drop-down arrow that appears next to the column or click the column heading.
2. Select "Filters" from the drop-down menu.
3. Click the down arrow to choose the report type from the list that appears.

The screenshot shows the STRS Employer Reports page. At the top, there are navigation links: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, and Withdrawal Certification. Below the navigation is the 'Employer Reports' section with filters for Trans Type (All), Status (All), and Work Report Status (All). A 'New Report' dropdown and 'One Time Payment' and 'Payment History' buttons are also present. A table of reports is displayed with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A dropdown menu is open over the 'Report Source' column, showing options: Sort Ascending, Sort Descending, Columns, and Filters. A red arrow labeled '1' points to the dropdown arrow in the 'Report Source' column header. A yellow box labeled '2' highlights the 'Filters' option in the dropdown menu. Another yellow box labeled '3' highlights the dropdown arrow in the 'Trans Identifier' column header.

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	03/21/2013	Regular	Complete	Payroll	12/31/2003	12/31/2003	Payroll : 2013-03-26 9430_Payroll_001 1397137...	139713746	\$102.86
Actions	02/06/2010	Regular	Complete	Payroll	02/06/2010	09/30/2003	2003-09-30 9430_Payroll_001 5804228	5804228	\$972.00
Actions	02/06/2010	Regular	Complete	Payroll	02/06/2010	10/31/2003	2003-10-31 9430_Payroll_001 5804229	5804229	\$972.00
Actions	02/06/2010	Regular	Complete	Payroll	02/06/2010	09/30/2003	2003-09-30 9430_Payroll_001 5804230	5804230	\$972.00
Actions	02/06/2010	Regular	Complete	Payroll	12/31/2003	12/31/2003	2003-12-31 9430_Payroll_001 5804231	5804231	\$972.00
Actions	03/27/2014	Adjustment	Complete	Payroll	03/27/2014	09/30/2014	Payroll_001 1470480...	147048009	\$375.00
Actions	10/31/2014	Adjustment	Complete	Back Postings	10/31/2014	07/31/2014	Annual ARP	149310264	\$2.12
Actions	07/13/2012	Adjustment	Complete	Payroll	07/13/2012	05/11/2012	Service Credit Verification	Payroll_001 132347016	\$697.30
Actions	12/18/2015	Adjustment	Complete	ARP	12/18/2015	10/30/2015	PSC	153570890	\$285.00
Actions	12/18/2015	Adjustment	Complete	ARP	12/18/2015	09/30/2015	Accrued Verification	153570892	\$285.00
Actions	12/18/2015	Adjustment	Complete	ARP	12/18/2015	10/30/2015	Employer Health Care	153570906	\$131.25
Actions	12/18/2015	Adjustment	Complete	Payroll	12/18/2015	09/30/2015	Payroll : 2015-09-30 9430_Payroll_001 1535709...	153570907	\$787.51

Printing Reports

You can print reports in the Employer Reports section of ESS.

Step 1

On the Employer Reports page:

1. Click on "Actions" in the Tools column for the report you want to print.
2. Select "Edit" from the drop-down menu.

The Work Report Editor screen shown below will appear.

The screenshot shows the 'Employer Reports' page. At the top, there's a navigation bar with 'Employer Reports' highlighted. Below it, there's a section titled 'Employer Reports' with filters for 'Trans Type', 'Status', and 'Work Report Status'. A table lists reports with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report T... A red arrow points to the 'Edit' option in the 'Tools' column of the second row.

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report T...
Actions	08/21/2018	Regular	Complete	Payroll	08/27/2018	08/24/2018	C002	189155329	\$323,252.78
Details	18	Regular	Complete	PSC	08/29/2018	08/31/2018	C002	188255381	\$150.88
Edit	18	Regular		Service Credit...	10/27/2009	06/30/2009	C002	187160349	\$0.00
Submit	18	Regular		Service Credit...	10/27/2009	06/30/2009	C002	187160347	\$0.00
Actions	08/07/2018	Regular	Complete	Payroll	08/13/2018	08/10/2018	C002	186755501	\$307,942.52
Actions	07/24/2018	Regular	Complete	Payroll	07/30/2018	07/27/2018	C002	185360572	\$312,078.39
Actions	07/13/2018	Regular	Complete	PSC	08/02/2018	07/31/2018	C002	184670379	\$150.88

Step 2

On the Work Report Editor screen:

1. Click on the "Tools" column heading.
2. Select "Reports" from the drop-down menu.
3. Click "View Work Report."
4. The report will appear. Click "Print" in the top left corner of the screen. (Screen not shown.)

The screenshot shows the 'Work Report Editor' screen. At the top, there's a 'Close' button. Below it, there's a summary section with fields for Employer, Billing Location, Report Source, Date Released, User Released, Work Report Type, Work Report Status, Report Start Date, Date Received, Batch No., Report Period, Identifier, Pay Date, Trans#, Updated By, # of Participants, # of Rows, Billing Type, and Agreement. Below the summary, there's a 'Summary' and 'Detail' tab. The 'Detail' tab is selected, showing a table with columns: Tools, Actions, SSN, Participant Name, Report Stop Date, Report Type, Record Status, Pre tax employee contribution, After tax employee contribution, Accrued Indicator, Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End, and Notes. A red arrow points to the 'Tools' column heading, and another red arrow points to the 'Reports' option in the 'Tools' dropdown menu.

Tools	Actions	SSN	Participant Name	Report Stop Date	Report Type	Record Status	Pre tax employee contribution	After tax employee contribution	Accrued Indicator	Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End	Notes
Export		123-45-6789	JOHNSON, S...	08/24/2018	Payroll Reporti...	Released	\$226.27	\$0	Y	2018	
Modify		123-45-6789	JOHNSON, S...	08/24/2018	Payroll Reporti...	Released	\$240.8	\$0	Y	2018	
View Row		123-45-6789	JOHNSON, S...	08/24/2018	Payroll Reporti...	Released	\$498.98	\$0	Y	2018	
Revert Settings		123-45-6789	JOHNSON, S...	08/24/2018	Payroll Reporti...	Released	\$249.58	\$0	Y	2018	
Advanced Sort		123-45-6789	JOHNSON, S...	08/24/2018	Payroll Reporti...	Released	\$322.6	\$0	Y	2018	
Reports		123-45-6789	JOHNSON, S...	08/24/2018	Payroll Reporti...	Released	\$340.94	\$0	Y	2019	
		123-45-6789	JOHNSON, S...	08/24/2018	Payroll Reporti...	Released	\$270.18	\$0	Y	2018	
		123-45-6789	JOHNSON, S...	08/24/2018	Payroll Reporti...	Released	\$437.27	\$0	Y	2018	

Section 5

Payroll Report

The following instructions explain how to submit a payroll report in ESS. **If you submit payroll reports through an Information Technology Center (ITC) or secure file upload, please disregard these instructions.**

Submitting a Payroll Report

Step 1

On the home page, click on “Employer Reports” in the banner menu. *(Screen not shown.)*

Step 2

To enter a payroll report, you will need to create a new work report. On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click the down arrow on “New Report” and select “Work Report” from the drop-down menu.
3. The Generate Work Report screen shown on the next page will appear.

Tools	Inserted Date	Work Report T...	Report Status	Report Source...	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	03/07/2018	Regular	Initial	Accrued Verifi...		06/30/2017	Work Report: Jul-2016	171271661	\$0.00
Actions	01/31/2018	Regular	Initial	PSC		12/31/2017	IPP Purchase : 2017-12	171195434	\$1,413.78
Actions	01/10/2017	Regular	Initial	Service Credit ...		06/30/2005	2004-05 Service Credit Verification	162015698	\$0.00

Tip! Payroll reports and contributions are due to STRS Ohio no later than five business days after the payroll date.

Step 3

1. In the Agreement Name column, click the box next to “Payroll” to indicate you want to create a payroll report.
2. If this is your school’s first payroll report, enter the first date of the payroll cycle in the Report Start Date column. If you have previously submitted payroll reports, the report start date should automatically populate based on your last payroll report.
3. Enter the pay date in the Pay Date column. This should be the date of your most recent payroll.
4. Click “Generate.” This will take you to the Work Report Editor screen shown on the next page.

The screenshot shows the STRS Ohio Employer Reports interface. A modal window titled "GenerateWorkReport" is open, displaying a table of report records. The table has the following columns: Agreement Name, Last Report Start Date, Report Start Date, Pay Date, Report Source, and Message. The "9599 Payroll" row is selected. Red arrows and numbered boxes (1-4) indicate the steps for generating a report: 1. Click the "Generate" button at the bottom left. 2. Click the checkbox next to "9599 Payroll". 3. Enter the "Report Start Date" (08/01/2017) and "Pay Date" (08/31/2017) for the selected row. 4. Click the checkbox next to "9599 Payroll" again.

Agreement Name	Last Report Start Date	Report Start Date	Pay Date	Report Source	Message
Backpostings	10/27/2017	11/01/2008		Back Postings	
Service Credit ...	10/27/2017	07/01/2017		Service Credit ...	
Purchase Serv...	10/27/2017	09/01/2017		PSC	
9599 Payroll	10/27/2017	08/01/2017	08/31/2017	Payroll	
9599 Annual	10/27/2017			Annual	
Accrued Verifi...	10/27/2017	07/01/2016		Accrued Verifi...	

Step 4

Each member's name, SSN and contribution amounts from the prior payroll report will appear.

1. If needed, edit the amount of contributions for the current payroll by clicking on the contribution field.
2. If contributions are accrued, enter "Y" for yes in the Accrued Indicator field (July and August payrolls only). Otherwise, leave this field blank. See **Tips!** on this page for details.
3. Review/edit each page of the report.
4. Review the "Report Totals" to ensure the amount matches the payment.
5. If you need to add new members or additional entries, go to [Step 5](#) on the next page.
6. When your payroll report is complete, click "Save." **You must save your report even if no changes were made.** You will automatically return to the Employer Reports page to submit the report.

[Go to Step 6.](#)

Work Report Editor

Save Apply Cancel

Employer: 9599 OHIO LOCAL SCHOOLS Work Report Type: Regular Report Period: 08/01/2017 - 08/31/2017 # of Participants: 15
Billing Location: OHIO LOCAL SCHOOLS Work Report Status: Initial Identifier: #012345678- Payroll : 201-8-3 # of Rows: 15
Report Source: Payroll Report Start Date: 08/01/2017 Pay Date: 08/31/2017 Billing Type: Contribution
Date Released: 08/15/2017 Trans#: #012345678 Agreement: 9599_Payroll_001
User Released: Batch No: 67860 Updated By: WOLFORDT

Summary Detail

Barg Unit Id: Exception Filter: Please Select

Add Member Delete Selected

Tools	Actions	SSN	Participant Name...	Report Stop Date	Report Type	Record Status	Pre tax employee contribution	After tax employee contribution	Accrued Indicator	Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End	Notes
		123-45-6229	TEACHER, K...	08/31/2017	Payroll Reporti...	Validated	\$12.6	\$0	Y		
		123-45-6789	LEWIS, TONY...	08/31/2017	Payroll Reporti...	Validated	\$1,484.76	\$0	Y		
		113-45-6787	ADOBE, ELI...	08/31/2017	Payroll Reporti...	Validated	\$387.65	\$0			
Page Totals							\$1,885.01	\$0			
Report Totals							\$1,885.01	\$0.00			

Page 1 of 2

1. Review contributions for each member's current pay.
2. Mark "Y" in the Accrued Indicator field if contributions are accrued.
3. Review all pages of the report.
4. Review report totals to ensure the amount matches your payment.

Accrued contributions are contributions on compensation earned by June 30 of the fiscal year, but not paid until after July 1 of the next fiscal year.

Tips!

- If you are reporting current year and accrued contributions on the same payroll report in July and August, you must have two entry lines for the member — one for current year contributions and one for accrued contributions. (See [Step 5](#) on the next page to add a member to the report.)
- When you create a new payroll report, the accrued indicator will appear as it was entered on the prior report. Ensure the Accrued Indicator field is blank if contributions were earned and paid during the same fiscal year. For example, if your school year begins in late August, payrolls from September to June will not have accrued contributions so the Accrued Indicator field should be blank.

Step 5

To add a new member or additional entries to a payroll report:

1. Click "Add Member." This will create a new blank line in the report.
2. Enter the member's SSN or name in the corresponding column.
3. Press "Enter" on your keyboard for a search screen to pop up or the member's SSN/name to appear on the blank line.
4. Enter all required payroll information for the member. See Step 4 (previous page).
5. When you are finished adding additional entries, click "Save." You will automatically return to the Employer Reports page to submit the report.

Go to Step 6.

The screenshot shows the 'Work Report Editor' interface. At the top, there are buttons for 'Save', 'Apply', and 'Cancel'. Below that, a summary section displays report details: Employer (9599 OHIO LOCAL SCHOOLS), Billing Location (OHIO LOCAL SCHOOLS), Report Source (Payroll), Date Released, User Released, Work Report Type (Regular), Work Report Status (Initial), Report Start Date (08/01/2017), Date Received (08/15/2017), Batch No (67860), Report Period (08/01/2017 - 08/31/2017), Identifier (#012345678- Payroll : 201-8-3), Pay Date (08/31/2017), Trans# (#012345678), Updated By (WOLFORDT), # of Participants (15), # of Rows (15), Billing Type (Contribution), and Agreement (9599_Payroll_001).

Below the summary, there are tabs for 'Summary' and 'Detail'. Under 'Detail', there are dropdown menus for 'Barg Unit Id' and 'Exception Filter'. A red circle highlights the 'Add Member' button, and a red arrow points to the 'Participant Name' column in the table below.

Tools	Actions	SSN	Participant Name	Report Stop Date	Report Type	Record Status	Pre tax employee contribution	After tax employee contribution	Accrued Indicator	Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End	Notes
	<input type="checkbox"/>			03/02/2018	Payroll Reporti...			\$0	\$0		
	<input type="checkbox"/>	123-45-6229	TEACHER, K...	08/31/2017	Payroll Reporti...	Validated	\$12.6	\$0	Y		
	<input type="checkbox"/>	123-45-6789	LEWIS, TONY...	08/31/2017	Payroll Reporti...	Validated	\$1,484.76	\$0	Y		
	<input type="checkbox"/>	113-45-6787	ADOBE, ELI...	08/31/2017	Payroll Reporti...	Validated	\$387.65	\$0			
Page Totals							\$1,885.01	\$0			
Report Totals							\$1,885.01	\$0.00			

At the bottom, there is a pagination control showing 'Page 1 of 2' and a refresh button.

Tip! You cannot add a new member to a payroll report until STRS Ohio has received notification of employment. Submit a new hire or reemployed retiree notification within 10 business days of the member's first date on payroll.

Step 6

Submit the payroll report.

After saving the report, you will automatically return to the Employer Reports page.

The report status of the payroll report will be listed as "Initial."

To submit the report:

1. Click on "Actions" in the Tools column for the payroll report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

The screenshot shows the 'Employer Reports' page with a table of reports. The 'Actions' column for the first report is expanded, showing 'Submit' circled in red. A 'Confirm' dialog box is open with 'Yes' circled in red. An 'Info' dialog box is also open with 'OK' circled in red.

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	10/27/2017	Regular	Initial	Payroll		08/31/2017	Work Report: Aug-2017	169668940	\$1,885.01

Tip! Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

Section 6

Payroll Adjustment

The following instructions explain how to correct a current year payroll when you are unable to make the correction in your payroll system.

Submitting a Payroll Adjustment

Step 1

On the home page, click on “Employer Reports” in the banner menu. *(Screen not shown.)*

Step 2

To enter a payroll adjustment, you will need to create a new adjustment. On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click the down arrow on “New Report” and select “Adjustment” from the drop-down menu.
3. The Generate Adjustment Report screen shown on the next page will appear.

Tools	Inserted Date	Work Report T...	Report Status	Report Source...	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	03/07/2018	Regular	Initial	Accrued Verifi...		06/30/2017	Work Report: Jul-2016	171271661	\$0.00
Actions	01/31/2018	Regular	Initial	PSC		12/31/2017	IPP Purchase - 2017-12	171195434	\$1,413.78
Actions	01/10/2017	Regular	Initial	Service Credit ...		06/30/2005	2004-05 Service Credit Verification	162015698	\$0.00

Step 3

1. In the Agreement Name column, click the box next to "Payroll" to indicate you want to create a payroll adjustment.
2. Enter the report start date and pay date. These dates should be the same — either the date of your most recent payroll or today's date.
3. Click "Save." This will take you directly to the Adjustment screen shown on the next page.

The screenshot shows the STRS Employer Reports interface. At the top, there are navigation links: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, and Withdrawal Certification. Below these is the 'Employer Reports' section with filters for Trans Type (All), Status (All), and Work Report Status (Initial). There are buttons for 'New Report', 'One Time Payment', and 'Payment History'. A table with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total is visible. A 'Generate Adjustment Report' dialog box is open, showing a table with the following data:

Agreement Name	Report Start Date	Pay Date	Report Source	Date Received	Billing Type	Active	Message
<input type="checkbox"/> ARP	10/10/2017	10/10/2017	ARP	10/10/2017	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Backpostings	10/10/2017	10/10/2017	Back Postings	10/10/2017	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Service Credit ...	10/10/2017	10/10/2017	Service Credit ...	10/10/2017	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Purchase Serv.	10/10/2017	10/10/2017	PSC	10/10/2017	Contribution	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> 9599_Payroll...	10/10/2017	10/10/2017	Payroll	10/10/2017	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Accrued Verifi..	10/10/2017	10/10/2017	Accrued Verifi.	10/10/2017	Contribution	<input checked="" type="checkbox"/>	

At the bottom of the dialog box, there is a 'Save' button and a 'Close' button. A red arrow points from a yellow box with the number '1' to the '9599_Payroll...' row. Another yellow box with the number '2' is next to the 'Report Start Date' cell. A third yellow box with the number '3' is next to the 'Save' button.

Step 4

1. On the Adjustment screen, click "Add Members."
2. The "Mass Adjustment" screen will appear. On this screen, click "Add Members."
3. The Search window will appear. Enter the member's SSN or name in the search field at the top of the screen and click "Search."
4. The member's information will appear. Click on the member's SSN. This will add the member to the adjustment report.
5. Then click "X" in the upper right corner of the screen to close the window. You will return to the Mass Adjustment screen.

Repeat actions 3 and 4 above to add additional members.

The screenshot displays the 'Adjustment' software interface. The main window is titled 'Mass Adjustment' and contains several sections: 'Report Source: Payroll', 'Billing Location: OHIO LOCAL SCHOOLS', 'Work Report Status: Initial', 'Date Released', 'User Released', 'Agreement Name', 'Category Name: STRS', 'Start Date: 10/10/2017', 'Stop Date: 10/10/2017', and 'Show Dates'. Below these are 'Work Units' and 'Members' sections. A 'Search' window is open, showing a search field with '012-56-3434' and a 'Search' button. A callout box with a red border contains the text: 'Refer to the instructions in Step 4 that correspond with the numbers on this screen.' Red arrows and numbers 1-5 point to specific elements: 1 points to the 'Add Members' button in the 'Mass Adjustment' window; 2 points to the 'Add Members' button in the 'Members' section; 3 points to the search field in the 'Search' window; 4 points to the search field in the 'Search' window; 5 points to the 'X' button in the top right corner of the 'Search' window.

Tools	Pre tax employee contribution	After tax employee contribution	Annual Backpost Payroll
	\$0	\$0	
	\$0	\$0	

Tools	SSN	Participant Name
	012-56-3434	BUCKEYE, B

Tools	SSN	Sort Name	Birth Date
	012-56-3434	BUCKEYE, B	7/29/1979

Step 5

Check to make sure the member(s) you added are listed in the Members section.

1. If you need to add additional members, repeat actions 2–5 on the previous page.
2. Click “Save” when finished.
3. Then click “OK.” You will return to the Adjustment screen.

The screenshot shows the 'Adjustment' window with the 'Mass Adjustment' sub-window open. The 'Save' button is circled in red. The 'Members' section lists one member: BUCKEYE, B with SSN 012-56-3434. A success message 'Save was Successful.' is displayed with an 'OK' button circled in red.

Step 6

1. Enter the payroll adjustment amount in the Pretax Employee Contribution field.
2. Enter “Y” for yes in the Accrued Indicator field if contributions are accrued. Otherwise, leave this field blank.
3. Add details in the Notes field as needed.
4. Click “Save” when finished. You will automatically return to the Employer Reports page to submit the adjustment.≠

The screenshot shows the 'Adjustment' window with the 'Summary' and 'Detail' sections. The 'Save' button is circled in red. The 'Detail' table shows a row for 'BUCKEY, B' with a 'Y' in the 'Accrued Indicator' field. The 'Notes' field contains 'Payroll Reporti...'. The 'Save' button is circled in red.

Tools	Actions	SSN	Participant Name	Agreement Name	Report Type	Record Status	Pre tax employee contribution	After tax employee contribution	Accrued Indicator	Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End	Notes
		012-56-3434	BUCKEY, B	0202_Payroll_...	Payroll Reporti...		\$0	\$0	Y		0
Page Totals							\$0	\$0			
Report Totals							\$0.00	\$0.00			

Tip! Enter “Y” in the Accrued Indicator field only if the contributions are being reported on a July or August payroll adjustment **and** the amount was or will be included in the annual report as part of accrued contributions.

