Employer Self Service (ESS) Instructions

www.strsoh.org/employer

50-368, 7/24/0

Employer Self Service (ESS) Instructions

Table of Contents

STRS OHIO

www.strsoh.org/employer

Need assistance?

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

Section 1

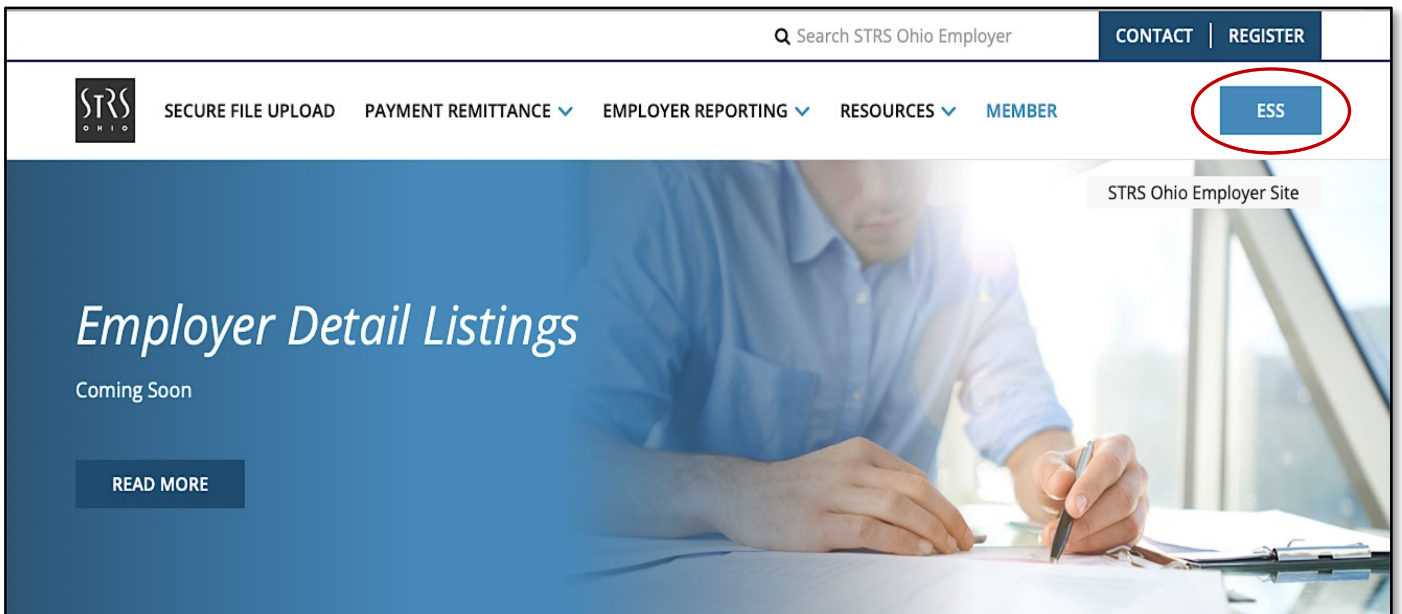
Getting Started

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!

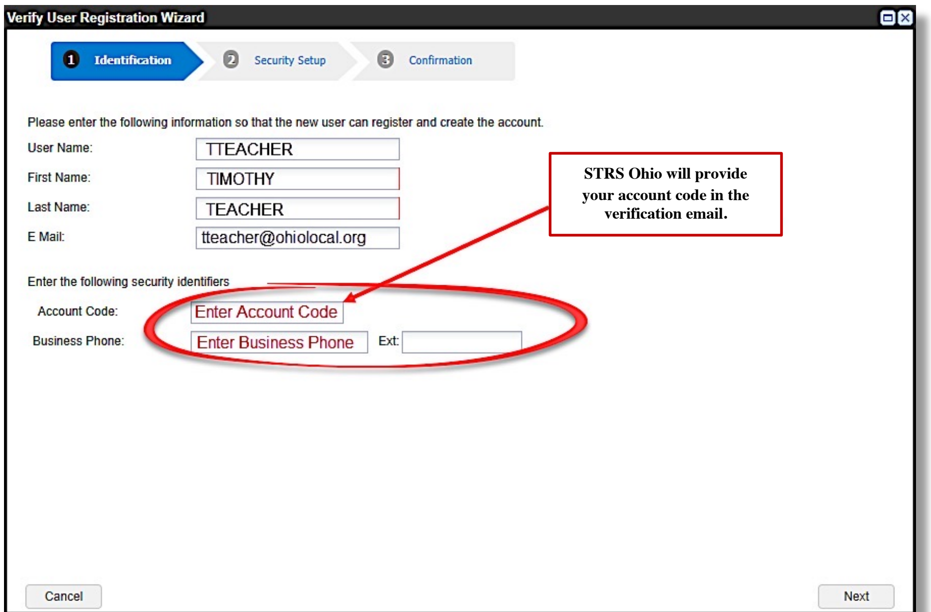
- *Look for "STRS Ohio Employer Site" under the ESS button to be sure you are on the employer website.*
- *Passwords are case sensitive. Make sure "Caps Lock" is not on.*
- *Your account may be automatically suspended (locked) if you have not accessed ESS in the past six months.*
- *If you cannot remember 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.

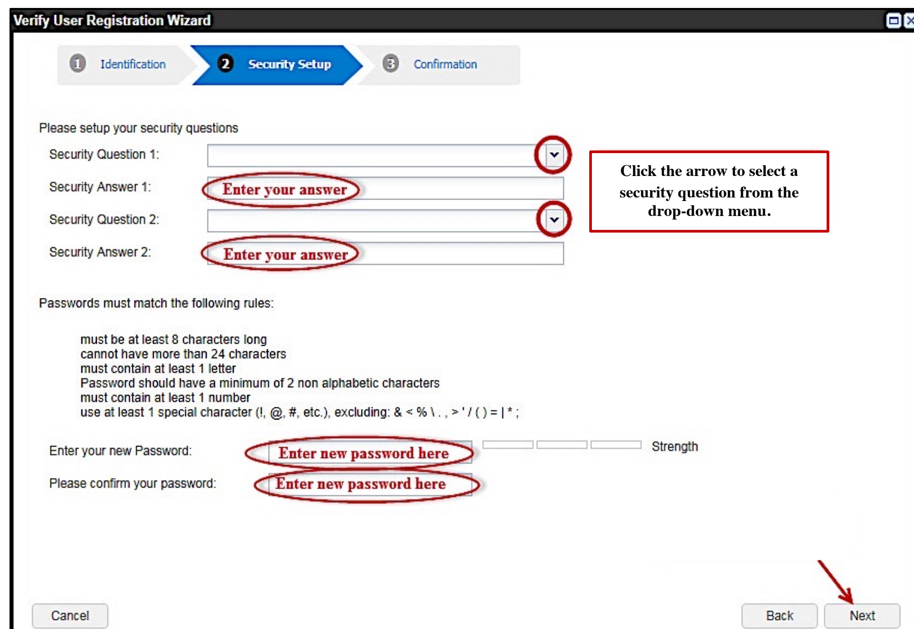
Step 1

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



Step 2

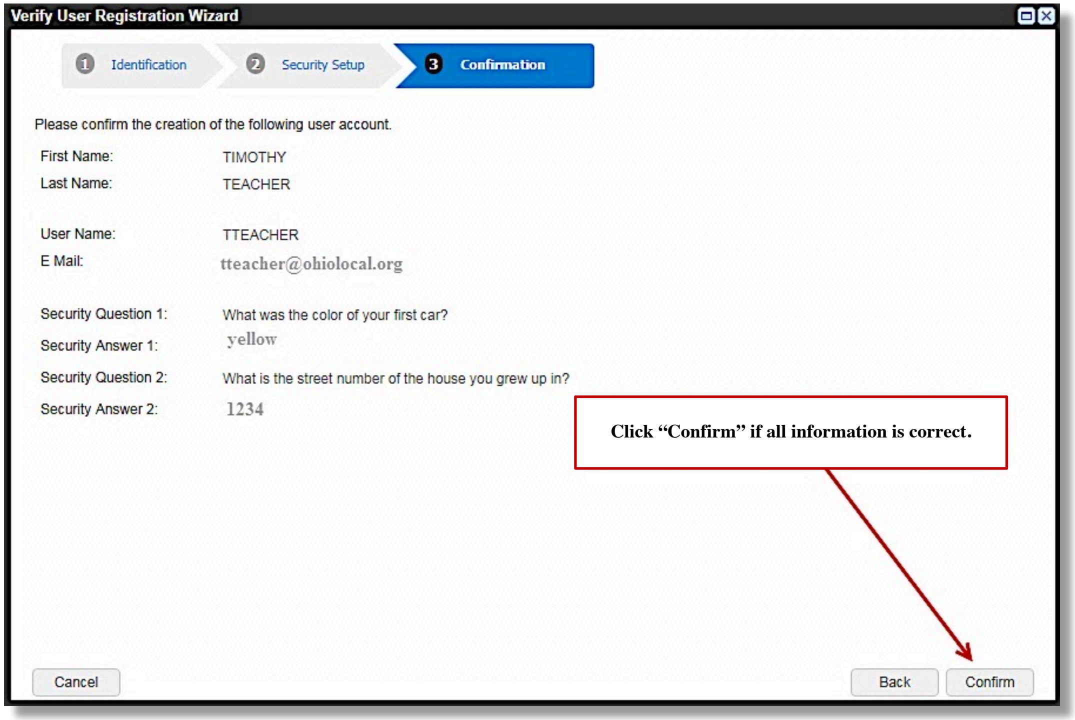
Enter all information on the Security Setup screen. Then click "Next" to continue to the Confirmation screen shown on the next page.



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).

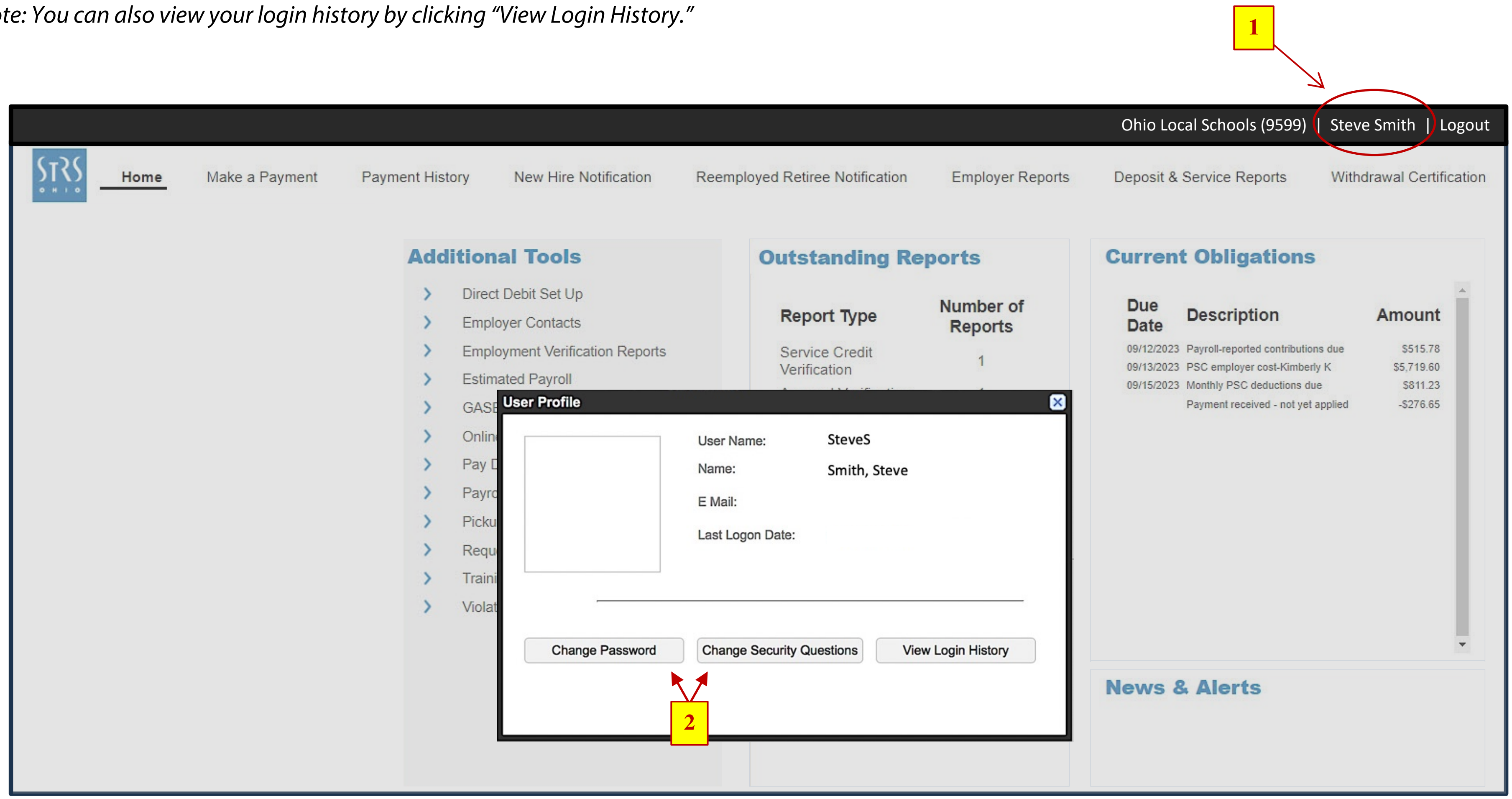


Changing Your Password or Security Questions

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

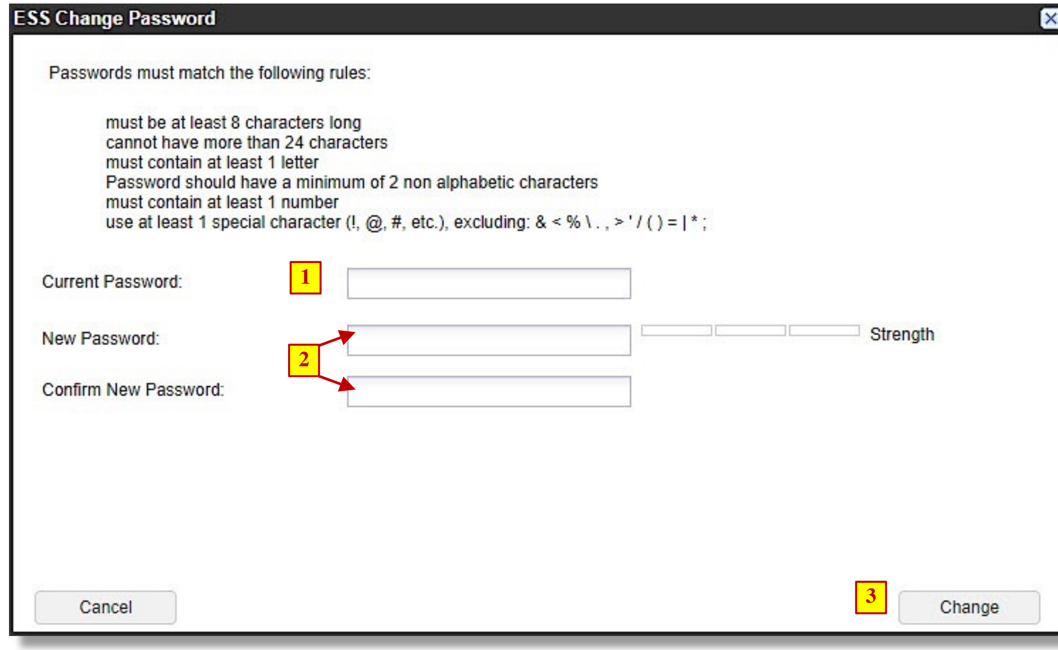
1. Click on your name at the top of any page.
2. In the User Profile box, click "Change Password" or "Change Security Questions."
3. The screen shown on the next page will appear for you to make the changes.

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



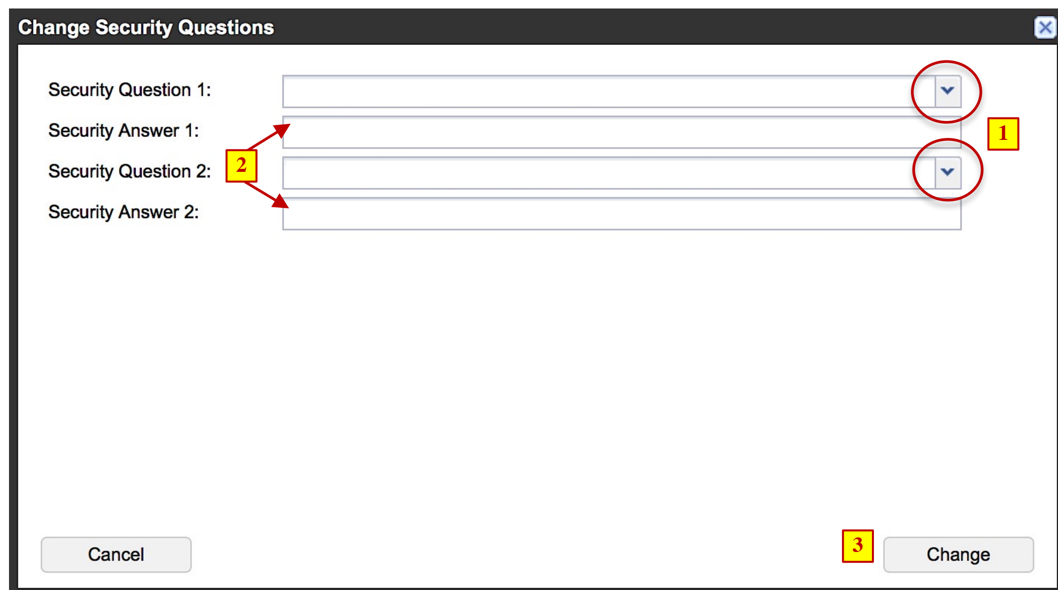
Change Password

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.”



Change Security Questions

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



Navigation Tips

Navigation on the Home Page

To navigate ESS on the home page:

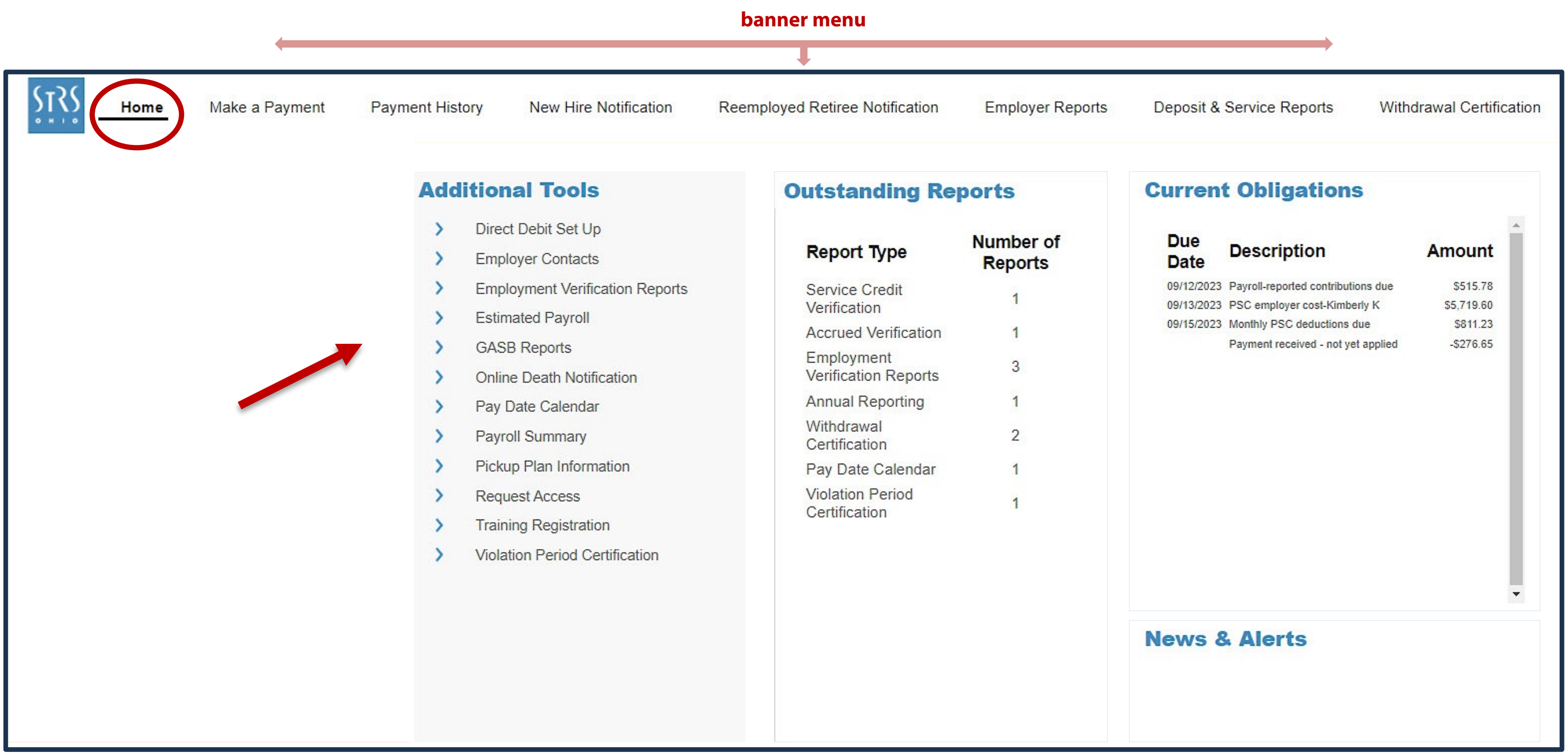
1. Click a topic in the banner menu at the top of the page, or
2. Click a topic in the Additional Tools menu.

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.



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

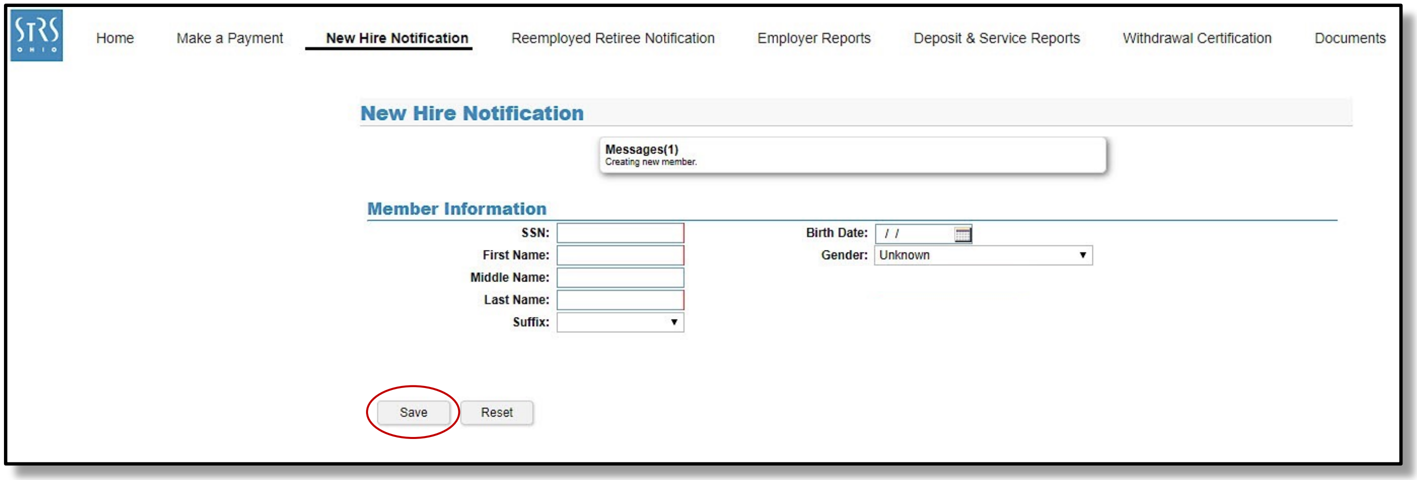
Click on "New Hire Notification" in the banner menu at the top of the home page. *(Screen not shown.)*

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.



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.

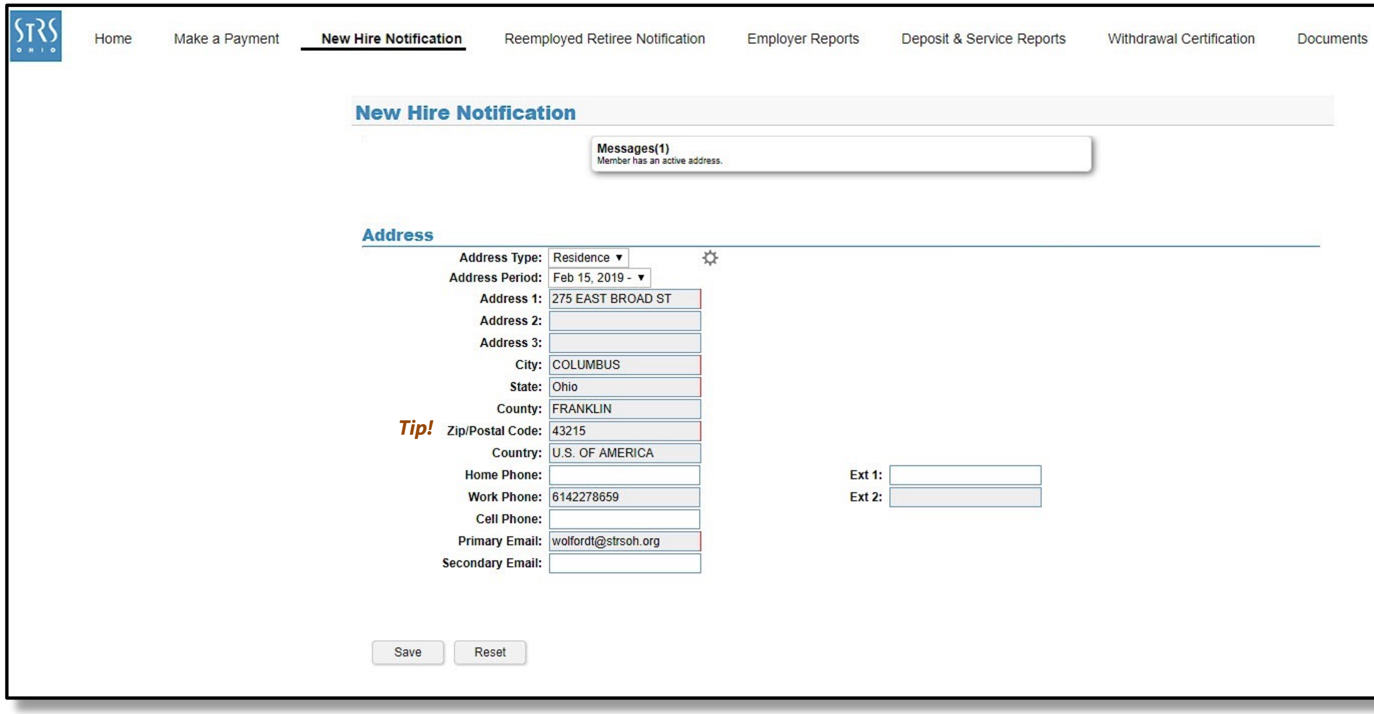
1. Enter any missing information, such as phone numbers and a secondary email address.
2. Click "Save." The screen shown on the next page will appear.

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)

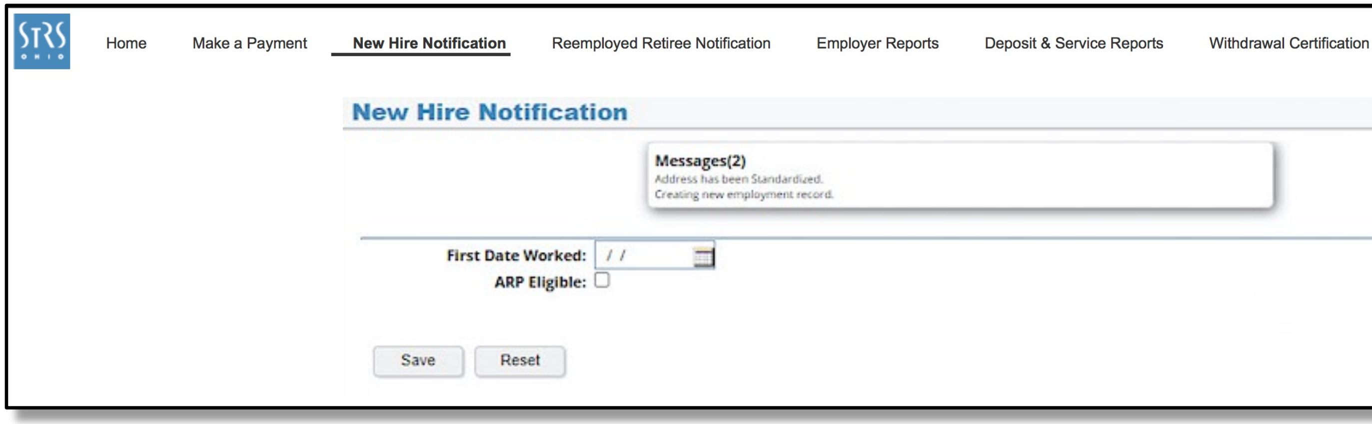
Click "Save." The screen shown on the next page will appear.



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

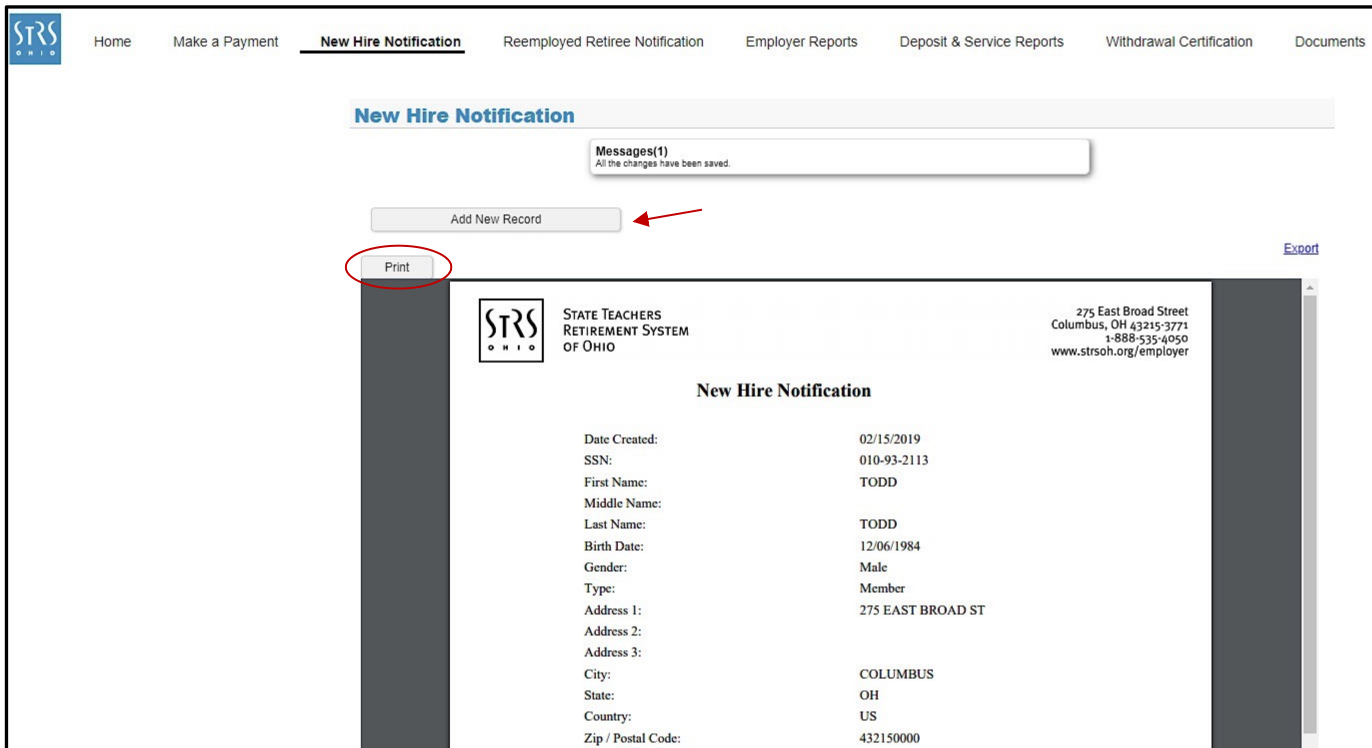
Step 4

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."



Step 5

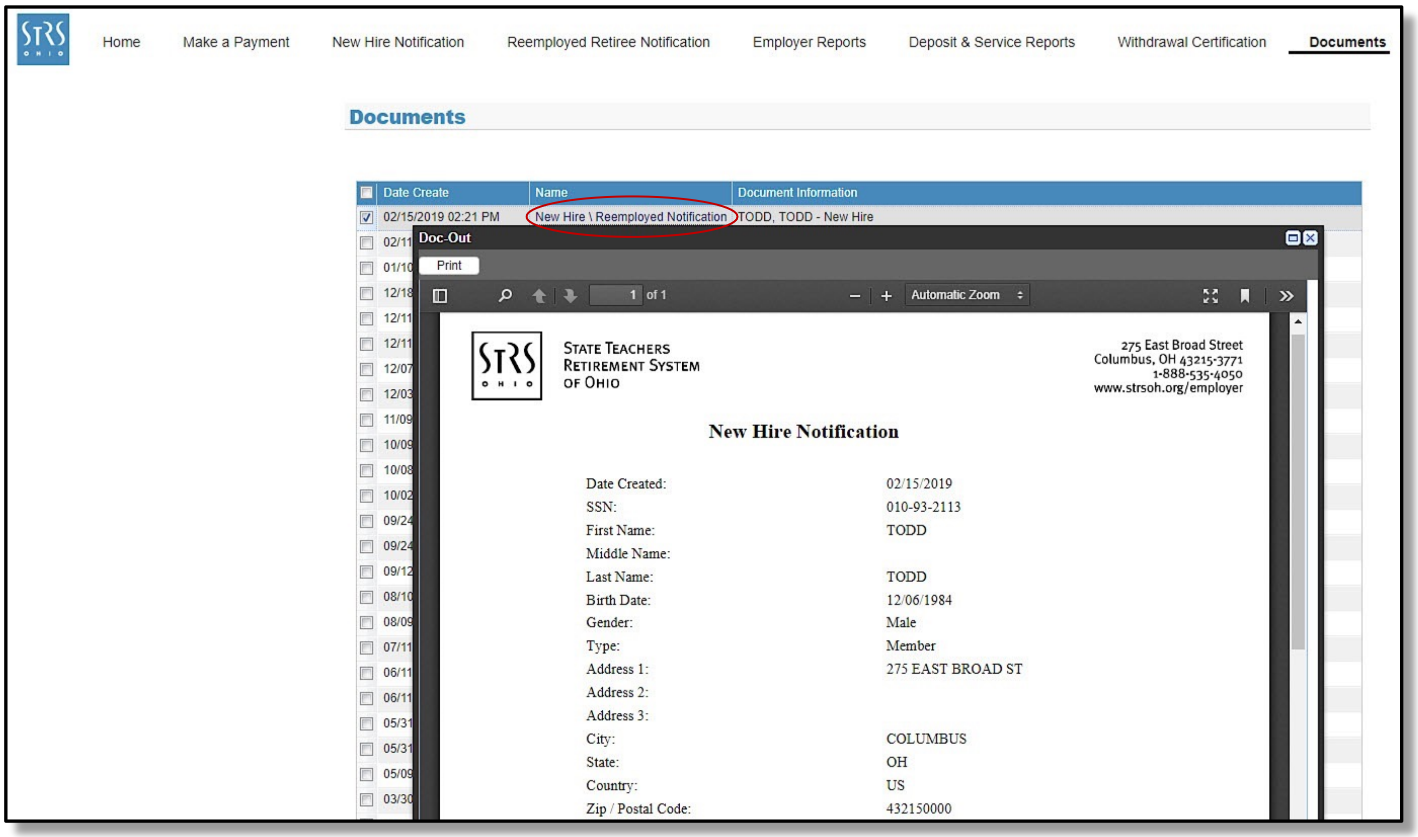
1. A new hire notification document will appear on your screen. Click "Print" to print a copy for your records.
2. To start a new hire notification for another member, click "Add New Record." If you are finished entering new hire notifications, click "Home" in the banner menu to return to the home page.



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.



