

## Section 20

# Additional Tools

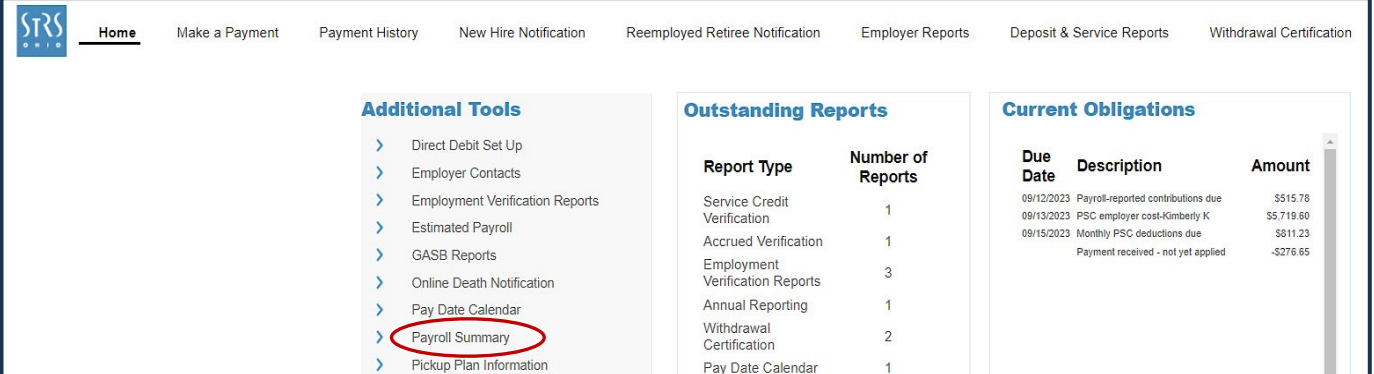
The following instructions explain how to generate a payroll report summary, review employer contact information, access GASB reports and submit an estimated annual payroll in ESS.

## Payroll Report Summary

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

### Step 1

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



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

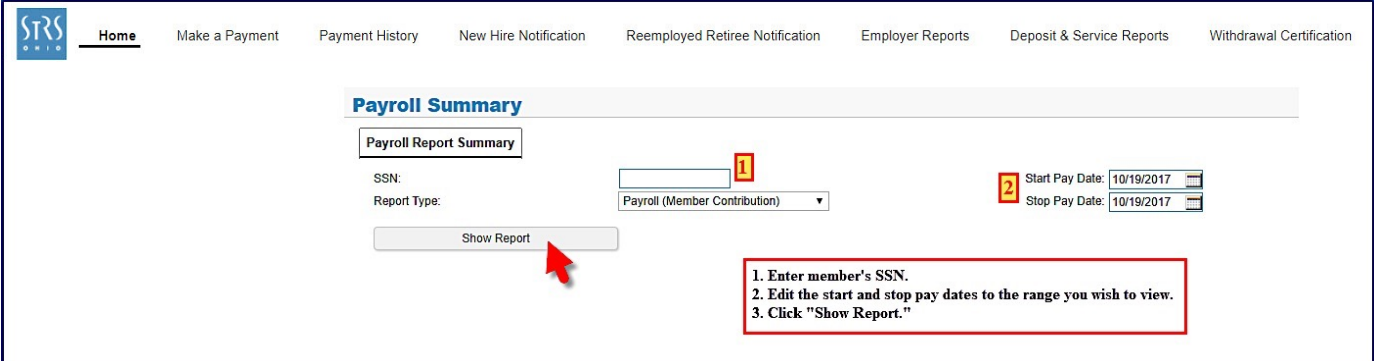
Report Type	Number of Reports
Service Credit Verification	1
Accrued Verification	1
Employment Verification Reports	3
Annual Reporting	1
Withdrawal Certification	2
Pay Date Calendar	1

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

### Step 2

On the Payroll Summary screen:

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



The screenshot shows the Payroll Summary screen with a form for generating a report. The form includes a 'Payroll Report Summary' section with an 'SSN:' field (marked with a red '1'), a 'Report Type:' dropdown menu (set to 'Payroll (Member Contribution)'), and 'Start Pay Date:' and 'Stop Pay Date:' fields (both set to '10/19/2017' and marked with a red '2'). A 'Show Report' button is at the bottom, with a red arrow pointing to it. A red box at the bottom right contains the following instructions: '1. Enter member's SSN.', '2. Edit the start and stop pay dates to the range you wish to view.', and '3. Click "Show Report."'