Go to Step 7.

Step 7

Submit the adjustment.

After saving the adjustment, you will automatically return to the Employer Reports page.

The report status of the adjustment will be listed as "Initial."

To submit the adjustment:

1. Click on "Actions" in the Tools column for the adjustment. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the adjustment.
3. Then click "OK."

Home Payment History New Hire Notification Reemployed Retiree Notification **Employer Reports** Deposit & Service Reports Withdrawal Certification Documents

Employer Reports

Trans Type: All
Status: Open
Work Report Status: Initial *Tip!*

Show Funds Show Fund Groups

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	10/10/2017	Adjustment	Initial	Payroll		10/10/2017	Payroll : 2017-10-10		\$120.20

Details
Edit
Submit
Delete

Confirm
Are you sure you want to submit this work report?
Yes No

Info
The selected work report was submitted successfully.
OK

***Tip!** Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."*

Section 7

Backposting

The following instructions explain how to correct previous year(s) contributions by submitting a backposting in ESS.

Submitting a Backposting

Step 1

On the home page, click on “Employer Reports” in the banner menu. (*Screen not shown.*)

Step 2

To enter a backposting, you will need to create a new adjustment. On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click the down arrow on “New Report” and select “Adjustment” from the drop-down menu.
3. The Generate Adjustment Report screen shown on the next page will appear.

Tools	Inserted Date	Work Report T...	Report Status	Report Source...	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	03/07/2018	Regular	Initial	Accrued Verifi...		06/30/2017	Work Report: Jul-2016	171271661	\$0.00
Actions	01/31/2018	Regular	Initial	PSC		12/31/2017	IPP Purchase : 2017-12	171195434	\$1,413.78
Actions	01/10/2017	Regular	Initial	Service Credit ...		06/30/2005	2004-05 Service Credit Verification	162015698	\$0.00

Step 3

1. In the Agreement Name column, click the box next to "Backpostings" to indicate you want to create a backposting.
2. Enter the report start date and pay date. These dates should be the same date the contributions were sent to STRS Ohio.
3. Click "Save." This will take you directly to the Adjustment screen shown on the next page.

The screenshot displays the STRS Ohio Employer Reports interface. At the top, there are navigation tabs: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, and Withdrawal Certification. Below the navigation is the 'Employer Reports' section, which includes a form for 'Trans Type', 'Status', and 'Work Report Status'. A 'New Report' dropdown menu and 'One Time Payment' and 'Payment History' buttons are also present.

The main area shows a table with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A 'Generate Adjustment Report' dialog box is open, showing a table with the following data:

Agreement Name	Report Start Date	Pay Date	Report Source	Date Received	Billing Type	Active	Message
<input type="checkbox"/> ARP	10/16/2017	10/16/2017	ARP	10/16/2017	Contribution	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Backpostings	10/16/2017	10/16/2017	Back Postings	10/16/2017	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Service Credit ...	10/16/2017	10/16/2017	Service Credit ...	10/16/2017	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Purchase Serv.	10/16/2017	10/16/2017	PSC	10/16/2017	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> 9599_Payroll_...	10/16/2017	10/16/2017	Payroll	10/16/2017	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Accrued Verifi..	10/16/2017	10/16/2017	Accrued Verifi..	10/16/2017	Contribution	<input checked="" type="checkbox"/>	

The 'Save' button at the bottom of the dialog box is highlighted with a yellow box and a red arrow. The 'Backpostings' row in the table is also circled in red, and its 'Report Start Date' and 'Pay Date' are highlighted with a yellow box and a red arrow.

Step 4

1. On the Adjustment screen, click "Add Members."
2. The "Mass Adjustment" screen will appear. On this screen, click "Add Members."
3. The Search window will appear. Enter the member's SSN or name in the search field at the top of the screen and click "Search."
4. The member's information will appear. Click on the member's SSN. This will add the member to the adjustment report.
5. Then click "X" in the upper right corner of the screen to close the window. You will return to the Mass Adjustment screen.

Repeat actions 3 and 4 above to add additional members.

The screenshot displays the 'Adjustment' software interface. The main window is titled 'Mass Adjustment' and contains several sections: 'Report Source: Payroll', 'Billing Location: OHIO LOCAL SCHOOLS', 'Work Report Status: Initial', 'Date Released', 'User Released', 'Agreement Name', 'Category Name: STRS', 'Start Date', 'Stop Date', and 'Show Dates'. Below these are 'Work Units' and 'Members' sections. A 'Search' window is open, showing a search field with '012-56-3434' and a 'Search' button. A table in the 'Members' section shows a member with SSN '012-56-3434' and Name 'BUCKEYE, B'. Red arrows and numbers 1-5 point to specific elements: 1 points to the 'Add Members' button in the 'Mass Adjustment' window; 2 points to the 'Add Members' button in the 'Members' section; 3 points to the 'SSN' column header in the 'Members' table; 4 points to the SSN '012-56-3434' in the 'Members' table; 5 points to the 'X' button in the top right corner of the 'Search' window. A callout box with a red border contains the text: 'Refer to the instructions in Step 4 that correspond with the numbers on this screen.'

Step 5

Check to make sure the member(s) you added are listed in the Members section.

1. If you need to add additional members, repeat actions 2–5 on the previous page.
2. Click “Save” when finished.
3. Then click “OK.” You will return to the Adjustment screen shown on the next page.

The screenshot displays the 'Mass Adjustment' window with the following details:

- Buttons:** 'Save' (circled in red), 'Apply', and 'Cancel' are visible at the top of the window.
- Form Fields:** 'Billing Location' (empty), 'Agreement Name' (Backpostings), 'Category Name' (STRS), 'Work Report Status' (Initial), 'Start Date' (10/16/2017), and 'Stop Date' (10/16/2017) are filled in.
- Work Units Table:**

Tools	Pre tax employee contribution	After tax employee contribution	Annual – Fiscal End / Backposting – Fiscal Start / Payroll – Fiscal End	Notes	Accrued Indicator
	\$0	\$0			
	\$0	\$0			
- Members Table:**

Tools	SSN	Participant Name
Delete	012-56-3434	BUCKEYE, B
- Success Message:** A 'Success' dialog box is open, displaying 'Save was Successful.' with an 'OK' button (circled in red).

Step 6

1. Enter the amount of the backposting in the Pretax Employee Contribution field.
2. If any additional service credit should be given, enter the percentage of service earned associated with this payment (e.g., 0.12).
3. Enter the fiscal year the compensation was earned. This is always the first year of the fiscal year (e.g., FY 2016–2017 is 2016).
4. Verify "Y" is marked in the Y = BPSRY field.
5. You must provide a brief explanation why the correction is needed in the Notes field.
6. Click "Save." You will automatically return to the Employer Reports page to submit the backposting.

Go to Step 7.

Adjustment

Save Apply Cancel

Emp 6 9599 OHIO LOCAL SCHOOLS Work Report Type: Adjustment
 Billing Location: OHIO LOCAL SCHOOLS Work Report Status: Initial
 Report Source: Back Postings Report Start Date: 10/16/2017
 Date Released: Date Received: 10/16/2017
 User Released: Batch No:

Summary Detail

Barg Unit Id: BP - Backpostings Exception Filter: Please Select

Delete Selected Add Members

Tools	Actions	SSN	Participant Name	Agreement Name	Report Type	Record Status	Pre tax employee contribution	After tax employee contribution	Service credit	Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End	Y = BPSRY	Notes
		012-56-3434	BUCKEYE, B	Backpostings	Backposting		\$120.2	\$0	0.00	2016	Y	Late time card
Page Totals							\$120.2	\$0				
Report Totals							\$0.00	\$0.00				

Step 7

Submit the backposting.

After saving the backposting, you will automatically return to the Employer Reports page.

The report status of the backposting will be listed as "Initial." Please note that the work report total will be listed as \$0.00. (This is okay.)

To submit the backposting:

1. Click on "Actions" in the Tools column for the backposting. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the backposting.
3. Then click "OK."

The screenshot shows the "Employer Reports" page with a navigation bar at the top containing links for Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation bar is a filter section with "Trans Type: All", "Status: Open", and "Work Report Status: Initial" (with a "Tip!" icon). To the right of the filters are buttons for "New Report", "One Time Payment", and "Payment History".

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	10/10/2017	Regular	Initial	Payroll		07/14/2017	Work Report: Jul-2017	169119795	\$108,563.28
Actions	10/10/2017	Adjustment	Initial	Payroll		10/10/2017	Payroll : 2017-10-10 9599 Payroll_001 1691267...	169126753	\$0.00
Actions	06/15/2017	Regular	Initial	PSC		06/30/2017	IPP Purchase : 2017-06	168708108	\$0.00
Actions	09/27/2017	Regular	Initial	PSC		07/31/2017	IPP Purchase : 2017-07	169091741	\$312.53
Actions	10/16/2017	Adjustment	Initial	Back Postings		10/31/2017	BPSRY : 2017-10-16	169133741	\$0.00

A red circle highlights the "Actions" link in the table. A red arrow points to the "Submit" option in the dropdown menu. A "Confirm" dialog box is open, asking "Are you sure you want to submit this work report?" with "Yes" and "No" buttons. The "Yes" button is circled in red. An "Info" dialog box is also open, displaying "The selected work report was submitted successfully." with an "OK" button circled in red.

Tip! Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

Section 8

Annual Report

The following instructions explain how to submit your annual report in ESS. **If you submit your report through an Information Technology Center (ITC) or secure file upload, please disregard these instructions.** Annual reports are available in ESS on July 1. Comprehensive annual reporting instructions are available on the STRS Ohio Employer Website.

Submitting Your Annual Report

Step 1

On the home page, click on “Employer Reports” in the banner menu or “Annual Report” in the Outstanding Reports section. (*Screen not shown.*)

Step 2

On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click on “Actions” in the row for the annual report and select “Edit” from the drop-down menu.
3. The Work Report Editor screen shown on the next page will appear.

The screenshot displays the 'Employer Reports' page. At the top, there is a navigation menu with the following items: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the menu, the page title is 'Employer Reports'. There is a form with the following fields: 'Trans Type' (set to 'All'), 'Status' (set to 'Open'), and 'Work Report Status' (set to 'Initial'). To the right of these fields are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table with the following columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row of data. A red arrow points to the 'Edit' option in the 'Tools' dropdown menu for the first row.

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	09/22/2017	Regular	Initial	Annual		06/30/2017	Work Report: Jul-2016		\$0.00
Details		Regular	Initial	Payroll		06/30/2017	Payroll : 2017-06-30		\$1,189.24

Step 3

The Work Report Editor screen displays each member's name and SSN. Enter the following information for each member:

1. Pretax employee contributions.
2. After-tax employee contributions (if applicable).
3. Accrued contributions (contributions earned by June 30 but not paid until July and August).
4. Service credit earned. (Enter service credit as a decimal, e.g., 1.00 for a full year or 0.50 for a half year. For reemployed retirees, enter 0.00.)
5. For membership type code, enter "R" if the member is reemployed. Leave this field blank for active members.
6. Include notes if needed.
7. If the report contains more than one page, click the page navigation arrow at the bottom of the screen to go to the next page.
8. Click "Save" when finished. You will automatically return to the Employer Reports page to submit the report.

Go to Step 4.

Work Report Editor

Save **FINISH**

Employer: OHIO LOCAL SCHOOLS Work Report Type: Regular Report Period: 07/01/2016 - 06/30/2017 # of Participants: 9

Billing Location: 9599 OHIO LOCAL SCHOOLS Work Report Status: Initial Identifier: #21016105- work Report- July 2... # of Rows: 9

Report Source: Annual Report Start Date: 07/01/2016 Pay Date: 06/30/2017 Billing Type: Contribution

Date Released: Date Received: 09/22/2017 Trans#: #21016105 Agreement: 9599 Annual Report

User Released: Batch No: Updated By: WOLFORD, T

Summary Detail

Barg Unit Id: Exception Filter:

Delete Selected

Tools	Actions	SSN	Participant Name	Report Stop Date	Report Type	Record Status	Pretax employee contribution	After tax employee contribution	Accrued contribution amount	Service credit	Annual - Fiscal End / Backposting - Fiscal Start	Membership Type Code	Notes
<input type="checkbox"/>		000-11-2222	Smith, T..	06/30/2017	Annual Report...		\$0	\$0	\$0.00	0.00	2017		
<input type="checkbox"/>		000-22-3333	Rolls, A..	06/30/2017	Annual Report...		\$0	\$0	\$0.00	0.00	2017		
<input type="checkbox"/>		000-33-4444	Batch, D..	06/30/2017	Annual Report...		\$0	\$0	\$0.00	0.00	2017		

1. Enter (edit) "Pre-tax employee contribution" amount. This is just the member contributions.
2. If applicable, enter the "After-tax employee contribution amount."
3. Enter "Accrued Contribution amount." These are the contributions on the amount paid to a member after July 1, but earned prior to June 30.
4. Enter the member's earned service credit for the fiscal year. Enter as a decimal, i.e. 1.00 for full year, 0.50 as a half year.
5. If reemployed, type "R" under "Membership Type Code."
6. Add any important notes in the "Notes" field.
7. Click to move to the next page if applicable.
8. Save

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Step 4

Submit the annual report.

After saving the annual report, you will automatically return to the Employer Reports page.

The report status of the annual report will be listed as "Initial."

To submit the report:

1. Click on "Actions" in the Tools column for the annual report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

Home Make a Payment New Hire Notification Reemployed Retiree Notification **Employer Reports** Deposit & Service Reports Withdrawal Certification Documents

Employer Reports

Trans Type: All
Status: Open
Work Report Status: Initial **Tip!**

New Report
One Time Payment Payment History

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	09/22/2017	Regular	Initial	Annual		06/30/2017	Work Report: Jul-2016	169070947	\$0.00
Details	17	Regular	Initial	Payroll		06/30/2017	Payroll : 2017-06-30 D058_Payroll_001 169126...	169126752	\$1,189.24

Confirm: Are you sure you want to submit this work report? Yes No

Info: The selected work report was submitted successfully. OK

Tip! Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

Section 9

Service Credit Verification Report

After your annual report is submitted, you may be asked to verify service credit for certain members. The following instructions explain how to submit a service credit verification report in ESS.

Submitting a Service Credit Verification Report

Please note that Step 3 varies depending on the method you use to calculate service credit.

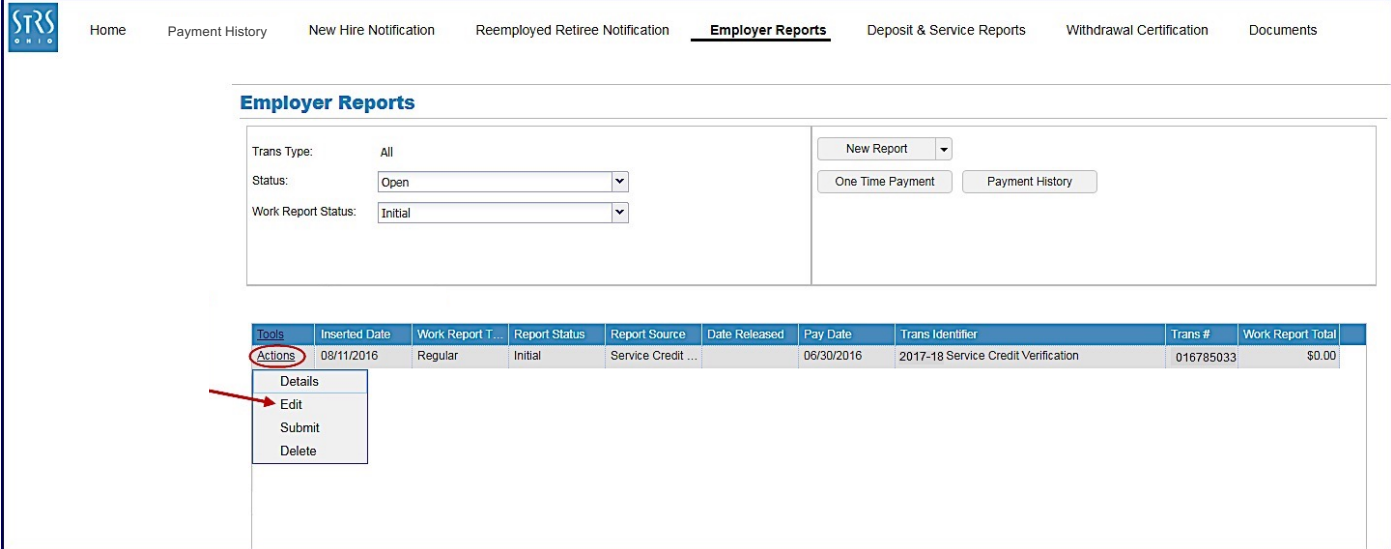
Step 1

On the home page, click on “Employer Reports” in the banner menu or “Service Credit Verification” in the Outstanding Reports section. *(Screen not shown.)*

Step 2

On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click on “Actions” in the row for the service credit verification report and select “Edit” from the drop-down menu.
3. The screen shown on the next page will appear with a list of members whose service credit needs to be verified.



The screenshot displays the 'Employer Reports' page in the ESS system. The page features a navigation menu at the top with options: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation is the 'Employer Reports' section, which includes a form with the following fields: Trans Type (All), Status (Open), and Work Report Status (Initial). To the right of the form are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table with the following columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row of data: Tools (Actions), Inserted Date (08/11/2016), Work Report T... (Regular), Report Status (Initial), Report Source (Service Credit ...), Date Released (06/30/2016), Pay Date (2017-18 Service Credit Verification), Trans # (016785033), and Work Report Total (\$0.00). A red circle highlights the 'Actions' cell, and a red arrow points to the 'Edit' option in the dropdown menu.

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	08/11/2016	Regular	Initial	Service Credit ...	06/30/2016	2017-18 Service Credit Verification	016785033		\$0.00

Step 3a — For Credit Calculated Using Days

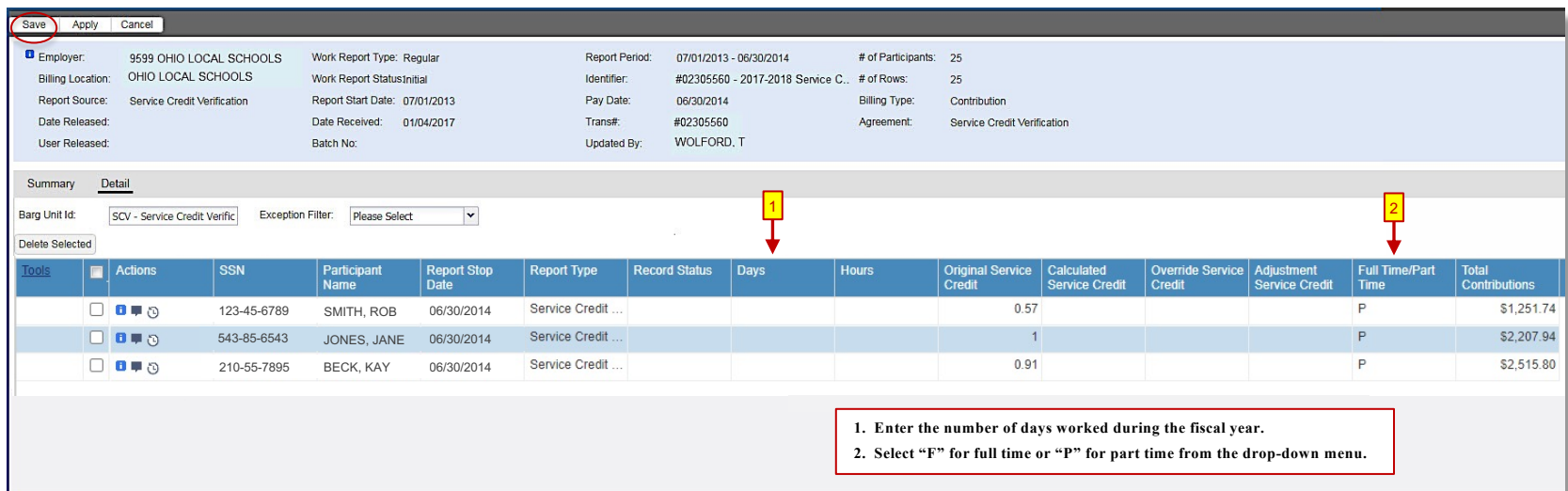
This step applies to **K-12 employers and colleges and universities** that use **days** to calculate service credit. If your college or university uses full-time equivalent (FTE) to calculate credit, go to Step 3b on the next page.

For each member, provide the number of days worked during the fiscal year and indicate work status (part time or full time based on STRS Ohio definitions). Please note that the service credit reported in the annual report will be listed for each member.

1. Click on the Days field to enter the number of days the member worked during the fiscal year.
2. Click on the Full Time/Part Time field and select “F” for full time or “P” for part time from the drop-down menu.
3. Click “Save” when you are finished entering data for each member. You will automatically return to the Employer Reports page to submit the report.

Note: If the report contains more than one page, be sure to complete all pages before submitting the report.