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

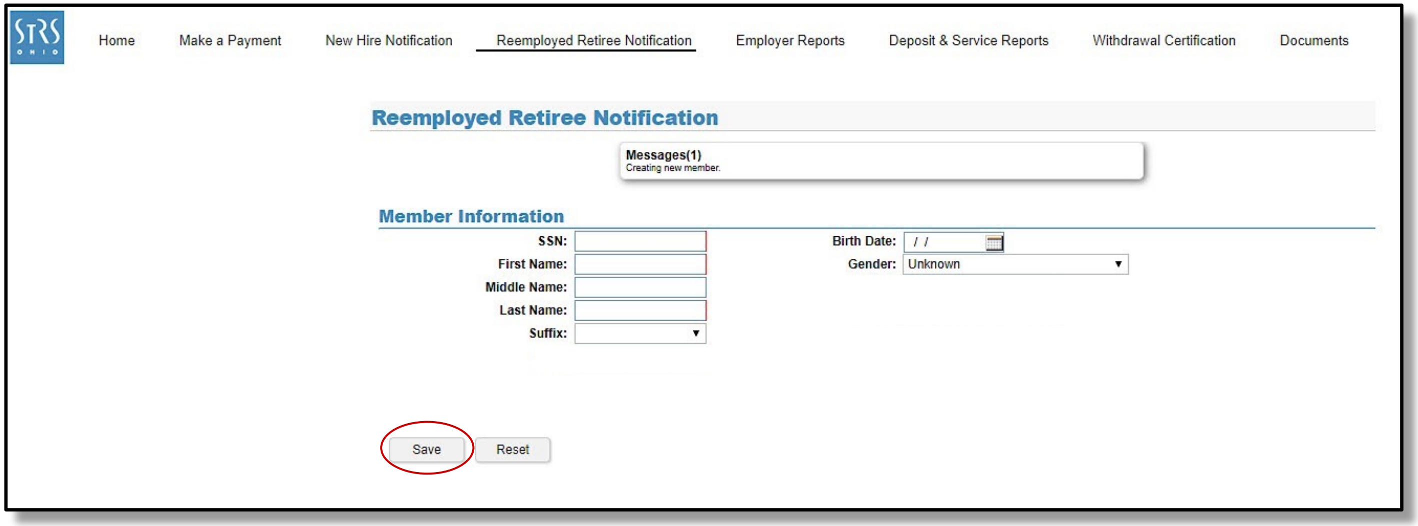
Click on “Reemployed Retiree Notification” in the banner menu at the top of the home page. *(Screen not shown.)*

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.



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.

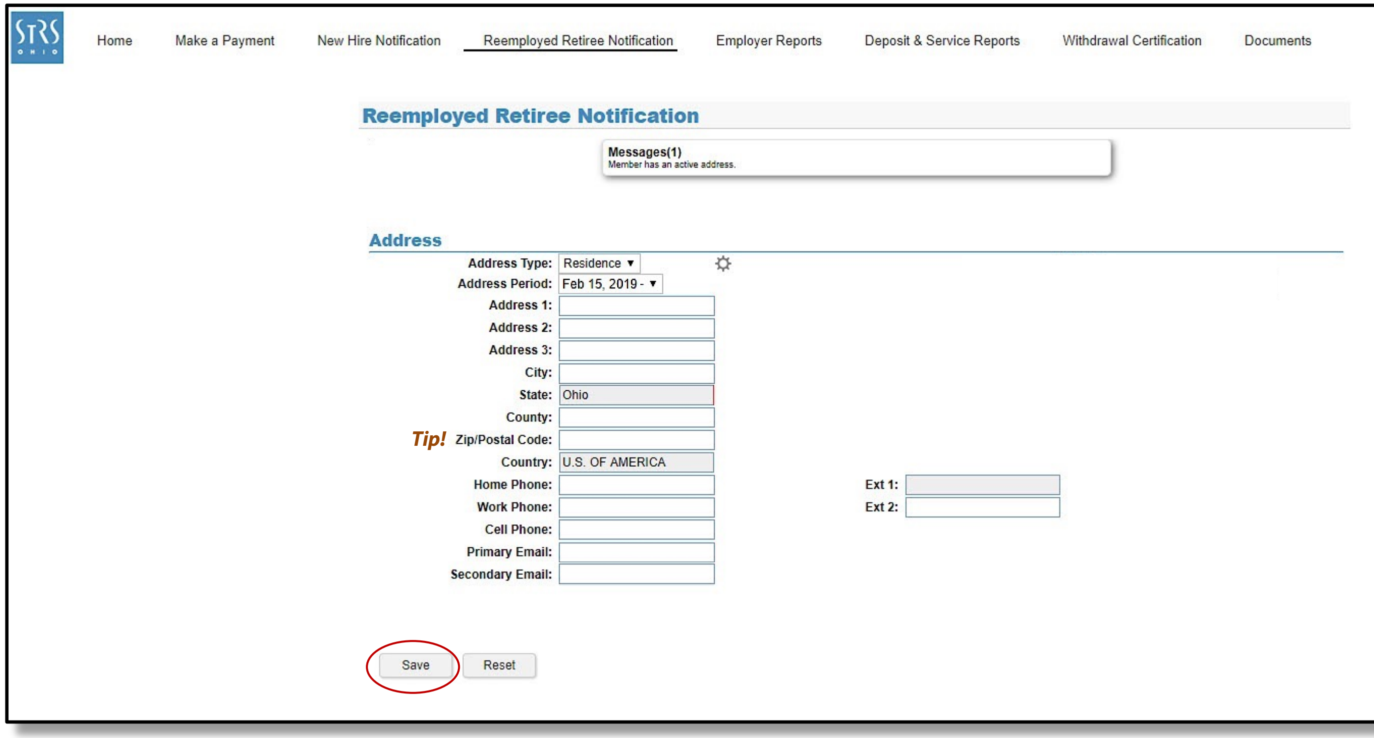
1. Enter any missing information, such as phone numbers and a secondary email address.
2. Click "Save." The screen shown on the next page will appear.

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.

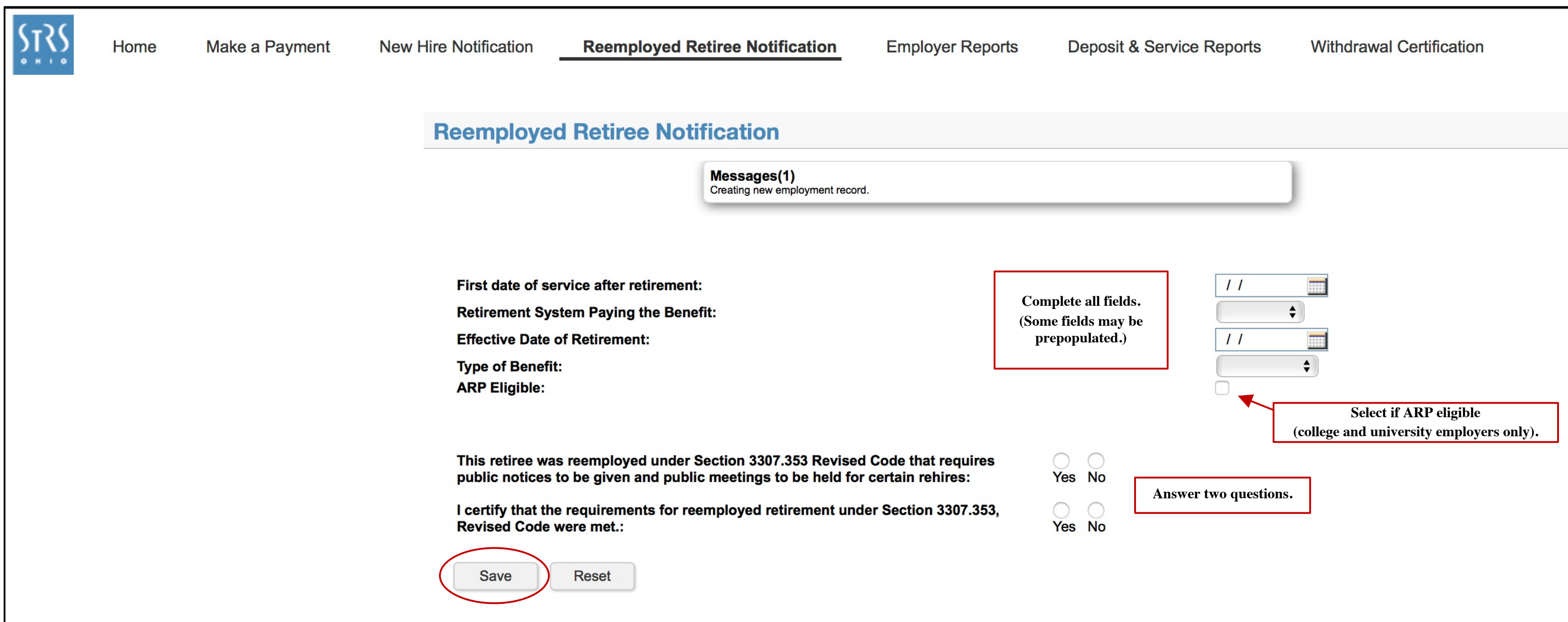


Tip! *Once you insert the ZIP code, press "Enter" on your keyboard to automatically populate the city and county.*

Step 4

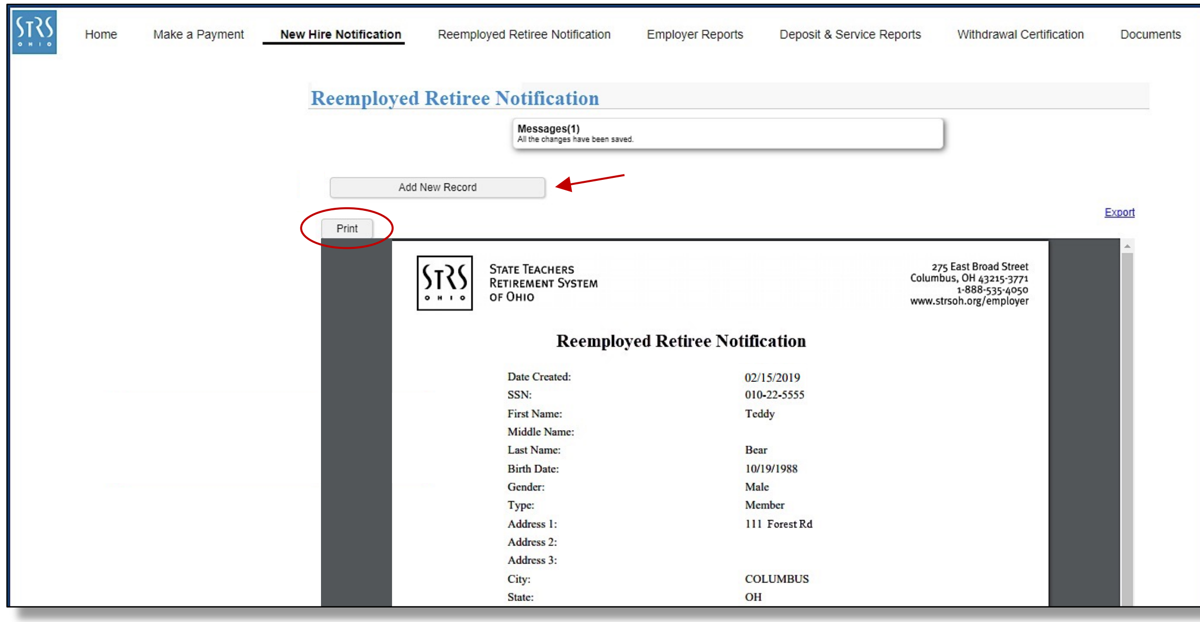
Enter the following information. (Some fields may be prepopulated if member information is already on file.)

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."



Step 5

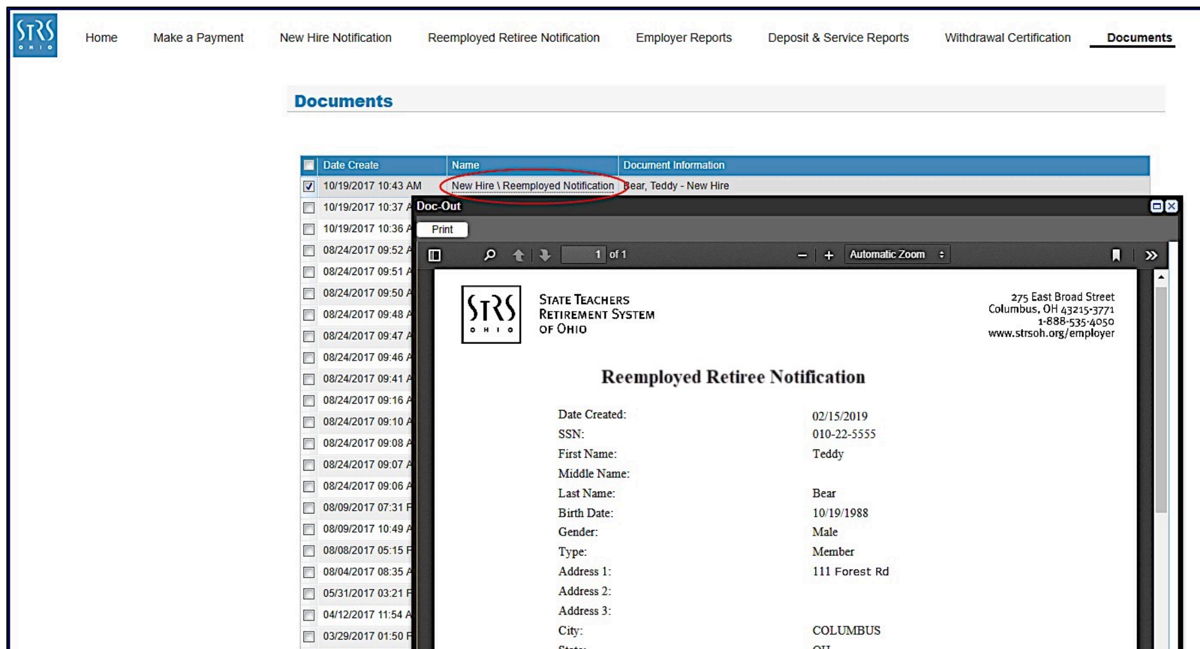
1. A reemployed notification document will appear on your screen. Click “Print” to print a copy for your records.
2. To start a new reemployed retiree notification for another member, click “Add New Record.” If you are finished entering reemployed retiree notifications, click “Home” in the banner menu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

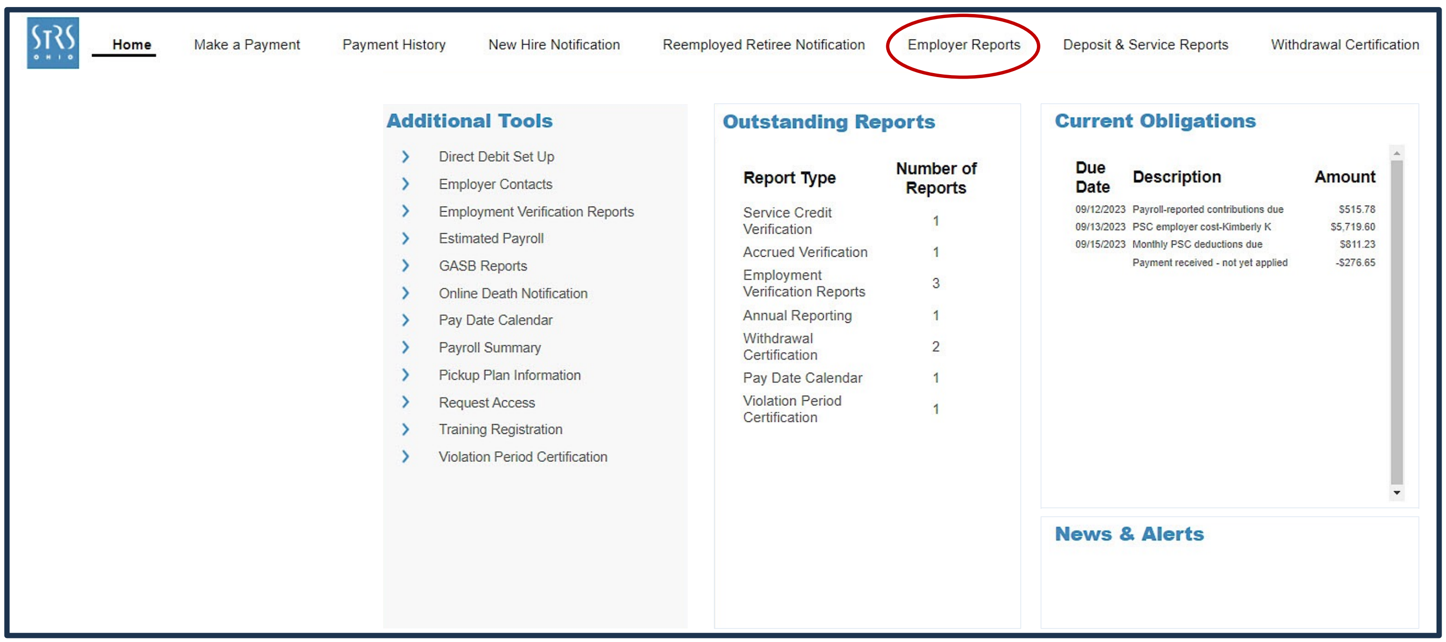
- Payroll report (Section 5)
- Payroll adjustment (Section 6)
- Backposting (Section 7)
- Annual report (Section 8)
- Service credit verification report (Section 9)
- Accrued verification report (Section 10)
- Purchase service credit report (Section 11)
- Pay date calendar (Section 14)
- Violation period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

Accessing Reports

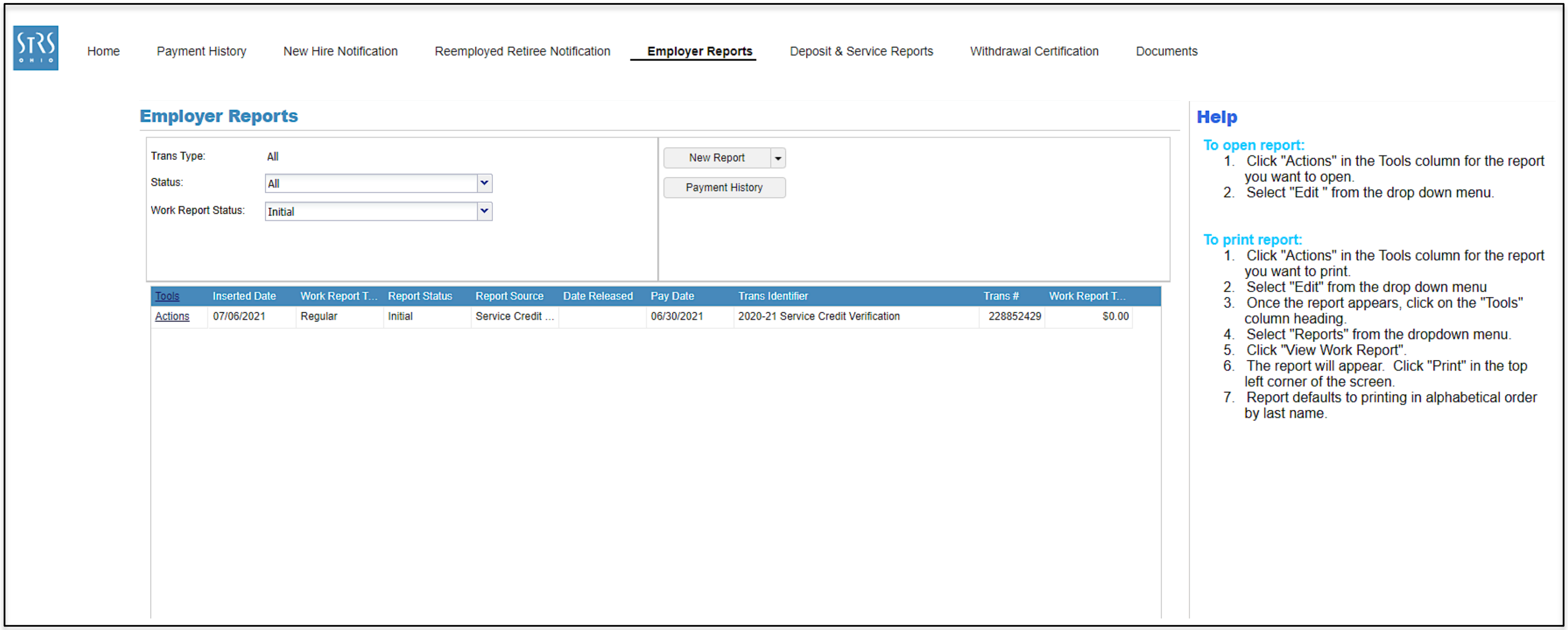
To access a report from the home page:

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.



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.



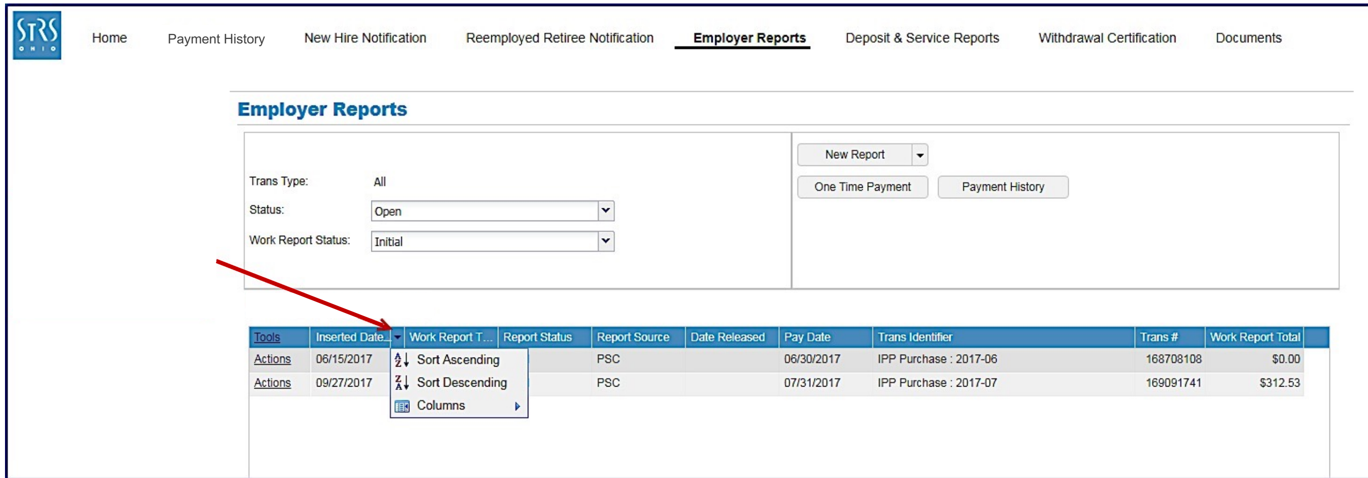
***Tip!** The Employer Reports screen automatically displays reports in initial status. To view all reports (initial, submitted and complete), change the Work Report Status to "All."*

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

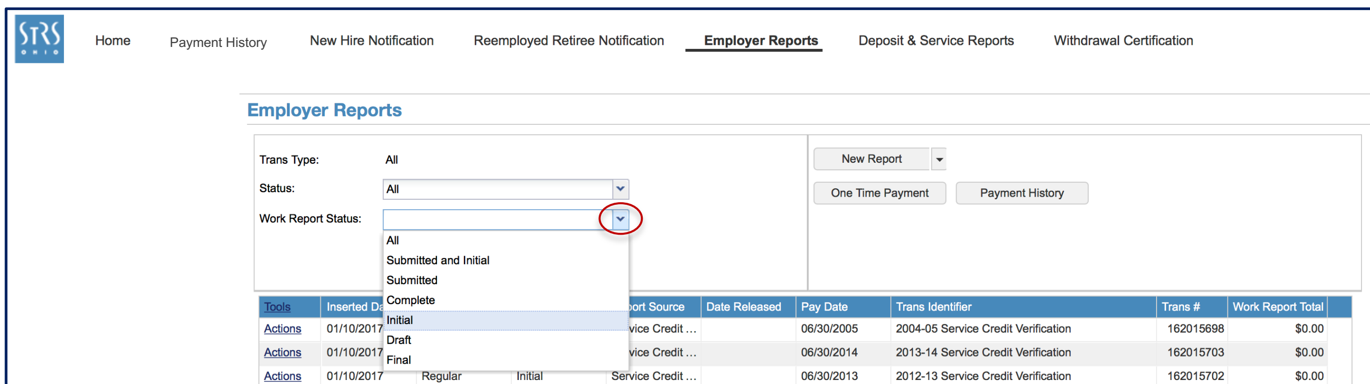
1. Place the cursor over the column you want to sort by.
2. Click the drop-down arrow that appears next to the column or click the column heading.
3. Choose "Sort Ascending" or "Sort Descending" from the drop-down menu.



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

Sort by Work Report Status

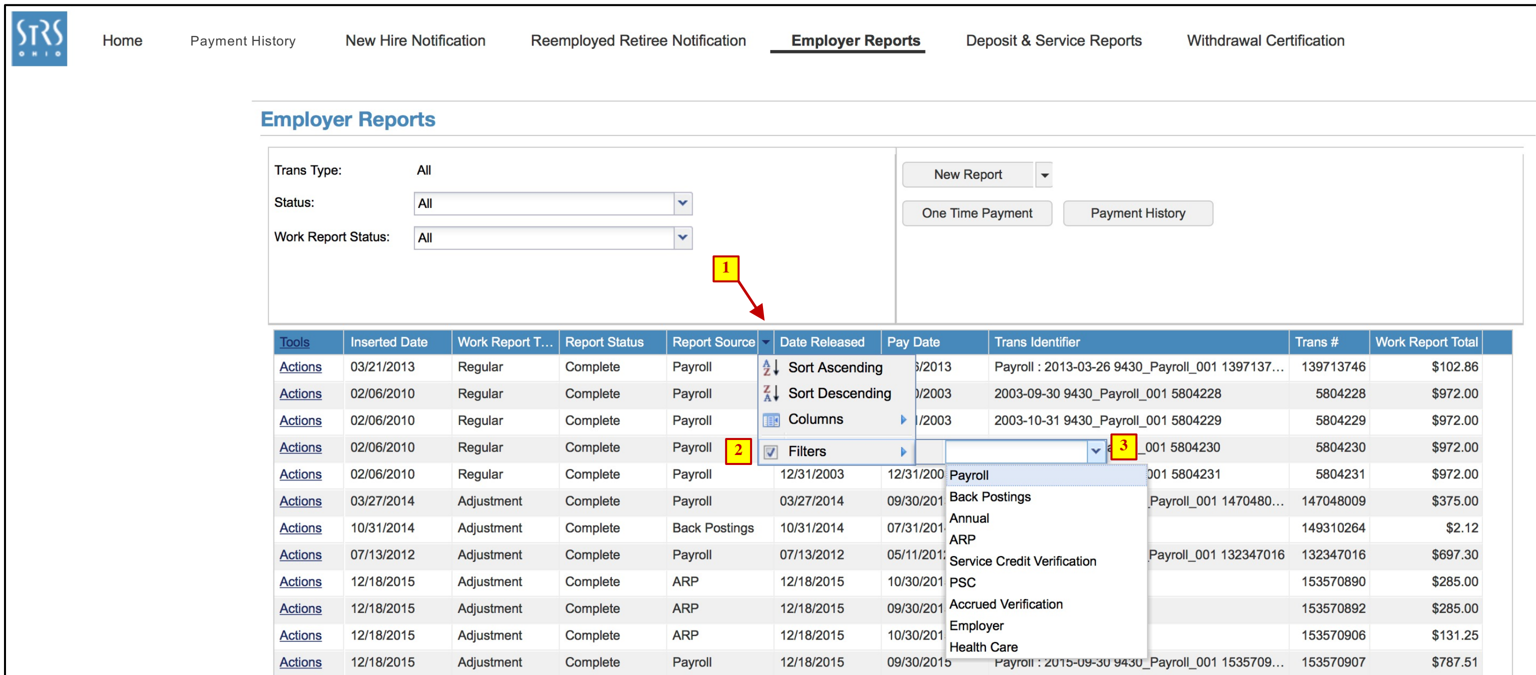
1. Click the down arrow in the "Work Report Status" field.
2. Select the status you want to search by. Once sorted, only reports in that status will appear.



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.



Printing Reports

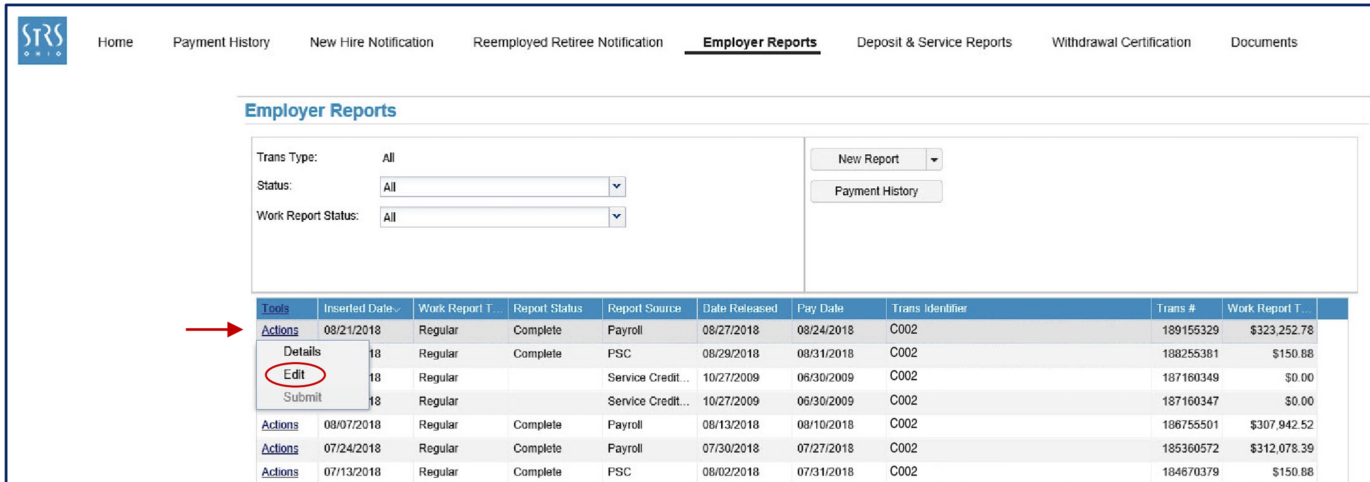
You can print reports in the Employer Reports section of ESS.

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.

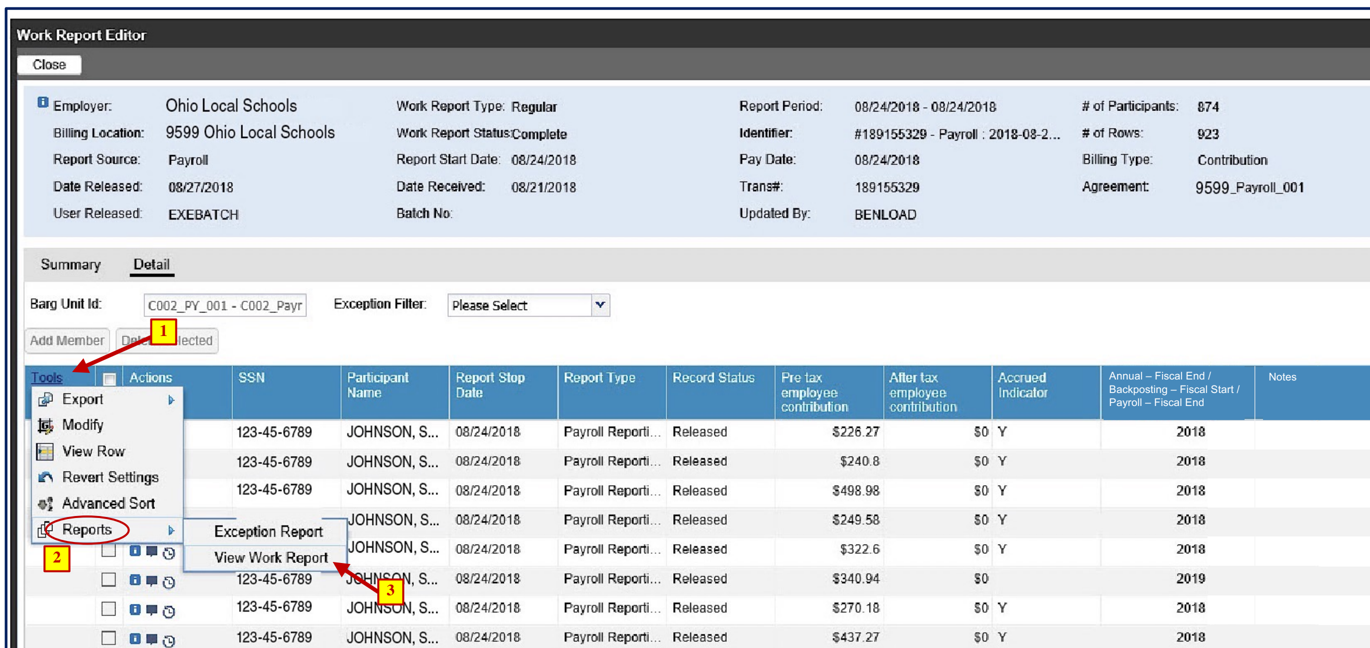
The Work Report Editor screen shown below will appear.



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.)*



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

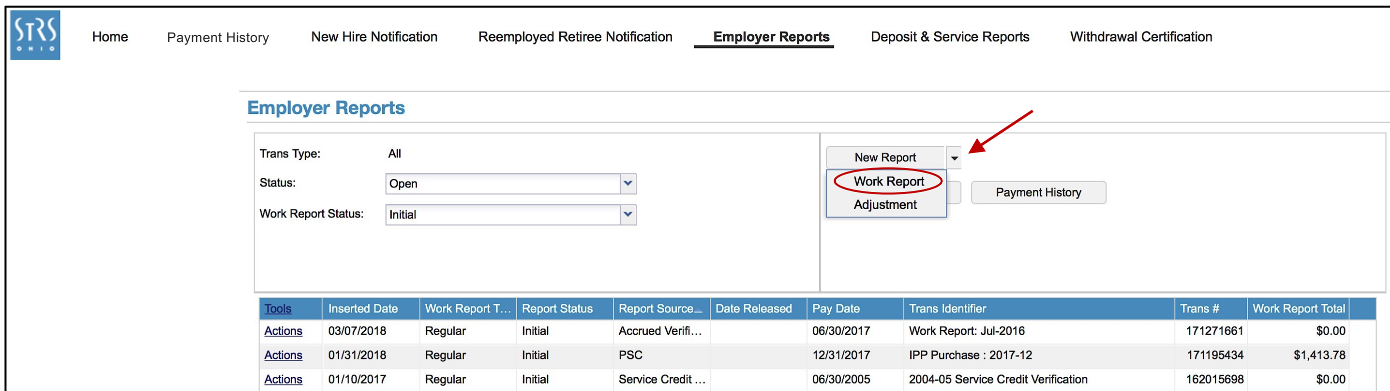
Step 1

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:

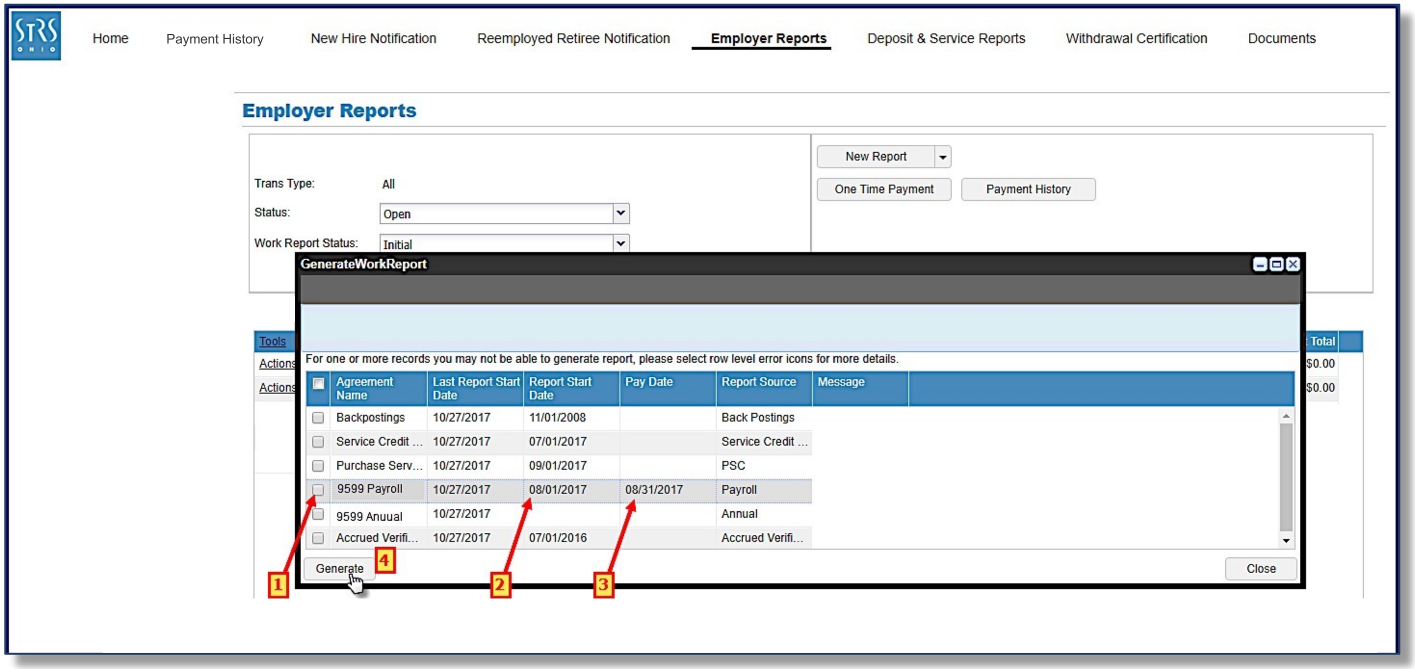
1. Verify the Work Report Status field is “Initial.”
2. Click the down arrow on “New Report” and select “Work Report” from the drop-down menu.
3. The Generate Work Report screen shown on the next page will appear.



