

## 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

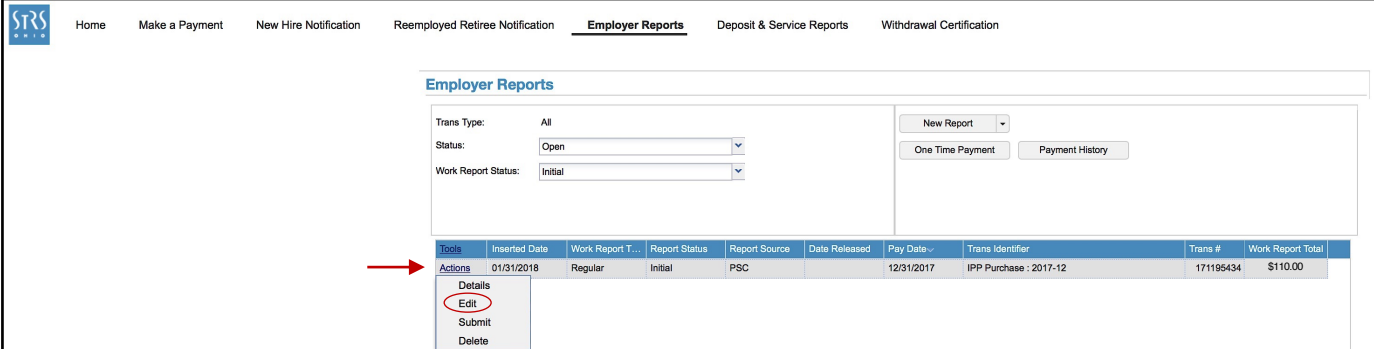
### Step 1

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.



The screenshot shows the 'Employer Reports' page in the ESS system. The page has a navigation bar with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, and Withdrawal Certification. Below the navigation bar is the 'Employer Reports' section, which includes a form for creating a new report with fields for Trans Type (All), Status (Open), and Work Report Status (Initial). There are also buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table with the following columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row with the following data: Actions, 01/31/2018, Regular, Initial, PSC, 12/31/2017, IPP Purchase : 2017-12, 171195434, \$110.00. A red arrow points to the 'Actions' column, and the 'Edit' option in the dropdown menu is circled in red.

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

### Step 3

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

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

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

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

**Work Report Editor**

Save Apply Cancel

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

Summary Detail

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

Add Member Delete Selected

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

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

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

## Step 4

To add a member to a PSC report:

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

Go to Step 5.

The screenshot shows the 'Work Report Editor' interface. At the top, there are buttons for 'Save', 'Apply', and 'Cancel'. Below this is a summary section with fields for Employer (9599 OHIO LOCAL SCHOOLS), Billing Location (OHIO LOCAL SCHOOLS), Report Source (PSC), Date Released (08/15/2017), User Released, Report Period (08/01/2017 - 08/31/2017), Report Status (Initial), Identifier (#23751165), Pay Date (08/31/2017), Transf# (#23751165), # of Participants (15), # of Rows (15), Billing Type (Contribution), and Agreement (Purchase Service). Below the summary is a table with columns: Tools, Actions, SSN, Participant Name, Report Stop Date, Report Type, Record Status, PSC Expected Amount, PSC Actual Amount, PSC Code, Tax Election, Final Pay Amount, Last Payment Amount, Retirement date, Last Payment Month, Final Payment Month, and Category Name. The table contains three rows of data for participants FREEMAN, A and WOLF, B. Red arrows point to specific fields: arrow 1 points to the 'Add Member' button, arrow 2 points to the SSN field, arrow 3 points to the PSC Actual Amount field, arrow 4 points to the PSC Code field, and arrow 5 points to the Tax Election field.

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

## Step 5

### Submit the PSC report.

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

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

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

To submit the report:

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

The screenshot shows the STS Employer Reports page. At the top, there is a navigation bar with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation bar is the 'Employer Reports' section. It contains a form with the following fields: Trans Type: All, Status: Open, Work Report Status: Initial, and a 'Tip!' icon. There are also buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table with the following columns: Tools, Inserted Date, Work Report T., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row with the following data: Actions, 08/15/2017, Regular, Initial, PSC, 08/31/2017, Work Report: Aug-2017, 169318994, \$111.00. A red arrow points to the 'Actions' cell. A dropdown menu is open over the 'Actions' cell, showing options: Details, Edit, **Submit**, and Delete. A 'Confirm' dialog box is displayed over the table, asking 'Are you sure you want to submit this work report?' with 'Yes' and 'No' buttons. The 'Yes' button is selected. An 'Info' dialog box is also displayed, showing 'The selected work report was submitted successfully.' with an 'OK' button.

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