Skip Step 3b and go to Step 4.



Save Apply Cancel

Employer: 9599 OHIO LOCAL SCHOOLS Work Report Type: Regular Report Period: 07/01/2013 - 06/30/2014 # of Participants: 25
Billing Location: OHIO LOCAL SCHOOLS Work Report Status: Initial Identifier: #02305560 - 2017-2018 Service C... # of Rows: 25
Report Source: Service Credit Verification Report Start Date: 07/01/2013 Pay Date: 06/30/2014 Billing Type: Contribution
Date Released: Date Received: 01/04/2017 Trans#: #02305560 Agreement: Service Credit Verification
User Released: Batch No: Updated By: WOLFORD, T

Summary Detail

Barg Unit Id: SCV - Service Credit Verific Exception Filter: Please Select

Delete Selected

Tools	Actions	SSN	Participant Name	Report Stop Date	Report Type	Record Status	Days	Hours	Original Service Credit	Calculated Service Credit	Override Service Credit	Adjustment Service Credit	Full Time/Part Time	Total Contributions
	<input type="checkbox"/>	123-45-6789	SMITH, ROB	06/30/2014	Service Credit ...				0.57				P	\$1,251.74
	<input type="checkbox"/>	543-85-6543	JONES, JANE	06/30/2014	Service Credit ...				1				P	\$2,207.94
	<input type="checkbox"/>	210-55-7895	BECK, KAY	06/30/2014	Service Credit ...				0.91				P	\$2,515.80

1. Enter the number of days worked during the fiscal year.
2. Select “F” for full time or “P” for part time from the drop-down menu.

Step 3b — For Credit Calculated Using FTE

This step applies **only to colleges and universities** that use **full-time equivalent (FTE)** to calculate service credit. If you use days to calculate credit, go to Step 3a on the previous page.

For each member, provide the **percentage** of FTE for each semester worked and indicate work status (part time or full time based on STRS Ohio definitions). Please note that the service credit reported in the annual report will be listed for each member.

1. Click on the Summer FTE, Fall FTE and/or Spring FTE field to enter the percentage of FTE for each semester worked. For example, if a professor was 50% FTE in the fall, enter "50" in the Fall FTE field for that member.
2. Click on the Full Time/Part Time field and select "F" for full time or "P" for part time from the drop-down menu.
3. Click "Save" when you are finished entering data for each member. You will automatically return to the Employer Reports page to submit the report.

Note: If the report contains more than one page, be sure to complete all pages before submitting the report.

Go to Step 4.

The screenshot shows the 'Service Credit Verification Report' interface. At the top, there are buttons for 'Save', 'Apply', and 'Cancel'. Below this is a summary section with fields for Employer, Billing Location, Report Source, Date Released, User Released, Work Report Type, Work Report Status, Report Start Date, Date Received, Batch No., Report Period, Identifier, Pay Date, Trans#, Updated By, # of Participants, # of Rows, Billing Type, and Agreement. The 'Summary' tab is selected, and the 'Detail' tab is also visible. Below the summary is a table with columns: Tools, Actions, SSN, Participant Name, Report Stop Date, Report Type, Record Status, Days, Hours, Summer FTE, Fall FTE, Spring FTE, Original Service Credit, Calculated Service Credit, Override Service Credit, Adjustment Service Credit, Full Time/Part Time, Total Contributions, and Category Name. The table contains four rows of data. Red annotations highlight the 'Save' button, the 'Summer FTE', 'Fall FTE', and 'Spring FTE' columns, and the 'Full Time/Part Time' dropdown menu. A red box at the bottom contains the following instructions:

1. Enter the percentage of FTE for each session (e.g., enter 50 for 50%).
2. Select "F" for full time or "P" for part time from the drop-down menu.

Step 4

Submit the service credit verification report.

After saving the service credit verification report, you will automatically return to the Employer Reports page.

The report status of the service credit verification report will be listed as "Initial."

To submit the report:

1. Click on "Actions" in the Tools column for the service credit verification report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

The screenshot shows the 'Employer Reports' page. At the top, there is a navigation bar with links: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation bar, the 'Employer Reports' section contains a form with the following fields: Trans Type: All, Status: Open (dropdown), Work Report Status: Initial (dropdown), and a 'Tip!' icon. To the right of the form are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table with the following columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row with the following data: Tools: Actions, Inserted Date: 01/04/2017, Work Report T...: Regular, Report Status: Initial, Report Source: Service Credit ..., Date Released: 06/30/2014, Pay Date: 2017-18 Service Credit Verification, Trans #: 016785033, Work Report Total: \$0.00. A red arrow points to the 'Actions' button in the Tools column. A confirmation dialog box is open over the table, asking 'Are you sure you want to submit this work report?' with 'Yes' and 'No' buttons. The 'Yes' button is circled in red. Below the confirmation dialog is an information dialog box with the message 'The selected work report was submitted successfully.' and an 'OK' button, which is also circled in red.

Tip! Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

Section 10

Accrued Verification Report

After your annual report and summer payrolls have been processed, you may be asked to verify accrued contributions for certain members. The following instructions explain how to submit an accrued verification report in ESS.

Submitting an Accrued Verification Report

Step 1

On the home page, click on “Employer Reports” in the banner menu or “Accrued Verification” in the Outstanding Reports section. *(Screen not shown.)*

Step 2

On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click on “Actions” in the row for the accrued verification report and select “Edit” from the drop-down menu.
3. The Work Report Editor screen shown on the next page will appear.

The screenshot shows the 'Employer Reports' page in the ESS system. The page has a navigation bar with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation bar is the 'Employer Reports' section, which includes a form for creating a new report with fields for Trans Type (All), Status (Open), and Work Report Status (Initial). To the right of the form are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table of reports with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row with the following data: Actions, 12/05/2017, Regular, Initial, Accrued Verif..., 06/30/2017, 2016-07 Accrued Verification Report, 170336953, and \$0.00. A red arrow points to the 'Actions' cell, and a dropdown menu is open, showing options: Details, **Edit** (circled in red), Submit, and Delete.

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	12/05/2017	Regular	Initial	Accrued Verif...	06/30/2017	2016-07 Accrued Verification Report	170336953		\$0.00

Step 3

The Work Report Editor screen displays individual member accounts with accrued contributions that need to be verified. For each member:

1. Review and compare accrued contributions for payroll and the annual report.
2. Click the drop-down menu in the Verification Indicator field to select the correct amount (payroll, annual or neither).
3. If “Neither” is selected in the Verification Indicator field, enter the correct amount of accrued contributions in the Notes field.
4. Click “Save” when finished verifying accrued contributions for each member listed in the report. You will automatically return to the Employer Reports page to submit the report.

Go to Step 4.

Work Report Editor

Save Apply Cancel

Employer: Ohio Local Schools Work Report Type: Regular Report Period: 07/01/2016 - 06/30/2017 # of Participants: 1039
 Billing Location: Work Report Status: Initial Identifier: 176846896 - 2016-07 Accrued V... # of Rows: 1039
 Report Source: Accrued Verification Report Start Date: 07/01/2016 Pay Date: 06/30/2017 Billing Type: Contribution
 Date Released: Date Received: Trans#: Agreement: Accrued Verification Report
 User Released: Batch No: Updated By: DBO

Summary **Detail**

Barg Unit Id: ARV - Accrued Verification Exception Filter: Please Select

Add Member Delete Selected

Tools	Actions	SSN	Participant Name...	Report Stop Date	Report Type	Record Status	Accrued Payroll Pre Tax	Accrued Payroll After Tax	Annual Report Accrued Amount	Verification Indicator	Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End	Notes
			Smith, S	06/30/2017	Accrued Verifi...	Validated	\$725.06	\$0.00	\$0.00	Payroll	2017	STRS
			Jones, R	06/30/2017	Accrued Verifi...	Validated	\$710.82	\$0.00	\$975.06	Annual	2017	STRS
			Baker, T	06/30/2017	Accrued Verifi...	Validated	\$0.00	\$0.00	\$45.50	Neither	2017	STRS
			Brown, A	06/30/2017	Accrued Verifi...	Validated	\$580.60	\$0.00	\$793.68		2017	STRS
			Thompson, J	06/30/2017	Accrued Verifi...	Validated	\$710.82	\$0.00	\$975.06		2017	STRS
			Willis, K	06/30/2017	Accrued Verifi...	Validated	\$185.05	\$0.00	\$475.98		2017	STRS
			Arms, T	06/30/2017	Accrued Verifi...	Validated	\$497.52	\$0.00	\$692.59		2017	STRS
			Brooks, B	06/30/2017	Accrued Verifi...	Validated	\$0.00	\$0.00	\$623.34		2017	STRS
			Brooks, L	06/30/2017	Accrued Verifi...	Validated	\$171.64	\$0.00	\$874.41		2017	STRS
			Gordon, P	06/30/2017	Accrued Verifi...	Validated	\$424.18	\$0.00	\$648.94		2017	STRS
			Rogers, C	06/30/2017	Accrued Verifi...	Validated	\$412.84	\$0.00	\$0.00		2017	STRS
			Date, C	06/30/2017	Accrued Verifi...	Validated	\$645.04	\$0.00	\$0.00		2017	STRS
			Andrews, B	06/30/2017	Accrued Verifi...	Validated	\$445.94	\$0.00	\$0.00		2017	STRS
			Times, N	06/30/2017	Accrued Verifi...	Validated	\$412.84	\$0.00	\$0.00		2017	STRS
			Jones, B	06/30/2017	Accrued Verifi...	Validated	\$456.94	\$0.00	\$0.00		2017	STRS
			Frost, J	06/30/2017	Accrued Verifi...	Validated	\$412.84	\$0.00	\$0.00		2017	STRS
Page Totals							\$11,369.16	\$0.00	\$10,455.98			
Report Totals							\$594,398.82	\$0.00	\$740,100.37			

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Step 4

Submit the accrued verification report.

After saving the accrued verification report, you will automatically return to the Employer Reports page.

The report status of the accrued verification report will be listed as "Initial."

To submit the report:

1. Click on "Actions" in the Tools column for the accrued verification report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

The screenshot shows the 'Employer Reports' page with a navigation bar at the top. The main content area has a filter section with 'Trans Type: All', 'Status: Open', and 'Work Report Status: Initial'. A table below lists reports, with one report highlighted. A red arrow points to the 'Actions' column of this report. A 'Confirm' dialog box is open, asking 'Are you sure you want to submit this work report?' with 'Yes' selected. An 'Info' dialog box below it shows 'The selected work report was submitted successfully.' with 'OK' selected.

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	10/10/2017	Regular	Initial	Accrued Verifi...		06/30/2017	Work Report: Jul-2016	170336953	\$0.00

Tip! Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

Section 11

Purchase Service Credit Report

The following instructions explain how to submit a purchase service credit (PSC) report in ESS. If a member is purchasing service credit through payroll deduction, STRS Ohio will notify you via email when a PSC report is ready to complete. These reports are available in ESS by the 20th of each month.

Submitting a Purchase Service Credit Report

Step 1

On the home page, click on “Employer Reports” in the banner menu or “Purchase Service Credit” in the Outstanding Reports section. *(Screen not shown.)*

Step 2

On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click on “Actions” in the row for the PSC report and select “Edit” from the drop-down menu.
3. The screen shown on the next page will appear with a list of all members currently participating in payroll deduction.

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	01/31/2018	Regular	Initial	PSC		12/31/2017	IPP Purchase : 2017-12	171195434	\$110.00

Step 3

All members currently participating in payroll deduction will be listed on this screen.

- For each member, review the amounts in the following columns:
 - PSC Expected Amount — This is the amount STRS Ohio expects to receive.
 - PSC Actual Amount — This is the actual amount being remitted.
 - Tax Election — “TD” indicates the amount is tax-deferred/pretax; “PT” indicates the amount is post-tax/after-tax.
- If the amount being remitted is different than the actual amount listed, click on the PSC Actual Amount field to enter the correct amount.

If you need to add members to the report, go to Step 4.

If you are finished, click “Save.” You will automatically return to the Employer Reports page to submit the report. Go to Step 5.

Work Report Editor

Save Apply Cancel

Employer: 9599 OHIO LOCAL SCHOOLS Work Report Type: Regular Report Period: 08/01/2017 - 08/31/2017 # of Participants: 15
Billing Location: OHIO LOCAL SCHOOLS Work Report Status: Initial Identifier: #23751165 - IPP Purchase : 20... # of Rows: 15
Report Source: PSC Report Start Date: 08/01/2017 Pay Date: 08/31/2017 Billing Type: Contribution
Date Released: Date Received: 08/15/2017 Trans#: #23751165 Agreement: Purchase Service
User Released: Batch No: 015382 Updated By: WOLFORDT

Summary Detail

Barg Unit Id: PSC - Purchase Service Exception Filter: Please Select

Add Member Delete Selected

Tools	Actions	SSN	Participant Name	Report Stop Date	Report Type	Record Status	PSC Expected Amount	PSC Actual Amount	PSC Code	Tax Election	Final Pay Amount	Last Payment Amount	Retirement date	Last Payment Month	Final Payment Month	Category Name
		016-16-1416	WOLF, B	08/01/2017	Purchase Serv...		\$41.00	\$41.00		TD	\$0.00	\$0.00				STRS
		015-15-1315	FREEMAN, A	08/01/2017	Purchase Serv...		\$70.00	\$70.00		TD	\$0.00	\$0.00				STRS
Page Totals							\$111.00	\$111.00								
Report Totals							\$111.00	\$111.00								

1. Verify all amounts and the tax election type.
2. If the amount being remitted differs from the actual amount listed, enter the correct amount in the PSC Actual Amount field. (Do not edit any other fields.)

Tip! Be sure to verify all information. If needed, correct the “PSC Actual Amount” before submitting the report. If other information is incorrect, please contact STRS Ohio to make corrections.

Step 4

To add a member to a PSC report:

1. Click on the "Add Member" button. This will create a new blank line in the report.
2. Enter the member's SSN or name. Then press "Enter" on your keyboard for a search screen to pop up or the member's SSN/name to appear on the blank line.
3. Enter the actual amount being remitted in the PSC Actual Amount field.
4. Enter the PSC code. This reference number can be found in the bottom left corner of the paper agreement the member received from STRS Ohio.
5. In the Tax Election field, enter "TD" if the amount is tax-deferred/pretax or "PT" if the amount is post-tax/after-tax.
6. Click "Save" when finished. You will automatically return to the Employer Reports page to submit the report.

Go to Step 5.

The screenshot shows the 'Work Report Editor' interface. At the top, there are buttons for 'Save', 'Apply', and 'Cancel'. Below this, there is a summary section with fields for Employer (9599 OHIO LOCAL SCHOOLS), Billing Location (OHIO LOCAL SCHOOLS), Report Source (PSC), Date Released (08/15/2017), User Released, Report Period (08/01/2017 - 08/31/2017), Report Status (Initial), Identifier (#23751165), Pay Date (08/31/2017), Transf# (#23751165), Updated By (WOLFORDT), # of Participants (15), # of Rows (15), Billing Type (Contribution), and Agreement (Purchase Service). Below the summary, there is a table with columns for SSN, Participant Name, Report Stop Date, Report Type, Record Status, PSC Expected Amount, PSC Actual Amount, PSC Code, Tax Election, Final Pay Amount, Last Payment Amount, Retirement date, Last Payment Month, Final Payment Month, and Category Name. Red arrows point to specific fields in the table, labeled 1 through 5, corresponding to the steps in the instructions.

Tools	Actions	SSN	Participant Name	Report Stop Date	Report Type	Record Status	PSC Expected Amount	PSC Actual Amount	PSC Code	Tax Election	Final Pay Amount	Last Payment Amount	Retirement date	Last Payment Month	Final Payment Month	Category Name	
				08/01/2017	Purchase Serv...						\$0.00	\$0.00				STRS	
		015-15-1315	FREEMAN, A	08/01/2017	Purchase Serv...		\$70.00	\$70.00		TD	\$0.00	\$0.00				STRS	
		016-16-1416	WOLF, B	08/01/2017	Purchase Serv...		\$41.00	\$41.00		TD	\$0.00	\$0.00				STRS	
Page Totals							\$111.00	\$111.00									
Report Totals							\$111.00	\$111.00									

Step 5

Submit the PSC report.

After saving the PSC report, you will automatically return to the Employer Reports page.

The report status of the PSC report will be listed as "Initial."

Payment cannot be applied to the member's account until the report is submitted and processed.

To submit the report:

1. Click on "Actions" in the Tools column for the PSC report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

The screenshot shows the STS Employer Reports page. At the top, there is a navigation bar with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation bar, the page title is "Employer Reports". There are several filters: "Trans Type: All", "Status: Open", and "Work Report Status: Initial". A "Tip!" icon is visible next to the "Work Report Status" filter. On the right side, there are buttons for "New Report", "One Time Payment", and "Payment History". Below the filters is a table with the following columns: Tools, Inserted Date, Work Report T., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row with the following data: Actions, 08/15/2017, Regular, Initial, PSC, 08/31/2017, Work Report: Aug-2017, 169318994, \$111.00. A red arrow points to the "Actions" cell. A dropdown menu is open from the "Actions" cell, showing options: Details, Edit, **Submit** (circled in red), and Delete. A "Confirm" dialog box is displayed over the table, asking "Are you sure you want to submit this work report?" with "Yes" (circled in red) and "No" buttons. An "Info" dialog box is also displayed, stating "The selected work report was submitted successfully." with an "OK" button (circled in red).

Tip! Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

Section 12

Retirement Reporting

The following instructions explain how to submit a deposit and service report as well as a request for additional information in ESS.

Deposit and Service Report

Step 1

You will receive an email when a deposit and service report is ready to complete.

To access the report from the home page:

1. Click on “Deposit & Service Reports” in the banner menu, or
2. Click on “Deposit & Service” in the Outstanding Reports section.

This will take you to the Reports To Be Completed tab on the Deposit and Service Report screen shown on the next page.

The screenshot displays the ESS home page with a navigation banner at the top containing: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports (circled in red), and Withdrawal Certification. Below the banner are three main sections: 'Additional Tools' with a list of links including Direct Debit Set Up, Employer Contacts, Employment Verification Reports, Estimated Payroll, GASB Reports, Online Death Notification, Pay Date Calendar, Payroll Summary, Pickup Plan Information, Request Access, Training Registration, and Violation Period Certification; 'Outstanding Reports' with a table listing report types and their counts; and 'Current Obligations' with a table of due dates, descriptions, and amounts. A red arrow points to the 'Deposit & Service' entry in the Outstanding Reports table.

Report Type	Number of Reports
Service Credit Verification	1
Deposit & Service	1
Employment Verification Reports	3
Annual Reporting	1
Withdrawal Certification	2
Pay Date Calendar	1
Violation Period Certification	1

Due Date	Description	Amount
09/12/2023	Payroll-reported contributions due	\$515.78
09/13/2023	PSC employer cost-Kimberly K	\$5,719.60
09/15/2023	Monthly PSC deductions due	\$811.23
	Payment received - not yet applied	-5276.65

Step 2

Click on the employee's SSN to open the report. This will take you to the screen shown on the next page.

STRS OHIO Home Make a Payment New Hire Notification Reemployed Retiree Notification Employer Reports **Deposit & Service Reports** Documents

Deposit & Service Reports

Reports To Be Completed Available for Updates Submitted Reports

Employee SSN	Employee Name	Retirement Date	Notification Date	Benefit Type
XXX-XX-1284	BAKER, ANDREA MARIE BARTLEY	07/01/2018	05/02/2018	Service Retirement
XXX-XX-9999	WEIBLER, KIMBERLY PELFREY	08/01/2018	06/04/2018	Service Retirement

* Indicates a partially completed form

[Return to Top of Page](#)

Navigation Notes

- You will automatically be taken to the Reports To Be Completed tab when you access a deposit and service report from the home page.
- The Available for Updates tab contains submitted reports that can be corrected if needed. **Important:** Only click on reports in this tab if you are submitting a revised deposit and service report.
- The Submitted Reports tab contains submitted reports that are available for viewing or printing.
- You may notice two reports are available for the same member. When a member's retirement effective date is between Aug. 1 and Oct. 1, STRS Ohio requires you to complete a deposit and service report for the current year and prior fiscal year while the annual report is being processed.

Step 3

Complete each section of the report.

Earnings

1. Compensation earned during the fiscal year under the most recent contract.
2. Any amounts earned during the fiscal year that were included in the annual report for work under a prior year contract. Only complete this line for members whose contracts cross fiscal years and who work in July.
3. Any amount reported and/or paid in the current year that was earned in the prior fiscal year and not backposted. Do not include accrued contributions.

DEPOSIT AND SERVICE REPORT

To enable us to compute and pay the benefit to the employee listed above, complete and return this report at the earliest date possible after you can accurately determine the total earnings and deposits for the fiscal year. The certification should be executed then, even though final salary may be paid at a later date. Early completion will speed both the processing of the application and the issuance of the first monthly benefit check.