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.

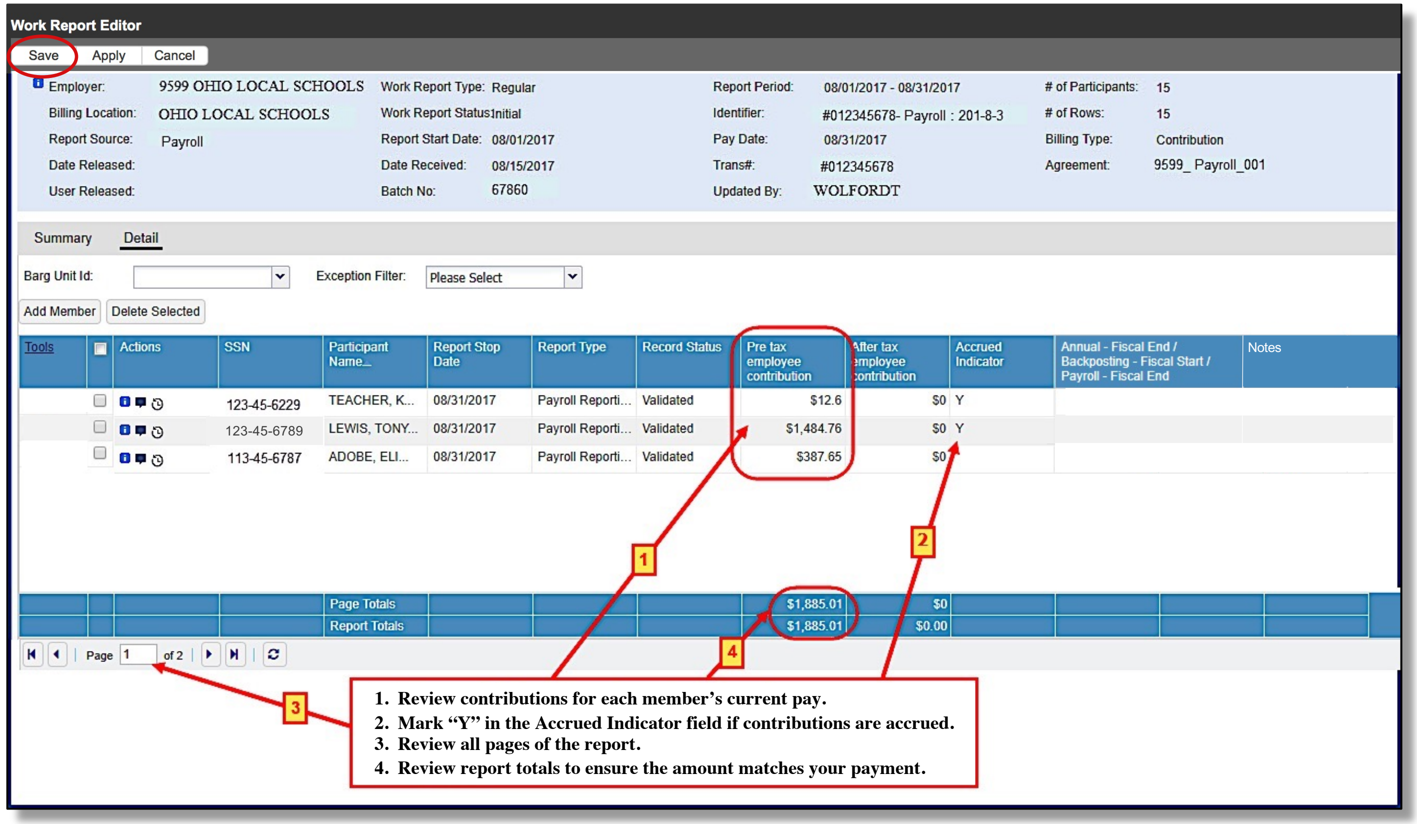


Step 4

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.



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!

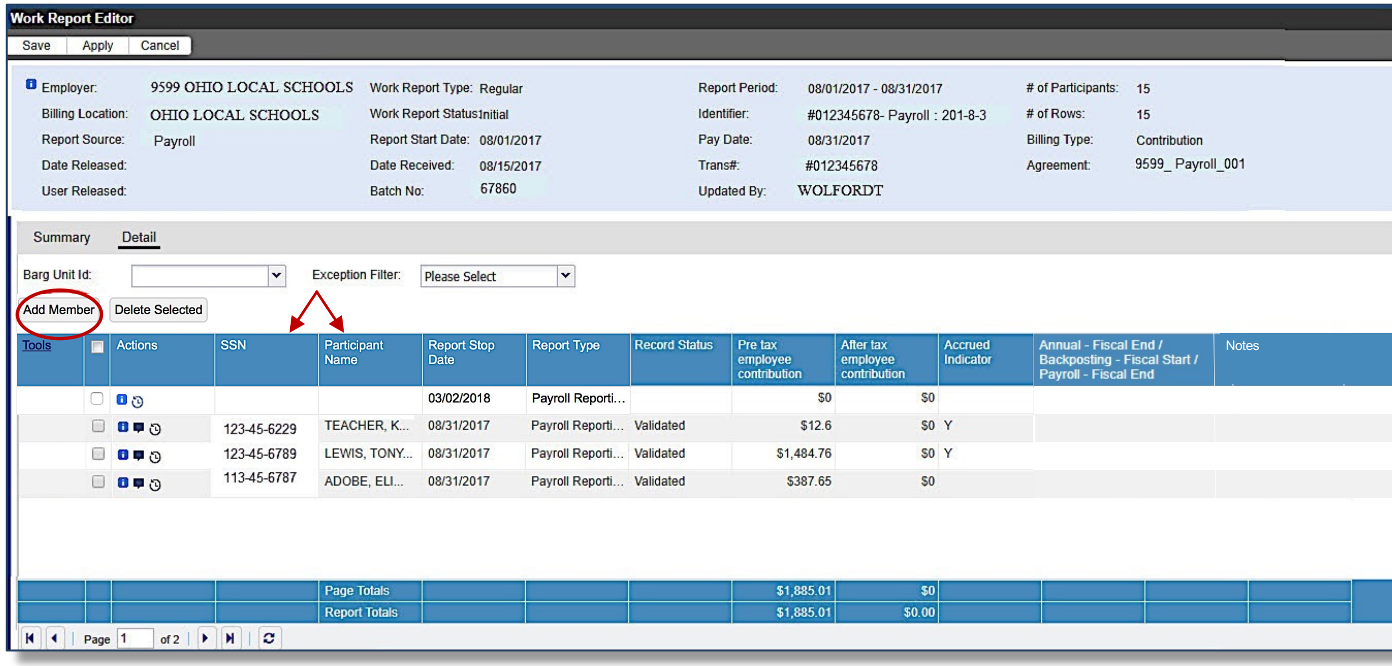
- *If you are reporting current year and accrued contributions on the same payroll report in July and August, you must have two entry lines for the member — one for current year contributions and one for accrued contributions. (See Step 5 on the next page to add a member to the report.)*
- *When you 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.



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

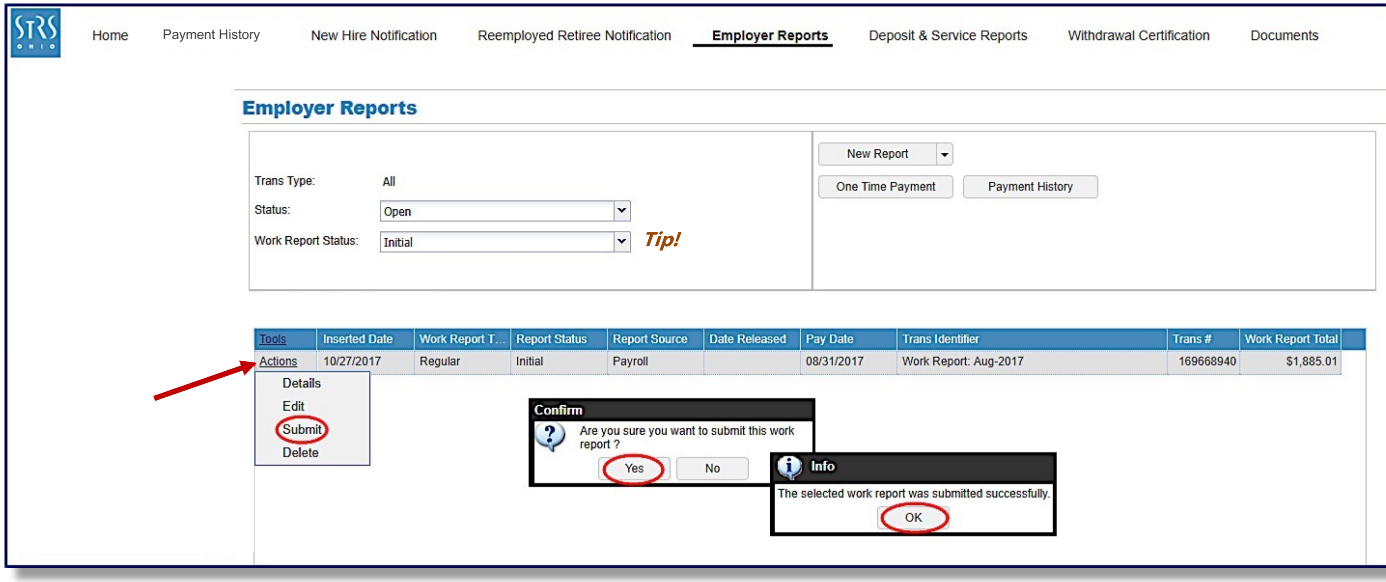
Submit the payroll report.

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."



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

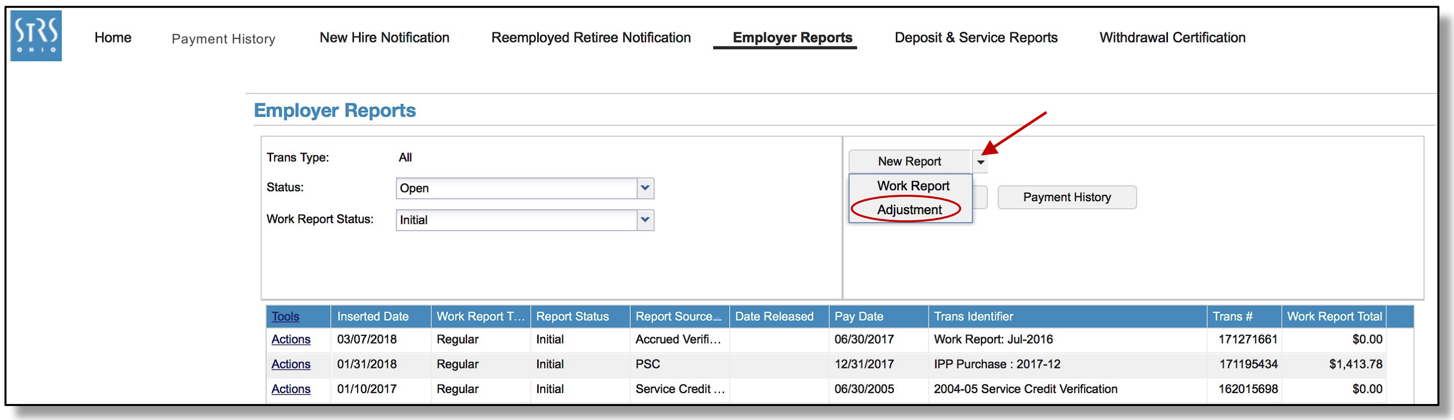
Step 1

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

Step 2

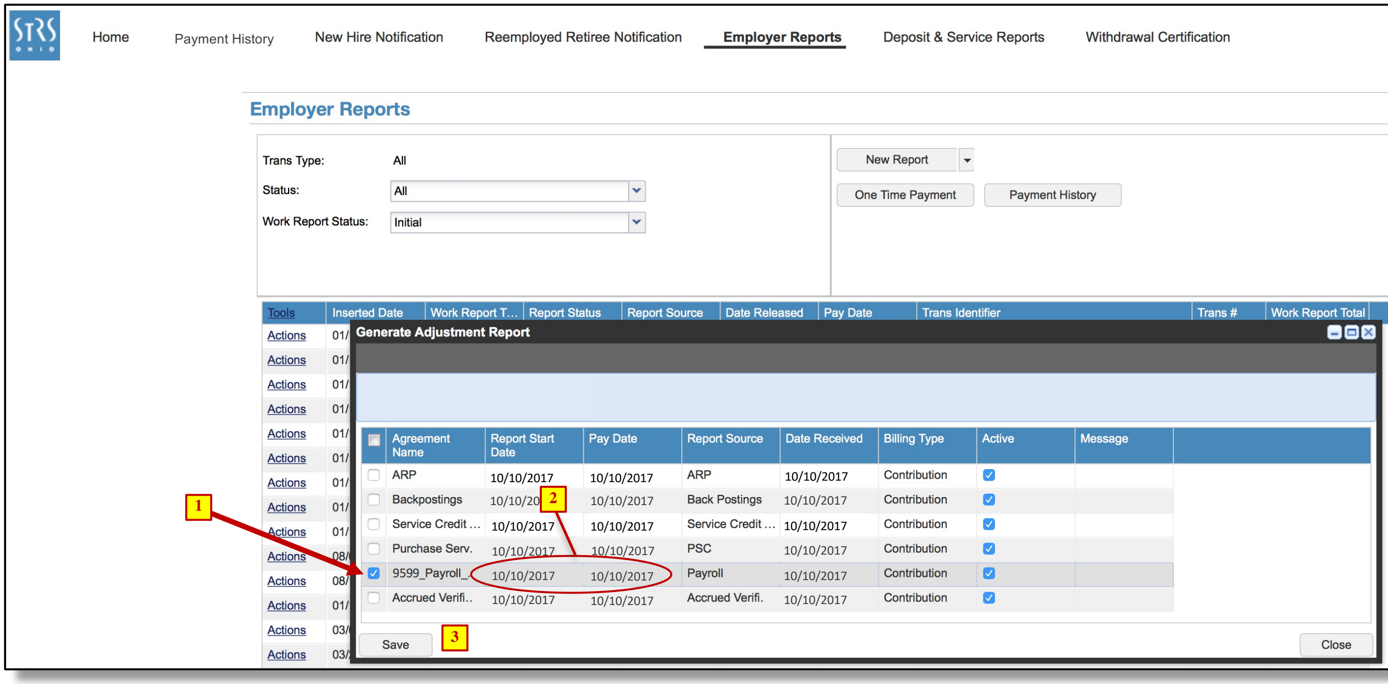
To enter a payroll adjustment, you will need to create a new adjustment. On the Employer Reports page:

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.



Step 3

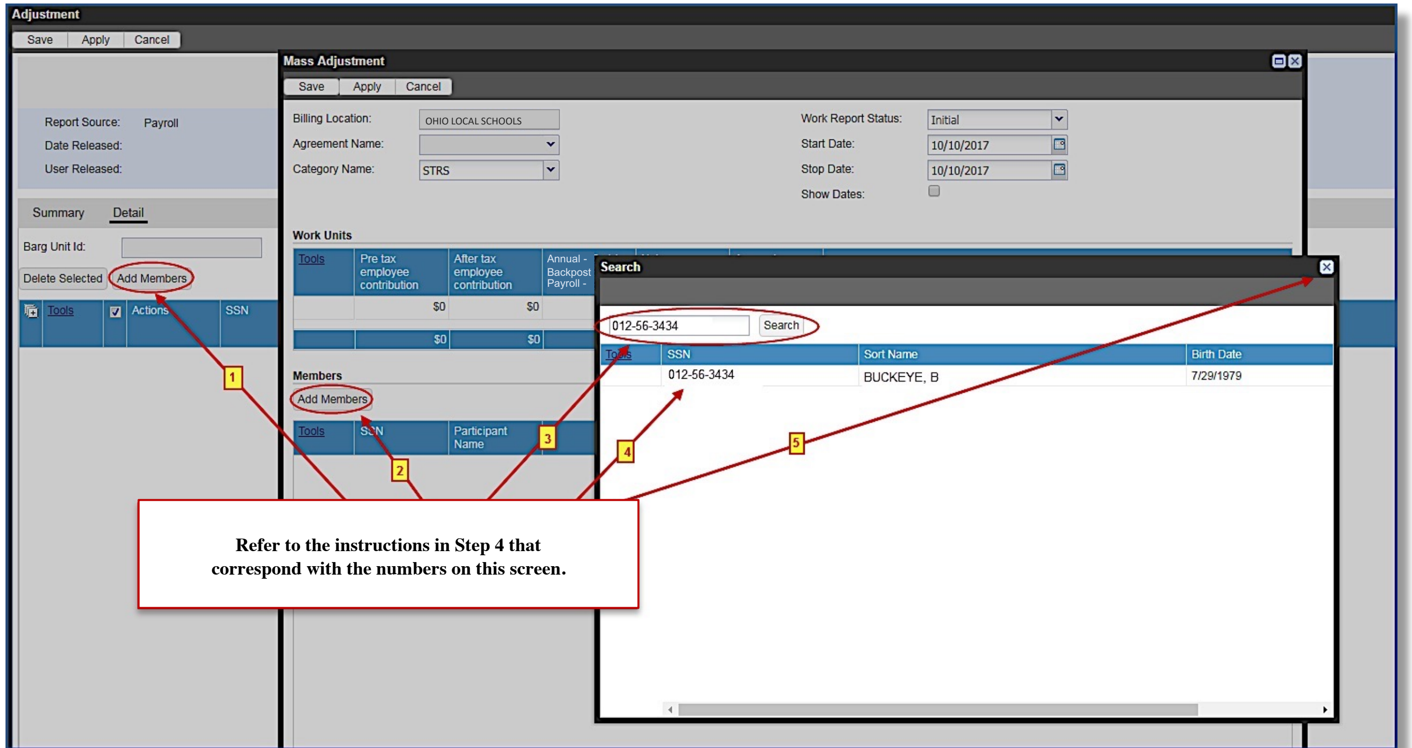
1. In the Agreement Name column, click the box next to "Payroll" to indicate you want to create a payroll adjustment.
2. Enter the report start date and pay date. These dates should be the same — either the date of your most recent payroll or today's date.
3. Click "Save." This will take you directly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



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.

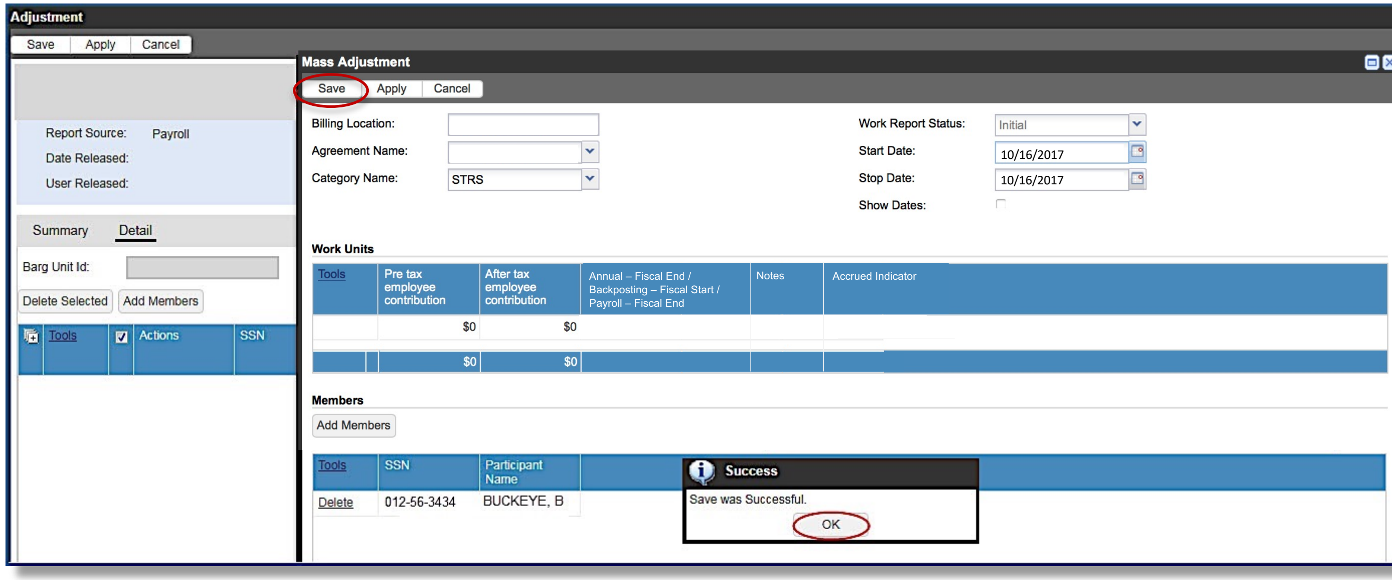
Repeat actions 3 and 4 above to add additional members.



Step 5

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

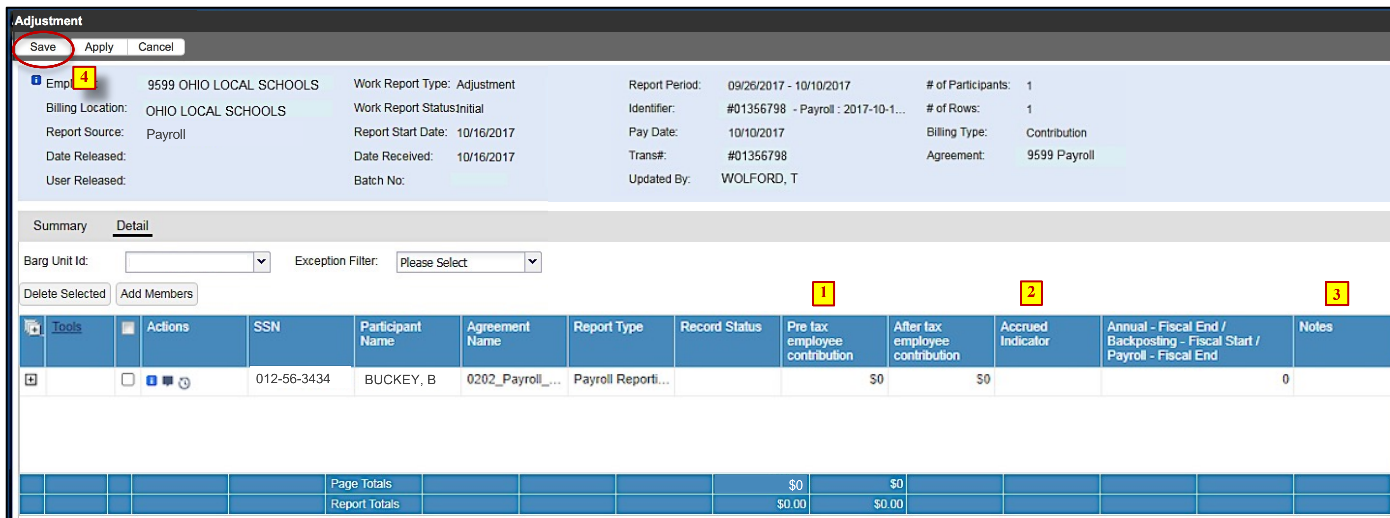
1. If you need to add additional members, repeat actions 2–5 on the previous page.
2. Click "Save" when finished.
3. Then click "OK." You will return to the Adjustment screen.



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.≠

Go to Step 7.



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.*

Step 7

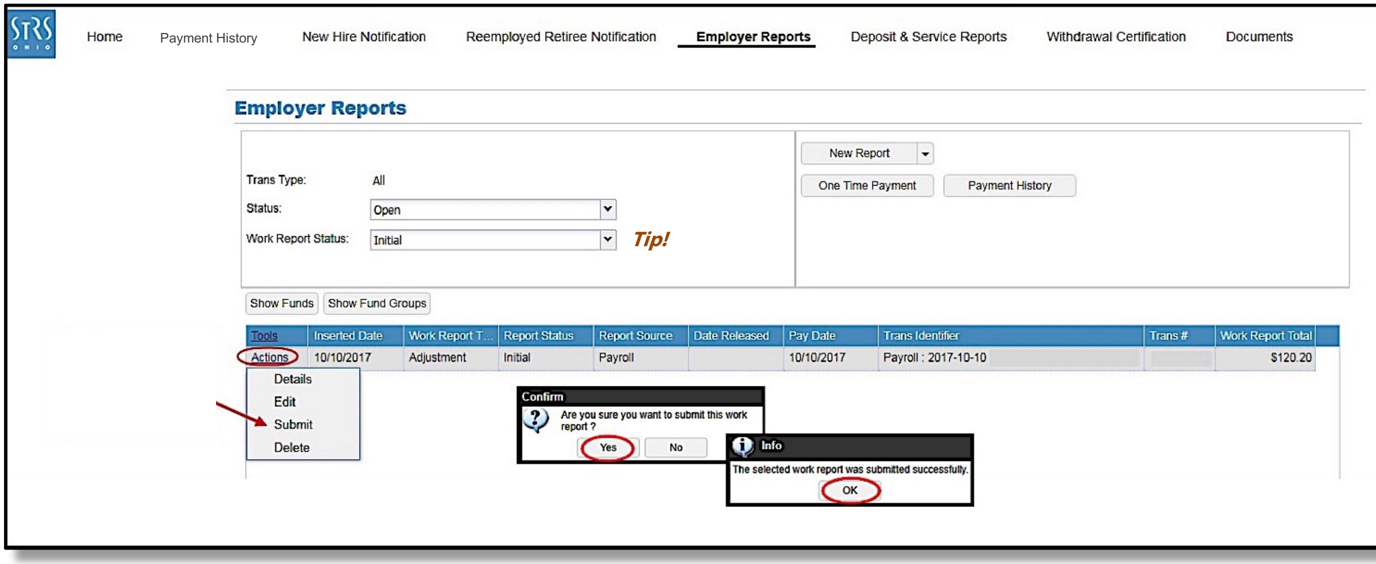
Submit the adjustment.

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."



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

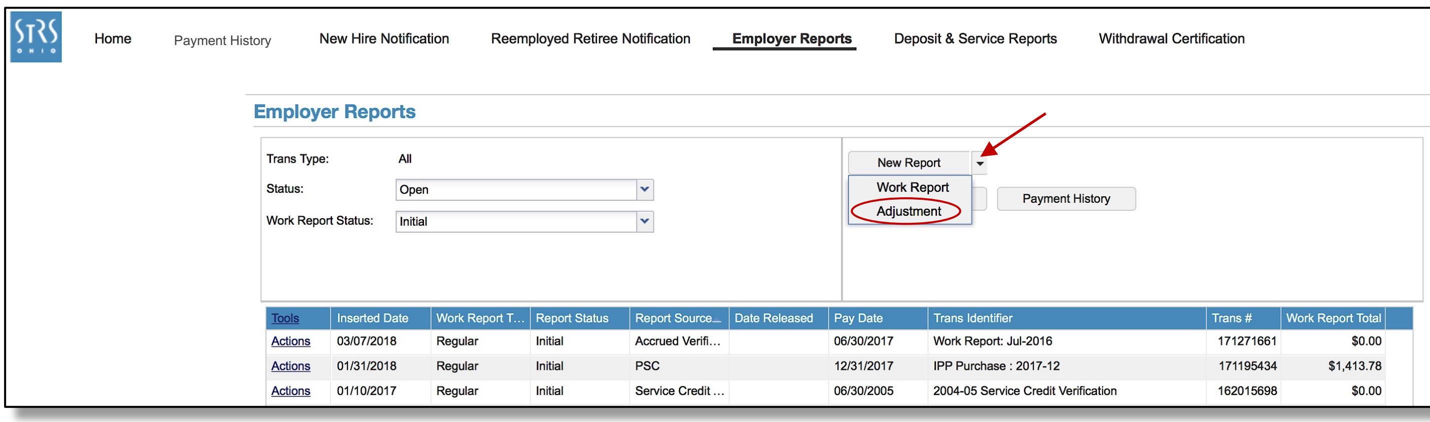
The following instructions explain how to correct previous year(s) contributions by submitting a backposting in ESS.

Submitting a Backposting

Step 1

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

Step 2

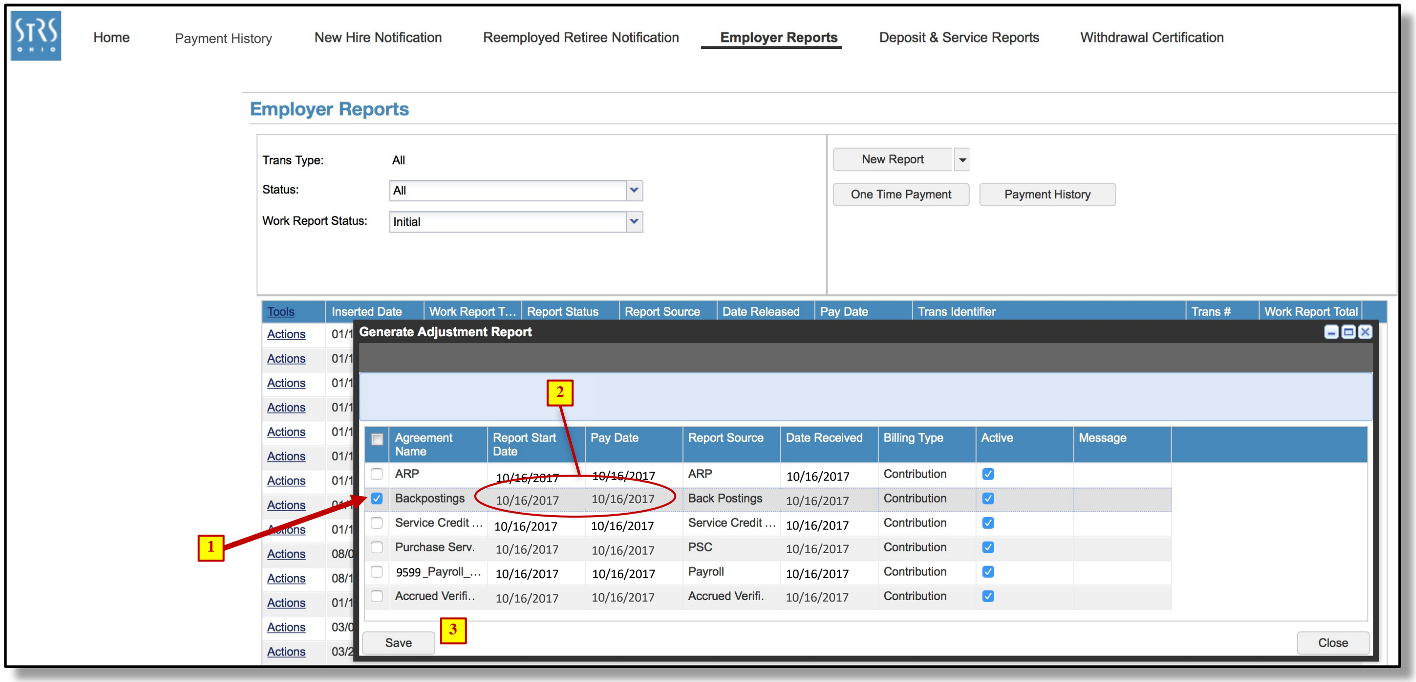


To enter a backposting, you will need to create a new adjustment. On the Employer Reports page:

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.

Step 3

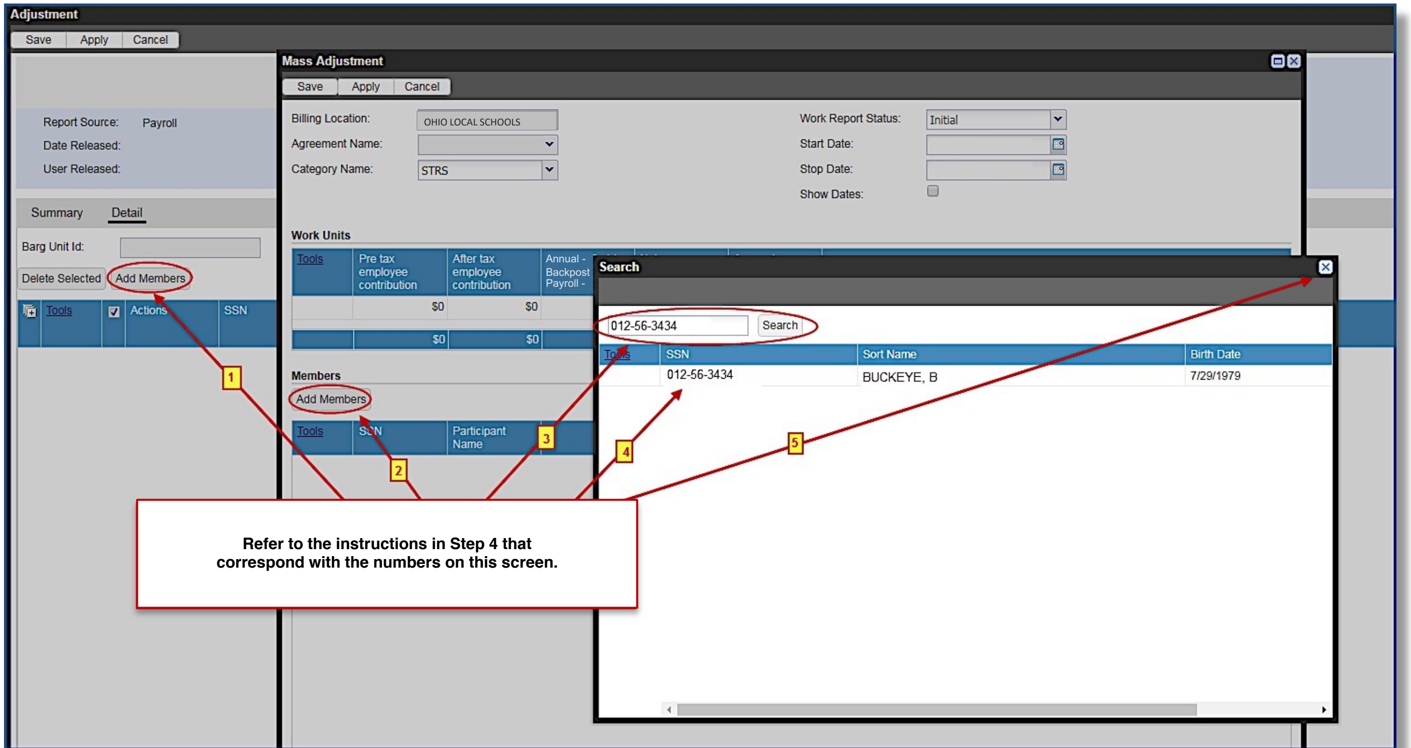
1. In the Agreement Name column, click the box next to “Backpostings” to indicate you want to create a backposting.
2. Enter the report start date and pay date. These dates should be the same date the contributions were sent to STRS Ohio.
3. Click “Save.” This will take you directly to the Adjustment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



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.

