

## Section 4

# Navigating Employer Reports

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

## Types of Reports

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

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

## Accessing Reports

To access a report from the home page:

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

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

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

- Additional Tools:** A list of links for various services: Direct Debit Set Up, Employer Contacts, Employment Verification Reports, Estimated Payroll, GASB Reports, Online Death Notification, Pay Date Calendar, Payroll Summary, Pickup Plan Information, Request Access, Training Registration, and Violation Period Certification.
- Outstanding Reports:** A table showing the number of reports for different types.
- Current Obligations:** A table showing due dates, descriptions, and amounts for various obligations.

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

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

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

**Employer Reports**

Trans Type: All

Status: All

Work Report Status: Initial

New Report

Payment History

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

**Help**

**To open report:**

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

**To print report:**

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

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

## Sorting Reports

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

### Sort in Ascending/ Descending Order

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

The screenshot shows the 'Employer Reports' page with a table of reports. The table has columns: Tools, Inserted Date, Work Report Total, Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A dropdown menu is open over the 'Work Report Total' column, showing options: 'Sort Ascending', 'Sort Descending', and 'Columns'. A red arrow points to the dropdown arrow in the 'Work Report Total' column header.

Tools	Inserted Date	Work Report Total	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	06/15/2017	\$0.00		PSC		06/30/2017	IPP Purchase : 2017-06	168708108	\$0.00
Actions	09/27/2017	\$312.53		PSC		07/31/2017	IPP Purchase : 2017-07	169091741	\$312.53

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

### Sort by Work Report Status

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

The screenshot shows the 'Employer Reports' page with a table of reports. The table has columns: Tools, Inserted Date, Work Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A dropdown menu is open over the 'Work Report Status' field, showing options: 'All', 'Submitted and Initial', and 'Submitted'. A red circle highlights the dropdown arrow in the 'Work Report Status' field.

Tools	Inserted Date	Work Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	01/10/2017	Initial	Service Credit ...		06/30/2005	2004-05 Service Credit Verification	162015698	\$0.00
Actions	01/10/2017	Draft	Service Credit ...		06/30/2014	2013-14 Service Credit Verification	162015703	\$0.00
Actions	01/10/2017	Final	Service Credit ...		06/30/2013	2012-13 Service Credit Verification	162015702	\$0.00

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

## Sort by Report Type

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

The screenshot shows the STRS Employer Reports page. At the top, there are navigation links: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, and Withdrawal Certification. Below the navigation is the "Employer Reports" section with filters for Trans Type (All), Status (All), and Work Report Status (All). A "New Report" dropdown and "One Time Payment" and "Payment History" buttons are also present. A table of reports is displayed with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A dropdown menu is open over the "Report Source" column, showing options: Sort Ascending, Sort Descending, Columns, and Filters. A second dropdown menu is open over the "Trans Identifier" column, showing a list of report types: Payroll, Back Postings, Annual, ARP, Service Credit Verification, PSC, Accrued Verification, Employer, and Health Care. Red boxes and arrows highlight the "Filters" option in the first dropdown and the "Payroll" option in the second dropdown.

Tools	Inserted Date	Work Report T...	Report Status	Report Source	Date Released	Pay Date	Trans Identifier	Trans #	Work Report Total
Actions	03/21/2013	Regular	Complete	Payroll	12/31/2003	12/31/2003	Payroll : 2013-03-26 9430_Payroll_001 1397137...	139713746	\$102.86
Actions	02/06/2010	Regular	Complete	Payroll	02/06/2010	09/30/2010	2003-09-30 9430_Payroll_001 5804228	5804228	\$972.00
Actions	02/06/2010	Regular	Complete	Payroll	02/06/2010	09/30/2010	2003-10-31 9430_Payroll_001 5804229	5804229	\$972.00
Actions	02/06/2010	Regular	Complete	Payroll	02/06/2010	09/30/2010	001 5804230	5804230	\$972.00
Actions	02/06/2010	Regular	Complete	Payroll	12/31/2003	12/31/2003	001 5804231	5804231	\$972.00
Actions	03/27/2014	Adjustment	Complete	Payroll	03/27/2014	09/30/2014	Payroll_001 1470480...	147048009	\$375.00
Actions	10/31/2014	Adjustment	Complete	Back Postings	10/31/2014	07/31/2015	Annual	149310264	\$2.12
Actions	07/13/2012	Adjustment	Complete	Payroll	07/13/2012	05/11/2015	ARP	Payroll_001 132347016	\$697.30
Actions	12/18/2015	Adjustment	Complete	ARP	12/18/2015	10/30/2015	Service Credit Verification	153570890	\$285.00
Actions	12/18/2015	Adjustment	Complete	ARP	12/18/2015	09/30/2015	PSC	153570892	\$285.00
Actions	12/18/2015	Adjustment	Complete	ARP	12/18/2015	10/30/2015	Accrued Verification	153570906	\$131.25
Actions	12/18/2015	Adjustment	Complete	Payroll	12/18/2015	09/30/2015	Employer	153570907	\$787.51
Actions	12/18/2015	Adjustment	Complete	Payroll	12/18/2015	09/30/2015	Health Care	Payroll : 2015-09-30 9430_Payroll_001 1535709...	\$787.51

# Printing Reports

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

## Step 1

On the Employer Reports page:

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

The Work Report Editor screen shown below will appear.

The screenshot shows the 'Employer Reports' page. At the top, there's a navigation bar with 'Employer Reports' highlighted. Below it, there's a section titled 'Employer Reports' with filters for 'Trans Type', 'Status', and 'Work Report Status'. A table lists reports with columns: Tools, Inserted Date, Work Report Type, Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A red arrow points to the 'Edit' option in the 'Tools' column of the second row.

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

## Step 2

On the Work Report Editor screen:

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

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

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