For the STRS Ohio fiscal beginning July 1, 2021 and ending June 30, 2022

Earnings					
1.	Earnings under employee's 2021-22 Base Contract <input type="text"/>				
2.	<i>Complete only if member's contract crosses fiscal years and member worked under contract in July: Balance of employee's 2020-21 contract earned in the 2021-22 fiscal year</i> <input type="text"/>				
3.	Amount reported in the current fiscal year but earned in the prior fiscal year and not backposted. <i>Do not include accrued contributions.</i> <input type="text"/>				
4.	Supplemental or Additional Earnings (Please Itemize) <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"><input type="button" value="Add"/> <input type="button" value="Delete"/> <table border="1" style="width: 100%;"><thead><tr><th>Description</th><th>Amount</th></tr></thead><tbody><tr><td> </td><td> </td></tr></tbody></table></div>	Description	Amount		
Description	Amount				
5.	Pickup included in compensation for retirement purposes Indicate percentage <input type="text"/>				
6.	Total 2021-22 Employee Earnings <input type="text" value="\$0.00"/>				
Contributions					
7.	Employee Contributions - After-Tax <input type="text" value="\$0.00"/>				
8.	Employee Contributions - Pre-Tax <input type="text" value="0.00"/>				
9.	Total 2021-22 Employee Contributions <input type="text" value="0.00"/>				

(*14.00% of total 2021-22 earnings on the line 6. These contributions should agree with those reported on the 2021-22 Annual Report.)

Partial screen

4. Any supplemental earnings paid in addition to the regular contract. List and describe each supplemental earning and enter the amount earned.
5. The percentage of pickup **only if** included in compensation for retirement purposes (pickup-on-pickup).
6. Total member earnings.

Contributions

7. Taxed contributions reported as after-tax during the fiscal year.
8. Pretax contributions reported as tax-deferred during the fiscal year.
9. 14% of total earnings (line 6 multiplied by 14%).

Step 3 continued on next page.

Step 3 (continued)

Service Credit and Contract Information

10. Service credit earned by the member during the fiscal year.
11. Last pay date that payment was or will be issued to the member.
12. Last date the member worked, including any paid sick leave or vacation days used (other than severance pay for unused benefits).
13. Position held by the member during the fiscal year.
14. Most recent contract salary.
15. Month and day service was contracted to begin and end, and number of days in contract.
16. Percentage increase generally granted to teaching members from previous year to current year.

Contact Information/ Certification

17. Treasurer or other fiscal officer authorized to certify the report.
18. Phone number for any necessary follow-up.

Comments

Provide any information necessary to process the account.

The screenshot shows a web form with the following sections and fields:

- Service Credit and Contract Information:**
 - 10. Service Credit earned in 2020-21 (with a [Calculate Service Credit](#) link)
 - 11. Last pay date (calendar icon)
 - 12. Last day employee worked (including paid sick time) (calendar icon)
 - 13. Position held
 - 14. Contract salary (please supply full contract amount even if not completed)
 - 15. Beginning date of full contract (calendar icon)
 - Contract ending date (typically the last day of school) (calendar icon)
 - Number of days in total contract (even if not completed)
 - 16. Percentage increase generally granted to teaching employees
- Contact Information:**
 - 17. Contact person
 - 18. Telephone number for contact person
- Comments:** A large text area for entering comments.

At the bottom of the form, there are several buttons: "Request for Additional Information", "Save Form" (circled in red), "Save And Submit", "Reset", "Return To List", "Save and Exit", "Help", "Print", and "Return to Top of Page". Red arrows point from "Step 5b" to the "Save Form" button and from "Step 5a" to the "Request for Additional Information" button.

Partial screen

Step 4

Click "Save Form" when finished entering information. Then go to Step 5a **or** Step 5b based on the situation.

Step 5a

If the member had supplemental contracts or additional earnings in the past five fiscal years **or** has a contract that crosses fiscal years, click "Request for Additional Information." This will take you to [Step 1 of Completing a Request for Additional Information](#) on the next page.

Step 5b

If you do not need to complete a request for additional information, click "Save and Submit" to submit the report.

Request for Additional Information

If a member had supplemental contracts or additional earnings in the past five fiscal years **or** has a contract that crosses fiscal years, you need to complete a request for additional information after you complete the deposit and service report.

Step 1

After completing Step 5a on the previous page, you will be taken to the Request for Additional Information screen. Complete each section of the report for each applicable fiscal year.

General Information

1. The position the member held for the respective fiscal year.
2. The amount of the member's full contract, even if not completed.
3. Deducted amount for board-approved docked days or unearned contract amounts.
4. Any amount reported and/or paid in the current year that was earned in the prior fiscal year and not backposted. Do not include accrued contributions.
5. The beginning date of the respective contract.
6. The ending date of the respective contract.
7. The number of days in the member's full contract.

Request for Additional Information					
Complete this form only if the employee had supplemental earnings in 2015-2016 through 2019-2020 or the employee's contract year was August through July and the employee worked in July. Information on this form will assist us in computing the proper final average salary for retiring employees. Please complete the appropriate information in the spaces below and submit this form.					
	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020
Member Contribution Rate	13.00%	14.00%	14.00%	14.00%	14.00%
General Information					
1. Position employee held	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2. Contract amount	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3. Unearned amount for board approved docked days	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. Amount of compensation reported during the fiscal year listed but earned in the prior fiscal year and not backposted. Do not list accrued wages.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. Contract specified to begin	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. Contract specified to end	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7. Number of days in contract	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Partial screen

Step 1 continued on next page.

Section 13

Withdrawal Certification

The following instructions explain how to certify a member account withdrawal and reemployed retiree payment in ESS.

Accessing a Withdrawal Certification

Step 1

You will receive an email when a withdrawal certification is ready to complete.

To access the certification from the home page:

1. Click on “Withdrawal Certification” in the banner menu, or
2. Click on “Withdrawal Certification” in the Outstanding Reports section.

This will take you to the Reports To Be Completed tab of the Withdrawal Certification screen shown on the next page.

The screenshot shows the ESS Home page with a navigation menu at the top. The 'Withdrawal Certification' link in the menu is circled in red. Below the menu, there are three main sections: 'Additional Tools', 'Outstanding Reports', and 'Current Obligations'. A red arrow points to the 'Withdrawal Certification' link in the 'Outstanding Reports' table.

Report Type	Number of Reports
Service Credit Verification	1
Accrued Verification	1
Employment Verification Reports	3
Annual Reporting	1
Withdrawal Certification	2
Pay Date Calendar	1
Violation Period Certification	1

Due Date	Description	Amount
09/12/2023	Payroll-reported contributions due	\$515.78
09/13/2023	PSC employer cost-Kimberly K	\$5,719.60
09/15/2023	Monthly PSC deductions due	\$811.23
	Payment received - not yet applied	-\$276.65

Step 2

1. Click on the employee's SSN to open the certification.
2. This will take you directly to the withdrawal certification screen for the member withdrawal (Page 3) or the reemployed payment (Page 4).

Employee SSN	Employee Name	Notification Date	Benefit Type
XXX-XX-4385	DEJA, DEJA	07/15/2023	Member Withdrawal
XXX-XX-2842	ABBED, ABBED	06/19/2023	Reemployed Payment

Navigation Notes

- You will automatically be taken to the Reports To Be Completed tab when you access a withdrawal certification from the home page. Two types of certifications may be listed: member withdrawal and reemployed payment.
- The Available for Updates tab lists existing certifications in need of correction. STRS Ohio will notify you if a correction is needed. Once notified, click on this tab to make the necessary corrections.
- The Submitted Reports tab contains submitted certifications that are available for viewing or printing. Click on this tab if you want to view or print a certification.

Certifying a Member Account Withdrawal

Once you click on the employee's SSN for a member withdrawal, you will be taken to the certification screen.

Step 1

Enter the following information for the member applying for account withdrawal:

1. Last day of service.
2. Last pay date.
3. Service credit earned for each year listed.
4. The alternative retirement plan (ARP) question appears for colleges and universities only. Click "Yes" if the member is currently contributing to an ARP. Then select the ARP provider from the drop-down menu. Otherwise, leave the selection marked as "No."
5. Include any comments necessary to help STRS Ohio process the withdrawal.

Step 2

When finished, click "Save & Submit."

To print a copy of the certification after it has been submitted, click on the Submitted Certifications tab.

The screenshot shows the STRS Ohio Withdrawal Certification form. At the top, there is a navigation bar with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, **Withdrawal Certification**, and Documents. Below the navigation bar, the title "Withdrawal Certification" is displayed. There are three tabs: "Reports To Be Completed", "Available for Updates", and "Submitted Certifications". A note states: "(For an STRS Ohio Member Applying for Account Withdrawal)". A warning box says: "Under Ohio law, employers must verify information and certify only accurate and correct information about an applicant's service credit and contributions. This information is used to determine payment due to the applicant. Employers are required to reimburse STRS Ohio for any overpayment of funds resulting from an error in employer certification." Employee information is shown: Employee: DEJA, DEJA; SSN: XXX-XX-4385. A tip indicates: "The member is still active because he or she has not terminated employment, is an applicant for employment, is on a leave of absence or has agreed to teach in the future. I cannot complete the certification at this time. I understand this will cancel the member's withdrawal application process." Fields for "Last Day of Service" and "Last Pay Date" are shown with dropdown menus. Below, there are sections for "FY 2023-2024" and "FY 2022-2023" with a "Service Credit Calculator" link. A question asks: "Is this applicant currently contributing to an Alternative Retirement Plan (ARP) in an STRS Ohio-covered position with your school?" with "Yes" (selected) and "No" radio buttons. An "ARP Provider Name" dropdown menu is open, showing options: AXA EQUITA, FIDELITY I, LINCOLN NA, MASS MUTUA, NATIONWIDE, TIAA, VALIC, VOYA FINAN. An "Optional comments (max)" text area is also present. A disclaimer box states: "By submitting this Employer Certification, you are certifying that to the best of your knowledge the member named above, who is applying for an STRS Ohio account withdrawal, is not currently under contract with your school in an STRS Ohio-contributing position as defined in retirement law; is not on a leave of absence from such employment; does not have any other contractual status; is not an applicant for such employment, including substitute teaching; and is under no verbal or written agreement for future teaching." At the bottom, there are "Back to List" and "Save & Submit" buttons.

Tip! If the member is still working, click the box under the member's name and Social Security number. (A check mark will appear.) Then click "Save & Submit."

Certifying a Reemployed Retiree Payment

Once you click on the employee's SSN for a reemployed payment, you will be taken to the certification screen.

Step 1

Enter the following information for the member applying for a reemployed payment:

1. Last day of service.
2. Last pay date.
3. Employee contributions for each year listed.
4. Include any comments necessary to help STRS Ohio process the payment.

Step 2

When finished, click "Save & Submit."

To print a copy of the certification after it has been submitted, click on the Submitted Certifications tab.

The screenshot shows the STRS Ohio Withdrawal Certification form. At the top, there is a navigation bar with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, **Withdrawal Certification**, and Documents. Below the navigation bar, the title "Withdrawal Certification" is displayed. There are three tabs: "Reports To Be Completed", "Available for Updates", and "Submitted Certifications". A note states: "(For an STRS Ohio Reemployed Retiree Applying for Reemployed Payment)". A warning box contains the text: "Under Ohio law, employers must verify information and certify only accurate and correct information about an applicant's contributions. This information is used to determine payment due to the applicant. Employers are required to reimburse STRS Ohio for any overpayment of funds resulting from an error in employer certification." The form fields include: Employee: ABBED, ABBED; SSN: XXX-XX-2842; a "Tip!" section with a checkbox and text: "The reemployed retiree is still active because he or she has not terminated employment, is an applicant for employment, is on a leave of absence or has agreed to teach in the future. I cannot complete the certification at this time. I understand this will cancel the reemployed retiree's application process."; Last Day of Service and Last Pay Date fields with dropdown menus; a section for "Information to be reported on Annual Report" for FY 2022-2023, with Employee contributions field; and an "Optional comments (max 500 characters)" text area. At the bottom, there is a disclaimer box: "By submitting this Employer Certification, you are certifying that to the best of your knowledge the member named above, who is applying for an STRS Ohio reemployed payment, is not currently under contract with your school in an STRS Ohio-contributing position as defined in retirement law; is not on a leave of absence from such employment; does not have any other contractual status; is not an applicant for such employment, including substitute teaching; and is under no verbal or written agreement for future teaching." and two buttons: "Back to List" and "Save & Submit".

Tip! If the member is still working, click the box under the member's name and Social Security number. (A check mark will appear.) Then click "Save & Submit."

Section 14

Pay Date Calendar

The following instructions explain how to submit your pay date calendar in ESS. Each spring, STRS Ohio asks employers to send their pay dates for the upcoming fiscal year. This allows us to alert you when we haven't received an expected payroll report.

Submitting Your Pay Date Calendar

Step 1

To access the report from the home page:

1. Click on "Pay Date Calendar" in the Additional Tools menu or Outstanding Reports section.
2. This will take you to the Pay Dates screen shown on the next page.

The screenshot shows the STRS Ohio ESS home page. The navigation bar includes: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three sections: 'Additional Tools', 'Outstanding Reports', and 'Current Obligations'. In the 'Additional Tools' section, 'Pay Date Calendar' is circled in red. In the 'Outstanding Reports' section, a red arrow points to 'Pay Date Calendar' in the table below.

Report Type	Number of Reports
Service Credit Verification	1
Accrued Verification	1
Employment Verification Reports	3
Annual Reporting	1
Withdrawal Certification	2
Pay Date Calendar	1
Violation Period Certification	1

The 'Current Obligations' section contains a table with the following data:

Due Date	Description	Amount
09/12/2023	Payroll-reported contributions due	\$515.78
09/13/2023	PSC employer cost-Kimberly K	\$5,719.60
09/15/2023	Monthly PSC deductions due	\$811.23
	Payment received - not yet applied	-\$276.65

The 'News & Alerts' section is currently empty.

Step 2

Include main pay dates only. Do not include supplemental pay dates.

Your pay dates may be prepopulated based on last year's pay schedule. Review each date for accuracy.

If all dates are correct, click "Submit." The screen shown on the next page will appear. If corrections are needed, choose an option below:

1. To change a pay date, click on the calendar icon next to the date and select the correct date.
2. To add a pay date, click "Add Another Pay Date." Then click on the calendar icon in the blank field and select the date.
3. To delete a pay date, highlight the date and click the delete button on your keyboard. Then leave the field blank.
4. To clear all pay dates and enter new dates, click "Reset." Then click on the calendar icon in the blank field and select the correct date.

When all dates are correct, click "Submit." The screen shown on the next page will appear. If you want to review the dates before submitting the report, click "Save." Be sure to submit the report to STRS Ohio after reviewing it.

STRS Ohio

Home Make a Payment New Hire Notification Reemployed Retiree Notification Employer Reports Deposit & Service Reports Withdrawal Certification

Verify the 2021-2022 FY pay dates listed below are correct and click on 'Submit'. To change a date, click the calendar and select the correct date. To clear all pay dates and manually enter, click the 'Reset' button. To add an additional pay date, click 'Add Another Pay Date' and select the dates from the calendar. To manually enter a date, you must use the format mm/dd/yyyy.

Pay Dates

07/01/2021	📅
07/30/2021	📅
08/15/2021	📅
08/30/2021	📅
09/15/2021	📅
09/30/2021	?
10/15/2021	📅
10/30/2021	📅
11/15/2021	📅
11/30/2021	📅
12/15/2021	📅
12/30/2021	📅
01/15/2022	📅
01/30/2022	📅
02/15/2022	📅
02/28/2022	📅
03/15/2022	📅
03/30/2022	📅
04/15/2022	📅
04/30/2022	📅
05/15/2022	📅
05/30/2022	📅
06/15/2022	📅
06/30/2022	📅

Tip!

Add Another Pay Date

Save Reset Submit

Tip! When making corrections, use the calendar to select the correct date. If you want to manually enter a date, you must use the format mm/dd/yyyy.

Step 3

Once the report is submitted, a copy of your pay date schedule will appear. Click "Print" to print a copy for your records.

You can also view or print a copy of the submitted report in the Documents section.

The screenshot shows the STRS Ohio website interface. At the top, there is a navigation menu with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. A 'Close' button is visible in the top right. Below the navigation, there is a 'Print' button circled in red. The main content area displays the STRS Ohio logo and the text 'STATE TEACHERS RETIREMENT SYSTEM OF OHIO'. To the right, contact information is provided: '275 East Broad Street, Columbus, OH 43215-3771, 888-535-4050, www.strsoh.org/employer'. The main heading is '9599 - OHIO LOCAL SCHOOLS' followed by 'Pay Date Schedule' and 'July 2021 - June 2022'. A section titled 'Pay Dates' lists the following dates: 07/01/2021, 07/30/2021, 08/15/2021, 08/30/2021, 09/15/2021, 09/30/2021, 10/15/2021, 10/30/2021, 11/15/2021, 11/30/2021, 12/15/2021, 12/30/2021, 01/15/2022, 01/30/2022, 02/15/2022, 02/28/2022, 03/15/2022, 03/30/2022, 04/15/2022, and 04/30/2022. An 'Export' link is visible in the top right corner.

Section 15

Direct Debit Payment

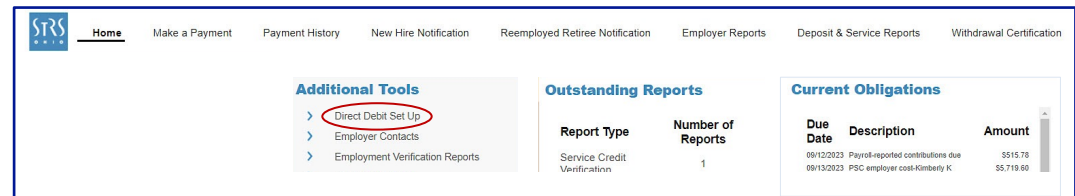
The following instructions explain how to set up a direct debit account and make a payment in ESS.

Setting Up a Direct Debit Account

STRS Ohio's preferred payment method for employers is direct debit in ESS. Before a direct debit payment can be scheduled, you must set up your direct debit account. Only treasurers and main contacts are granted access to set up account information. If you prefer payroll personnel enter this information, the treasurer or CFO should email report@strsoh.org requesting direct debit access be granted to that individual.

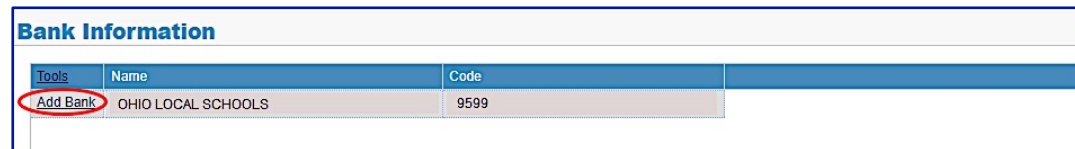
Step 1

On the home page, click on "Direct Debit Set Up" in the Additional Tools menu.



Step 2

On the Bank Information page, click "Add Bank" in the Tools column.



Step 3

On the EFT page, click "Add Bank." The Details screen shown on the next page will appear.



Step 4

On the Details screen, provide the following information:

1. **Start Date** — Enter the date you want to activate the bank account to make payments. STRS Ohio recommends using today's date.

Note: It will take up to three business days from the date entered to approve the account before payments can be made.

Do not enter a Stop Date.

2. **Description** — Enter a nickname for the account (e.g., "Employee Account" or "Employer Account").
3. **Bank Account Number** — Enter your bank account number.
4. **Re-enter Bank Account Number** — Enter your bank account number again.
5. **Click "Search."** The Financial Institution Search screen shown on the next page will appear.

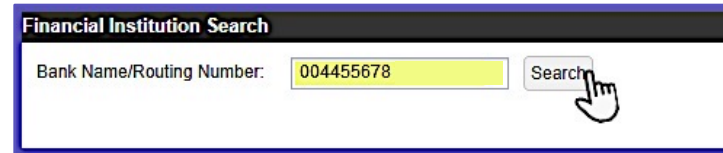
The screenshot shows a 'Details' window with the following fields and values:

Start Date:	MM/dd/yyyy	
Stop Date:	MM/dd/yyyy	
Payment Account:	Employer Bank Accounts	
Eft Type:	Bank	
Description:		
Account Status:	Pending	
Bank Name:		
Bank Routing Number:		
Bank Account Number:		
Re-enter Bank Account Number:		
Bank Account Type:	Checking	

Buttons: Cancel, Save, Search (with a hand cursor pointing to it).