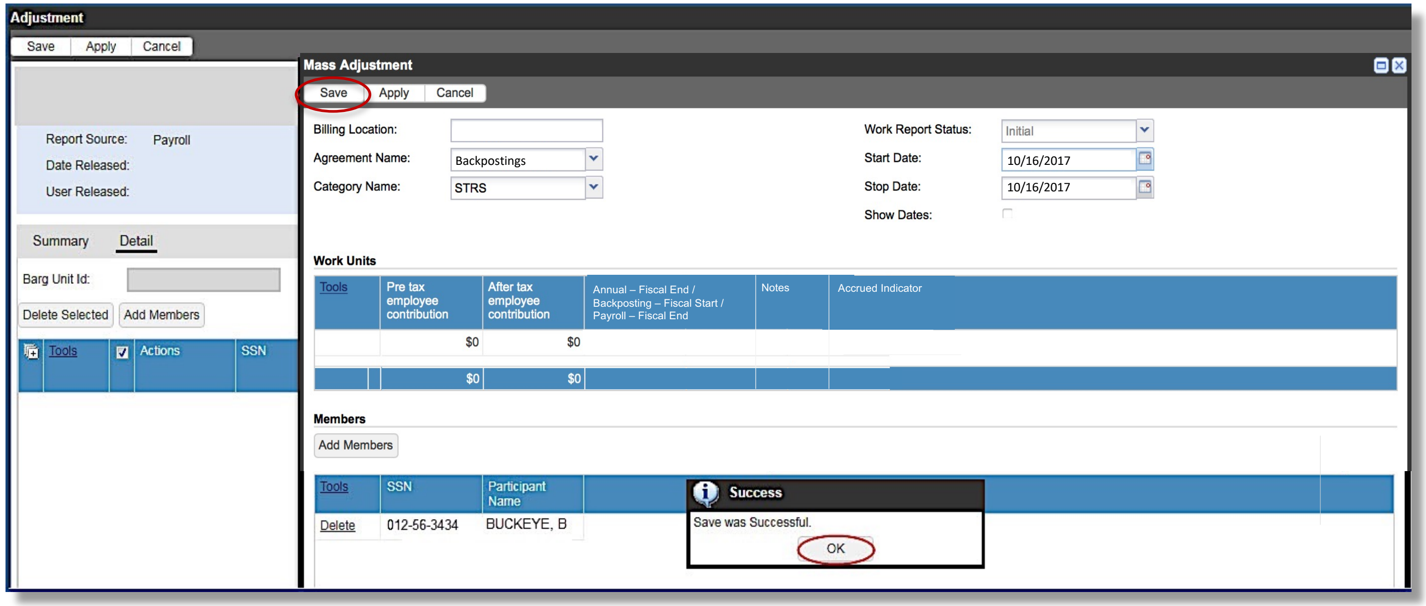
Repeat actions 3 and 4 above to add additional members.



Step 5

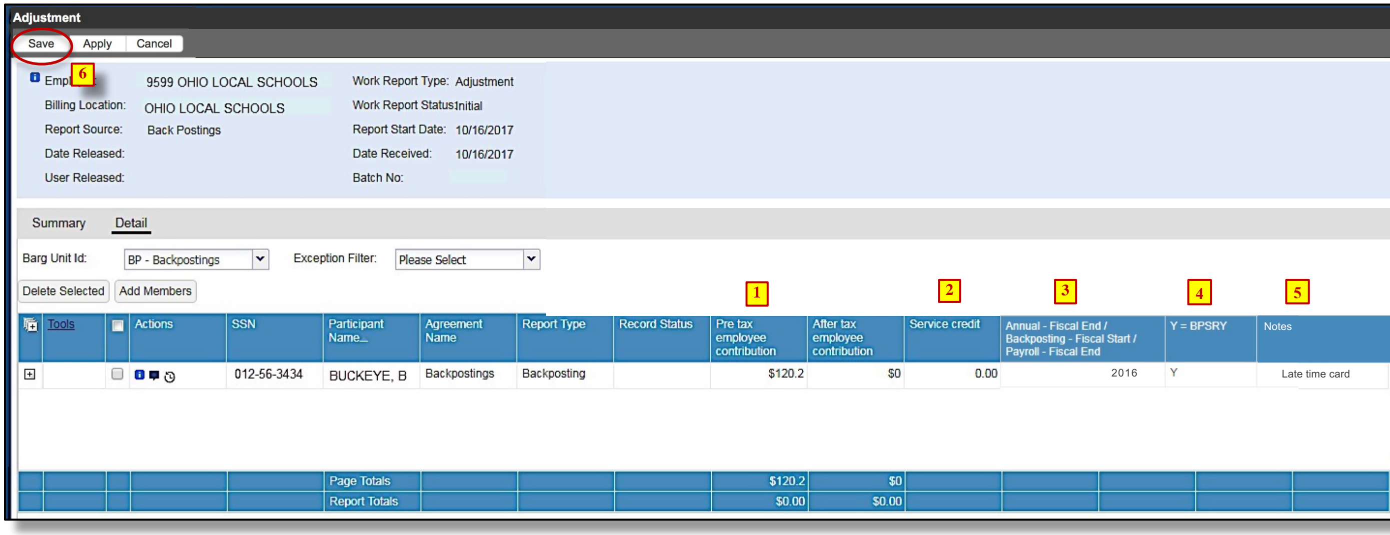
Check to make sure the member(s) you added are listed in the Members section.

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.



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.

Step 7

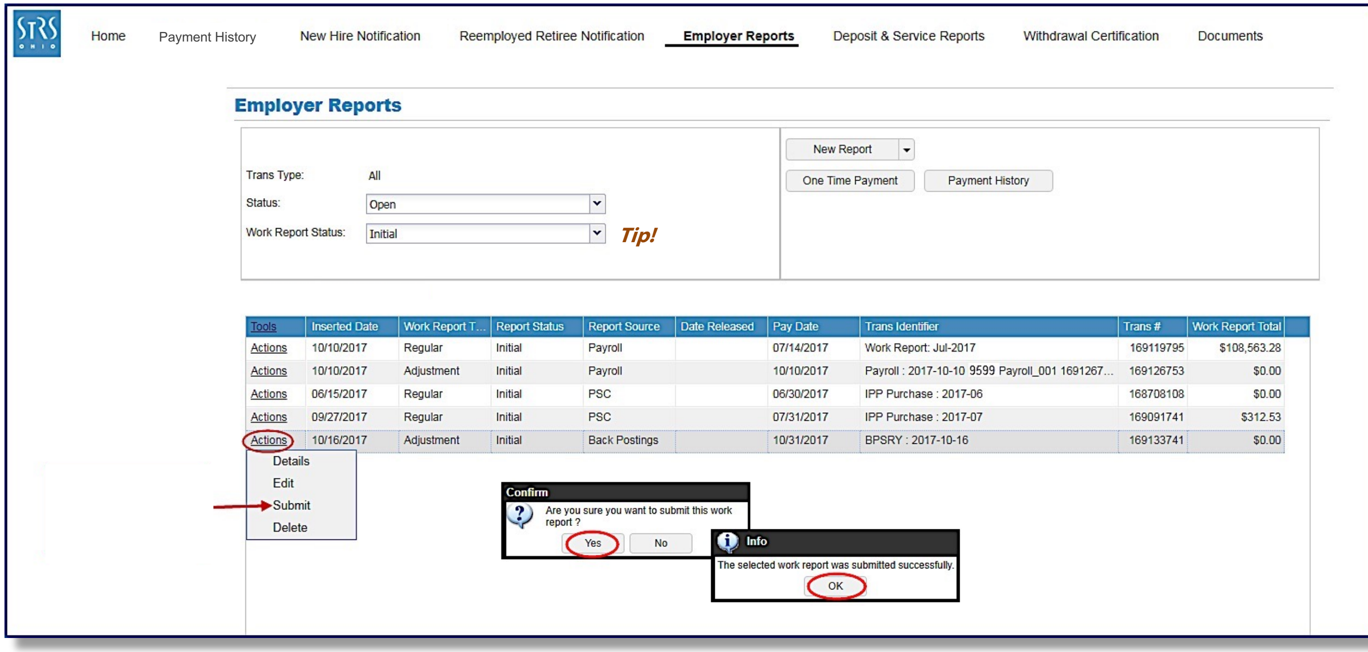
Submit the backposting.

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.”



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

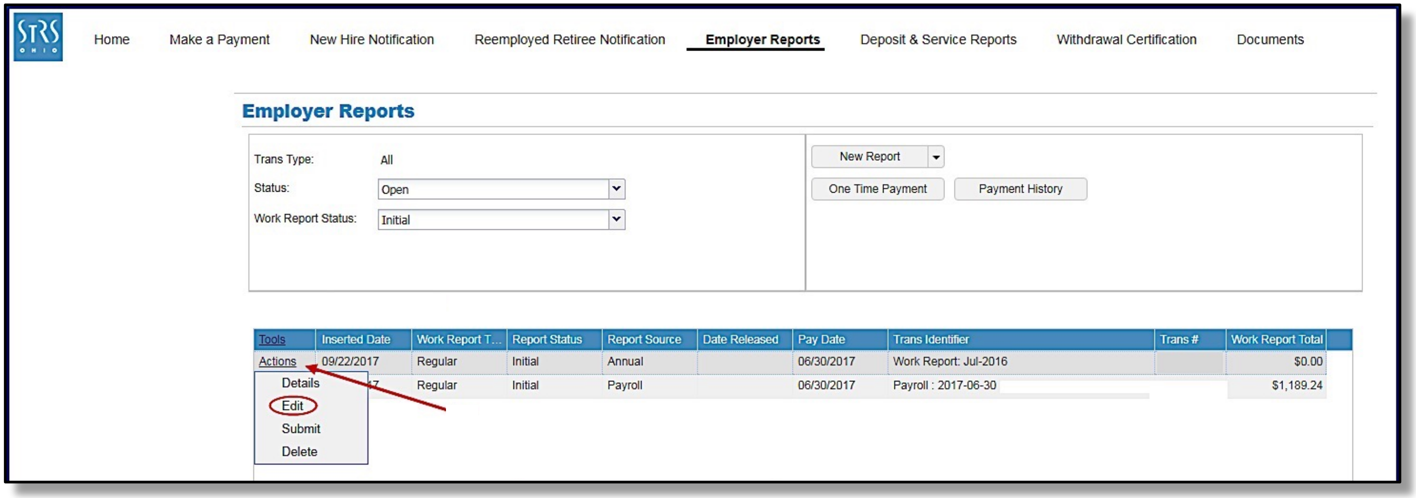
Step 1

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.

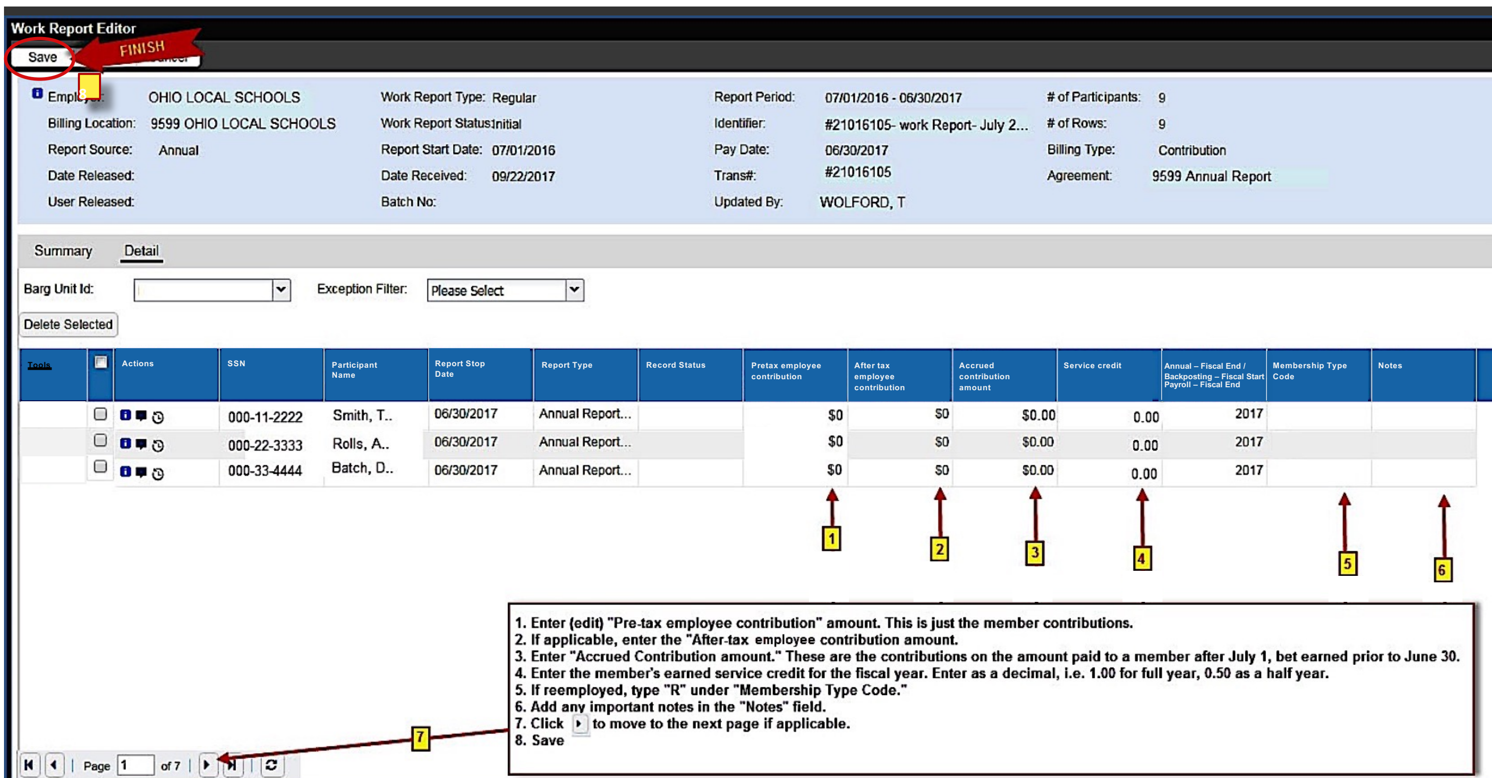


Step 3

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.



Step 4

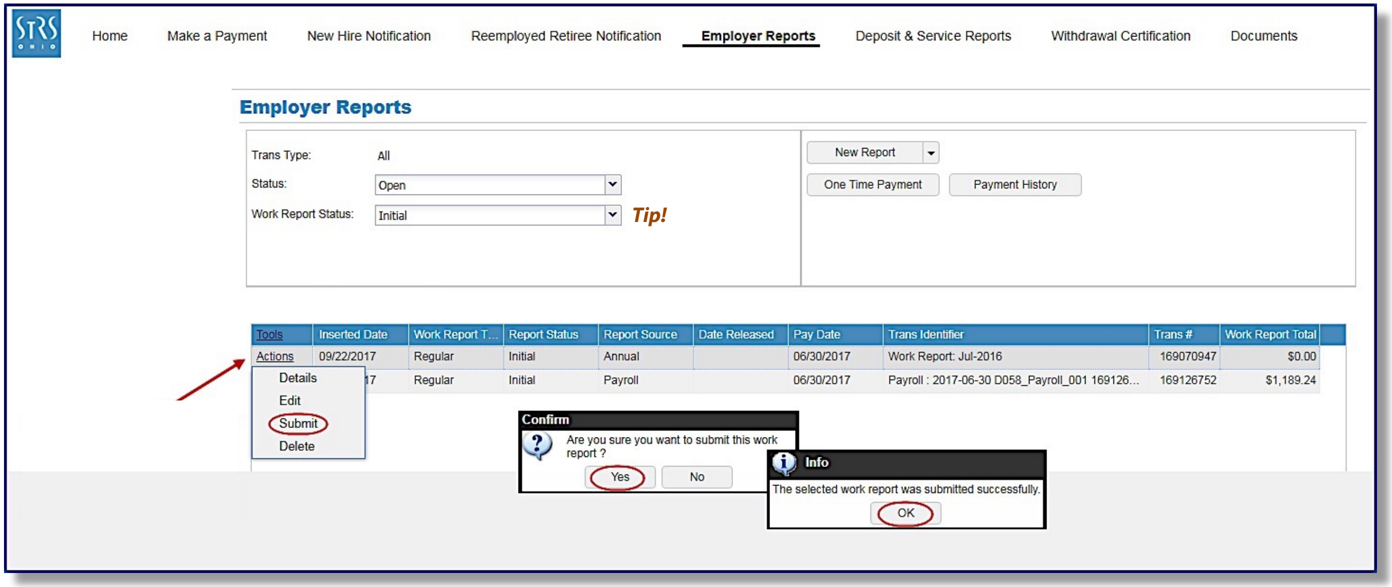
Submit the annual report.

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."



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.

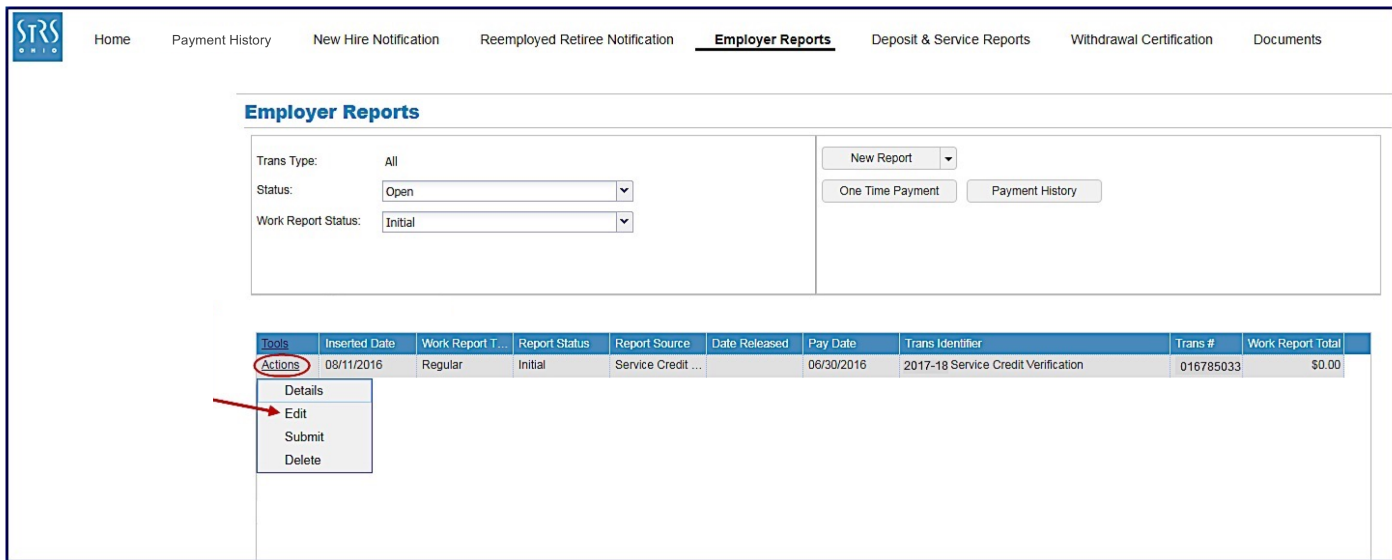
Step 1

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.



Step 3a — For Credit Calculated Using Days

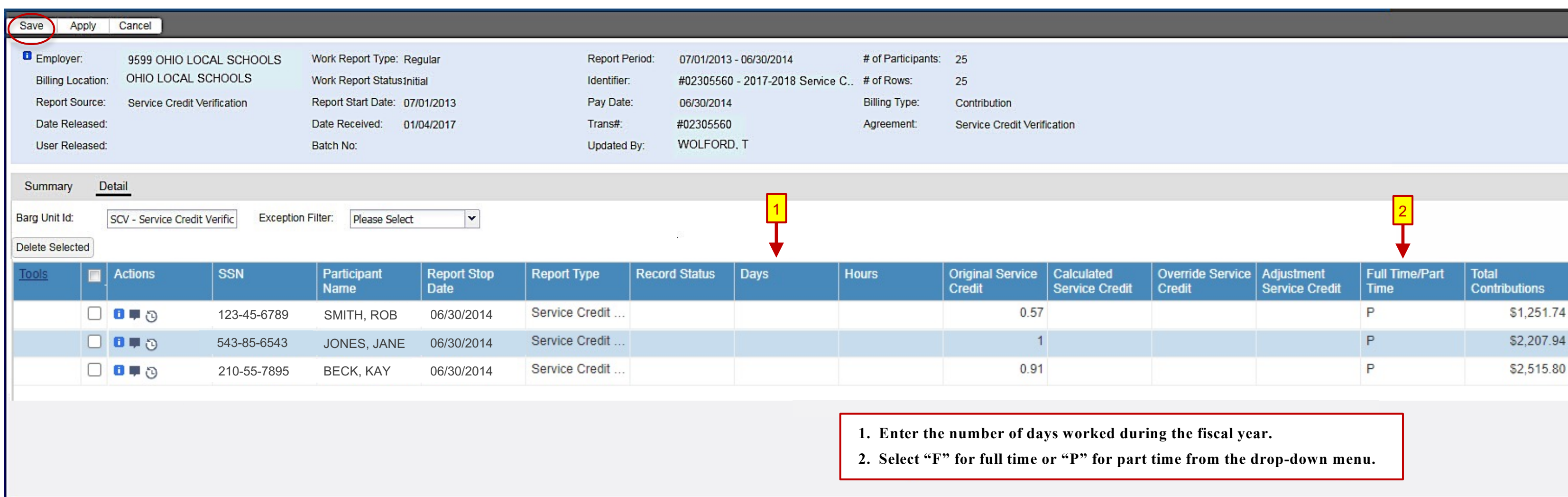
*This step applies to **K–12 employers and colleges and universities** that use **days** to calculate service credit. If your college or university uses full-time equivalent (FTE) to calculate credit, go to Step 3b on the next page.*

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.



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.

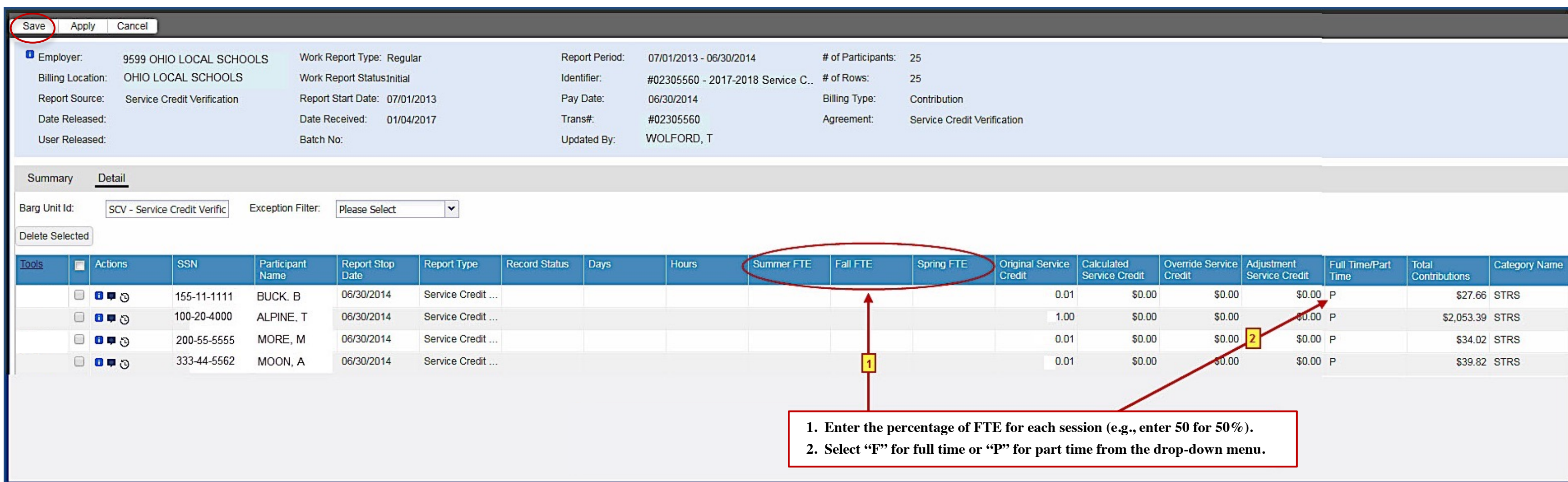
1. Click on the Summer FTE, Fall FTE and/or Spring FTE field to enter the percentage of FTE for each semester worked. For example, if a professor was 50% FTE in the fall, enter “50” in the Fall FTE field for that member.

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.



Step 4

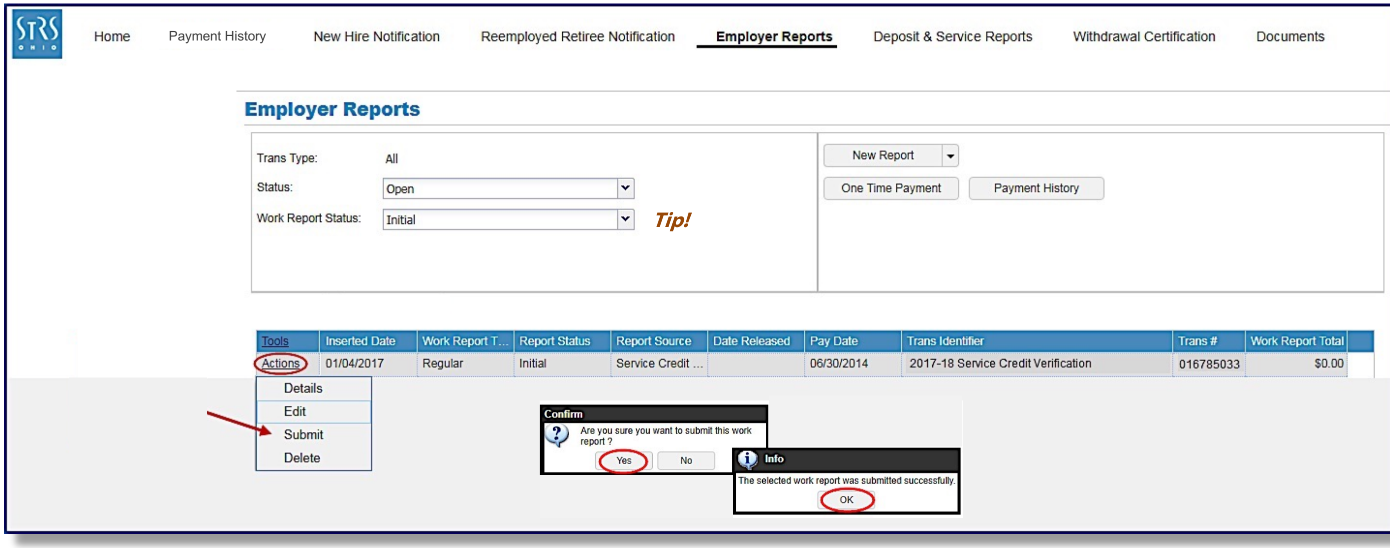
Submit the service credit verification report.

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."



***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

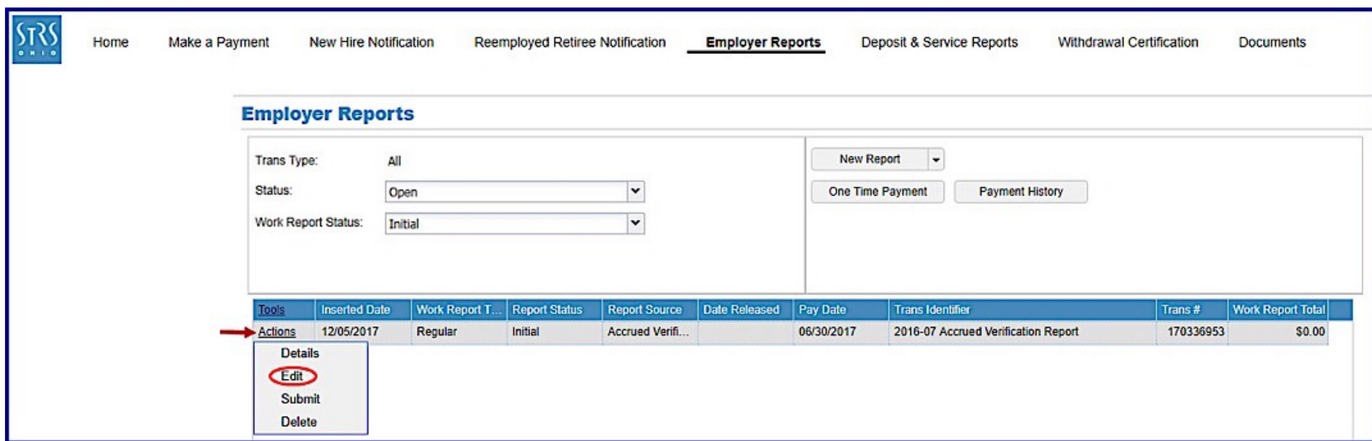
Step 1

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.

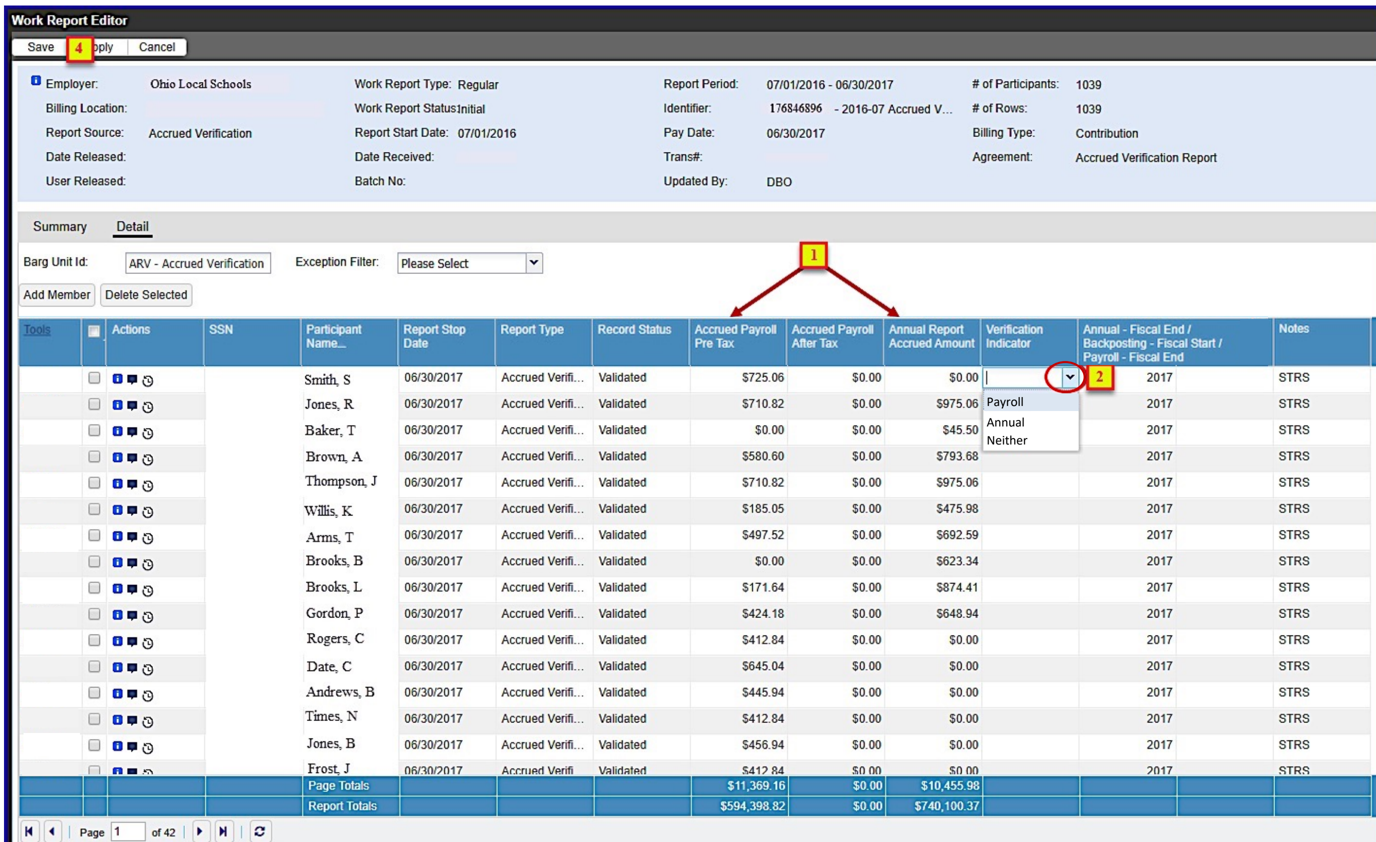


Step 3

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.



Step 4

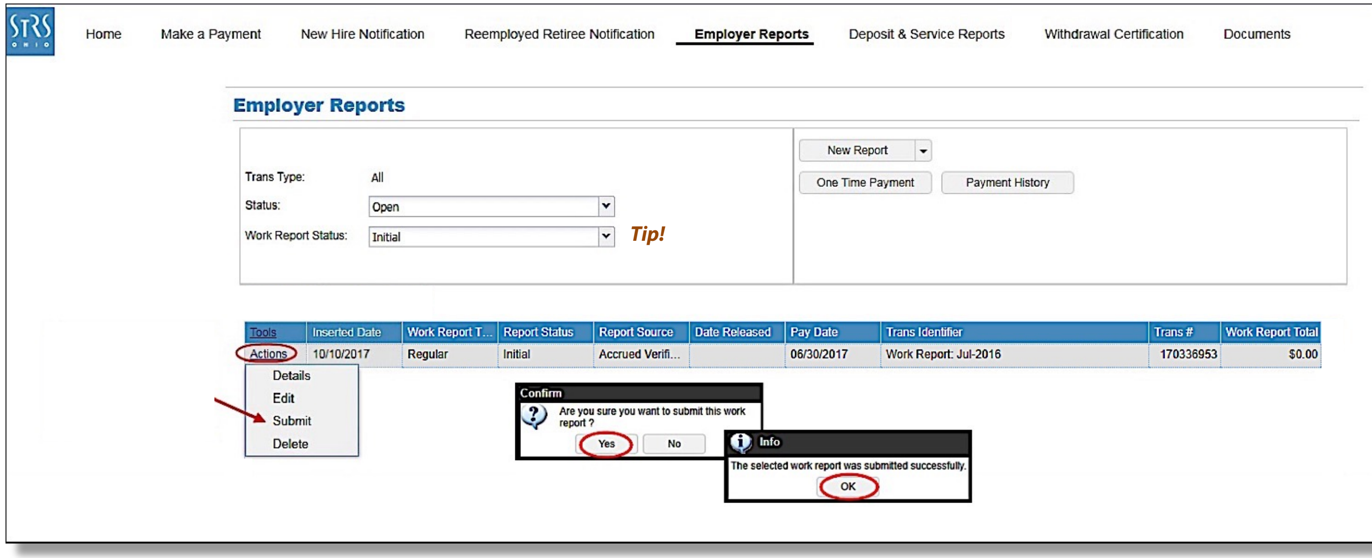
Submit the accrued verification report.

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."



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

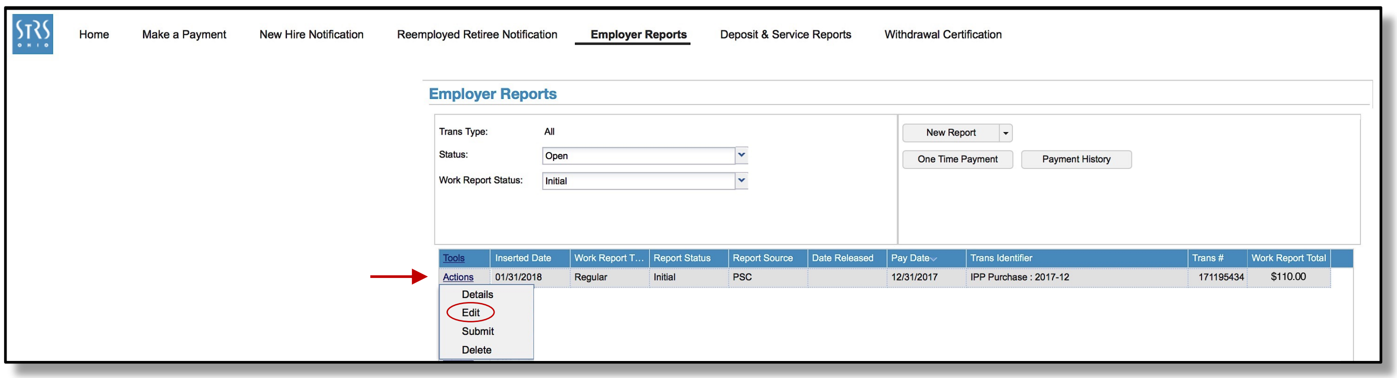
Step 1

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.