Step 5

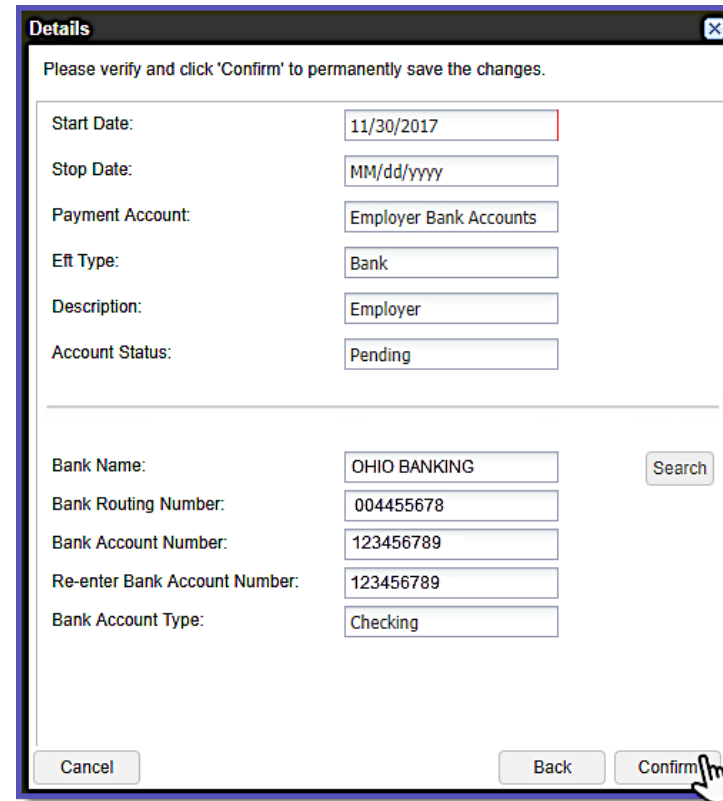
1. Enter the Routing Number.
2. Click "Search."
3. Click "Save." (Screen not shown.)



The image shows a dialog box titled "Financial Institution Search". It contains a text input field labeled "Bank Name/Routing Number:" with the value "004455678" entered. To the right of the input field is a "Search" button. A mouse cursor is pointing at the "Search" button.

Step 6

1. Verify all information is correct and click "Confirm."
2. The Authorization Agreement screen shown on the next page will appear.



The image shows a dialog box titled "Details" with a close button (X) in the top right corner. The main text reads: "Please verify and click 'Confirm' to permanently save the changes." Below this text are several form fields:

- Start Date: 11/30/2017
- Stop Date: MM/dd/yyyy
- Payment Account: Employer Bank Accounts
- Eft Type: Bank
- Description: Employer
- Account Status: Pending

Below the horizontal line are more form fields:

- Bank Name: OHIO BANKING
- Bank Routing Number: 004455678
- Bank Account Number: 123456789
- Re-enter Bank Account Number: 123456789
- Bank Account Type: Checking

At the bottom of the dialog box are three buttons: "Cancel", "Back", and "Confirm". A mouse cursor is pointing at the "Confirm" button.

Step 7

You must print the authorization agreement, complete it and send it to STRS Ohio via secure file upload.

1. Click "Print" to print the authorization agreement.
2. List all individuals authorized to initiate employer payments.
3. Complete and sign the bottom portion of the form. (The name and title of the individual responsible for financial information will already be filled in.)
4. Send the form to STRS Ohio via secure file upload on the STRS Ohio Employer Website.

Important: Online payments cannot be scheduled until STRS Ohio receives the agreement and the bank approves the direct debit request. Bank approval may take up to three business days from the date STRS Ohio receives the signed agreement.

Once the bank account is approved, the school's main contact will receive an email from STRS Ohio confirming direct debit payments can be made in ESS.

Doc-Out

Print

AUTHORIZATION AGREEMENT FOR DIRECT PAYMENT THROUGH ACH DEBIT

Complete the bottom portion of this agreement and send to STRS Ohio via secure file upload.

Employer: OHIO LOCAL SCHOOLS	Employer No: 9599
Account Type: Checking	Bank Name: OHIO BANKING
Routing No: 004455678	Account No: 123456789

AUTHORIZATION RULES
This *Authorization Agreement for Direct Payment Through ACH Debit* ("Agreement") explains the terms and conditions governing Employer's access and use of the online payment service ("Service") for direct payments through ACH debits via the ESS website operated by State Teachers Retirement System of Ohio ("STRS Ohio"). The Service will enable the Employer to pay electronically amounts due to STRS Ohio including, but not limited to, employee and employer contributions, interest, penalties and costs to purchase service credit.

AUTHORIZATION
Employer represents and warrants it is legally authorized to use the bank account identified above on the STRS Ohio ESS website. Employer hereby authorizes STRS Ohio to debit Employer's account identified above in such amounts and at such times as requested by Employer through the Service. Employer acknowledges the origination of ACH transactions to its account must comply with the rules of the National Automated Clearing House Association and provisions of U.S. and Ohio law. Employer agrees to maintain balances sufficient to pay all requested payments and to be solely liable for any overdraft or insufficient fund situation or charge (including, but not limited to, finance charges, late fees or similar charges) caused by its failure to maintain funds sufficient to pay all payments issued through the Service. Employer agrees to promptly notify STRS Ohio of any changes to the financial institution account information by submitting a new *Authorization Agreement for Direct Payment Through ACH Debit*. Employer understands and agrees that use of the Service does not waive any penalties and/or interest for any payments or reports that are not completed or filed timely.

TERMS AND TERMINATION
This Agreement shall remain in force until terminated by either party. Employer may terminate this Agreement by submitting a request in writing to STRS Ohio, provided the delivery of such termination request shall provide STRS Ohio a reasonable opportunity to act on it. STRS Ohio may terminate this Agreement at any time by giving written notice. The termination of this Agreement shall not affect any payments or charges already due to STRS Ohio from Employer.

DISCLAIMER OF WARRANTY
Employer expressly agrees the use of the Service is at Employer's sole risk and the Service is provided "as is" with no warranties whatsoever including, without limitation, warranties of availability, reliability, usefulness, course of performance or fitness for a particular purpose.

Please list individuals authorized to initiate Employer payments using the Service:

Certified by <u>TODD WOLFORD</u>	Phone _____
Title <u>Treasurer</u>	Email _____
Signature _____	Date _____

Making a Direct Debit Payment

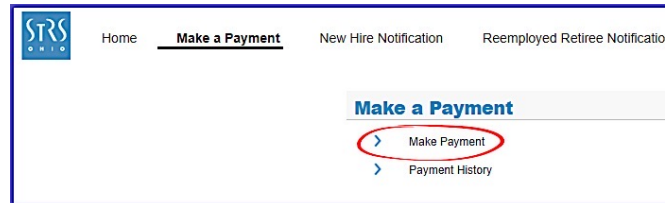
Once the bank account is approved, you can begin making direct debit payments. Please note that these are **one-time** payments. Recurring payments cannot be scheduled in ESS.

Step 1

To schedule a payment, select “Make a Payment” from the banner menu at the top of the home page. *(Screen not shown).*

Step 2

Select “Make Payment.”



Step 3

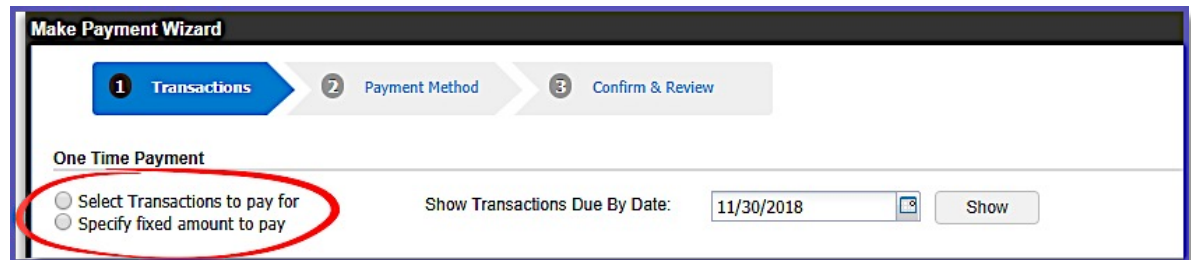
On the Make Payment Wizard screen, you will need to choose which option you will use to make the payment.

Option 1 — Select transactions to pay for

This option allows you to make a payment related to an open work report. Refer to Step 3a on next page.

Option 2 — Specify fixed amount to pay

This option allows you to make a payment not related to an open work report. Refer to Step 3b on Page 8.



Step 3a

Option 1 — Select transactions to pay for

The following instructions are for making a payment **related to** an open work report, such as payroll.

Transactions

1. Click “Select Transactions to pay for.”
2. Click the “Show” button next to the Show Transactions Due By Date field. A list of work reports will appear.
3. Click on the work report you want to make a payment for.
4. The payment amount will appear in the Payment Amount field.
5. Enter the payment date (must be today’s date or later). Also enter a description if needed.
6. Click “Next.” This will take you to the Payment Method screen shown on the next page.

Step 3a continued on next page.

Make Payment Wizard

1 Transactions 2 Payment Method 3 Confirm & Review

One Time Payment

1 Select Transactions to pay for Specify fixed amount to pay

Show Transactions Due By Date: 11/30/2018 Show 2

Payment Amount: 4

Payment Date: MM/dd/yyyy 5

Description:

<input type="checkbox"/>	Transaction Date	Trans#	Type	Identifier	Status	Due Date	Total Balance	Applied Amount	Balance	Scheduled Payment
<input checked="" type="checkbox"/>	11/30/2017	170270617	Work Report A...	Payroll : 2017-11-30	Open	12/07/2017	\$100.00	\$0.00	\$100.00	\$100.00

3

Cancel 6 Next

Step 3a (continued)

Payment Method

1. Click the down arrow in the Payment Account field and select the account from the drop-down menu.
2. Click "Next." This will take you to the Confirm & Review screen.

Make Payment Wizard

1 Transactions 2 **Payment Method** 3 Confirm & Review

Payment Method

Payment Account: Employer xxxx12536

Cancel Back Next

Confirm & Review

1. Verify the payment information is correct.
2. Click "Confirm."
3. The Info box will appear letting you know your payment was successful. Click "OK." This will take you to the Employer Reports page shown on Page 10.

[See Payment History on Page 10.](#)

Make Payment Wizard

1 Transactions 2 Payment Method 3 **Confirm & Review**

One Time Payment

Pay By: Transactions Bank Name:

Payment Amount: \$100.00 Bank Account Type: Checking

Payment Date: 11/30/2017 Bank Routing Number:

Description: Employee Contributions Bank Account Number:

Selected Transactions

Transaction Date	Trans#	Type	Identifier	Status	Due Date	Total Balance	Scheduled Payment
11/30/2017	170270617	Work Report A...	Payroll: 2017-11-30	Open	12/7/2017	\$100.00	\$100.00

Cancel Back Confirm

Info
PAYMENT_SUCCESS
OK

Step 3b

Option 2 — Specify fixed amount to pay

The following instructions are for making a payment **not related to** an open work report, such as an invoice.

Transactions

1. Click “Specify fixed amount to pay.”
2. Enter the payment amount, payment date (must be today’s date or later) and a description.
3. Click “Add” to bring up payment details.
4. Enter information about the payment: payment order detail type (description of payment), pay date **or** invoice number, and the payment amount. If needed, repeat this action to add additional details.
5. Once all details are added, click “Next.” This will take you to the Payment Method screen shown on the next page.

Step 3b continued on next page.

Tips! If you are making an invoice payment, click on the Invoice Number field and select the invoice number from the drop-down menu. Leave the pay date field blank.

If you are making a payment for payroll deduction for purchase service, a pay date is required. The month of the pay date must match the month of the report you are paying. For example, for an August purchase service credit report, the pay date should be 08/dd/yyyy.

Step 3b (continued)

Payment Method

1. Click the down arrow in the Payment Account field and select the account from the drop-down menu.
2. Click "Next." This will take you to the Confirm & Review screen.

Make Payment Wizard

1 Transactions 2 **Payment Method** 3 Confirm & Review

Payment Method

Payment Account: Employer xxxx12536

Cancel Back Next

Confirm & Review

1. Verify the payment information is correct.
2. Click "Confirm."
3. The Info box will appear letting you know your payment was successful. Click "OK." This will take you to the Employer Reports page shown on the next page.

See [Payment History](#) on the next page.

Make Payment Wizard

1 Transactions 2 Payment Method 3 **Confirm & Review**

One Time Payment

Pay By: Fixed Amount Bank Name:
Payment Amount: \$5,000.00 Bank Account Type: Checking
Payment Date: 11/30/2017 Bank Routing Number:
Description: Bank Account Number:

One Time Payment

Payment Order Detail Type	Pay Date	Invoice Number	Amount
Employee Con...	11/30/17		\$5,000.00

Cancel Back Confirm

Info
PAYMENT_SUCCESS
OK

Payment History

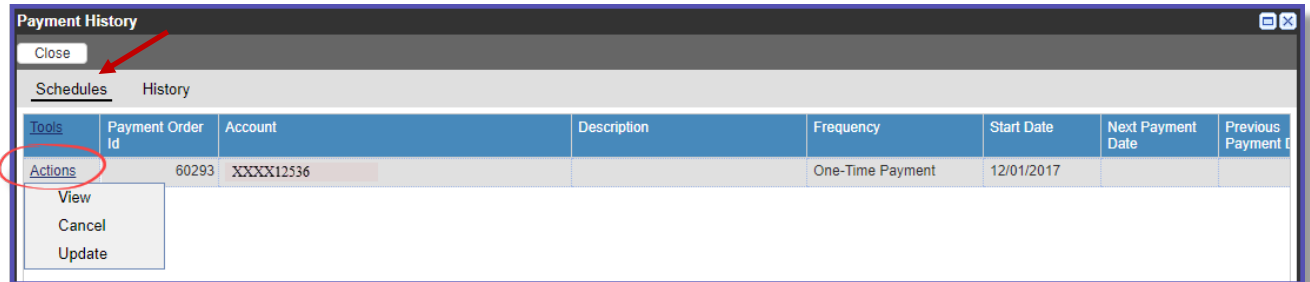
You can view a record of your direct debit payments by clicking the "Payment History" button on the Employer Reports page.



Schedules

Under "Schedules," you can view current payments waiting to be processed by STRS Ohio.

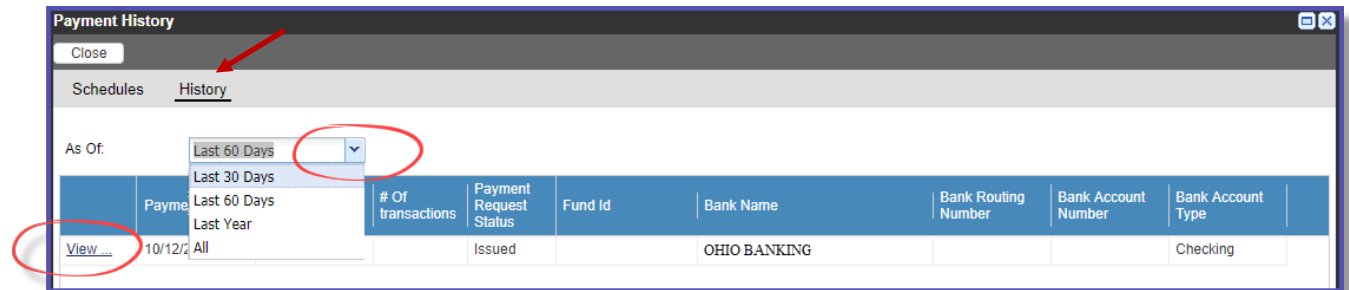
- To view, cancel or update a payment, click "Actions" in the Tools column and select an option from the drop-down menu.
- A payment will appear under "Schedules" until it is processed. Once processed, it will appear under "History."



History

Under "History," you can view past payments issued to STRS Ohio.

- To sort payments, click the down arrow in the As Of field, and select the time frame you want to sort by.
- To view payment details, click "View" in the row for the payment.



Section 16

Employment Verification Report

In late fall, you may receive a request to complete employment verification reports. IRS tax regulations require any individual age 73 who is not actively employed in an STRS Ohio-covered position to take a minimum distribution from his or her retirement plan. To comply with these regulations, STRS Ohio identifies reemployed retirees who may meet this criteria and sends this request to their most recent employers to certify current employment status. STRS Ohio also needs final contribution and pay date information from employers if individuals meeting these requirements are no longer working.

Completing an Employment Verification Report

Step 1

To access the report from the home page:

1. Click on "Employment Verification Reports" in the Additional Tools menu, or
2. Click on "Employment Verification Reports" in the Outstanding Reports section.

The screenshot shows the STRS Ohio website home page. The navigation bar includes: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The 'Additional Tools' menu is open, with 'Employment Verification Reports' circled in red. A red arrow points from this menu item to the 'Outstanding Reports' table. The 'Outstanding Reports' table has the following data:

Report Type	Number of Reports
Deposit & Service	6
Purchase Service Credit	1
Service Credit Verification	2
Employment Verification Reports	1

Step 2

On the Employment Verification Reports screen, click on the member's Social Security number. The report shown on the next page will appear.

The screenshot shows the 'Employment Verification Reports' screen. The table below lists the reports:

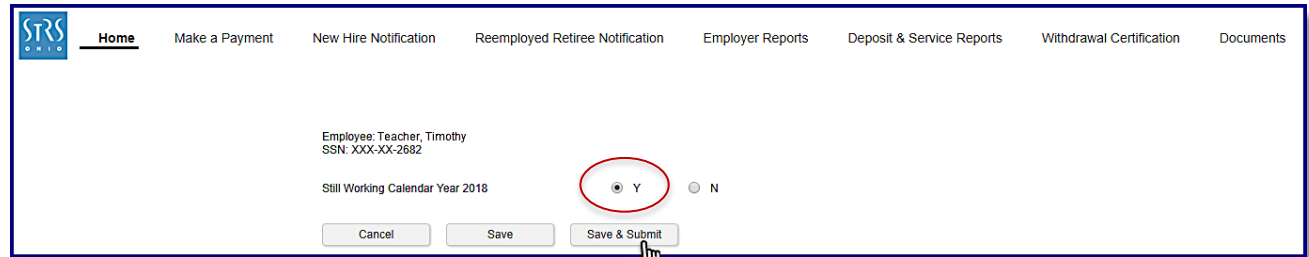
Employee SSN	Employee Name	Notification Date
XXX-XX-2682	Teacher, Timothy	12/04/2017
XXX-XX-8559	Smith, Roy	12/04/2017
XXX-XX-8549	Employee, Patty	12/04/2017

Step 3

Indicate if the member is still working for your school during the specified calendar year.

If the member **is still working**:

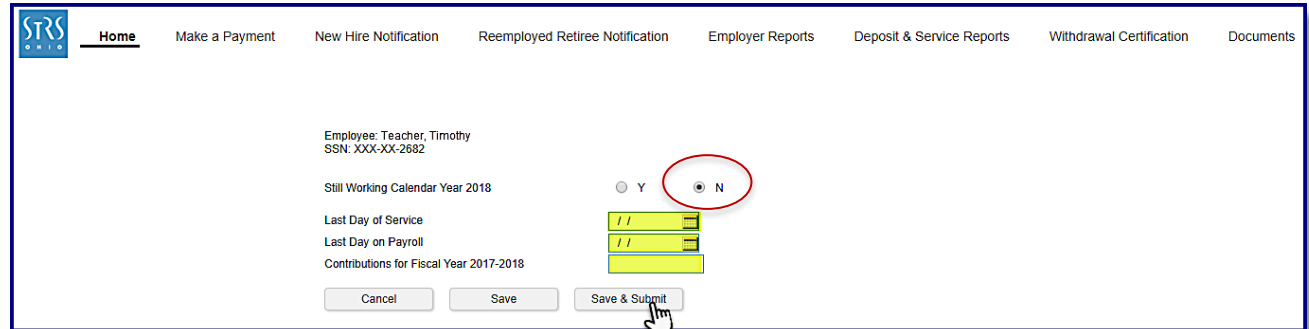
1. Click “Y” for yes.
2. Then click “Save & Submit.” You will automatically return to the Employment Verification Reports screen to complete any remaining reports.



The screenshot shows the STS Ohio web portal interface. At the top, there is a navigation menu with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the menu, the employee information is displayed: Employee: Teacher, Timothy and SSN: XXX-XX-2682. The main form area is titled 'Still Working Calendar Year 2018'. It contains two radio buttons: 'Y' (selected and circled in red) and 'N'. Below the radio buttons are three buttons: 'Cancel', 'Save', and 'Save & Submit'. A mouse cursor is pointing at the 'Save & Submit' button.

If the member is **no longer working**:

1. Click “N” for no. Additional fields will appear.
2. Enter the last day of service, last day on payroll and contributions for the fiscal year.
3. Then click “Save & Submit.” You will automatically return to the Employment Verification Reports screen to complete any remaining reports.



The screenshot shows the STS Ohio web portal interface. At the top, there is a navigation menu with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the menu, the employee information is displayed: Employee: Teacher, Timothy and SSN: XXX-XX-2682. The main form area is titled 'Still Working Calendar Year 2018'. It contains two radio buttons: 'Y' and 'N' (selected and circled in red). Below the radio buttons are three input fields: 'Last Day of Service', 'Last Day on Payroll', and 'Contributions for Fiscal Year 2017-2018'. Each field has a yellow background and contains two slashes '//'. Below the input fields are three buttons: 'Cancel', 'Save', and 'Save & Submit'. A mouse cursor is pointing at the 'Save & Submit' button.

Tip! If the member is a substitute and you are unsure if services will be provided, click “Y” if it is possible the member may work during the calendar year.

Repeat Steps 2–3 until all reports have been submitted. The list on the Employment Verification Reports screen will be empty when you’ve successfully submitted all reports.