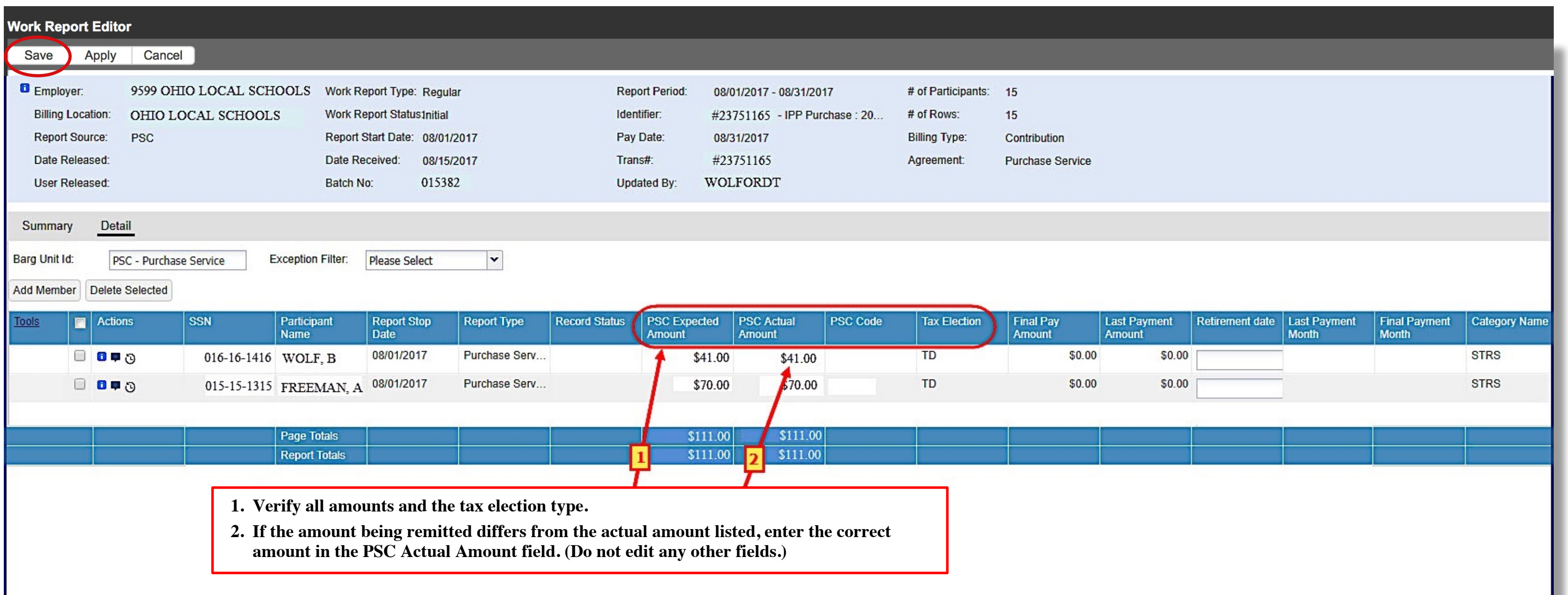
Step 3

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

1. 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.
2. 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.**



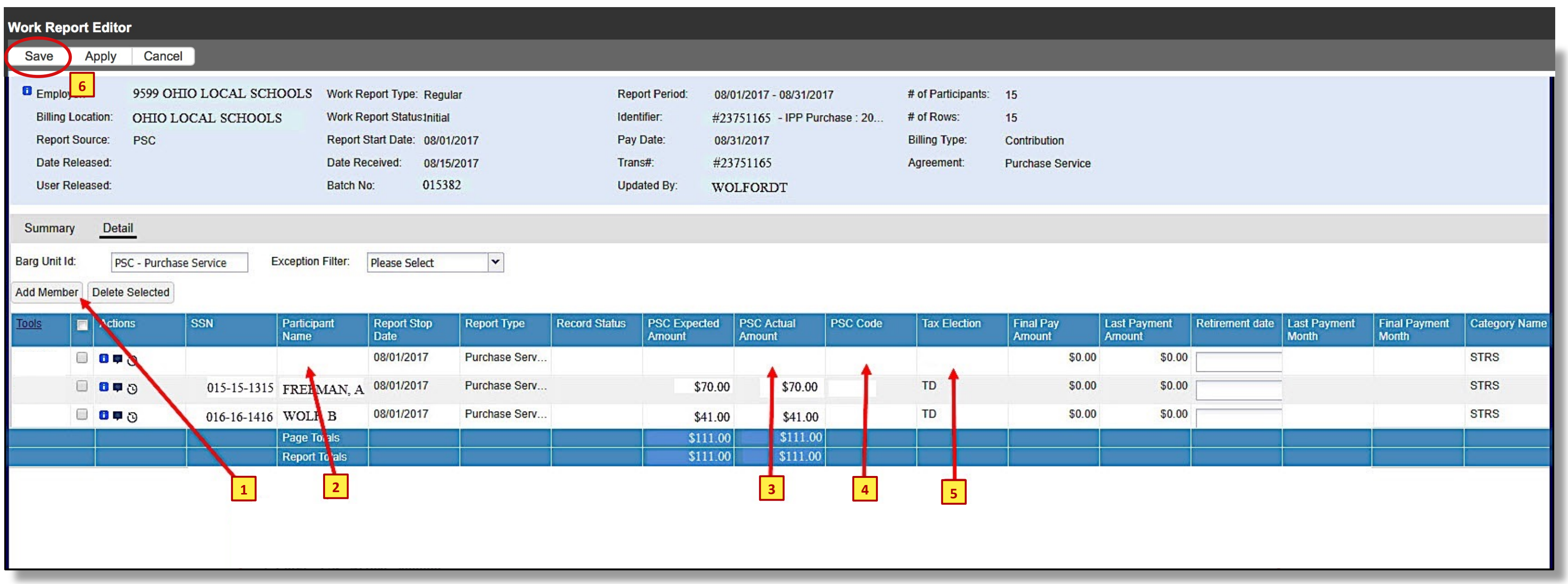
***Tip!** Be sure to verify all information. If needed, correct the "PSC Actual Amount" before submitting the report. If other information is incorrect, please contact STRS Ohio to make corrections.*

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.



Step 5

Submit the PSC report.

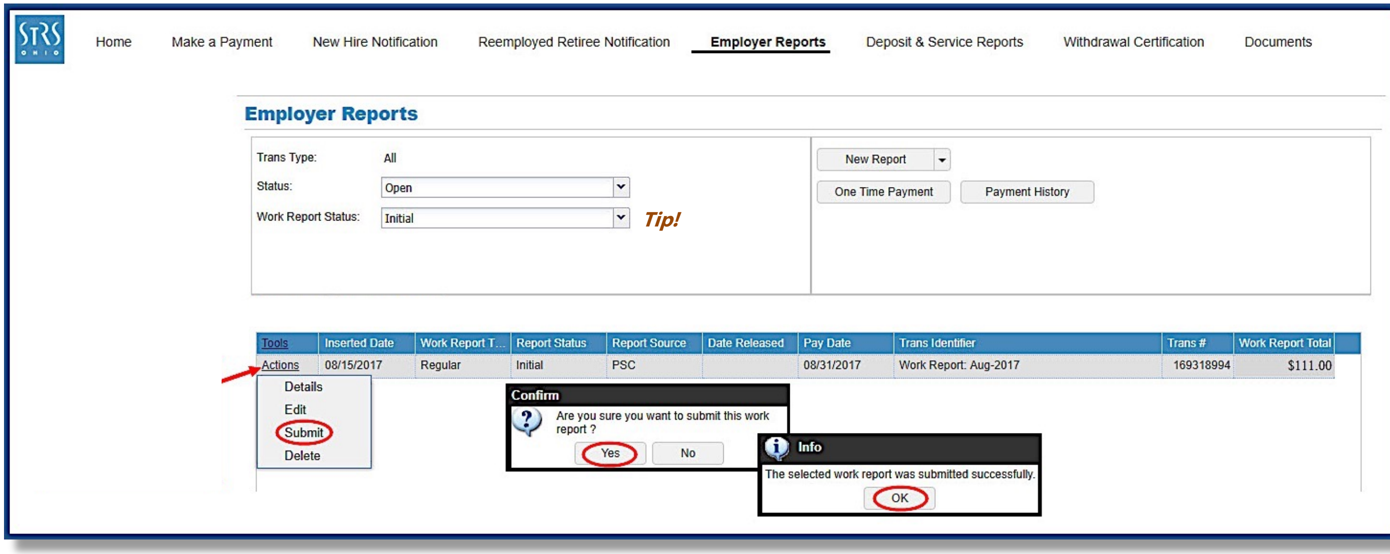
After saving the PSC report, you will automatically return to the Employer Reports page.

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."



***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.

Step 2

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

Navigation Notes

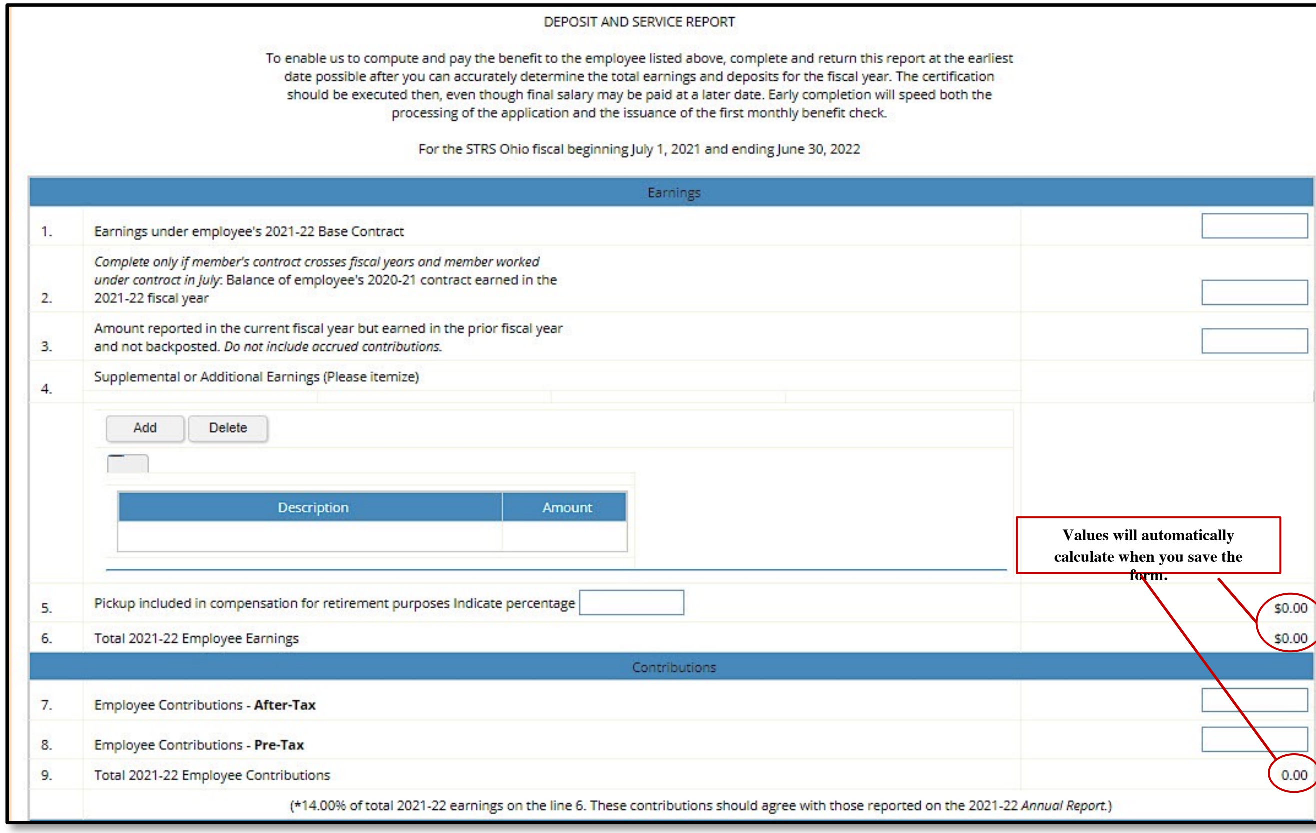
- You will automatically be taken to the Reports To Be Completed tab when you access a deposit and service report from the home page.
- The Available for Updates tab contains submitted reports that can be corrected if needed. **Important:** Only click on reports in this tab if you are submitting a revised 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	
2.	*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	
3.	Amount reported in the current fiscal year but earned in the prior fiscal year and not backposted. *Do not include accrued contributions.*	
4.	Supplemental or Additional Earnings (Please itemize) Add Delete	
	Description / Amount	
5.	Pickup included in compensation for retirement purposes Indicate percentage	$0.00
6.	Total 2021-22 Employee Earnings	$0.00
	Contributions	
7.	Employee Contributions - **After-Tax**	
8.	Employee Contributions - **Pre-Tax**	
9.	Total 2021-22 Employee Contributions	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.*)

Values will automatically calculate when you save the form.

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

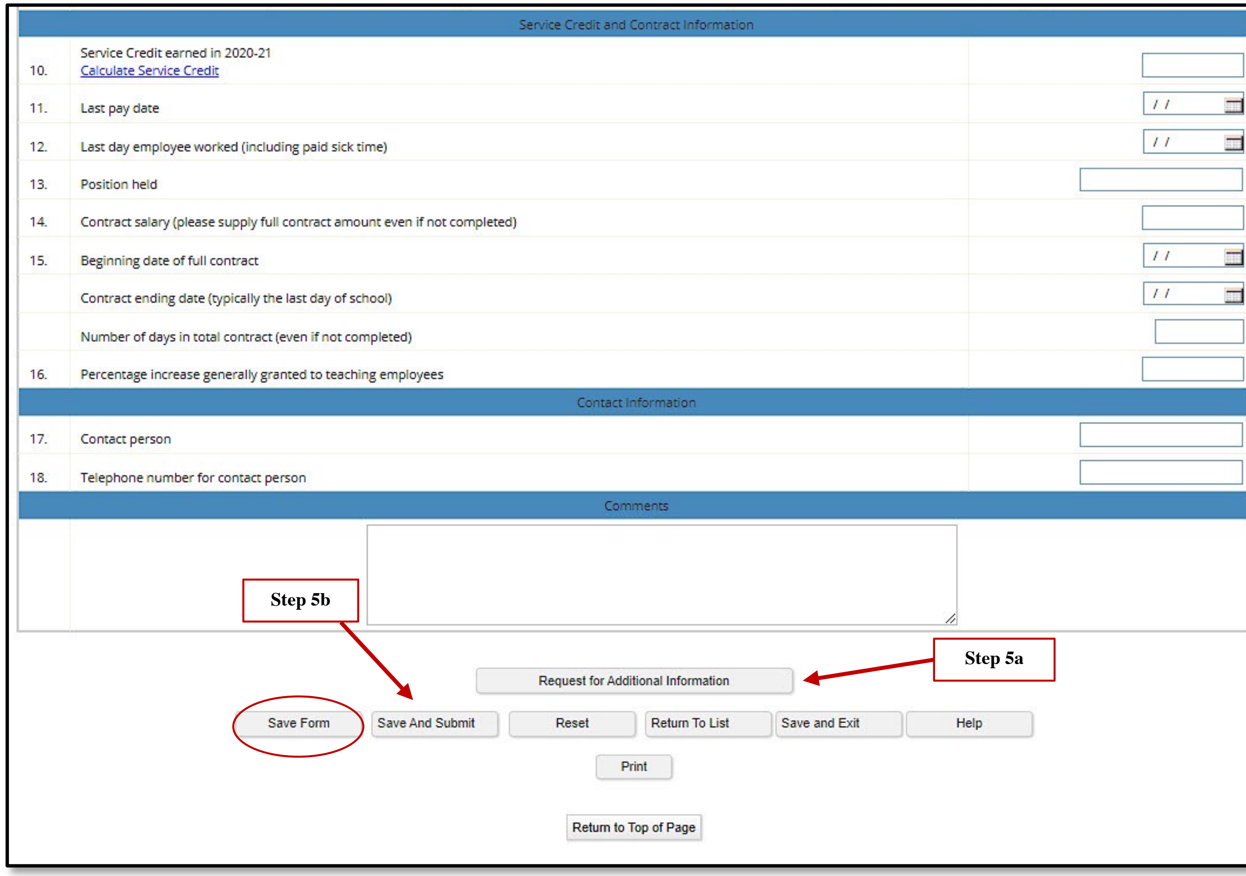
10. Service credit earned by the member during the fiscal year.
11. Last pay date that payment was or will be issued to the member.
12. Last date the member worked, including any paid sick leave or vacation days used (other than severance pay for unused benefits).
13. Position held by the member during 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.



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.

Step 1 continued on next page.

Request for Additional Information

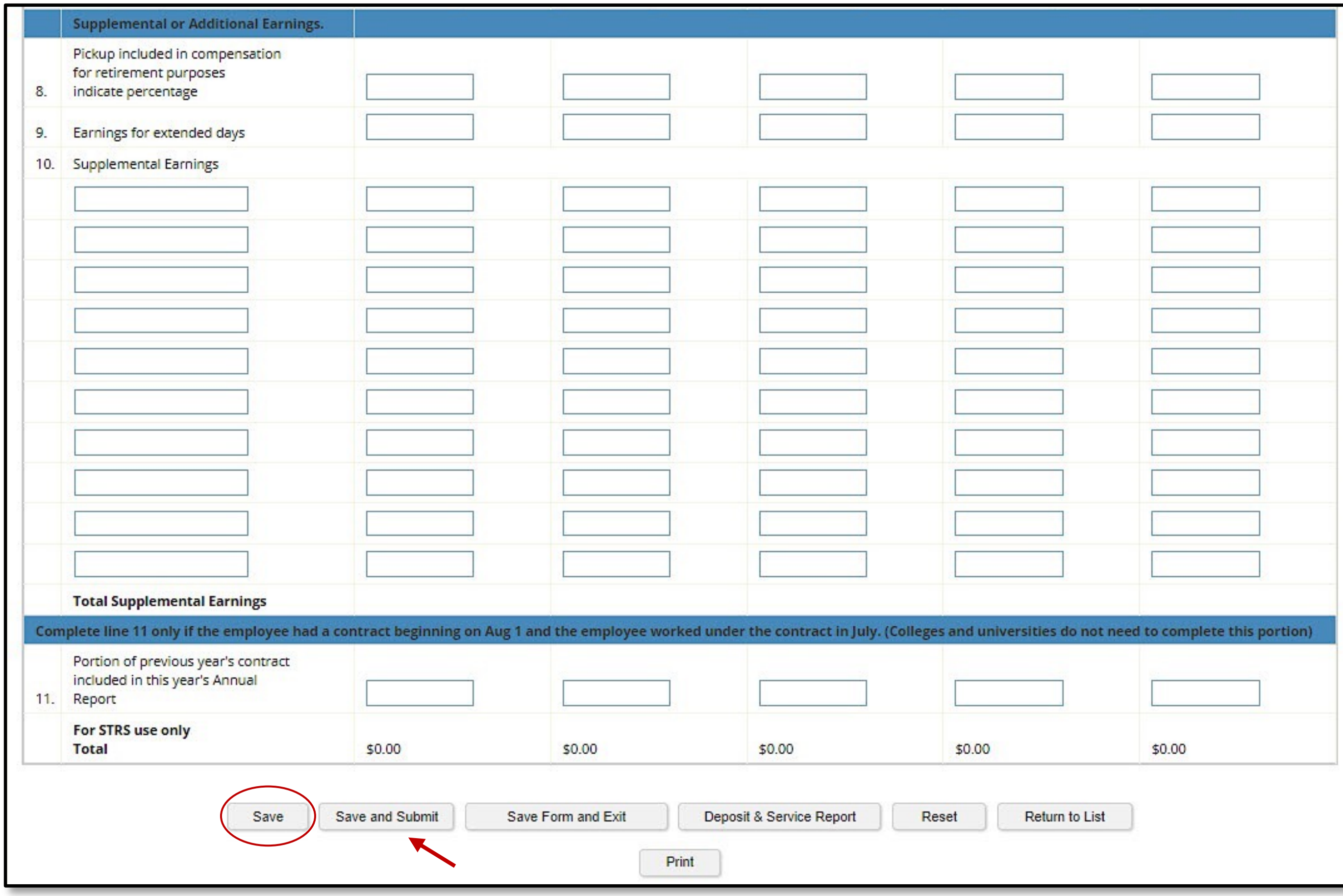
Complete this form only if the employee had supplemental earnings in 2015-2016 through 2019-2020 or the employee's contract year was August through July and the employee worked in July. Information on this form will assist us in computing the proper final average salary for retiring employees. Please 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					
2.	Contract amount					
3.	Unearned amount for board approved docked days					
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.*					
5.	Contract specified to begin	/ /	/ /	/ /	/ /	/ /
6.	Contract specified to end	/ /	/ /	/ /	/ /	/ /
7.	Number of days in contract					

Partial screen

Supplemental or Additional Earnings

8. The percentage of pickup **only if** included in compensation for retirement purposes (pickup-on-pickup).
9. Compensation for days worked outside the beginning and ending contract dates.
10. Any supplemental earnings. Provide brief description of each.
11. 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.



Partial screen

Step 2

Click "Save" to save data for the request for additional information.

Step 3

If you are ready to submit **both** the deposit and service report and request for additional information, click "Save and Submit." **Your reports will not be submitted until you complete this action.** Please note:

- If you need to return to the deposit and service report to make corrections before submitting, click "Deposit & Service Report."
- If you need to start over, click "Reset." **Caution:** This will delete all data you have entered.
- To print a copy for your files, click "Print."

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.

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).

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

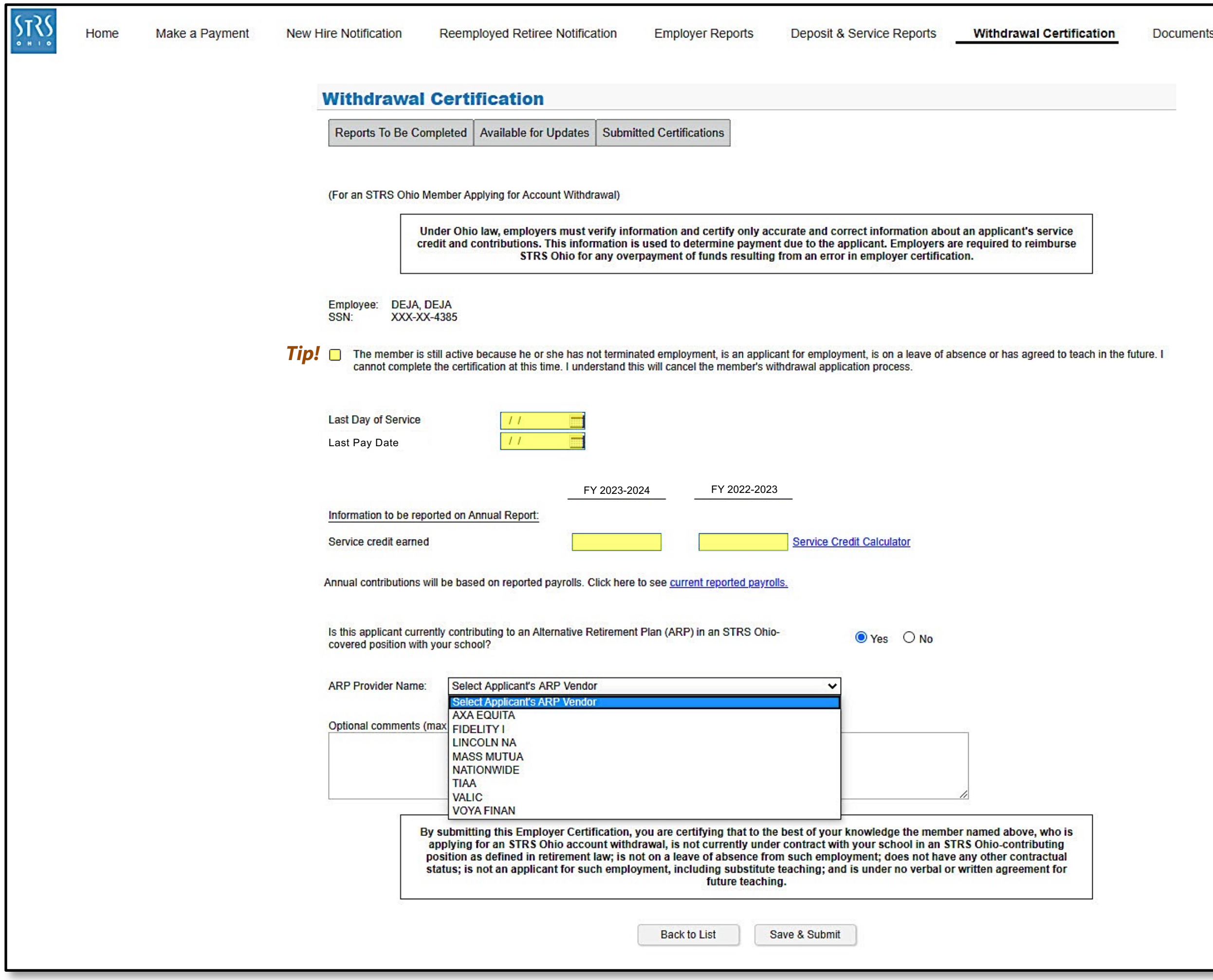
Enter the following information for the member applying for account withdrawal:

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.



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

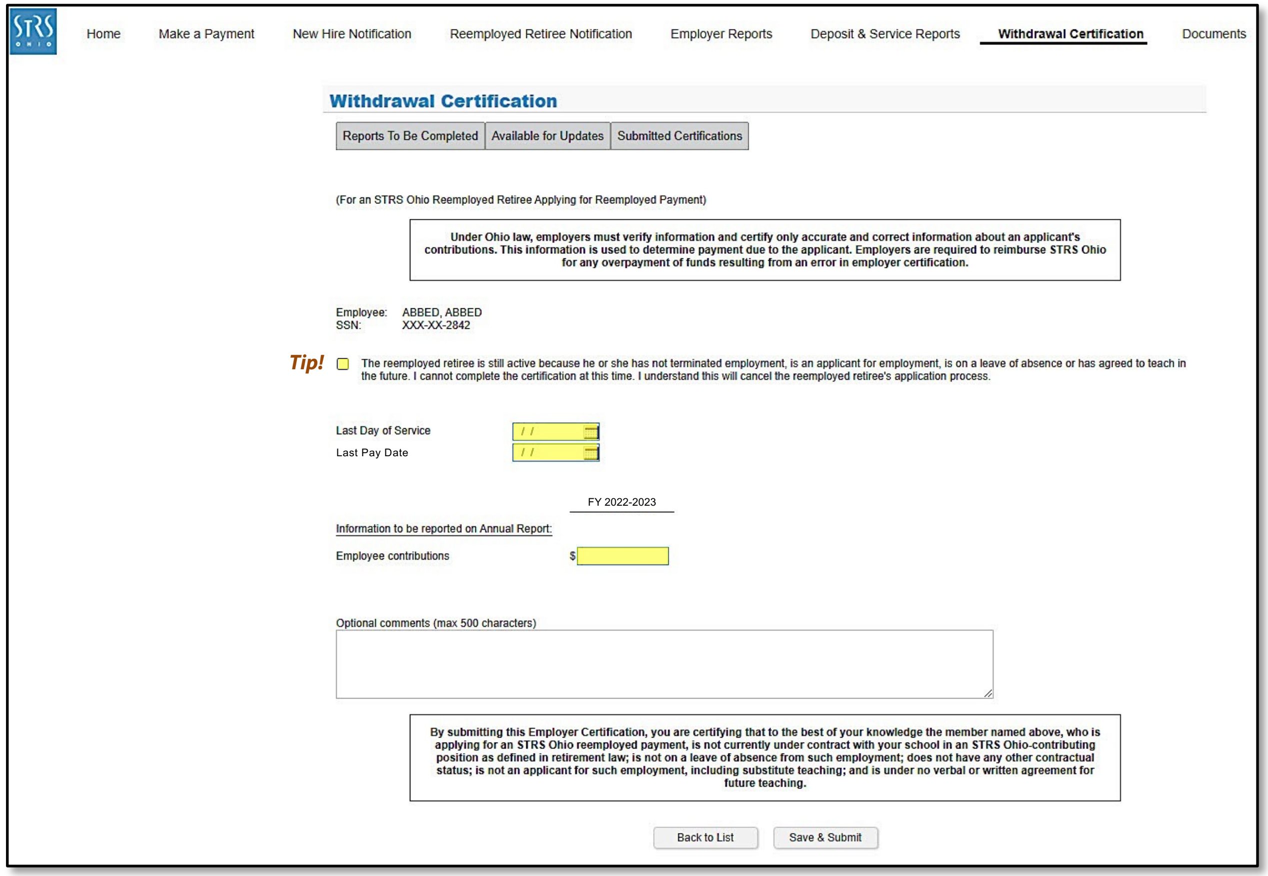
Enter the following information for the member applying for a reemployed payment:

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.



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.

Step 2

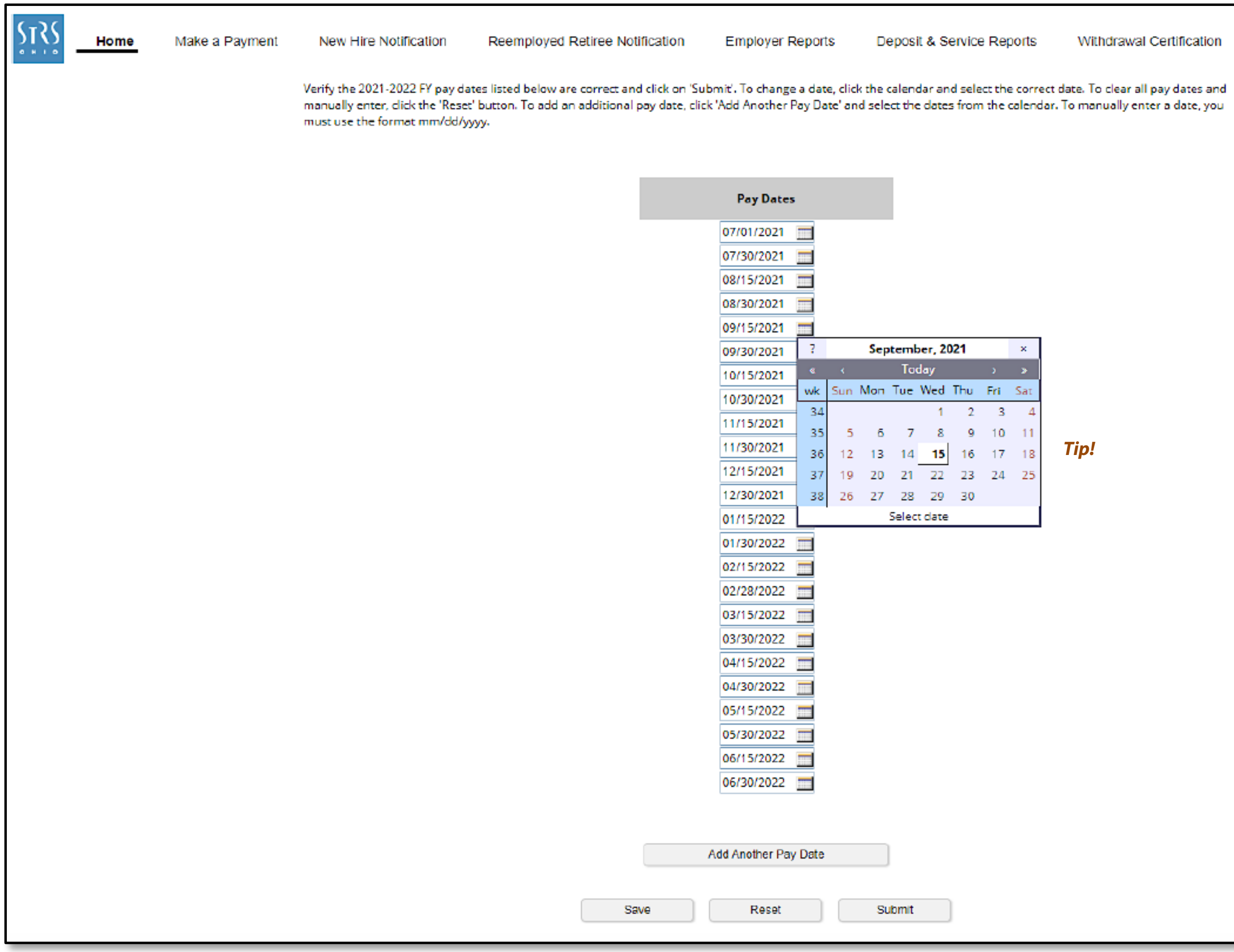
Include main pay dates only. Do not include supplemental pay dates.

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.

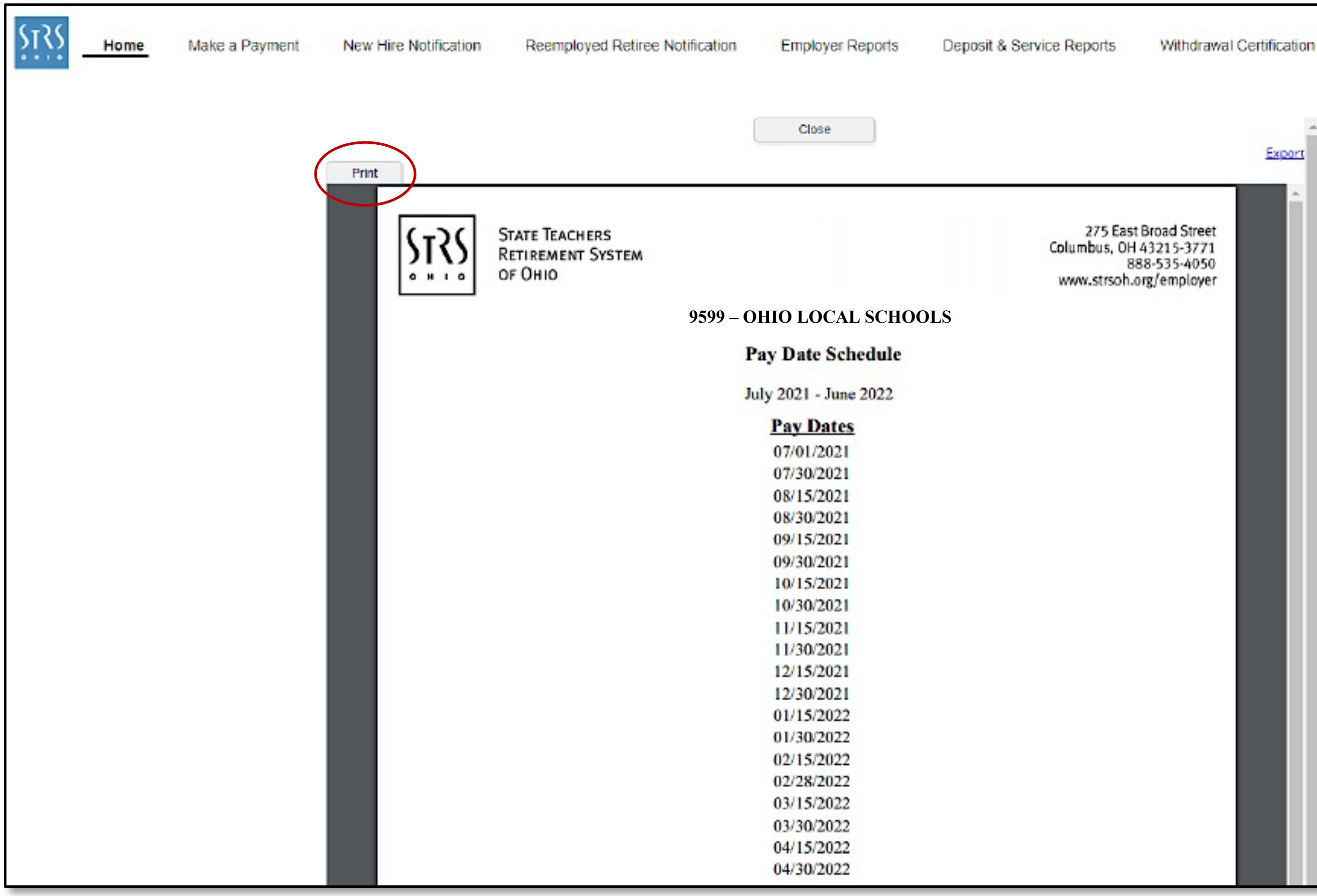


***Tip!** When making corrections, use the calendar to select the correct date. If you want to manually enter a date, you must use the format mm/dd/yyyy.*

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.