Section 17

Violation Period Certification

Employers may receive a request to complete a violation period certification when employing a reemployed retiree. Section 3307.35, Revised Code, stipulates that public employees who retire under one of the five Ohio retirement systems are prohibited from returning to work in public employment for **two months** after their retirement effective date. Any retiree who violates this restriction will forfeit monthly benefits for any month in which he or she is in violation.

Completing a Violation Period Certification

Step 1

To access the certification from the home page:

1. Click on “Violation Period Certification” in the Additional Tools menu, or
2. Click on “Violation Period Certification” in the Outstanding Reports section.

The screenshot shows the STRS Ohio website home page. The navigation bar includes: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three sections: Additional Tools, Outstanding Reports, and Current Obligations. In the Additional Tools section, 'Violation Period Certification' is circled in red. In the Outstanding Reports section, a table lists various report types and their counts, with 'Violation Period Certification' having a count of 1, indicated by a red arrow. The Current Obligations section shows a table of due dates, descriptions, and amounts.

Report Type	Number of Reports
Service Credit Verification	1
Accrued Verification	1
Employment Verification Reports	3
Annual Reporting	1
Withdrawal Certification	2
Pay Date Calendar	1
Violation Period Certification	1

Step 2

On the Violation Period Certification screen, click on the employee’s SSN to open the certification. The report shown on the next page will appear.

The screenshot shows the Violation Period Certification screen. At the top, there is a button labeled 'Violation Period Certification'. Below it is a table with three columns: Employee SSN, Employee Name, and Notification Date. The SSN 'XXX-XX-1938' is circled in red.

Employee SSN	Employee Name	Notification Date
XXX-XX-1938	Teacher, Todd	12/20/2018

Step 3

If the member **did** return to work after retirement, enter the following information:

1. The first day the member worked with your school after retirement.
2. The amount of earnings during the first month after retirement.
3. The amount of earnings during the second month after retirement.
4. Include any comments necessary to help STRS Ohio process the certification.

Step 4

When finished, click "Save & Submit."

To print a copy of the certification after it has been submitted, click "Print Summary." (*Screen not shown.*) To complete additional certifications, click "Back to List." Then repeat Steps 2–4 until all certifications have been submitted. The list on the Violation Period Certification screen will be empty when you've successfully submitted all certifications.

The screenshot shows the 'Violation Period Certification' form in the STRS Ohio system. The form includes a navigation bar with links like 'Home', 'Make a Payment', and 'Payment History'. The main content area contains a title 'Violation Period Certification', a legal notice about Section 3307.35 of the Ohio Revised Code, and a notification from the user's office. Below this, there is a table of employee information for 'Teacher, Todd' with fields for SSN, Retirement Effective Date, and Reported Returned to Work Date. There are also input fields for 'First Day Worked With Your School After Retirement', 'Earnings First Month (08/01/2018 - 8/31/2018)', and 'Earnings Second Month (09/01/2018 - 9/30/2018)'. A 'Tip!' section contains a checkbox labeled 'Member did not work after retirement'. Below the tip is a text area for 'Optional comments (max 250 characters)'. At the bottom, there are three buttons: 'Back to List', 'Save', and 'Save & Submit'.

Tip! If the member did not return to work after retirement, click the box to indicate the member did not work after retirement. (A check mark will appear.) Add a note in the comments section and click "Save & Submit."

Section 18

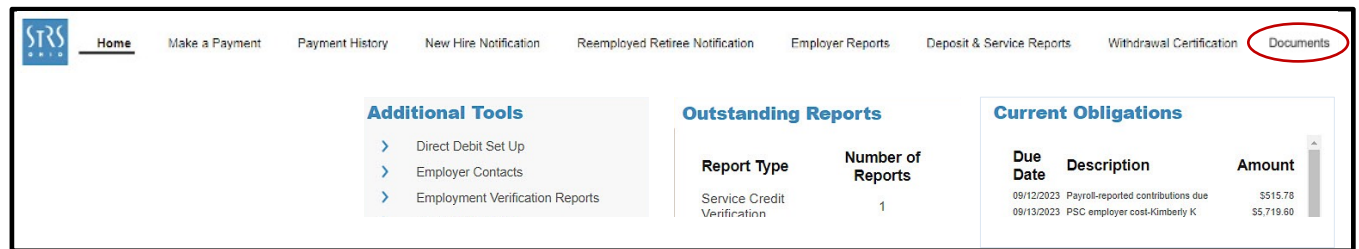
Documents

You can access some documents that were previously submitted in ESS or mailed directly to you. These documents include new hire and reemployed retiree notifications, *Employer Detail Listings*, employer statements, pay date calendars and GASB schedules.

Viewing Documents

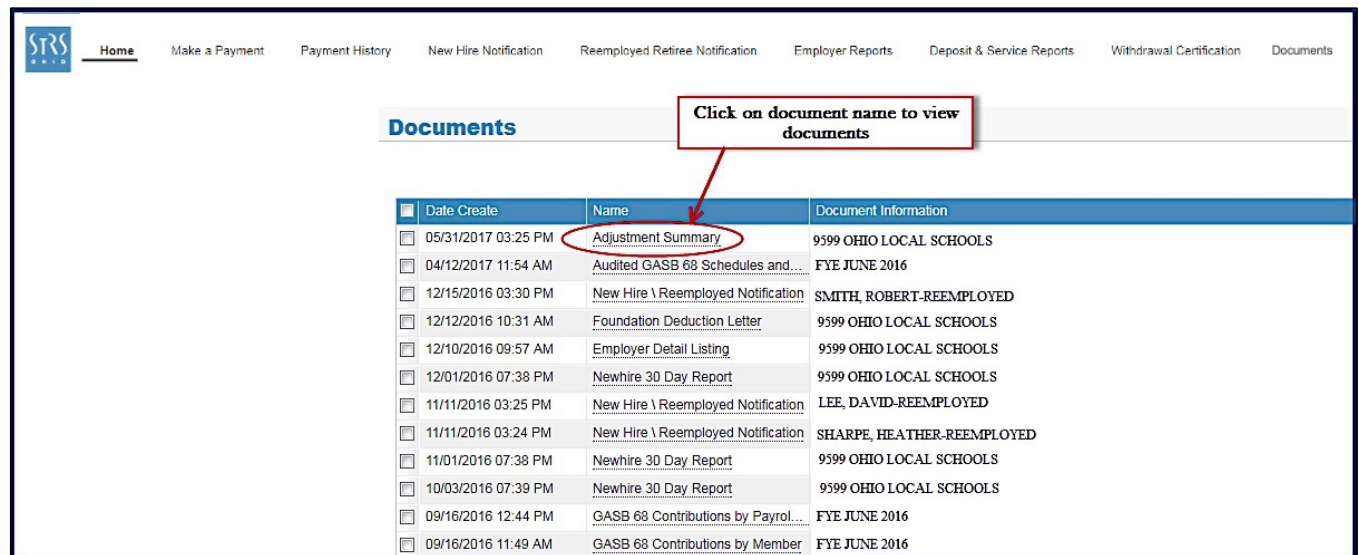
Step 1

To access a document, click on “Documents” in the banner menu at the top of the home page.



Step 2

In the Name column, click on the name of the document you want to view. A copy of the document will appear.



Tip! Click on any column header to sort in ascending or descending order.

Section 19

Training Registration

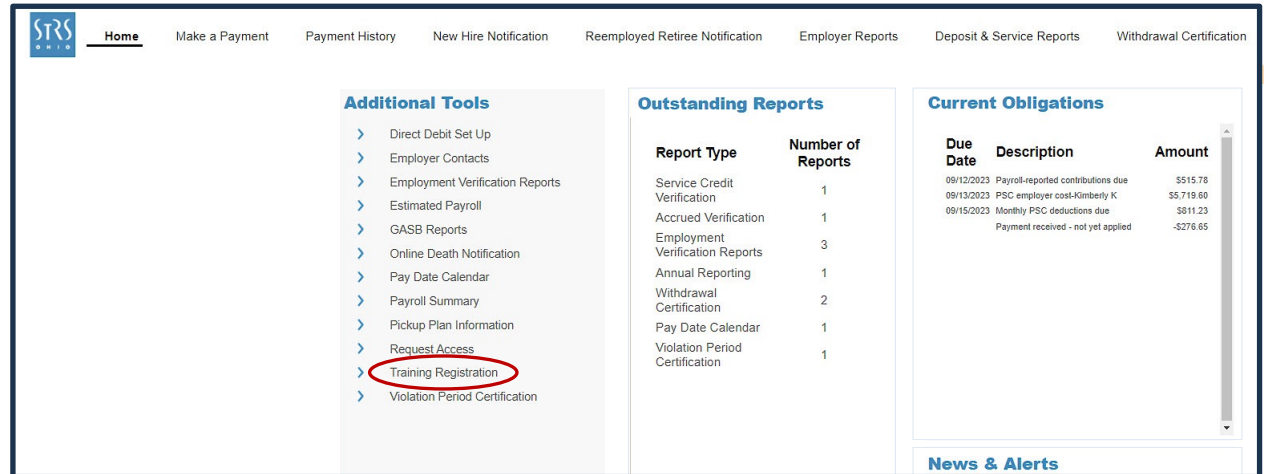
The following instructions explain how to register for employer training sessions and workshops, as well as view or cancel a registration.

How to Register

Step 1

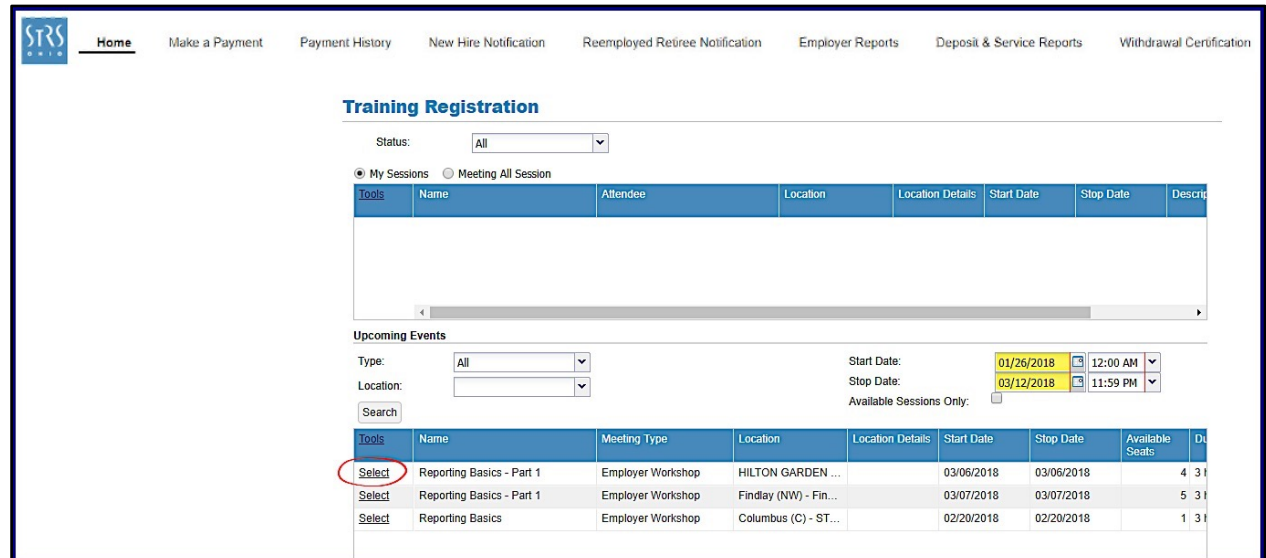
You will receive an email when registration for an education program is available.

To register, click on "Training Registration" in the Additional Tools menu on the home page.



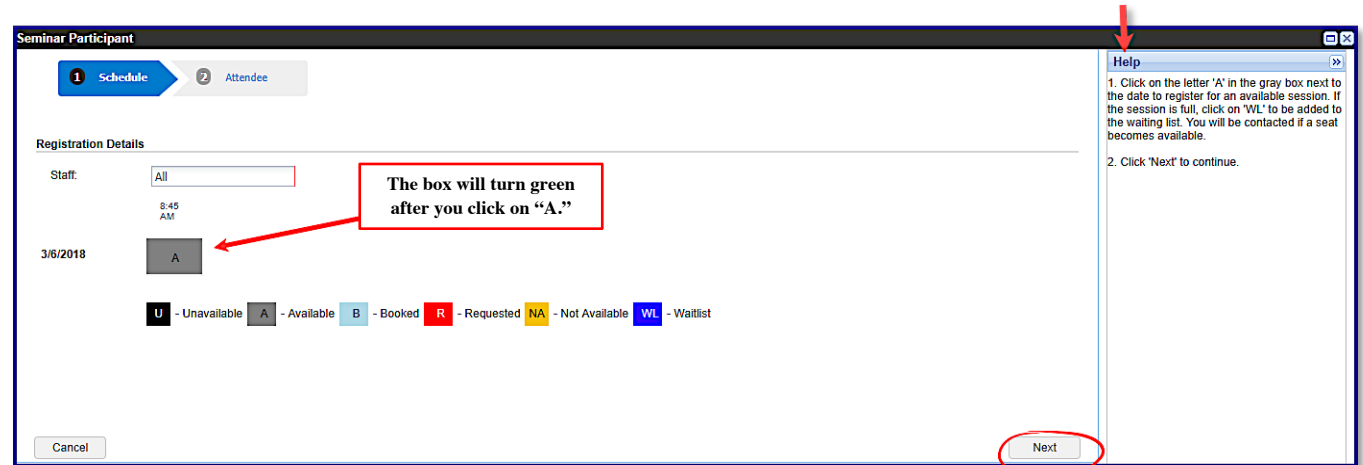
Step 2

1. Under "Upcoming Events," enter the start and stop dates for the time period you are searching for and click "Search."
2. A list of programs will appear. Click "Select" next to the program date and location you want to attend.
3. The Seminar Participant screen shown on the next page will appear.



Step 3

1. Click on the gray "A" box.
(If program capacity is full, a blue "WL" box will appear. Click on it to be added to the waitlist.)
2. Click "Next."



Tip! The Help screen on the right side of each page provides instructions.

Step 4

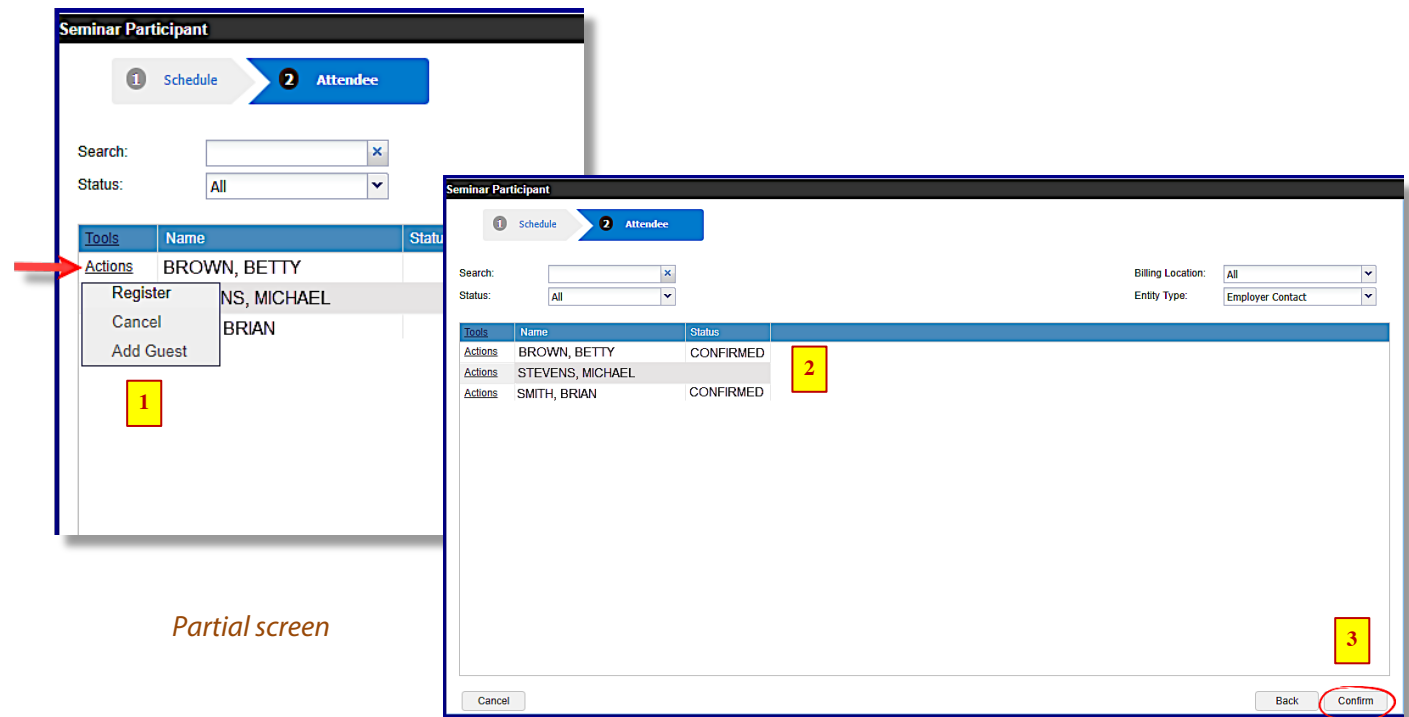
A list of employer contacts on file with STRS Ohio will appear. To register one or more attendees:

1. Click "Actions" next to the person you want to sign up and select "Register."
2. The status will change to "Confirmed" or "Waitlist" depending on space available.

Repeat to register more attendees.

3. When finished registering all attendees, click "Confirm."

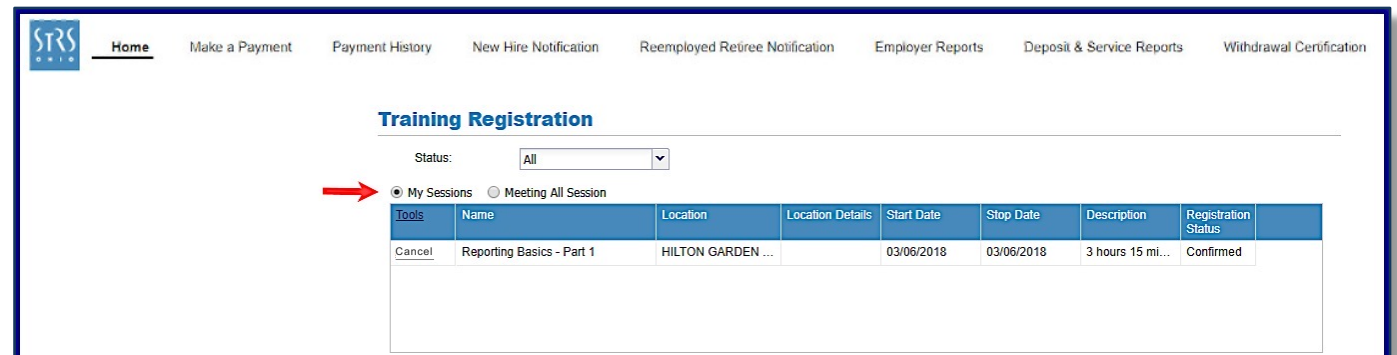
You will return to the Training Registration screen shown on the next page.



Viewing Registrations

Your Registrations Only

To view education programs you are currently registered to attend, click on **“My Sessions”** on the Training Registration screen.

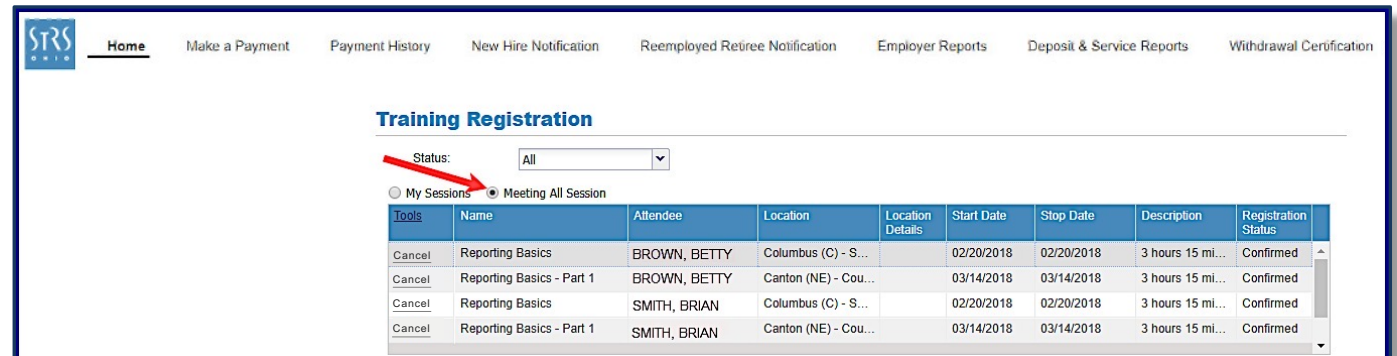


The screenshot shows the 'Training Registration' page with the 'My Sessions' radio button selected. A red arrow points to this button. The table below shows one registration entry.