Section 15

Direct Debit Payment

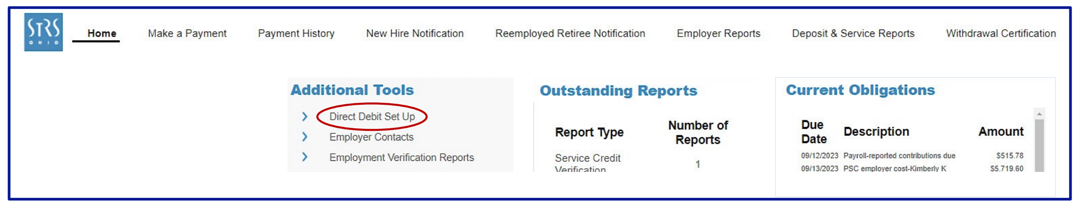
The following instructions explain how to set up a direct debit account and make a payment in ESS.

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.

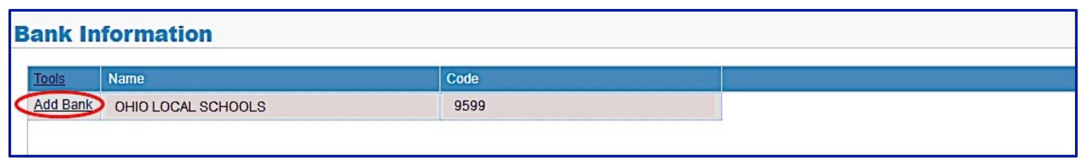
Step 1

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



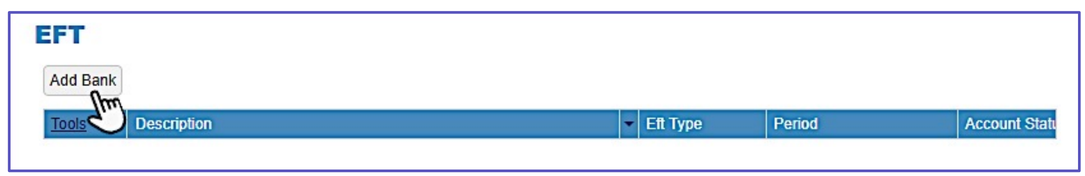
Step 2

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

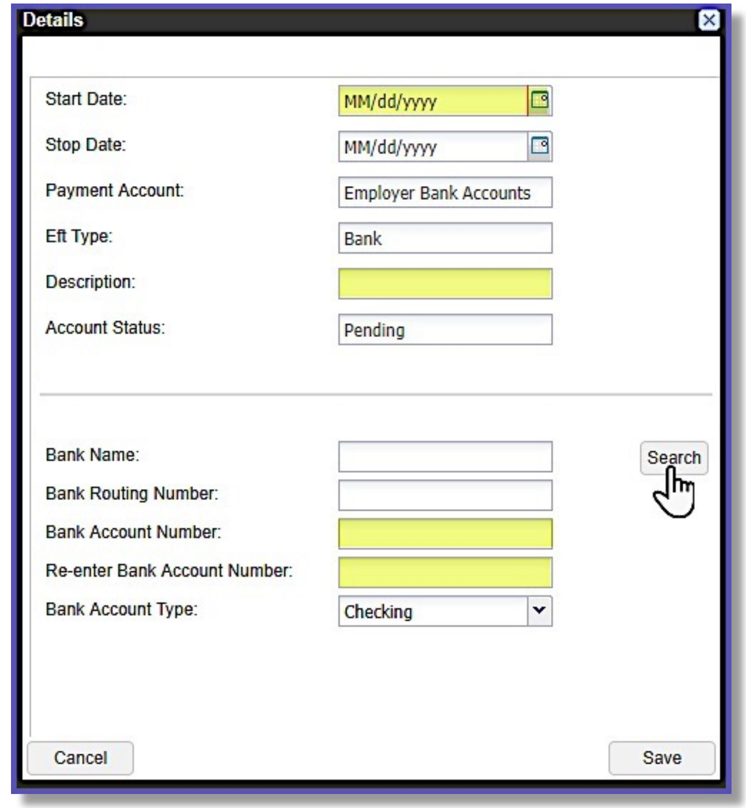
On the Details screen, provide the following information:

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.

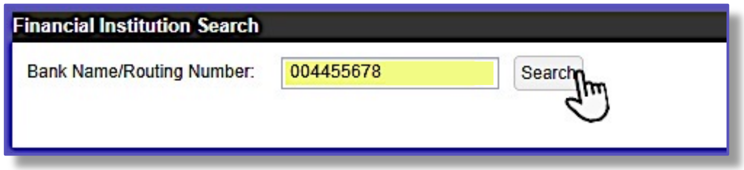
Do not enter a Stop Date.

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.



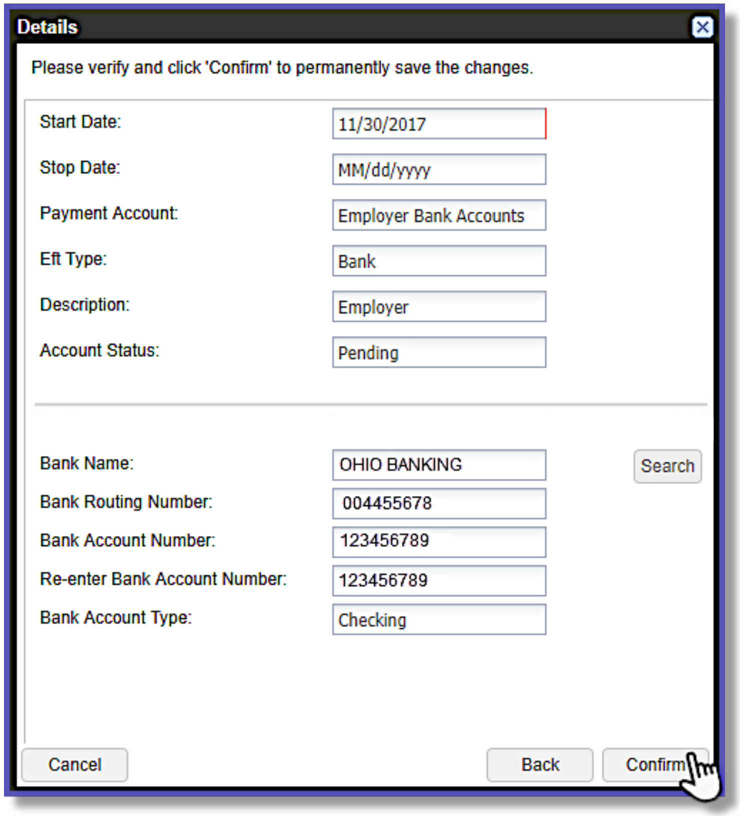
Step 5

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



Step 6

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



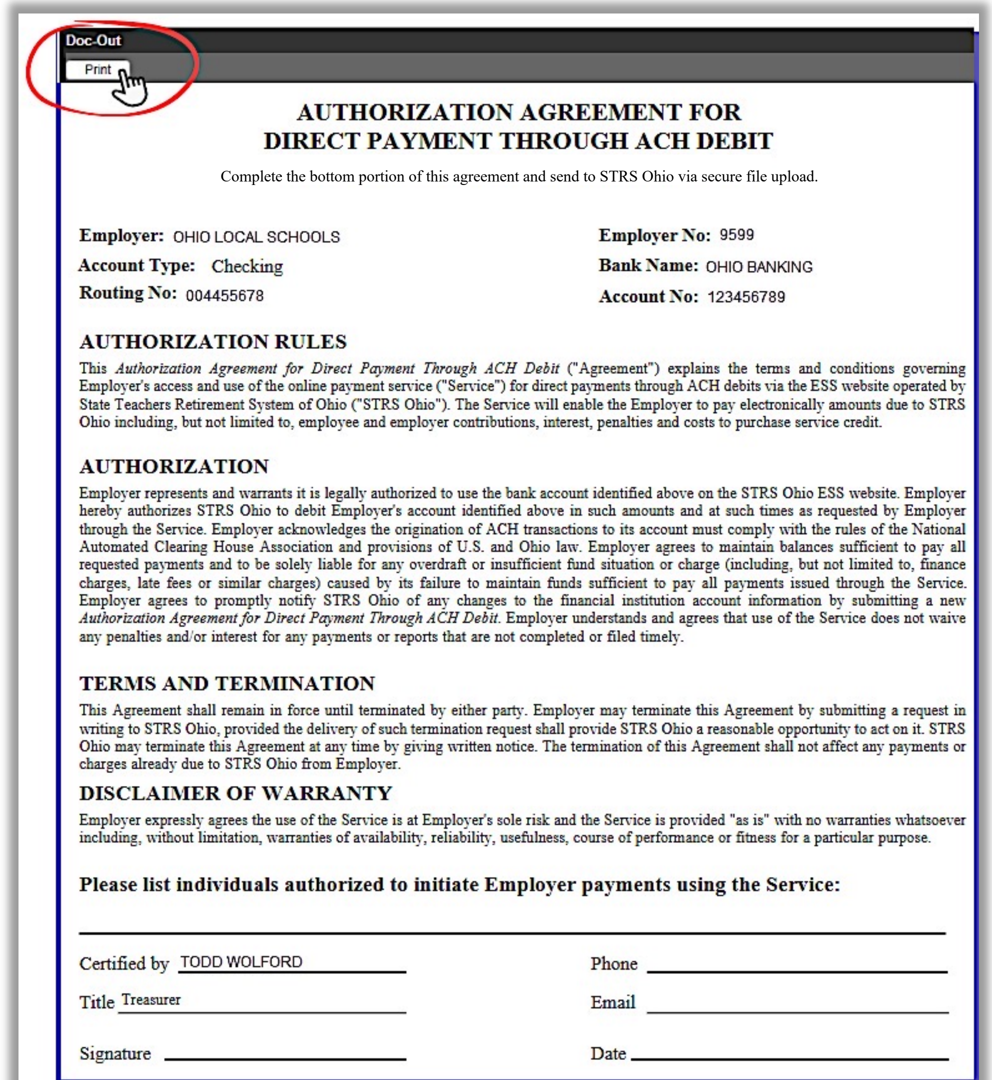
Step 7

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 TODD WOLFORD
Phone ________________

Title Treasurer
Email ________________

Signature ________________
Date ________________

Making a Direct Debit Payment

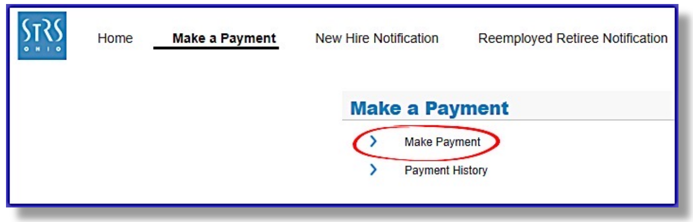
Once the bank account is approved, you can begin making direct debit payments. Please note that these are **one-time** payments. Recurring payments cannot be scheduled in ESS.

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

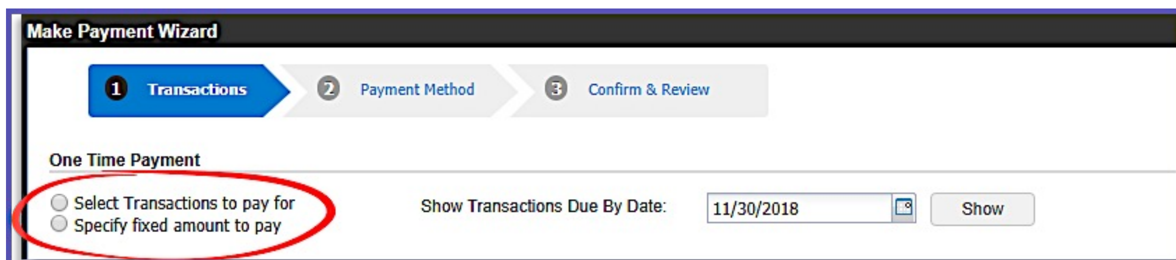
On the Make Payment Wizard screen, you will need to choose which option you will use to make the payment.

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

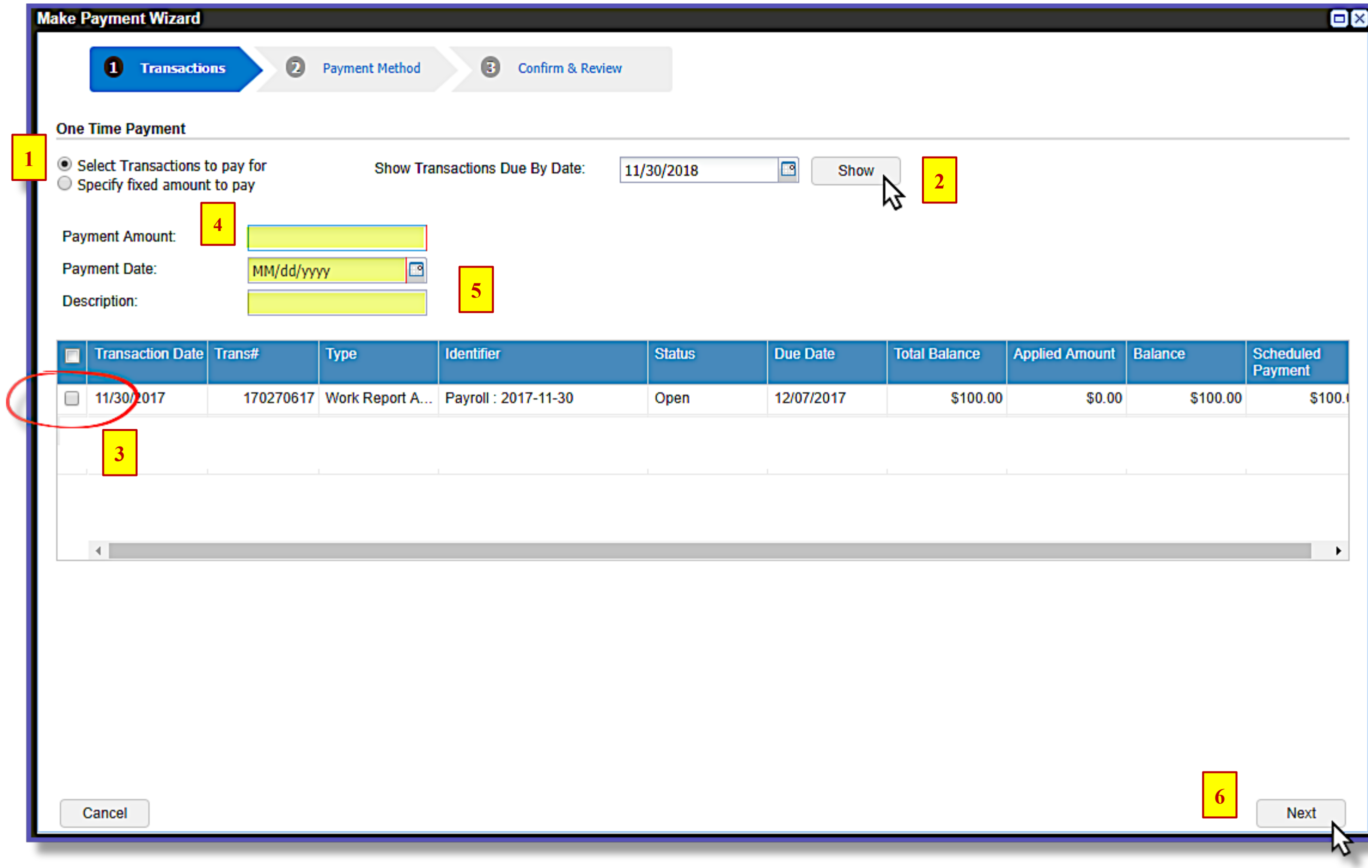
Option 1 — Select transactions to pay for

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.

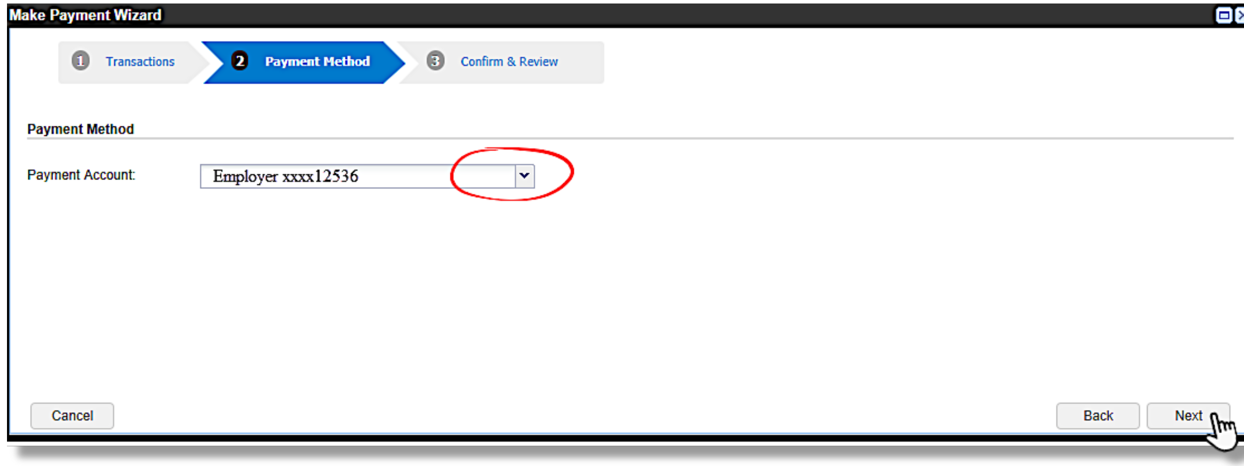
Step 3a continued on next page.



Step 3a *(continued)*

Payment Method

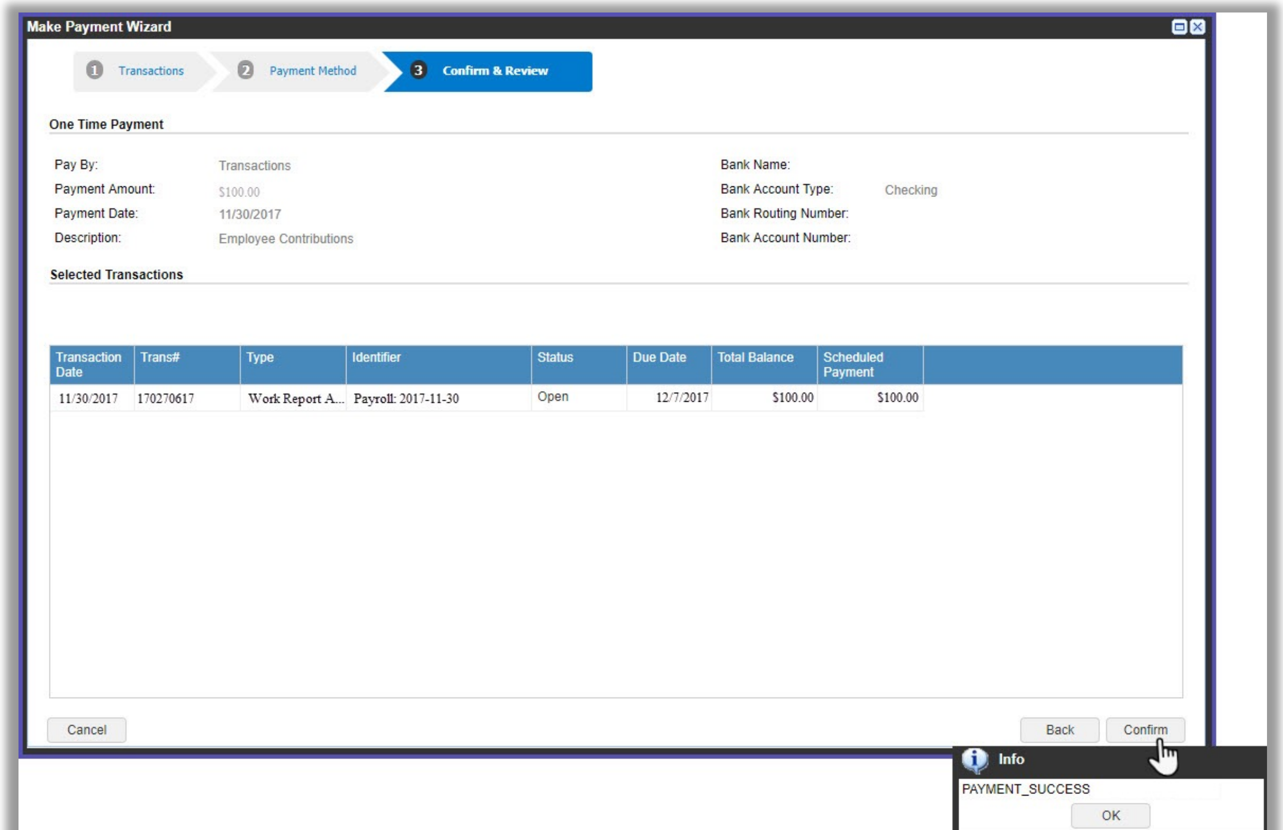
1. Click the down arrow in the Payment Account field and select the account from the drop-down menu.
2. Click "Next." This will take you to the Confirm & Review screen.



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.



Step 3b

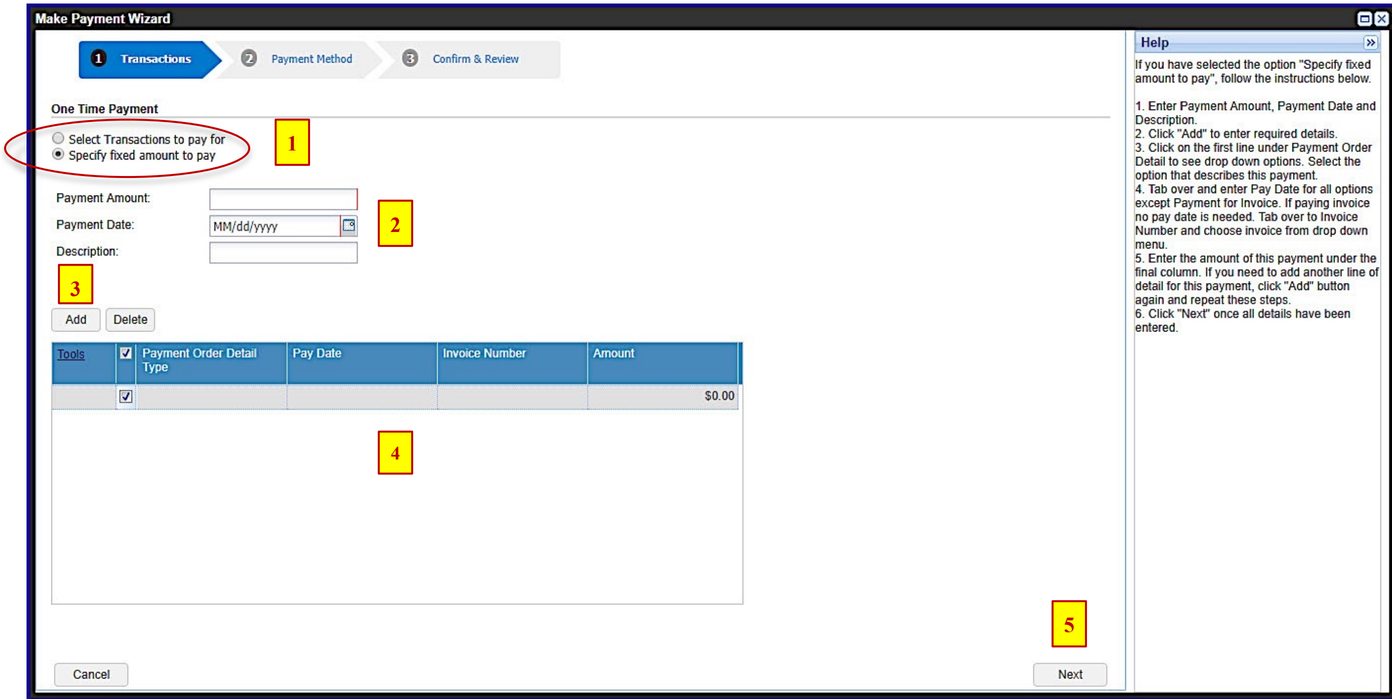
Option 2 — Specify fixed amount to pay

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.



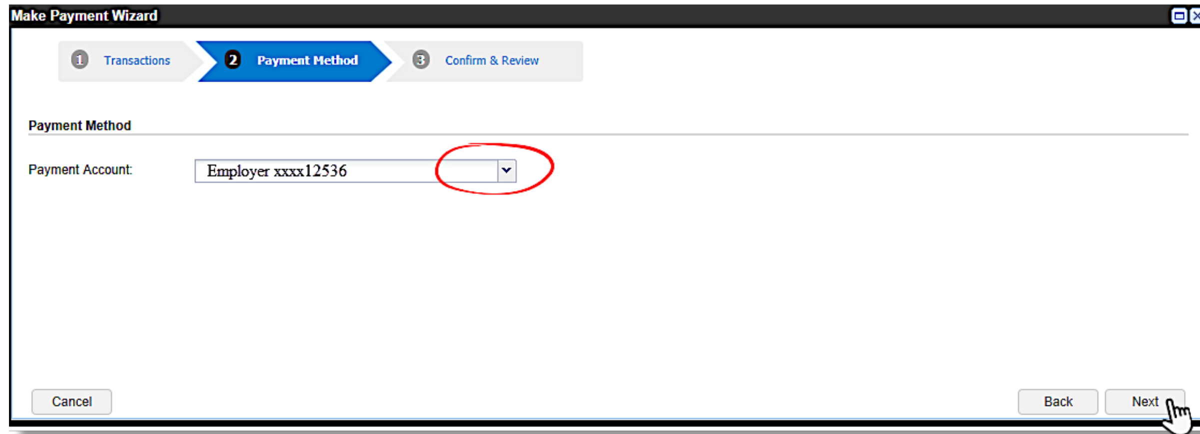
***Tips!** If you are making an invoice payment, click on the Invoice Number field and select the invoice number from the drop-down menu. Leave the pay date field blank.*

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)*

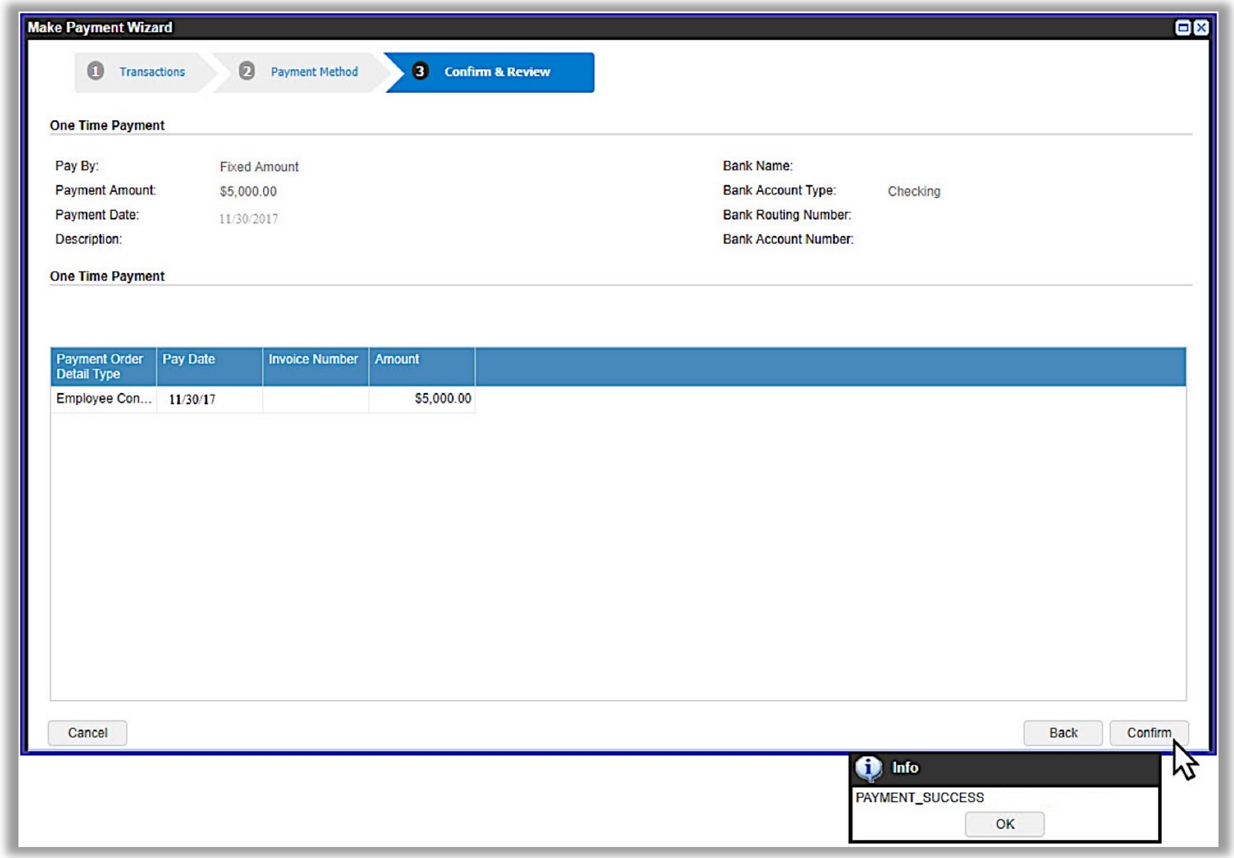
Payment Method

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.



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.

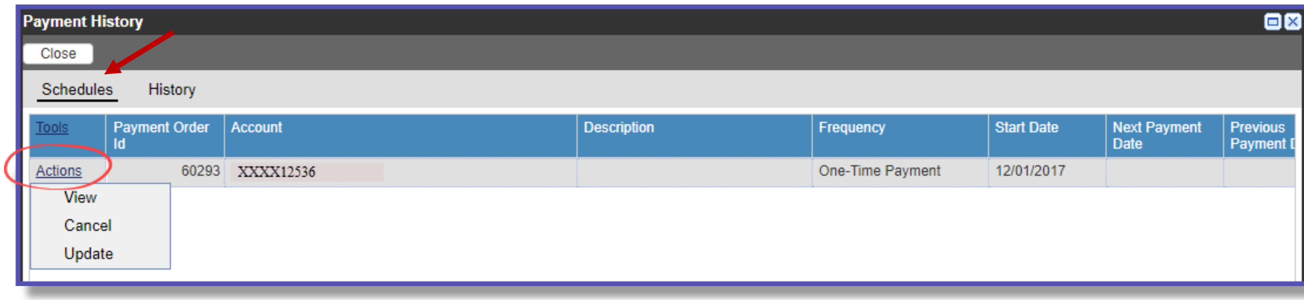
Payment History

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.

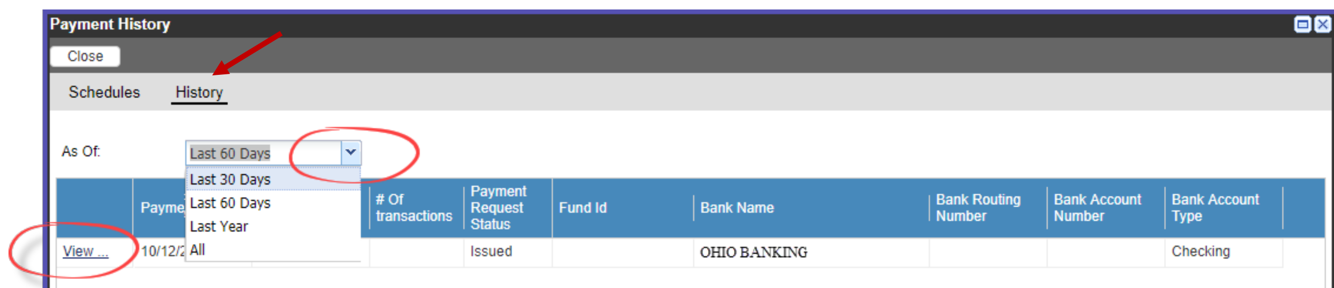
- To view, cancel or update a payment, click “Actions” in the Tools column and select an option from the drop-down menu.
- A payment will appear under “Schedules” until it is processed. Once processed, it will appear under “History.”



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

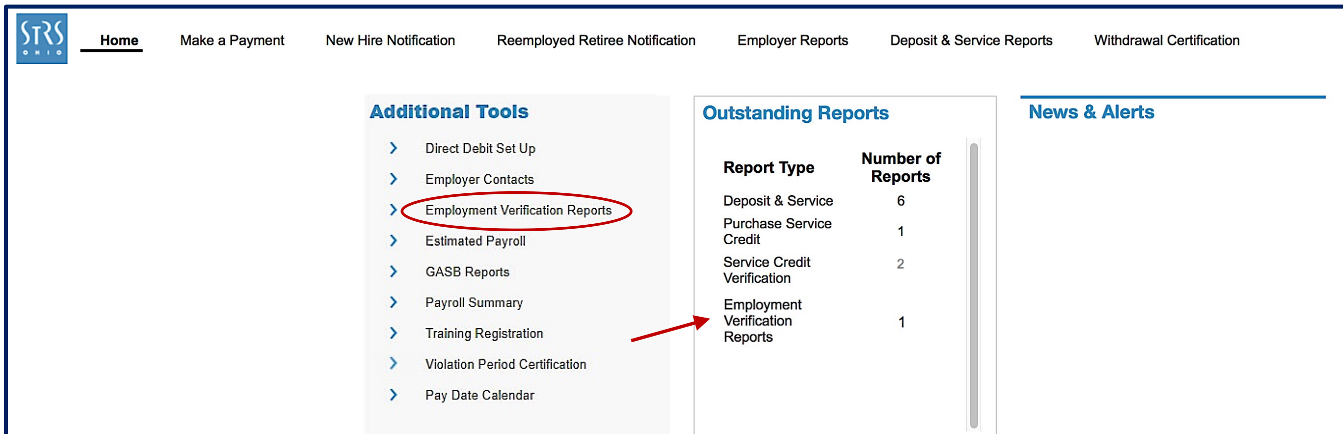
In late fall, you may receive a request to complete employment verification reports. IRS tax regulations require any individual age 73 who is not actively employed in an STRS Ohio-covered position to take a minimum distribution from his or her retirement plan. To comply with these regulations, STRS Ohio 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

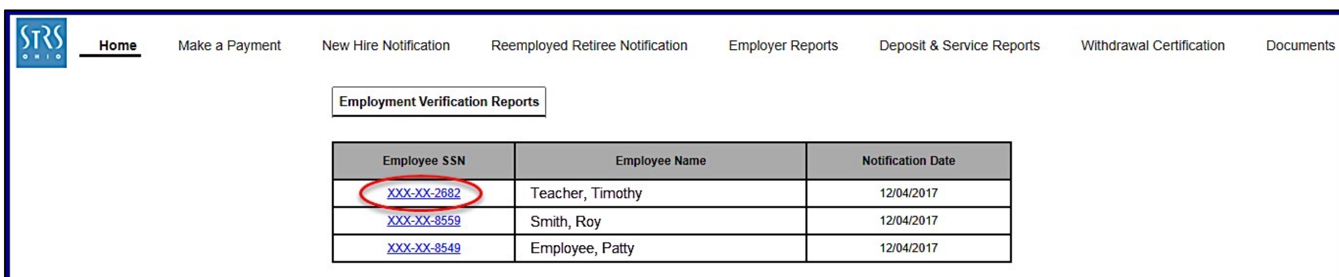
To access the report from the home page:

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



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.