Tools	Name	Location	Location Details	Start Date	Stop Date	Description	Registration Status
Cancel	Reporting Basics - Part 1	HILTON GARDEN ...		03/06/2018	03/06/2018	3 hours 15 mi...	Confirmed

Registrations for You and Other Attendees

To view education programs you or other individuals in your school are currently registered to attend, click on **“Meeting All Session”** on the Training Registration screen.



The screenshot shows the 'Training Registration' page with the 'Meeting All Session' radio button selected. A red arrow points to this button. The table below shows four registration entries.

Tools	Name	Attendee	Location	Location Details	Start Date	Stop Date	Description	Registration Status
Cancel	Reporting Basics	BROWN, BETTY	Columbus (C) - S...		02/20/2018	02/20/2018	3 hours 15 mi...	Confirmed
Cancel	Reporting Basics - Part 1	BROWN, BETTY	Canton (NE) - Cou...		03/14/2018	03/14/2018	3 hours 15 mi...	Confirmed
Cancel	Reporting Basics	SMITH, BRIAN	Columbus (C) - S...		02/20/2018	02/20/2018	3 hours 15 mi...	Confirmed
Cancel	Reporting Basics - Part 1	SMITH, BRIAN	Canton (NE) - Cou...		03/14/2018	03/14/2018	3 hours 15 mi...	Confirmed

Canceling Registrations

To cancel a registration:

1. Click "Cancel" in the Tools column next to the name of the attendee you want to cancel.
2. Click "Yes" to confirm.

The screenshot displays the STRS Training Registration page. At the top, there is a navigation menu with links: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main heading is "Training Registration". Below this, there is a "Status:" dropdown menu set to "All". There are two radio buttons: "My Sessions" (unselected) and "Meeting All Session" (selected). A table lists training sessions with columns: Tools, Name, Attendee, Location, Location Details, Start Date, Stop Date, Description, and Registration Status. A red arrow points to the "Cancel" link in the "Tools" column of the first row. Below the table is an "Upcoming Events" section with filters for Type, Location, Start Date, and Stop Date. A "Search" button is also present. A "Confirm" dialog box is overlaid on the table, asking "Are you sure you want to cancel the meeting?" with "Yes" and "No" buttons. A red arrow points to the "Yes" button.

Tools	Name	Attendee	Location	Location Details	Start Date	Stop Date	Description	Registration Status
Cancel	Reporting Basics	BROWN, BETTY	Columbus (C) - S...		02/20/2018	02/20/2018	3 hours 15 mi...	Confirmed
Cancel	Reporting Basics - Part 1	BROWN, BETTY	Canton (NE) - Cou...		03/14/2018	03/14/2018	3 hours 15 mi...	Confirmed
Cancel	Reporting Basics	SMITH, BRIAN	Columbus (C) - S...		02/20/2018	02/20/2018	3 hours 15 mi...	Confirmed
Cancel	Reporting Basics - Part 1	SMITH, BRIAN	Canton (NE) - Cou...		03/14/2018	03/14/2018	3 hours 15 mi...	Confirmed

Tools	Name	Meeting Type	Date	Stop Date	Available Seats	Duration
Select	Reporting Basics - Part 1	Employer W...	02/20/2018	03/06/2018	2	3 hours 15 minut...
Select	Reporting Basics - Part 1	Employer Workshop	Finney (NW) - Fin...	03/07/2018	03/07/2018	5 3 hours 15 minut...
Select	Reporting Basics	Employer Workshop	Columbus (C) - ST...	02/20/2018	02/20/2018	1 3 hours 15 minut...

Section 20

Additional Tools

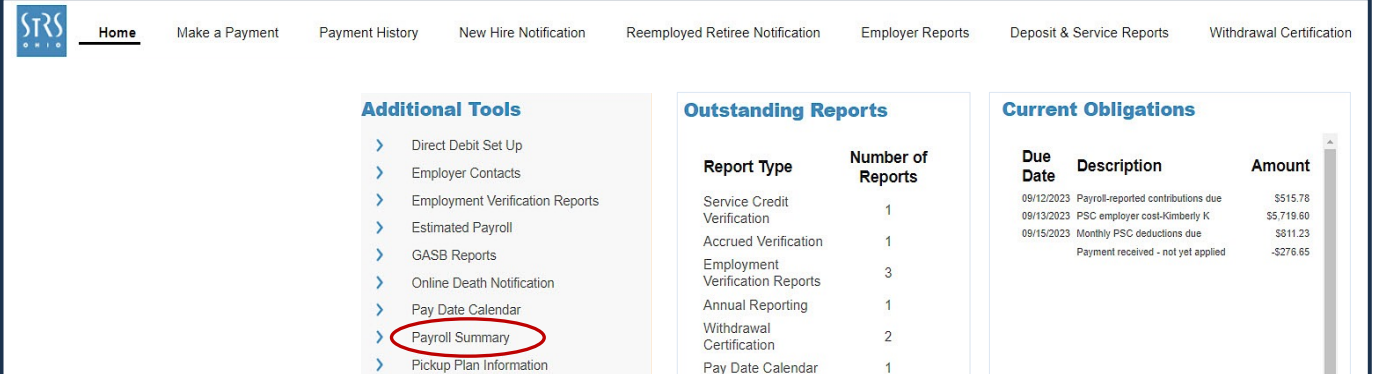
The following instructions explain how to generate a payroll report summary, review employer contact information, access GASB reports and submit an estimated annual payroll in ESS.

Payroll Report Summary

Payroll report summary is a useful reference when preparing deposit and service reports, withdrawal certifications, annual reports and post annual reporting documents. The following instructions explain how to generate the report.

Step 1

To generate a payroll report summary from the home page, click on "Payroll Summary" in the Additional Tools menu.



The screenshot shows the ESS Home page with a navigation bar at the top containing: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. Below the navigation bar, there are three main sections: 'Additional Tools', 'Outstanding Reports', and 'Current Obligations'. The 'Additional Tools' section is expanded, showing a list of options: Direct Debit Set Up, Employer Contacts, Employment Verification Reports, Estimated Payroll, GASB Reports, Online Death Notification, Pay Date Calendar, Payroll Summary (circled in red), and Pickup Plan Information. The 'Outstanding Reports' section contains a table with columns for Report Type and Number of Reports. The 'Current Obligations' section contains a table with columns for Due Date, Description, and Amount.

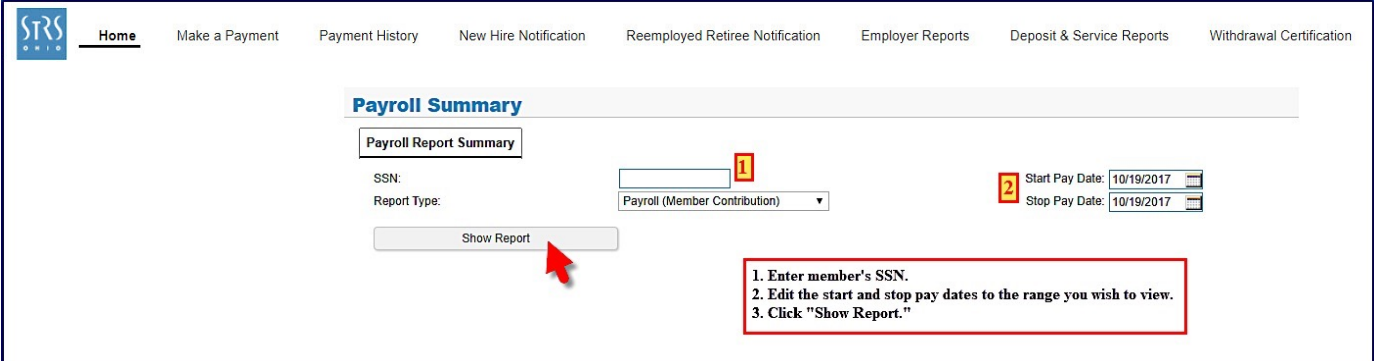
Report Type	Number of Reports
Service Credit Verification	1
Accrued Verification	1
Employment Verification Reports	3
Annual Reporting	1
Withdrawal Certification	2
Pay Date Calendar	1

Due Date	Description	Amount
09/12/2023	Payroll-reported contributions due	\$515.78
09/13/2023	PSC employer cost-Kimberly K	\$5,719.60
09/15/2023	Monthly PSC deductions due	\$811.23
	Payment received - not yet applied	-\$276.65

Step 2

On the Payroll Summary screen:

1. Enter member's SSN.
2. Select start and stop pay dates.
3. Click "Show Report."



The screenshot shows the Payroll Summary screen. At the top, there is a navigation bar with the same items as the previous screenshot. Below the navigation bar, there is a 'Payroll Summary' header. Underneath, there is a 'Payroll Report Summary' section. It includes a text input field for 'SSN:' with a red '1' next to it, a dropdown menu for 'Report Type:' with 'Payroll (Member Contribution)' selected, and two date pickers for 'Start Pay Date:' and 'Stop Pay Date:' both set to '10/19/2017' with a red '2' next to them. A 'Show Report' button is located below these fields, with a red arrow pointing to it. A red box on the right side of the screen contains the following instructions: '1. Enter member's SSN.', '2. Edit the start and stop pay dates to the range you wish to view.', and '3. Click "Show Report."'

Step 3

1. A PDF of all reported member contributions for the selected time period will appear.
2. To print a copy of the report, click "Print."

Home Make a Payment Payment History New Hire Notification Reemployed Retiree Notification Employer Reports Deposit & Service Reports Withdrawal Certification

Payroll Summary

Payroll Report Summary

SSN:
Report Type:
Start Pay Date:
Stop Pay Date:

Show Report [Export](#)

Print

STATE TEACHERS RETIREMENT SYSTEM OF OHIO
275 East Broad Street
Columbus, OH 43215-3771
888-237-1977
www.strsobh.org

Report Type	Payroll (Member Contribution)	Start Pay Date	07/01/2016
SSN:	XXX-XX-9471	Stop Pay Date:	06/30/2017
Pay Date	Report Status	Contribution Amount	
06/23/2017	Complete	328.41	
06/09/2017	Complete	328.41	
05/26/2017	Complete	328.41	
05/12/2017	Complete	328.41	
04/28/2017	Complete	328.41	
04/13/2017	Complete	328.41	
03/31/2017	Complete	328.41	
03/17/2017	Complete	328.41	
03/03/2017	Complete	328.41	
02/17/2017	Complete	328.41	
02/03/2017	Complete	328.41	
01/20/2017	Complete	328.41	
01/06/2017	Complete	328.41	
12/16/2016	Complete	328.41	
12/09/2016	Complete	328.41	
11/22/2016	Complete	328.41	
11/10/2016	Complete	328.41	
10/28/2016	Complete	328.41	
10/13/2016	Complete	328.41	
09/30/2016	Complete	328.41	
09/16/2016	Complete	328.41	
09/02/2016	Complete	328.41	
08/19/2016	Complete	298.97	ACCRUED
08/05/2016	Complete	298.98	ACCRUED
07/22/2016	Complete	298.98	ACCRUED
07/08/2016	Complete	298.98	ACCRUED
		<hr/>	
		8,420.93	

Employer Contacts

STRS Ohio needs current contact information for personnel who are involved with STRS Ohio reporting. To ensure these individuals receive timely information from STRS Ohio, you should periodically check your school's contact information in ESS and submit updates as needed.

Review Contacts

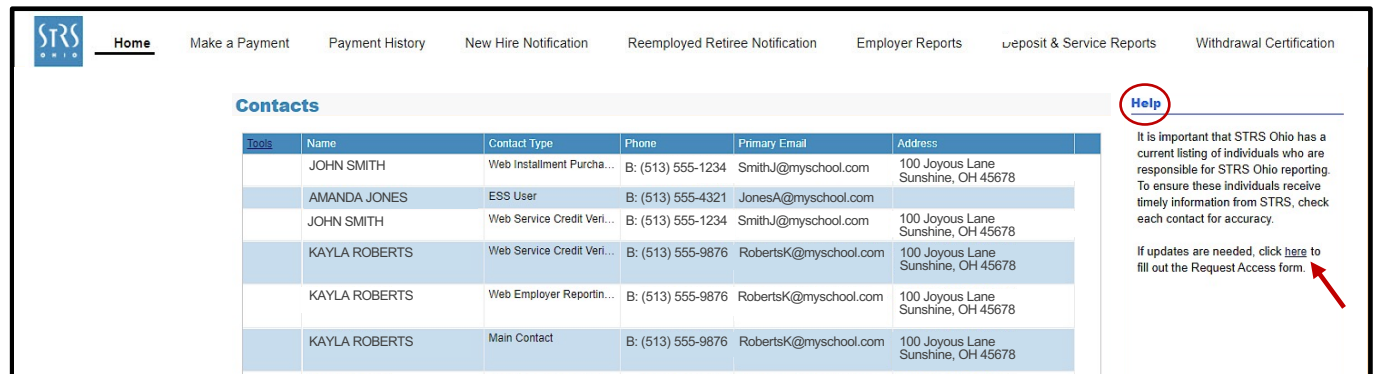
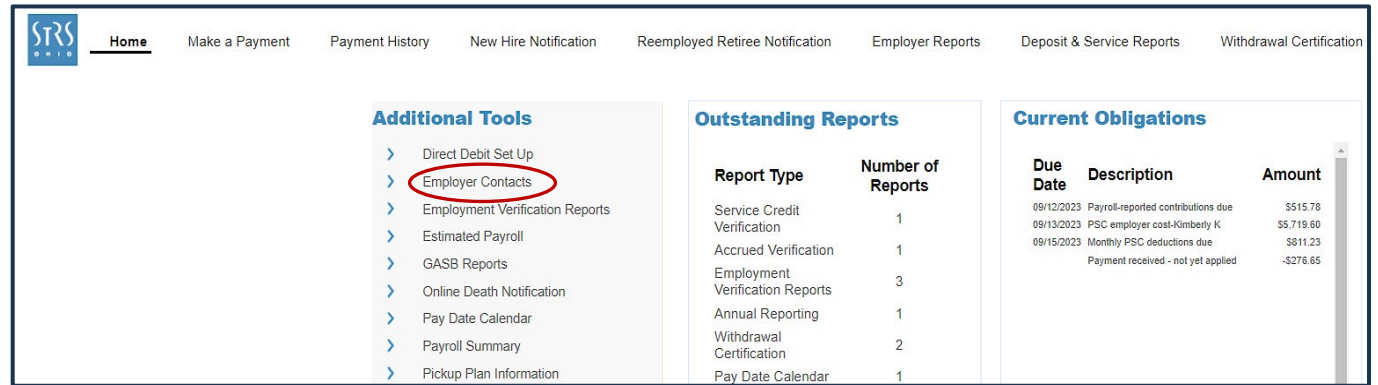
Step 1

To access your school's contact information from the home page, click on "Employer Contacts" in the Additional Tools menu.

Step 2

A list of contacts will appear.

1. Verify the individuals still work for your school.
2. Verify all information, including the spelling of names.
3. Look for "Web" notifications in the Contact Type column to ensure the individual is receiving emails when reports are ready to complete in ESS.
4. If your list is more than one page, check all pages for accuracy.
5. If updates are needed, click on the link in the Help box and complete the Request Access form. You will receive confirmation of changes once the form is submitted.



Tip! Web notifications are available for these contact types: annual reporting, deposit and service reports (includes withdrawal certifications), employer reporting (includes payroll report notifications), installment purchase service credit, service credit verification and accrued verification. If "Web" is not listed in the Contact Type column, email or call STRS Ohio to add notifications for these individuals.

Add or Modify Contacts

Step 1

To add a new contact or modify access for an existing contact, click on “Request Access” in the Additional Tools menu on the home page.

Step 2

The Request Access screen will appear. Select an option:

1. Add new contact and register for access, or
2. Add or modify access for existing contact.

Step 3

The Request Access form for the option you selected will appear. Enter all required information and click “Submit.” (Screen not shown.)

You will receive confirmation of changes once the form is submitted.

The screenshot shows the STS Home page with a navigation bar at the top containing links: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three columns:

- Additional Tools:** A list of options with right-pointing chevrons. The option "Request Access" is circled in red.
- Outstanding Reports:** A table with two columns: "Report Type" and "Number of Reports".
- Current Obligations:** A table with three columns: "Due Date", "Description", and "Amount".

Report Type	Number of Reports
Service Credit Verification	1
Accrued Verification	1
Employment Verification Reports	3
Annual Reporting	1
Withdrawal Certification	2
Pay Date Calendar	1
Violation Period Certification	1

Due Date	Description	Amount
09/12/2023	Payroll-reported contributions due	\$515.78
09/13/2023	PSC employer cost-Kimberly K	\$5,719.60
09/15/2023	Monthly PSC deductions due	\$811.23
	Payment received - not yet applied	-\$276.65

Below the Current Obligations table is a section titled "News & Alerts".

The screenshot shows the STS Request Access screen. The navigation bar at the top is identical to the previous screenshot. The main content area features a heading "Request Access" followed by two options, each with a right-pointing chevron:

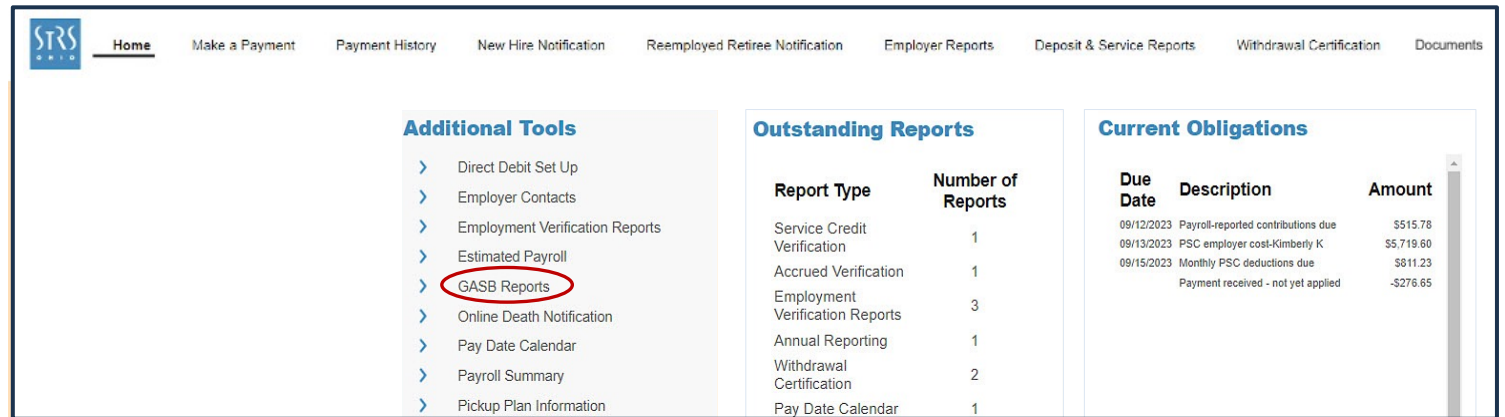
- > Add new contact and register for access
- > Add or modify access for existing contact

GASB Reports

The Governmental Accounting Standards Board (GASB) requires employers to report their proportionate share of STRS Ohio’s net liability and annual expense for pensions (GASB 68) and other post-employment benefits (GASB 75) in their financial statements. The following instructions explain how to access allocation schedules and other data needed to comply with these standards.

Step 1

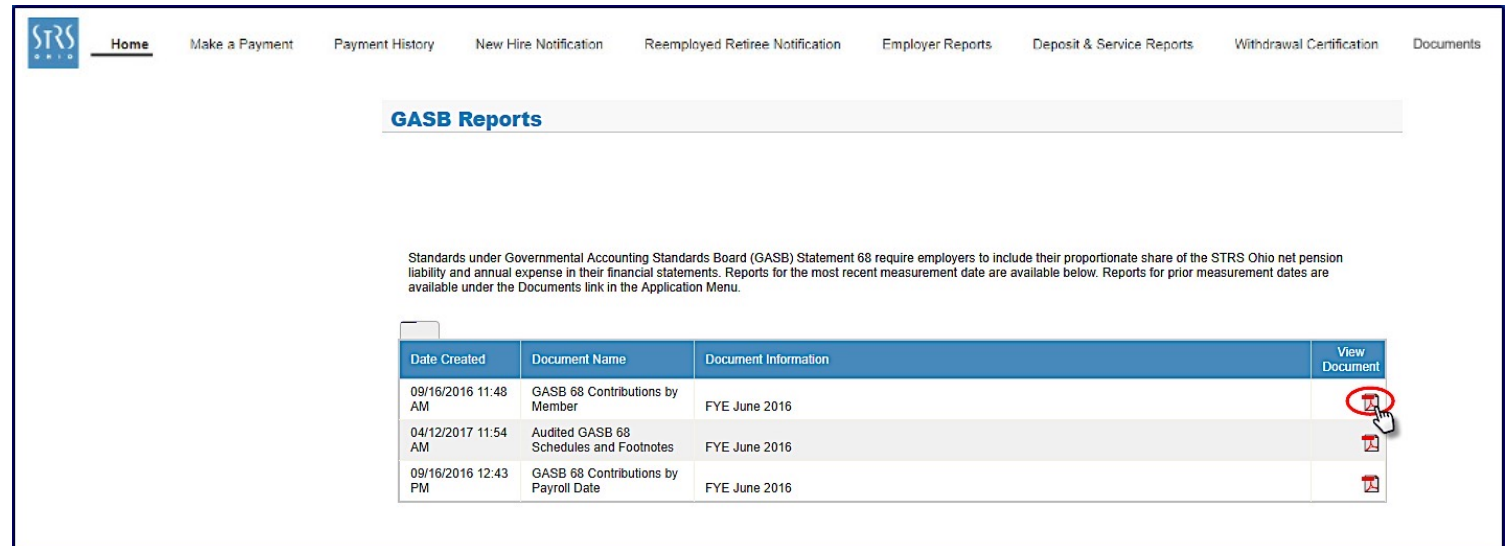
To access GASB Reports on the home page, click on “GASB Reports” in the Additional Tools menu.