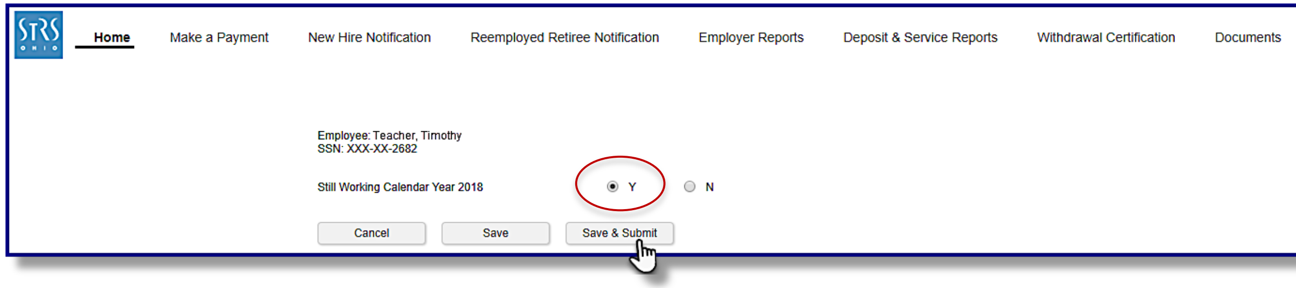


Step 3

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

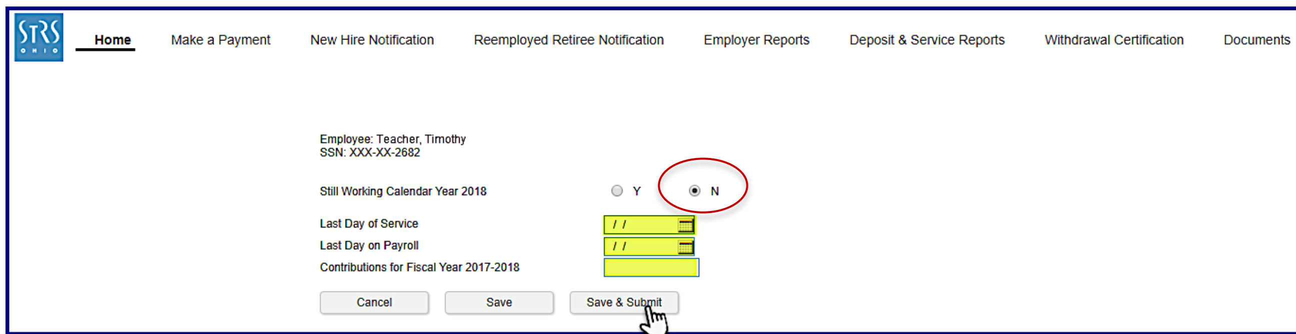
If the member **is still working**:

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.



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.



***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

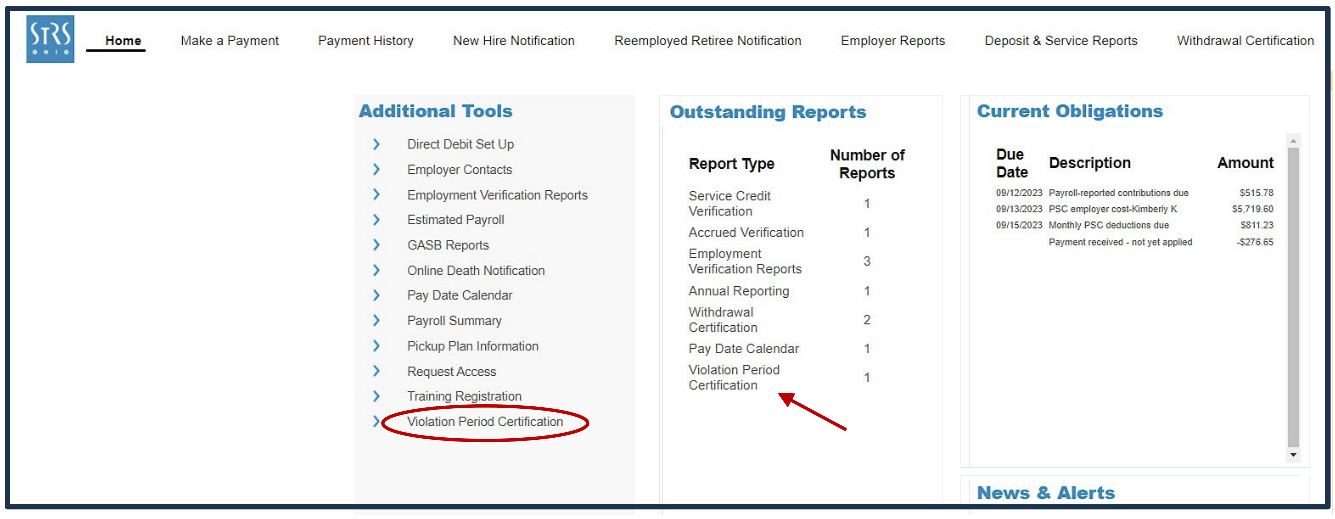
Employers may receive a request to complete a violation period certification when employing a reemployed retiree. Section 3307.35, Revised Code, stipulates that public employees who retire under one of the five Ohio retirement systems are prohibited from returning to work in public employment for **two 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

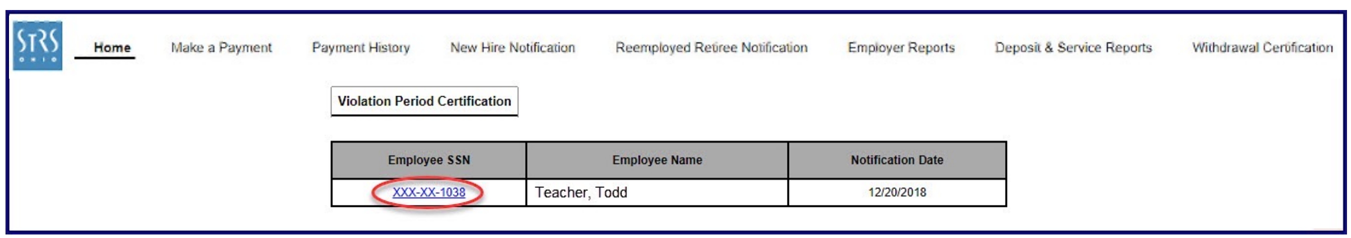
To access the certification from the home page:

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



Step 2

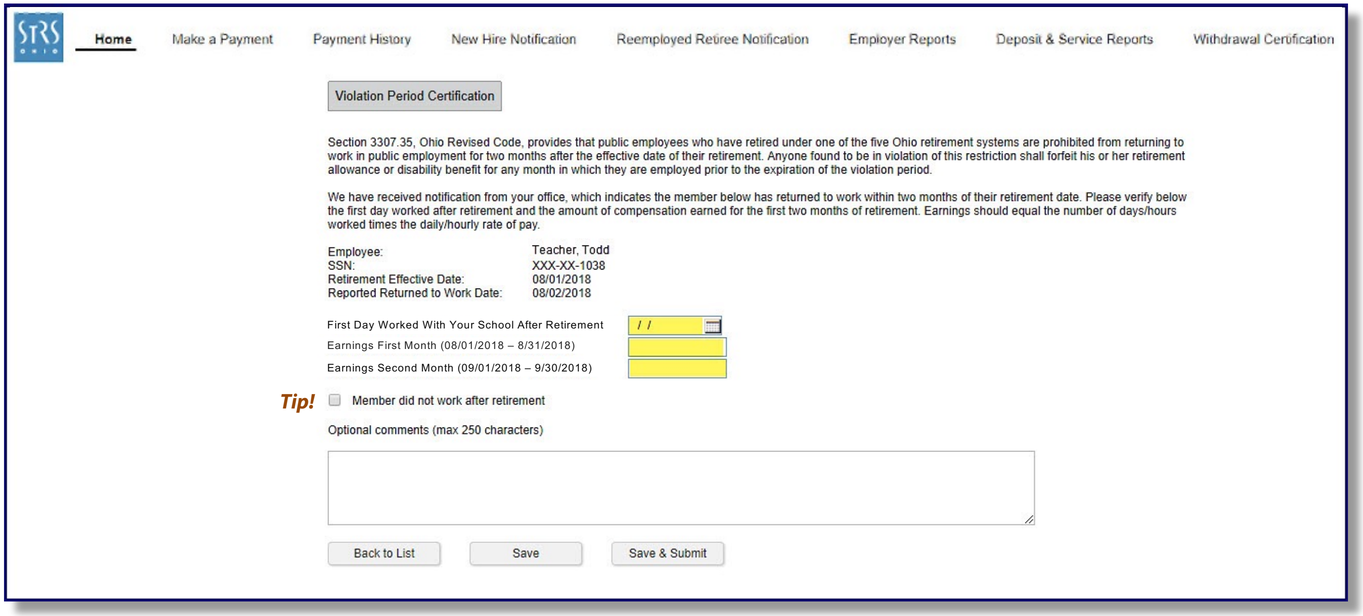
On the Violation Period Certification screen, click on the employee's SSN to open the certification. The report shown on the next page will appear.



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.



***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."*

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.

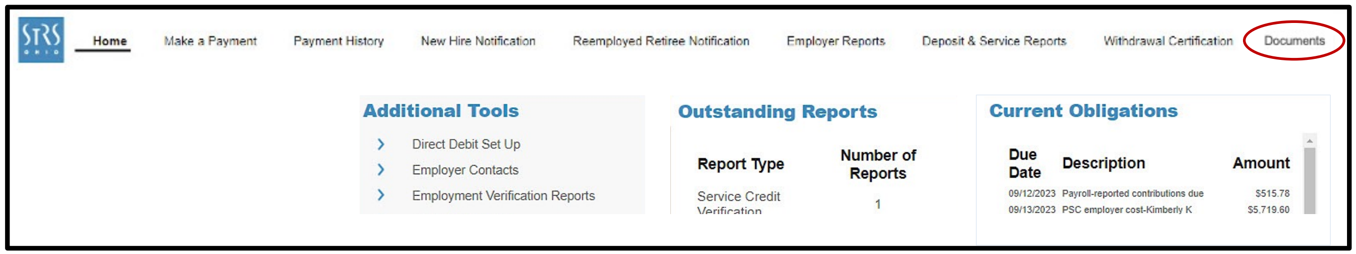
Section 18
Documents

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

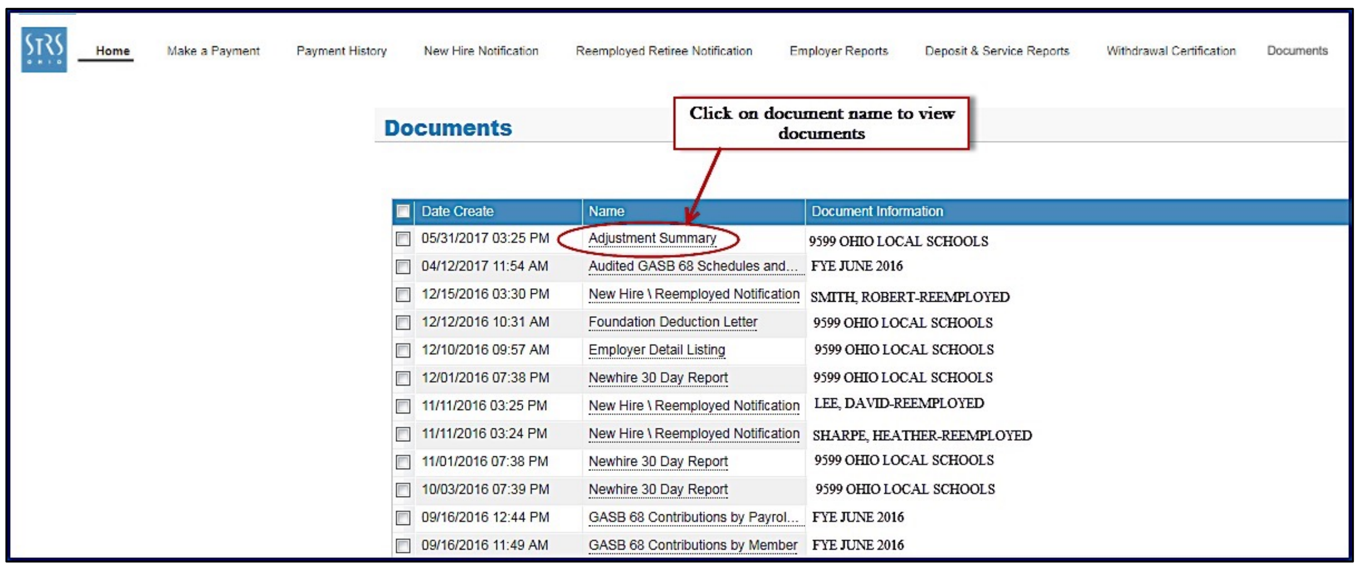
Step 1

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

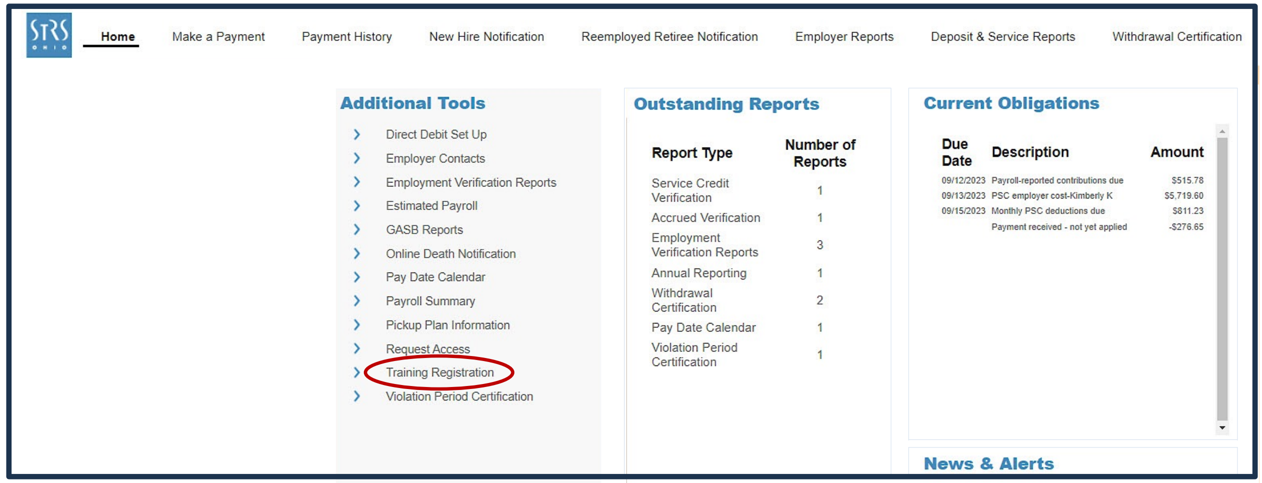
The following instructions explain how to register for employer training sessions and workshops, as well as view or cancel a registration.

How to Register

Step 1

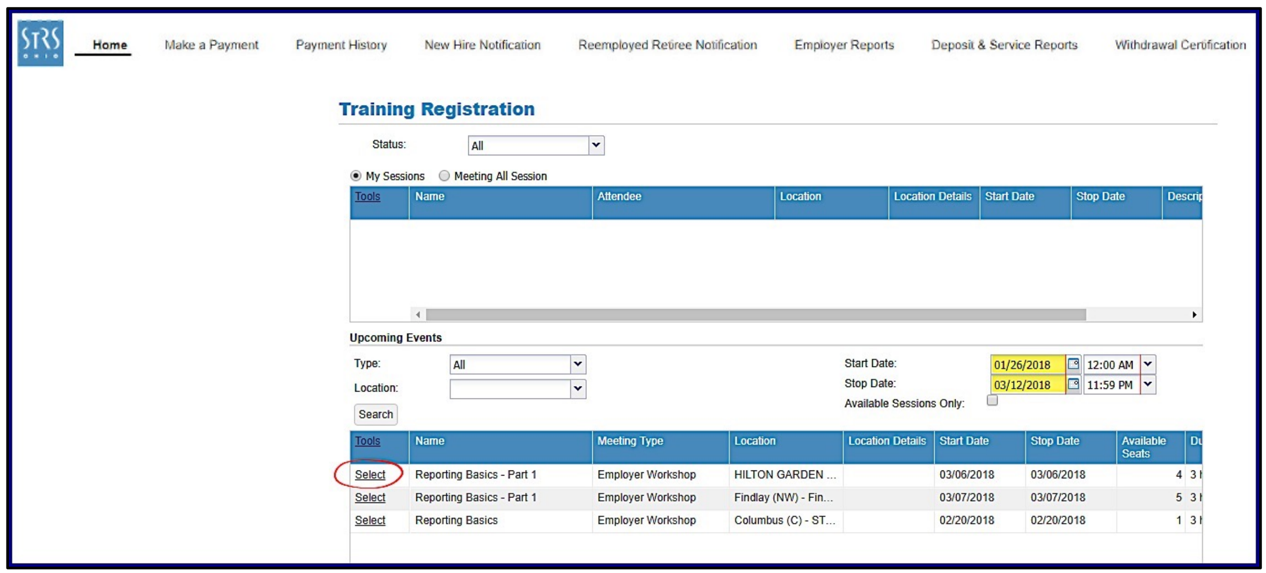
You will receive an email when registration for an education program is available.

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

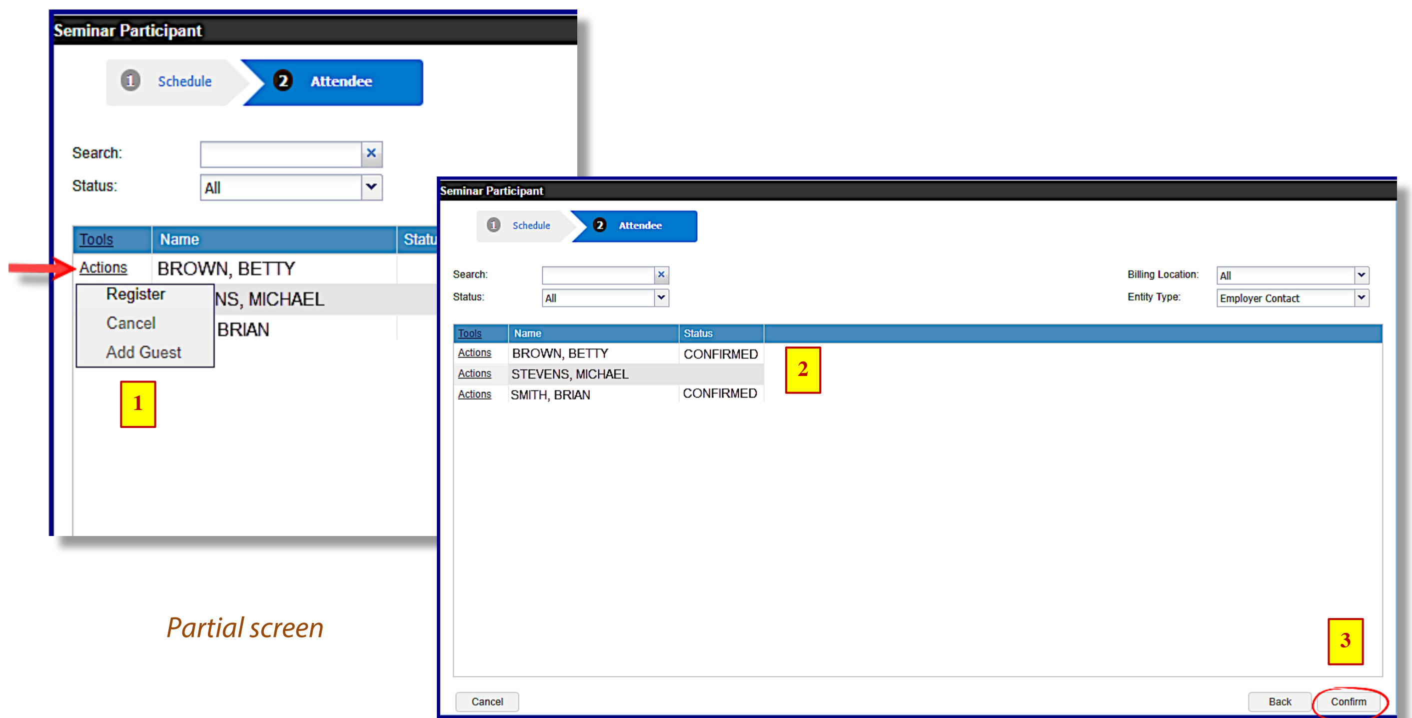
A list of employer contacts on file with STRS Ohio will appear. To register one or more attendees:

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.

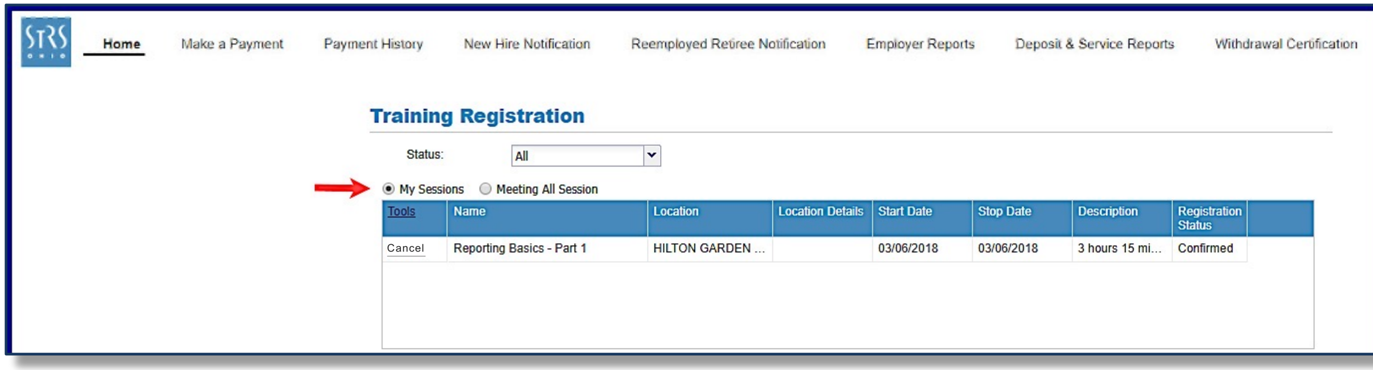


Partial screen

Viewing Registrations

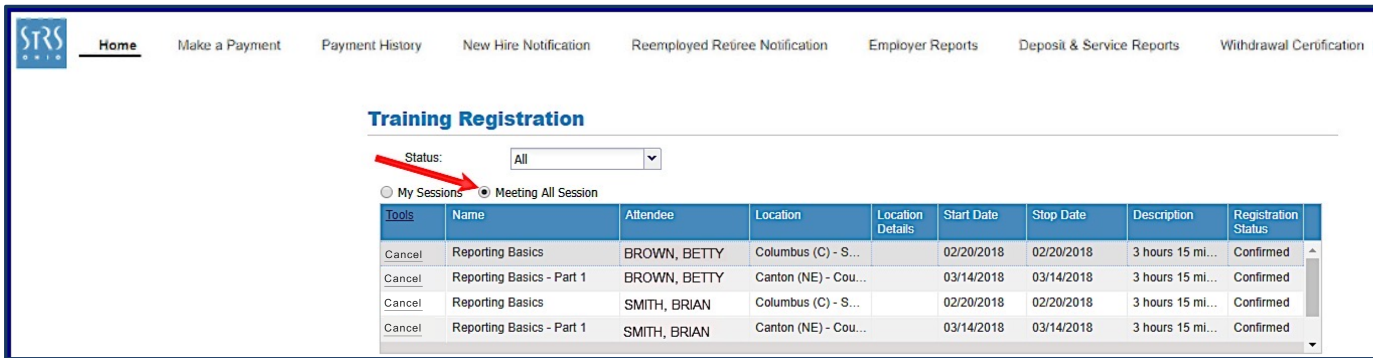
Your Registrations Only

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



Registrations for You and Other Attendees

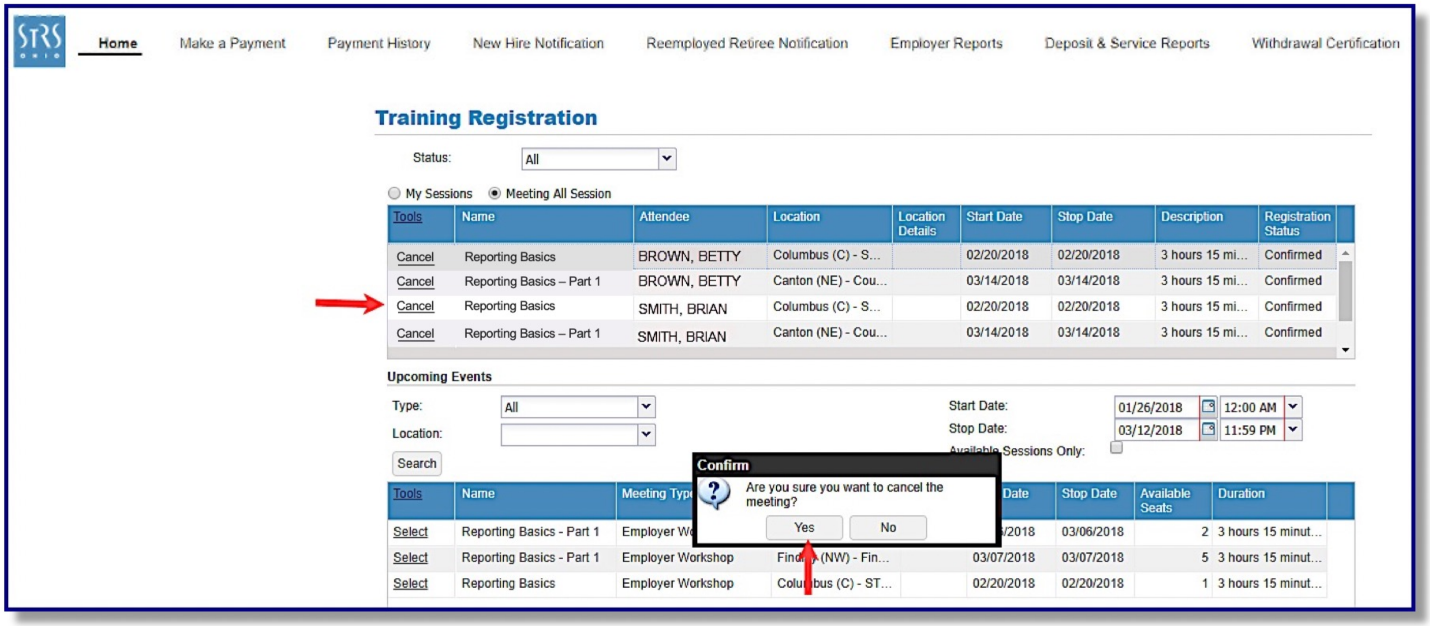
To view education programs you or other individuals in your school are currently registered to attend, click on "**Meeting All Session**" on the Training Registration screen.



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.



Section 20

Additional Tools

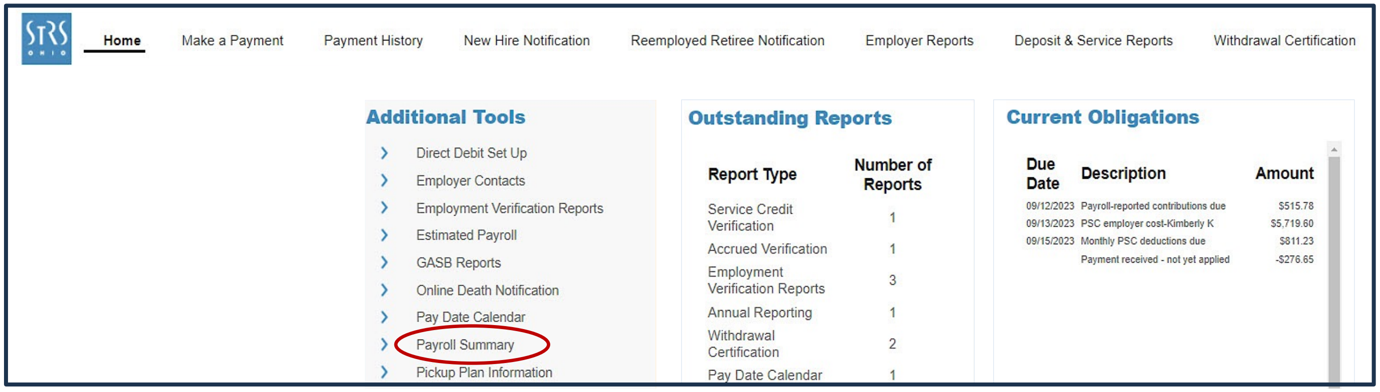
The following instructions explain how to generate a payroll report summary, review employer contact information, access GASB reports and submit an estimated annual payroll in ESS.

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

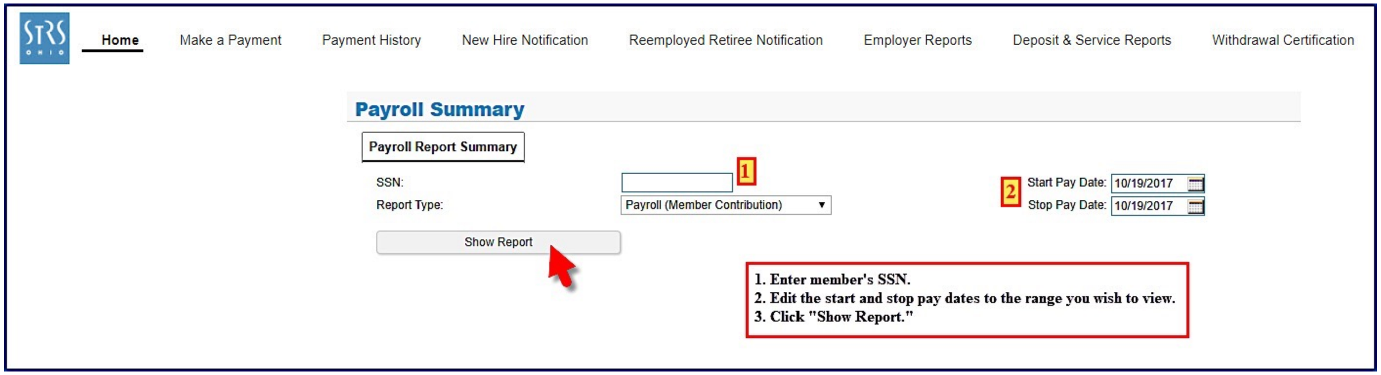
To generate a payroll report summary from the home page, click on "Payroll Summary" in the Additional Tools menu.



Step 2

On the Payroll Summary screen:

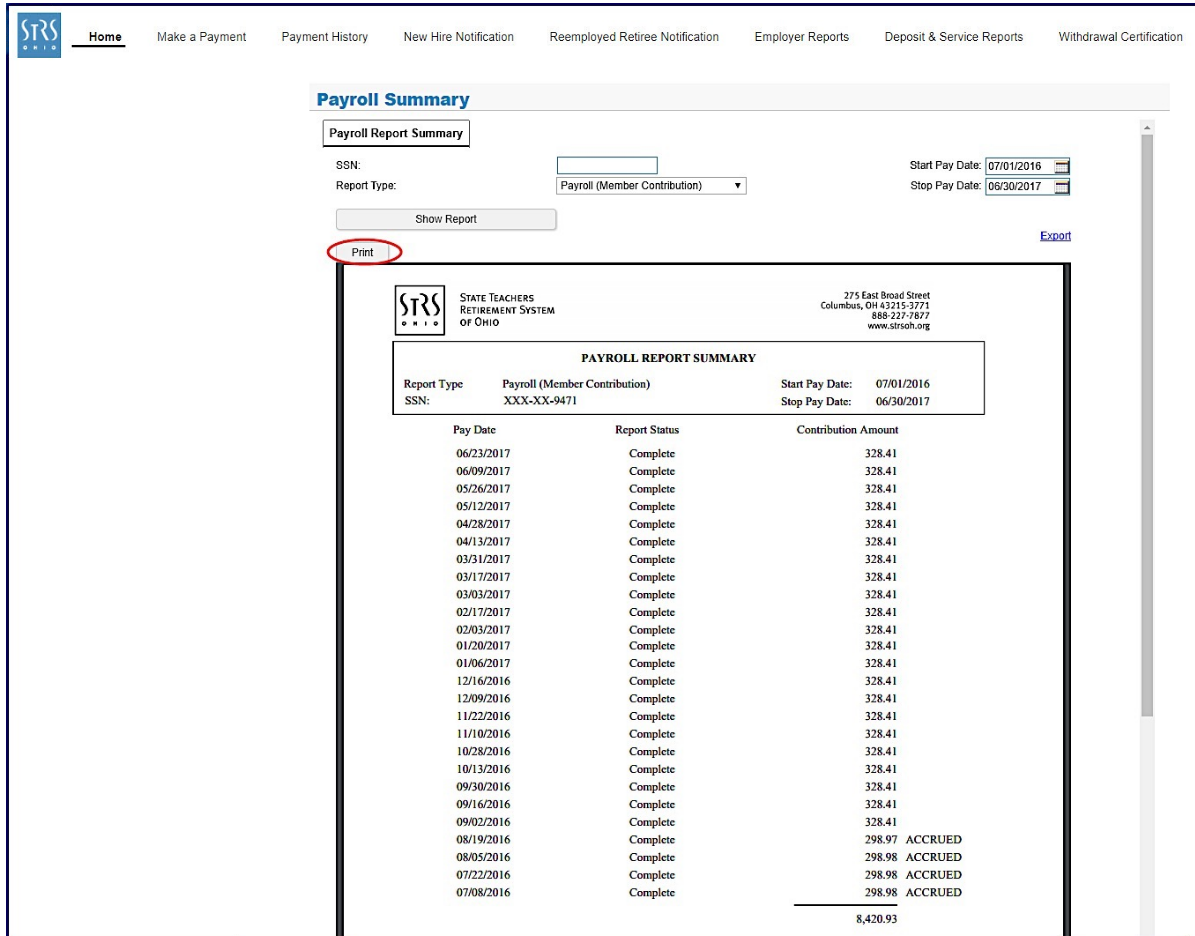
1. Enter member's SSN.
2. Select start and stop pay dates.
3. Click "Show Report."



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.”



PAYROLL REPORT SUMMARY

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
		8,420.93	

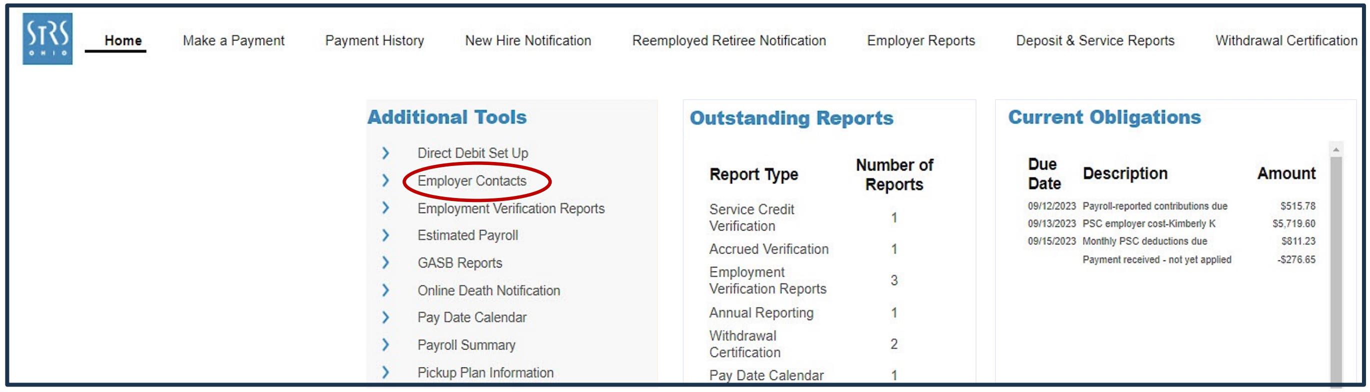
Employer Contacts

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

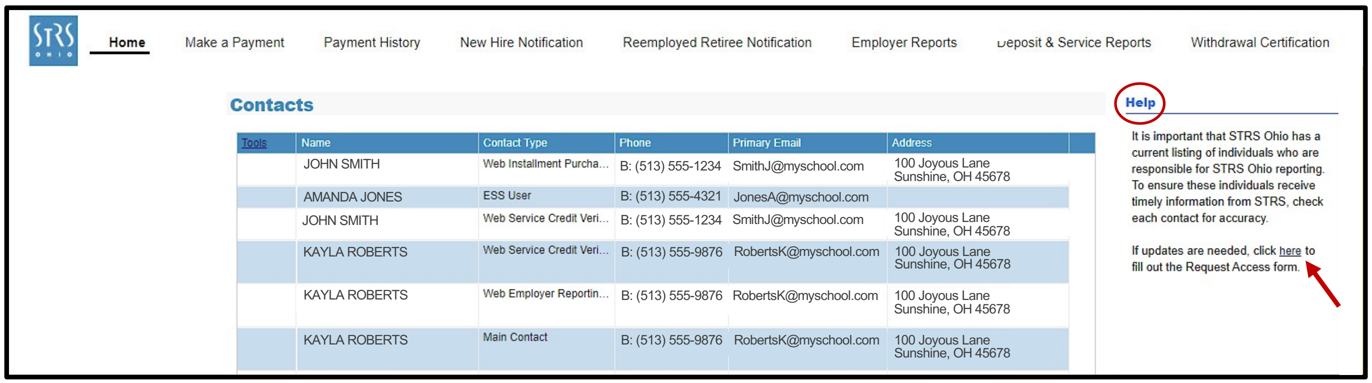
To access your school's contact information from the home page, click on "Employer Contacts" in the Additional Tools menu.



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

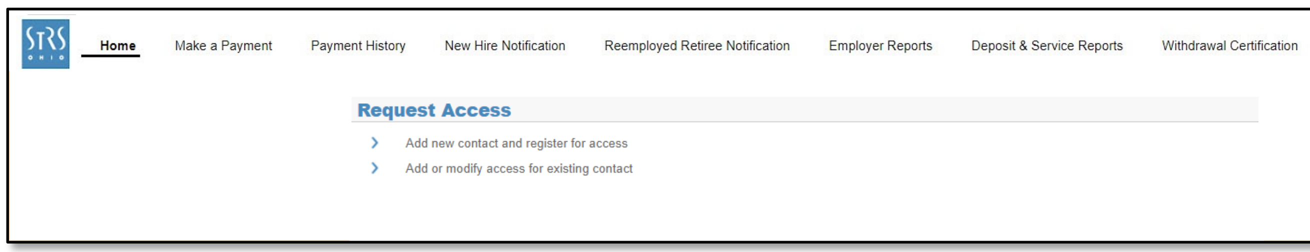
Step 1

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.)*

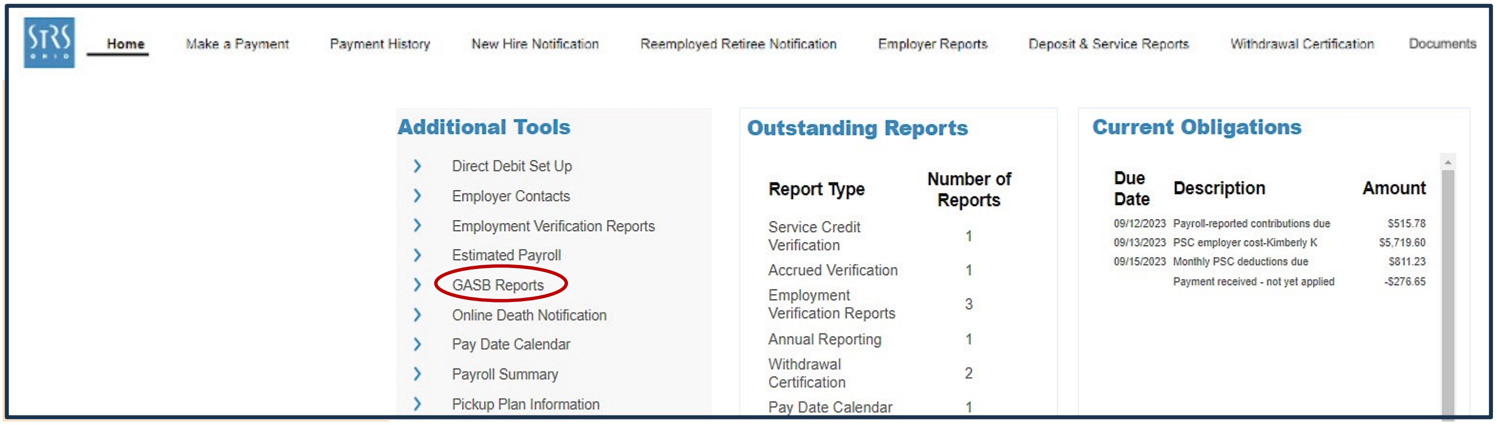
You will receive confirmation of changes once the form is submitted.

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

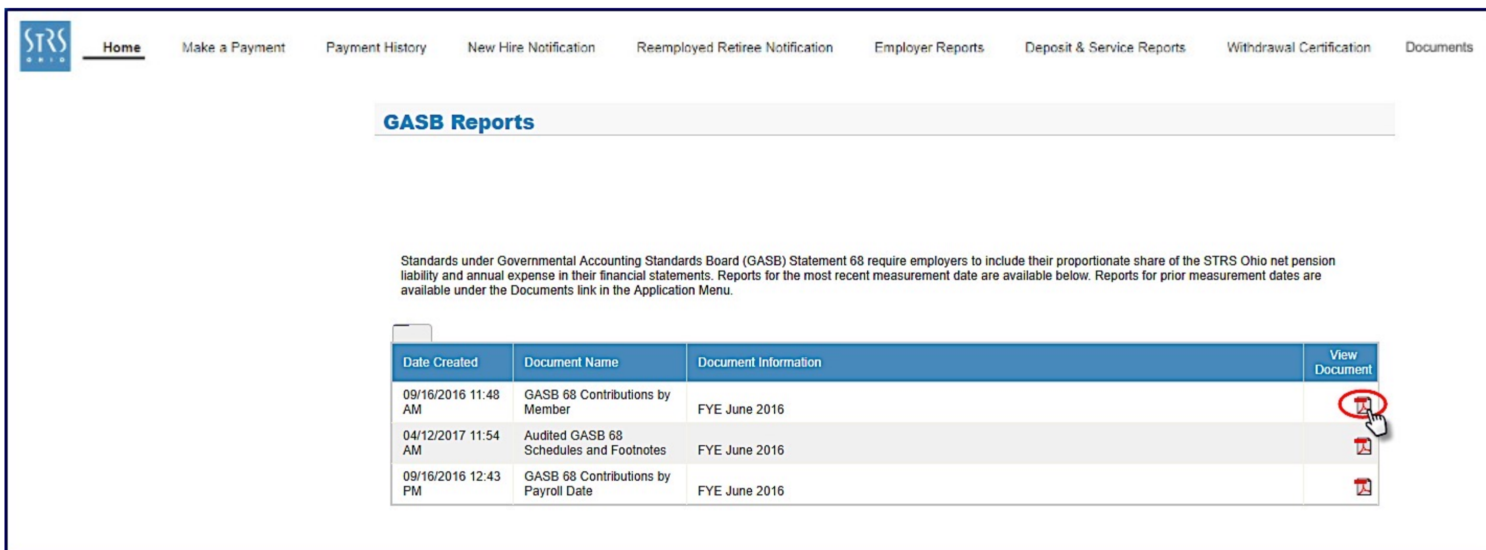
To access GASB Reports on the home page, click on "GASB Reports" in the Additional Tools menu.



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.

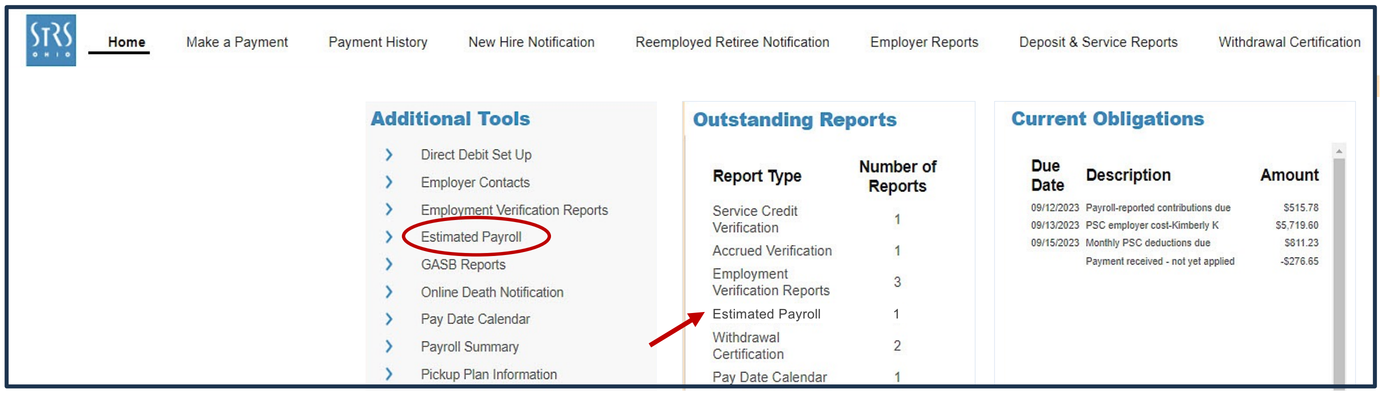


Estimated Annual Payroll

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

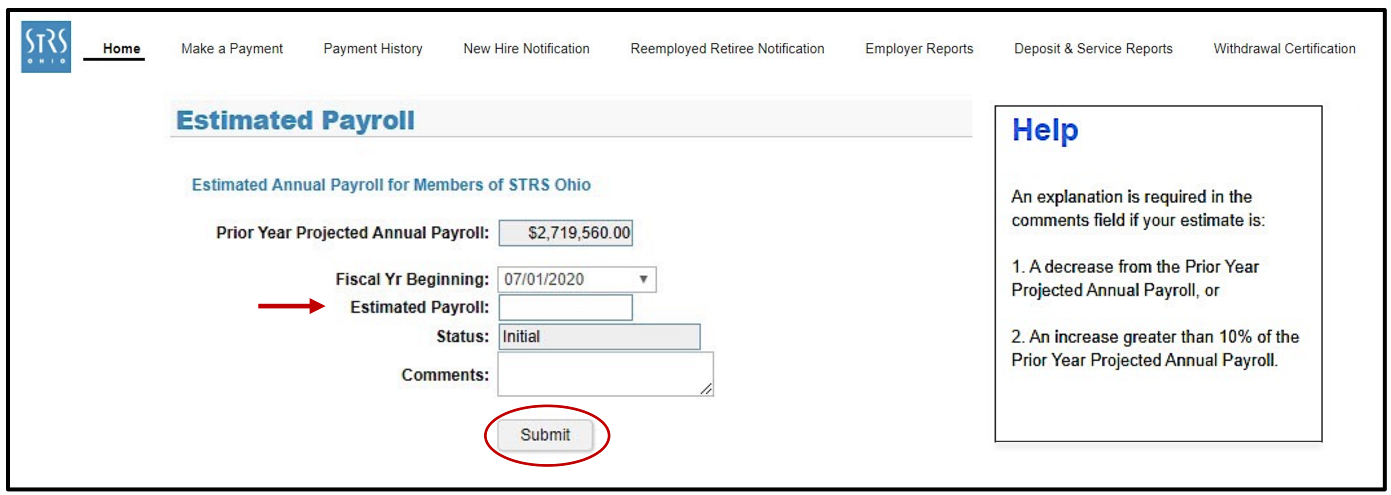
To access the report from the home page, click on "Estimated Payroll" in the Additional Tools menu or the Outstanding Reports section.



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

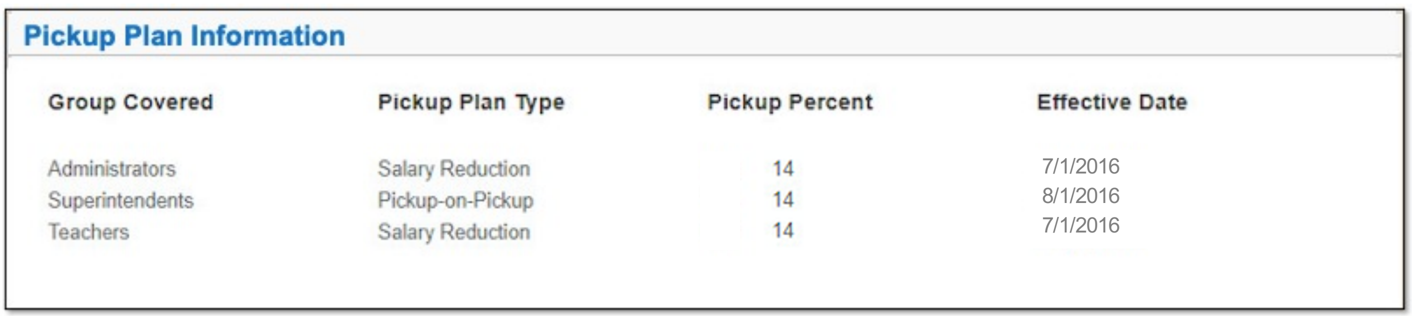
STRS Ohio needs accurate pickup plan information for your school. You should check your pickup plan information in ESS and submit new plan documentation if updates are needed.

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.



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

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.

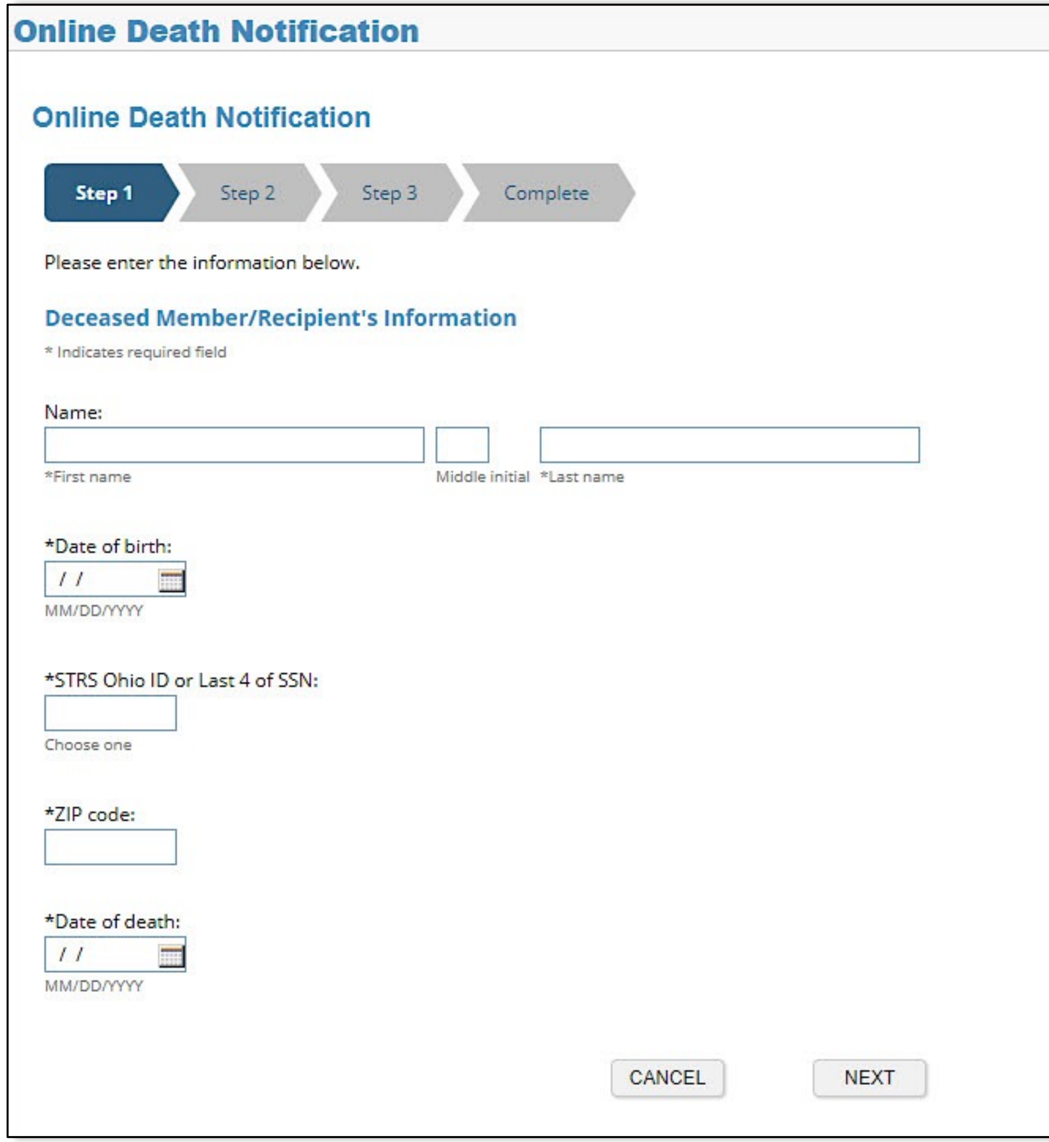
Online Death Notification

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

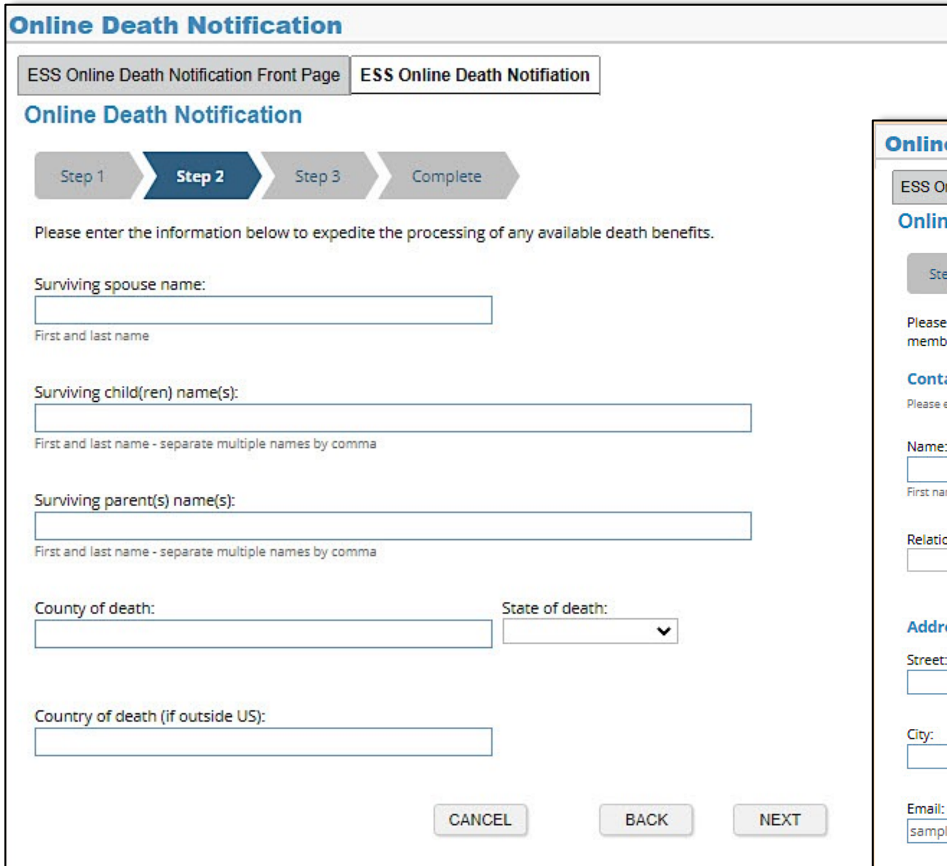
1. To access the online death notification from the home page, click on "Online Death Notification" in the Additional Tools menu. *(Screen not shown.)*
2. The first screen of the online death notification will appear. Enter the member's name, date of birth, STRS Ohio ID or last four digits of the Social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

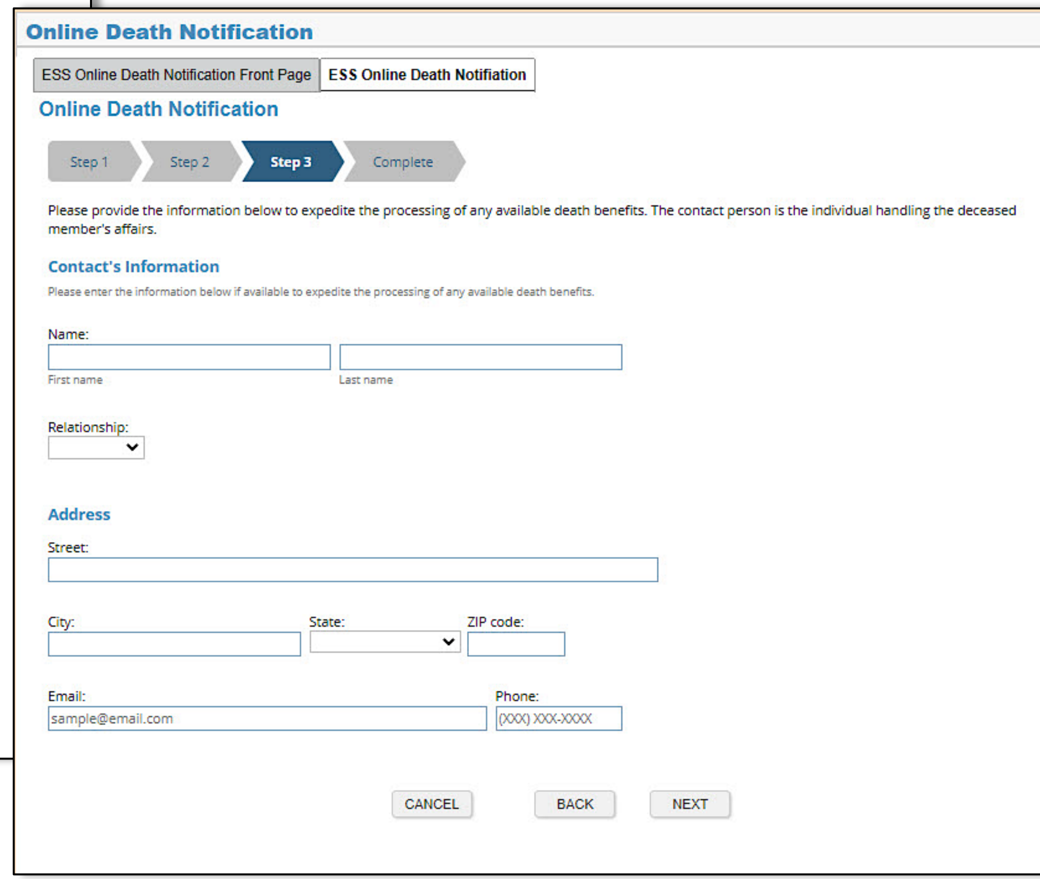
Error message: If you do not know all this information or the information you enter does not match a member in our system, an error message will appear indicating the person is not found. If this occurs, you can reenter the correct information or contact STRS Ohio's Member Services Center to provide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



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.





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

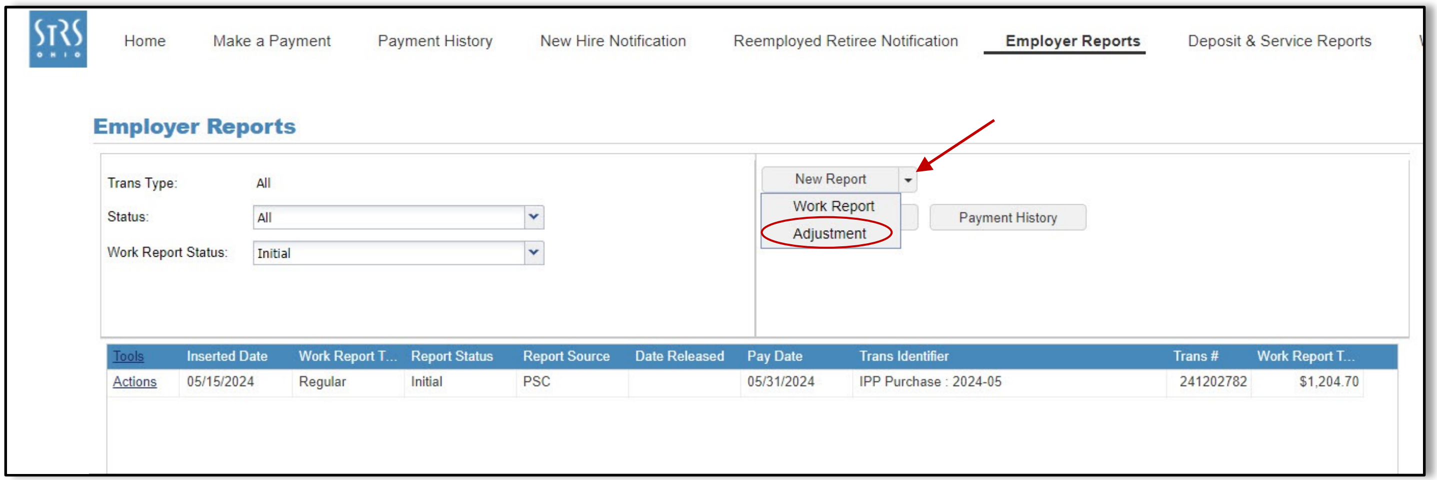
Step 1

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

Step 2

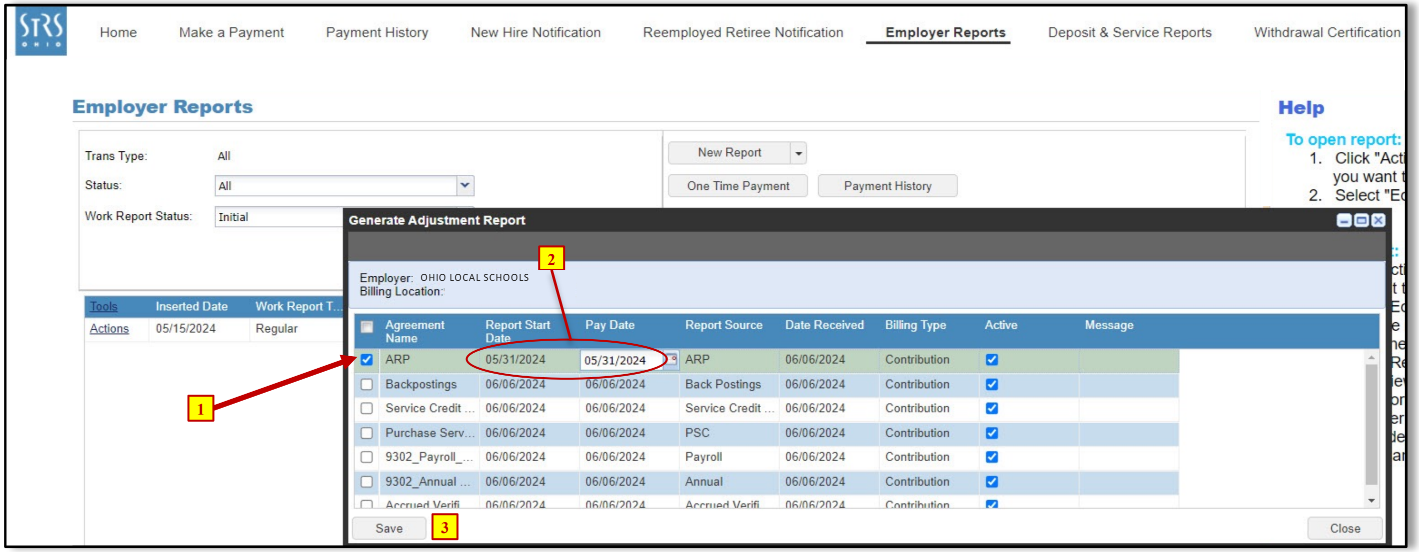
To enter an adjustment to increase or decease the amount of ARP contributions submitted, you will need to create a new adjustment. On the Employer Reports page:

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.

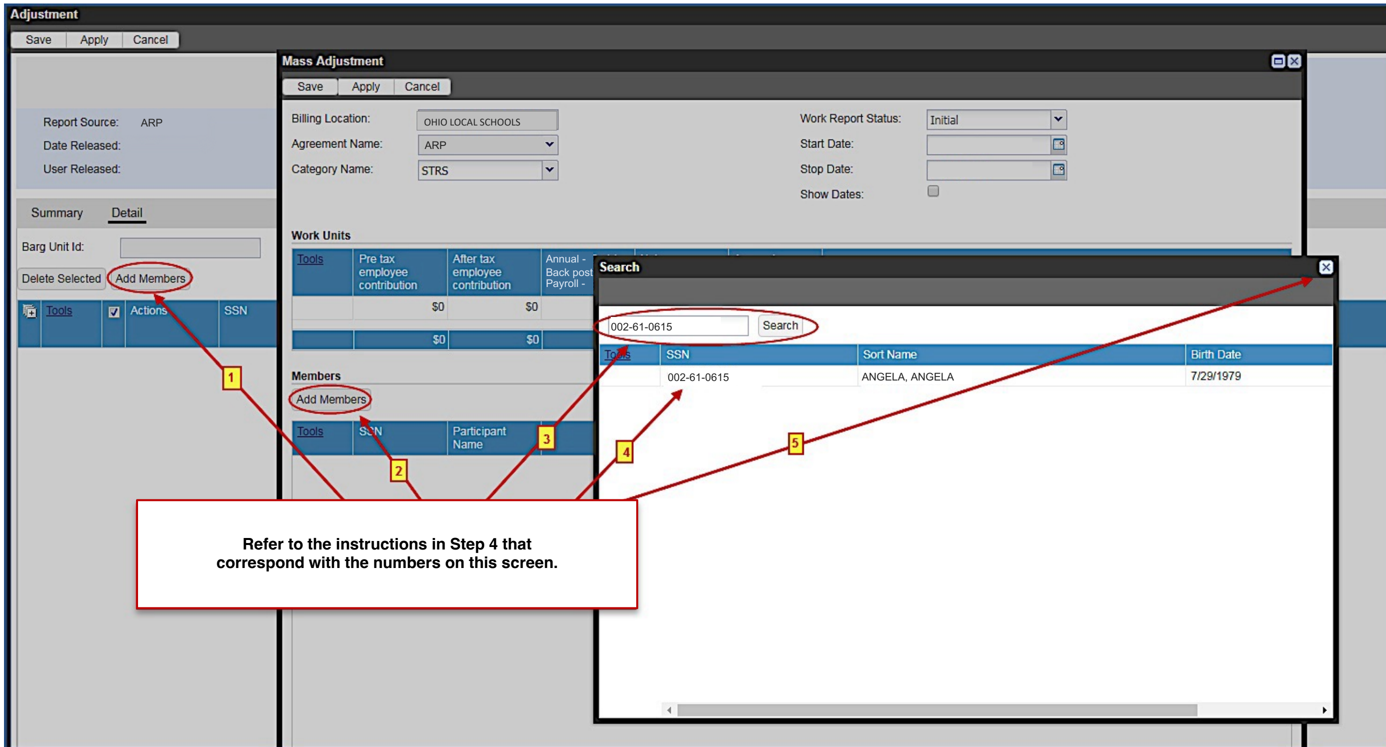


Step 4

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.

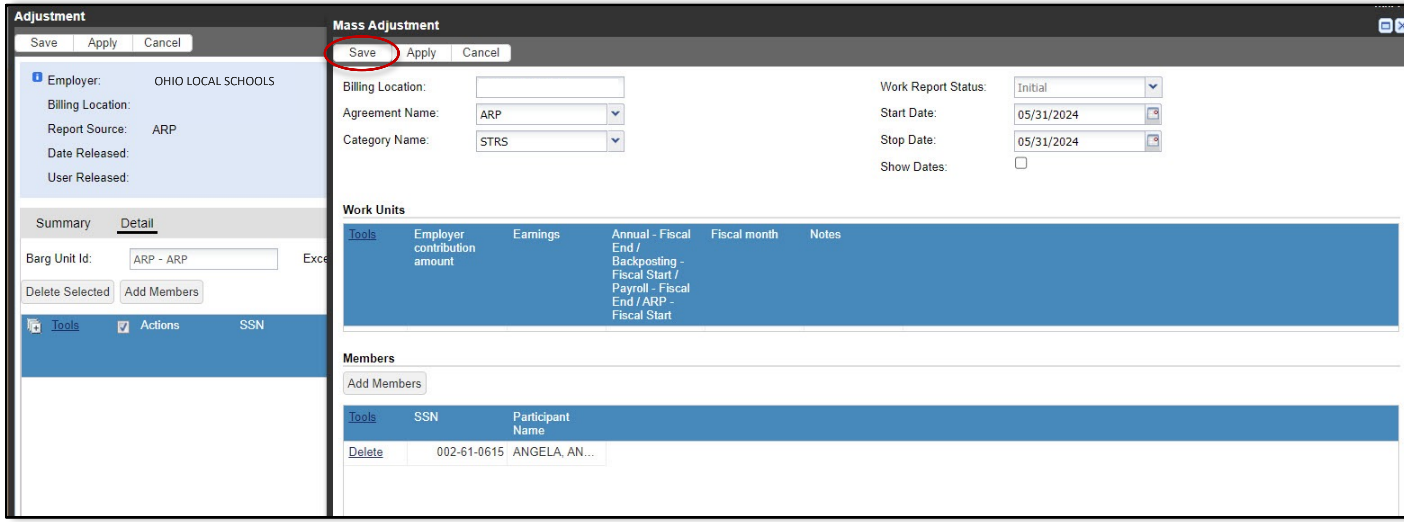


__Tip!__ If a member has more than one adjustment in the same fiscal year, you can enter the total adjustment amount in one entry for the member. You don’t need a separate entry for each month if the adjustments occur in the same fiscal year.

Step 5

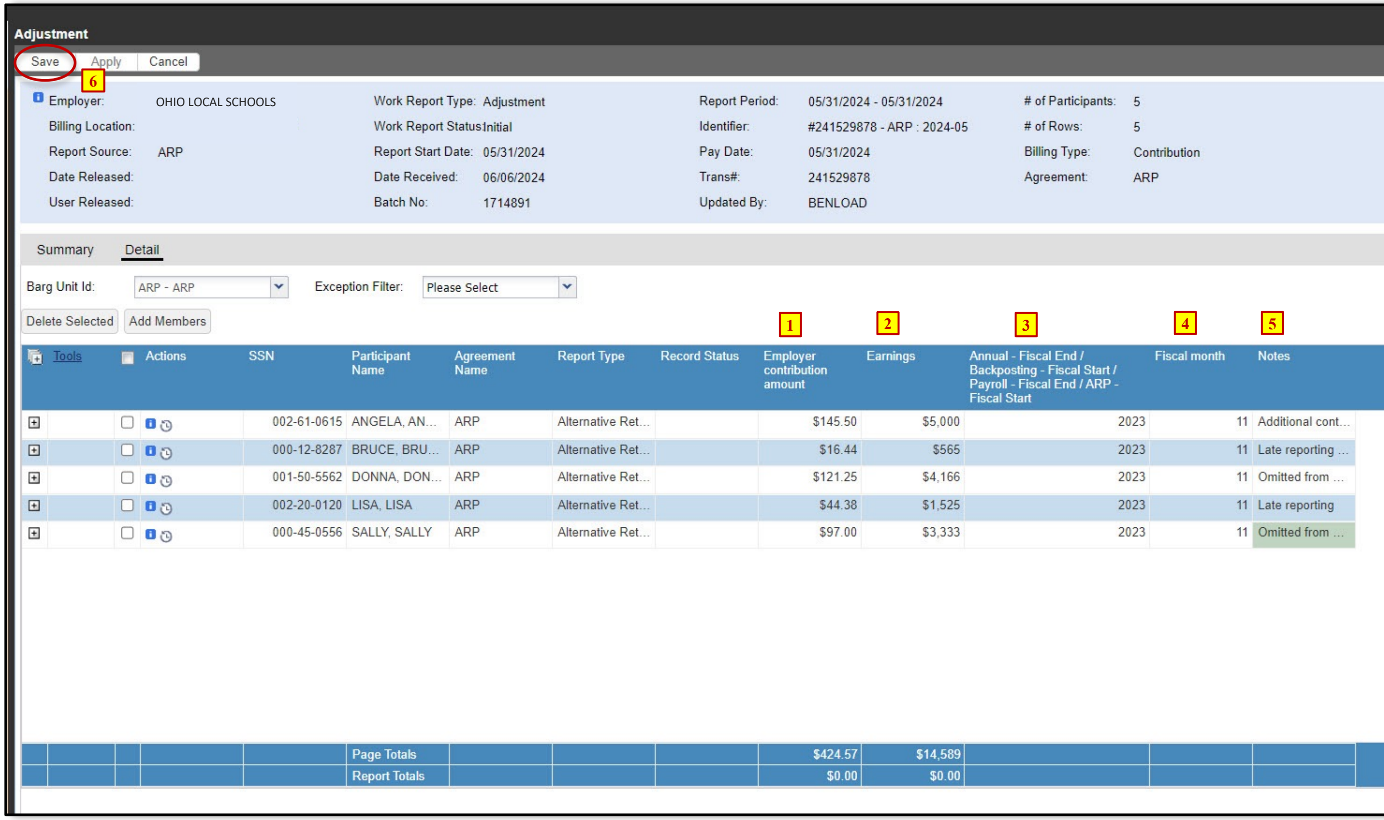
On the Mass Adjustment screen, check to make sure the member(s) you added are listed in the Members section.

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.



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.

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.”