Tip! GASB reports can also be found in the Documents section of ESS.

Step 2

A list of available reports will appear. To view or print a report, click the PDF icon in the View Document column.

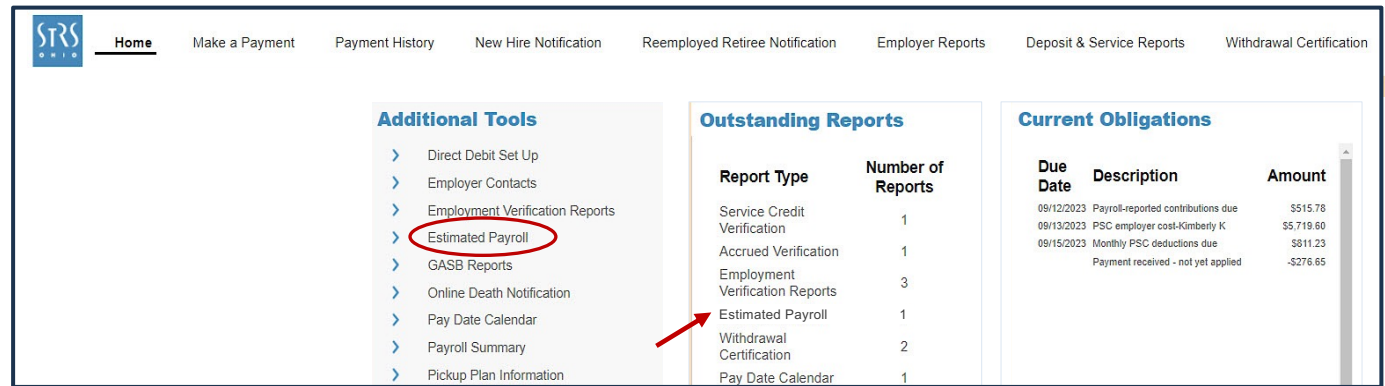


Estimated Annual Payroll

This information applies only to employers participating in the state foundation program. You will receive an email from STRS Ohio in April notifying you it is time to provide your estimated annual payroll for the upcoming fiscal year. This information is used to calculate employer contributions due from the state foundation program.

Step 1

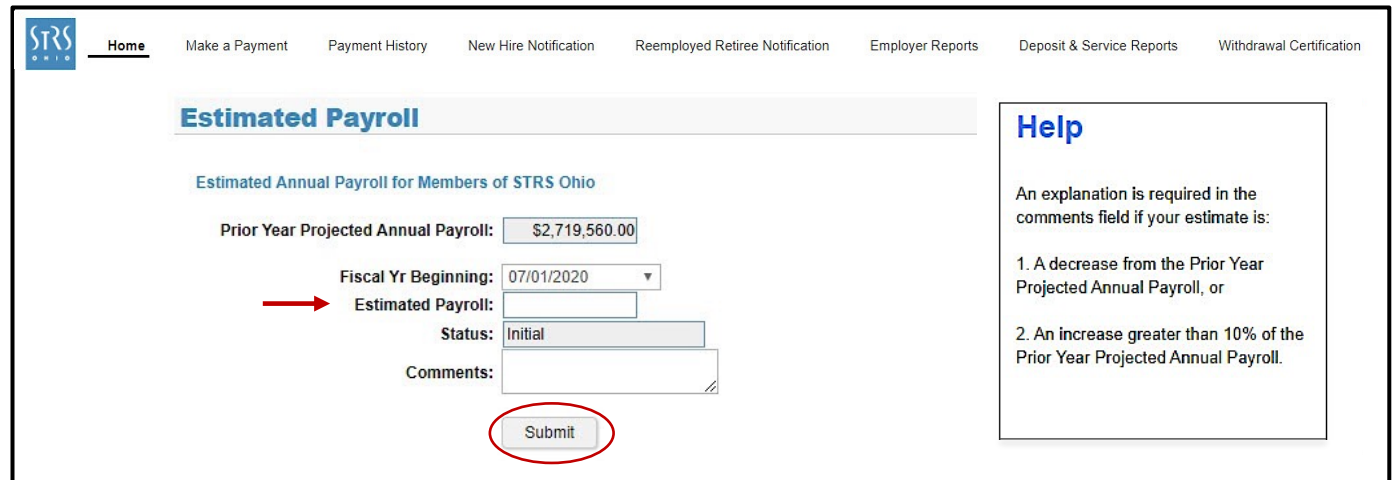
To access the report from the home page, click on "Estimated Payroll" in the Additional Tools menu or the Outstanding Reports section.



Step 2

To help you prepare an accurate payroll estimate, the projected amount of your current payroll is prepopulated in the Prior Year Projected Annual Payroll field. The start date of the upcoming fiscal year is also prepopulated in the Fiscal YR Beginning field.

To complete the report, enter your estimated payroll for the upcoming fiscal year (July 1–June 30) in the Estimated Payroll field. Then click "Submit."



Tip! If you need to correct the report after you submit it, email report@strsoh.org. Corrections cannot be made in ESS.

Pickup Plan Information

STRS Ohio needs accurate pickup plan information for your school. You should check your pickup plan information in ESS and submit new plan documentation if updates are needed.

Step 1

To access pickup plan information from the home page, click on "Pickup Plan Information" in the Additional Tools menu.

Step 2

Your pickup plan information will appear.

1. Review the employee groups covered, plan type, percentage being picked up and effective date.
2. If the total pickup percentage is less than the current 14% member contribution rate and/or the effective date is not 7/1/2016 or later, new plan documentation is needed.
3. If any information is not accurate, email new plan documentation to report@strsoh.org.
4. If "multiple plans" is listed in place of a specific percentage, the plan type or percentage varies within an employee group.

The screenshot shows the STRS Ohio ESS home page. The navigation bar includes: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The 'Additional Tools' menu is expanded, listing: Direct Debit Set Up, Employer Contacts, Employment Verification Reports, Estimated Payroll, GASB Reports, Online Death Notification, Pay Date Calendar, Payroll Summary, Pickup Plan Information (circled in red), Request Access, Training Registration, and Violation Period Certification. The 'Outstanding Reports' section shows a list of report types and their counts. The 'Current Obligations' section shows a table of due dates, descriptions, and amounts.

Pickup Plan Information			
Group Covered	Pickup Plan Type	Pickup Percent	Effective Date
Administrators	Salary Reduction	14	7/1/2016
Superintendents	Pickup-on-Pickup	14	8/1/2016
Teachers	Salary Reduction	14	7/1/2016

Online Death Notification

Employers can report the death of a member in ESS. The sooner STRS Ohio is notified of a member's death, the sooner benefits are paid to the member's beneficiaries. Understandably, sometimes the family does not think about notifying STRS Ohio right away, so this notification allows the employer to start the process.

Step 1

1. To access the online death notification from the home page, click on "Online Death Notification" in the Additional Tools menu. *(Screen not shown.)*
2. The first screen of the online death notification will appear. Enter the member's name, date of birth, STRS Ohio ID or last four digits of the Social Security number, ZIP code and date of death. Then click "Next."

Error message: If you do not know all this information or the information you enter does not match a member in our system, an error message will appear indicating the person is not found. If this occurs, you can reenter the correct information or contact STRS Ohio's Member Services Center to provide the information you know. You will not be able to submit the notification online if any required information is incorrect or missing.

Online Death Notification

Online Death Notification

Step 1 Step 2 Step 3 Complete

Please enter the information below.

Deceased Member/Recipient's Information

* Indicates required field

Name:

*First name Middle initial *Last name

*Date of birth:

MM/DD/YYYY

*STRS Ohio ID or Last 4 of SSN:

Choose one

*ZIP code:

*Date of death:

MM/DD/YYYY

CANCEL NEXT

Step 2 and Step 3

Providing information on these screens is optional but preferred. If you know some or all the requested information, enter it and click "Next." If you do not know any of the information, click "Next" to continue.

Online Death Notification

ESS Online Death Notification Front Page | ESS Online Death Notification

Online Death Notification

Step 1 > **Step 2** > Step 3 > Complete

Please enter the information below to expedite the processing of any available death benefits.

Surviving spouse name:

First and last name

Surviving child(ren) name(s):

First and last name - separate multiple names by comma

Surviving parent(s) name(s):

First and last name - separate multiple names by comma

County of death: State of death:

Country of death (if outside US):

Online Death Notification

ESS Online Death Notification Front Page | ESS Online Death Notification

Online Death Notification

Step 1 > Step 2 > **Step 3** > Complete

Please provide the information below to expedite the processing of any available death benefits. The contact person is the individual handling the deceased member's affairs.

Contact's Information

Please enter the information below if available to expedite the processing of any available death benefits.

Name:

First name Last name

Relationship:

Address

Street:

City: State: ZIP code:

Email: Phone:
sample@email.com (XXX) XXX-XXXX

Complete

Clicking "Next" on the Step 3 screen will submit the notification to STRS Ohio. A message on the "Complete" screen confirming successful submission will appear. *(Screen not shown.)*

Section 21

ARP Adjustment

The following instructions explain how to correct contributions reported in the monthly ARP report.

Submitting an ARP Adjustment

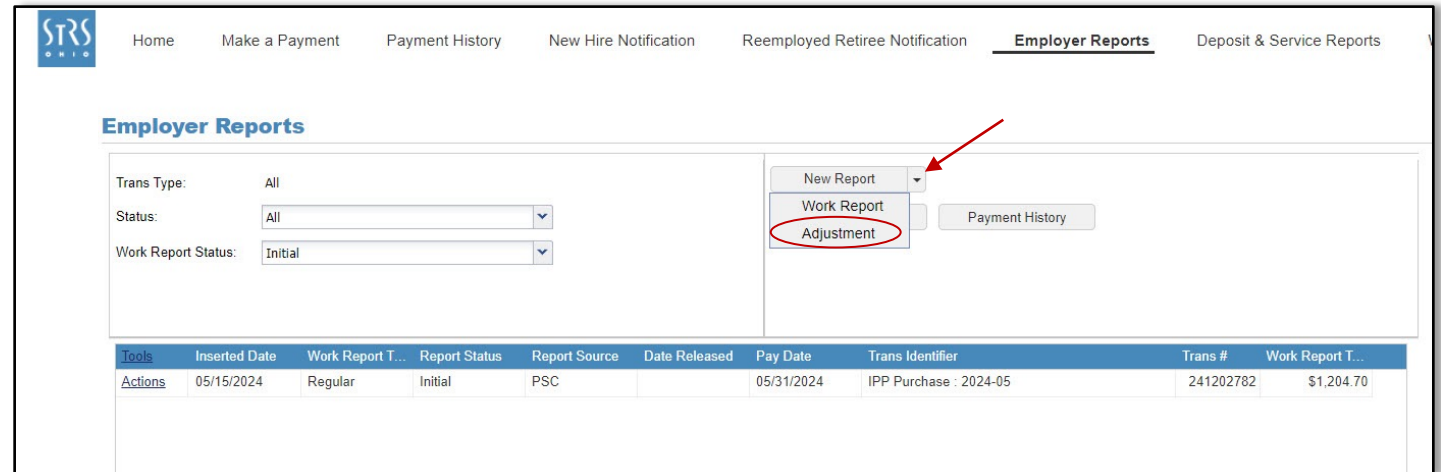
Step 1

On the home page, click on “Employer Reports” in the banner menu. *(Screen not shown.)*

Step 2

To enter an adjustment to increase or decrease the amount of ARP contributions submitted, you will need to create a new adjustment. On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click the down arrow on “New Report” and select “Adjustment” from the drop-down menu.
3. The Generate Adjustment Report screen shown on the next page will appear.



Step 3

1. In the Agreement Name column, click the box next to "ARP" to indicate you want to create an ARP adjustment.
2. Enter the report start date and pay date. These dates should be the same — either today's date or the last day of the month in which the correction needs to be made.
3. Click "Save." This will take you directly to the Adjustment screen shown on the next page.

The screenshot shows the STS Employer Reports interface. A modal window titled "Generate Adjustment Report" is open, displaying a table of report entries. The table has the following columns: Agreement Name, Report Start Date, Pay Date, Report Source, Date Received, Billing Type, Active, and Message. The first row is selected, with "ARP" in the Agreement Name column, "05/31/2024" in the Report Start Date column, and "05/31/2024" in the Pay Date column. A red arrow points to the checkbox next to "ARP" in the table. A yellow box highlights the "Save" button at the bottom left of the modal. Another yellow box highlights the "Report Start Date" and "Pay Date" fields, which are circled in red. The background interface shows the "Employer Reports" section with various filters and buttons.

Agreement Name	Report Start Date	Pay Date	Report Source	Date Received	Billing Type	Active	Message
<input checked="" type="checkbox"/> ARP	05/31/2024	05/31/2024	ARP	06/06/2024	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Backpostings	06/06/2024	06/06/2024	Back Postings	06/06/2024	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Service Credit ...	06/06/2024	06/06/2024	Service Credit ...	06/06/2024	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Purchase Serv...	06/06/2024	06/06/2024	PSC	06/06/2024	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> 9302_Payroll_...	06/06/2024	06/06/2024	Payroll	06/06/2024	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> 9302_Annual ...	06/06/2024	06/06/2024	Annual	06/06/2024	Contribution	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Accrued Verifi	06/06/2024	06/06/2024	Accrued Verifi	06/06/2024	Contribution	<input checked="" type="checkbox"/>	

Step 4

1. On the Adjustment screen, click "Add Members."
2. The "Mass Adjustment" screen will appear. On this screen, click "Add Members."
3. The Search window will appear. Enter the member's SSN or name in the search field at the top of the screen and click "Search."
4. The member's information will appear. Click on the member's SSN. This will add the member to the adjustment report.

Note: If you have not submitted a new hire or reemployed retiree notification for the individual, the member's information will not appear. Submit the applicable employment notification to add the member to the report.

5. Then click "X" in the upper right corner of the screen to close the window. You will return to the Mass Adjustment screen.

Repeat actions 3 and 4 above to add additional members.

The screenshot displays the 'Adjustment' software interface. The main window is titled 'Mass Adjustment' and contains fields for 'Billing Location' (OHIO LOCAL SCHOOLS), 'Agreement Name' (ARP), and 'Category Name' (STRS). It also has 'Work Report Status' (Initial), 'Start Date', 'Stop Date', and 'Show Dates' options. Below these are 'Work Units' and 'Members' sections. A 'Search' window is overlaid on top, showing a search field with '002-61-0615' entered and a 'Search' button. The search results table shows one entry for 'ANGELA, ANGELA' with SSN '002-61-0615' and Birth Date '7/29/1979'. Red arrows and numbers 1-5 indicate the sequence of actions: 1 points to the 'Add Members' button in the Mass Adjustment window; 2 points to the 'Add Members' button in the Search window; 3 points to the SSN field in the Search window; 4 points to the search results table; 5 points to the 'X' close button in the Search window. A text box in the center reads: 'Refer to the instructions in Step 4 that correspond with the numbers on this screen.'

Tip! If a member has more than one adjustment in the same fiscal year, you can enter the total adjustment amount in one entry for the member. You don't need a separate entry for each month if the adjustments occur in the same fiscal year.

Step 5

On the Mass Adjustment screen, check to make sure the member(s) you added are listed in the Members section.

1. If you need to add additional members, repeat actions 2–5 on the previous page.
2. Click “Save” when finished.
3. You will return to the Adjustment screen shown on the next page.

The screenshot shows a software interface with two main panels: 'Adjustment' on the left and 'Mass Adjustment' on the right. The 'Mass Adjustment' panel has a 'Save' button circled in red. Below the 'Save' button are fields for 'Billing Location', 'Agreement Name' (set to 'ARP'), and 'Category Name' (set to 'STRS'). To the right of these fields are 'Work Report Status' (set to 'Initial'), 'Start Date' (05/31/2024), 'Stop Date' (05/31/2024), and a 'Show Dates' checkbox. Below these fields is a 'Work Units' table with columns: Tools, Employer contribution amount, Earnings, Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End / ARP - Fiscal Start, Fiscal month, and Notes. Below the 'Work Units' table is a 'Members' section with an 'Add Members' button and a table with columns: Tools, SSN, and Participant Name. The table contains one entry: 'Delete', '002-61-0615', and 'ANGELA, AN...'. The 'Adjustment' panel on the left shows 'Employer: OHIO LOCAL SCHOOLS', 'Barg Unit Id: ARP - ARP', and buttons for 'Delete Selected' and 'Add Members'.

Step 6

1. Enter the ARP contribution amount in the Employer contribution amount field. (Negative amounts are accepted.) This amount should be earnings listed multiplied by the mitigating rate for the fiscal year. The mitigating rate can be found in the Payroll Reporting section of the employer website under ARP Reporting.

2. Enter the earnings that correspond with the amount entered in the Employer contribution amount field.

3. Enter the fiscal year for the contributions. This is always the first year of the fiscal year (e.g., FY 2023–2024 is 2023).

4. Enter the assigned number of the fiscal month for the contributions: July = 1; August = 2; September = 3; October = 4; November = 5; December = 6; January = 7; February = 8; March = 9; April = 10; May = 11; and June = 12.

5. You must provide a brief explanation why the correction is needed in the Notes field.

6. Click “Save.” You will automatically return to the Employer Reports page to submit the ARP adjustment.

Go to Step 7.

Adjustment
Save Cancel

Employer: OHIO LOCAL SCHOOLS	Work Report Type: Adjustment	Report Period: 05/31/2024 - 05/31/2024	# of Participants: 5
Billing Location:	Work Report Status: Initial	Identifier: #241529878 - ARP : 2024-05	# of Rows: 5
Report Source: ARP	Report Start Date: 05/31/2024	Pay Date: 05/31/2024	Billing Type: Contribution
Date Released:	Date Received: 06/06/2024	Trans#: 241529878	Agreement: ARP
User Released:	Batch No: 1714891	Updated By: BENLOAD	

Summary Detail

Barg Unit Id: Exception Filter:

Tools	Actions	SSN	Participant Name	Agreement Name	Report Type	Record Status	Employer contribution amount	Earnings	Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End / ARP - Fiscal Start	Fiscal month	Notes
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	002-61-0615	ANGELA, AN...	ARP	Alternative Ret...		\$145.50	\$5,000		2023	11 Additional cont...
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	000-12-8287	BRUCE, BRU...	ARP	Alternative Ret...		\$16.44	\$565		2023	11 Late reporting ...
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	001-50-5562	DONNA, DON...	ARP	Alternative Ret...		\$121.25	\$4,166		2023	11 Omitted from ...
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	002-20-0120	LISA, LISA	ARP	Alternative Ret...		\$44.38	\$1,525		2023	11 Late reporting
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	000-45-0556	SALLY, SALLY	ARP	Alternative Ret...		\$97.00	\$3,333		2023	11 Omitted from ...
Page Totals							\$424.57	\$14,589			
Report Totals							\$0.00	\$0.00			

Step 7

To submit the adjustment:

1. Click on "Actions" in the Tools column for the ARP adjustment. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the ARP adjustment.
3. Then click "OK."

The screenshot displays the STRS Employer Reports page. At the top, there is a navigation bar with links: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, and Deposit & Service Reports. Below the navigation bar, the "Employer Reports" section contains a filter area with dropdown menus for "Trans Type" (set to All), "Status" (set to All), and "Work Report Status" (set to Initial). To the right of these filters are buttons for "New Report", "One Time Payment", and "Payment History".

Below the filter area is a table with the following columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report T... The table contains two rows. The first row has "Actions" in the Tools column. The second row, which is highlighted in green, has "Actions" in the Tools column, "06/06/2024" in the Inserted Date column, "Adjustment" in the Work Report T... column, "Initial" in the Report Status column, "ARP" in the Report Source column, "05/31/2024" in the Date Released column, "05/31/2024" in the Pay Date column, "IPP Purchase : 2024-05" in the Trans Identifier column, "241529878" in the Trans # column, and "\$424.57" in the Work Report T... column. A red circle highlights the "Actions" link in the Tools column of the second row. A red arrow points to the "Submit" option in the dropdown menu that appears below the "Actions" link.

Two dialog boxes are overlaid on the table. The first is a "Confirm" dialog box with the text "Are you sure you want to submit this work report?" and "Yes" and "No" buttons. The "Yes" button is circled in red. The second is an "Info" dialog box with the text "The selected work report was submitted successfully." and an "OK" button, which is also circled in red.