### Step 3

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

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

### Payroll Summary

**Payroll Report Summary**

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

Show Report [Export](#)

**Print**

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

#### 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
		<b>8,420.93</b>	

# 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.

The screenshot shows the STRS Ohio home page with a navigation bar at the top containing links for Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. Below the navigation bar, there are three main sections: 'Additional Tools', 'Outstanding Reports', and 'Current Obligations'. In the 'Additional Tools' section, the 'Employer Contacts' link is circled in red. The 'Outstanding Reports' section shows a table with columns for Report Type and Number of Reports. The 'Current Obligations' section shows a table with columns for Due Date, Description, and Amount.

The screenshot shows the 'Contacts' page on the STRS Ohio website. It features a table with columns for Tools, Name, Contact Type, Phone, Primary Email, and Address. The table lists several contacts, including John Smith, Amanda Jones, and Kayla Roberts, with their respective contact types and information. To the right of the table, there is a 'Help' link circled in red. Below the 'Help' link, there is a text box explaining the importance of keeping contact information up-to-date and providing a link to the Request Access form, which is also circled in red and has a red arrow pointing to it.

Tools	Name	Contact Type	Phone	Primary Email	Address
	JOHN SMITH	Web Installment Purcha...	B: (513) 555-1234	SmithJ@myschool.com	100 Joyous Lane Sunshine, OH 45678
	AMANDA JONES	ESS User	B: (513) 555-4321	JonesA@myschool.com	
	JOHN SMITH	Web Service Credit Veri...	B: (513) 555-1234	SmithJ@myschool.com	100 Joyous Lane Sunshine, OH 45678
	KAYLA ROBERTS	Web Service Credit Veri...	B: (513) 555-9876	RobertsK@myschool.com	100 Joyous Lane Sunshine, OH 45678
	KAYLA ROBERTS	Web Employer Reportin...	B: (513) 555-9876	RobertsK@myschool.com	100 Joyous Lane Sunshine, OH 45678
	KAYLA ROBERTS	Main Contact	B: (513) 555-9876	RobertsK@myschool.com	100 Joyous Lane Sunshine, OH 45678

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

## Add or Modify Contacts

### Step 1

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

### Step 2

The Request Access screen will appear. Select an option:

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

### Step 3

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

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

The screenshot shows the STS Home page with a navigation bar at the top containing links for Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three columns: 'Additional Tools', 'Outstanding Reports', and 'Current Obligations'. The 'Additional Tools' menu is highlighted, and the 'Request Access' option is circled in red. The 'Outstanding Reports' table lists various report types and their counts. The 'Current Obligations' table shows due dates, descriptions, and amounts for various contributions and deductions.

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

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

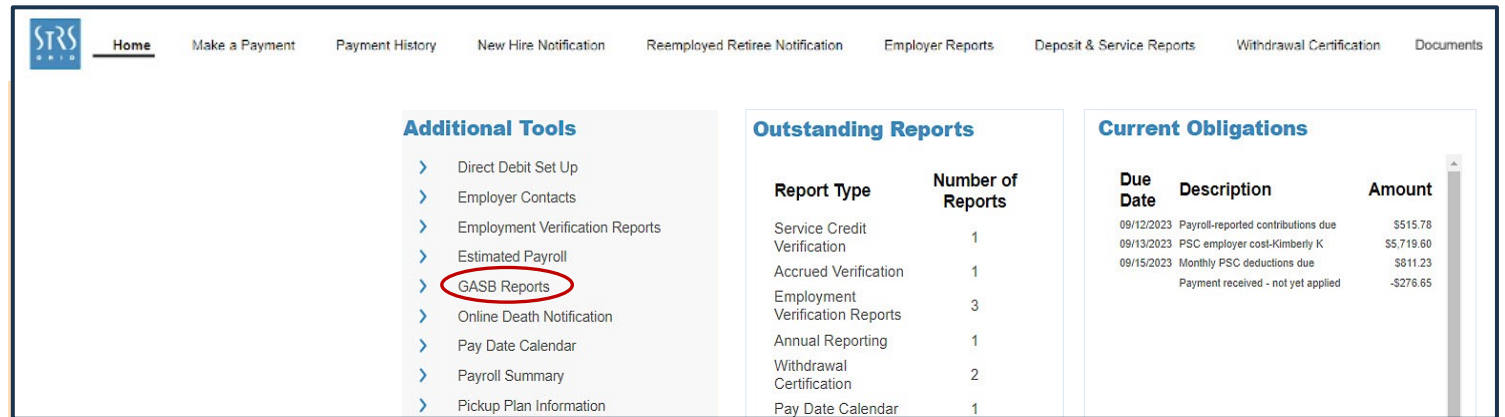
- > Add new contact and register for access
- > Add or modify access for existing contact

# GASB Reports

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

## Step 1

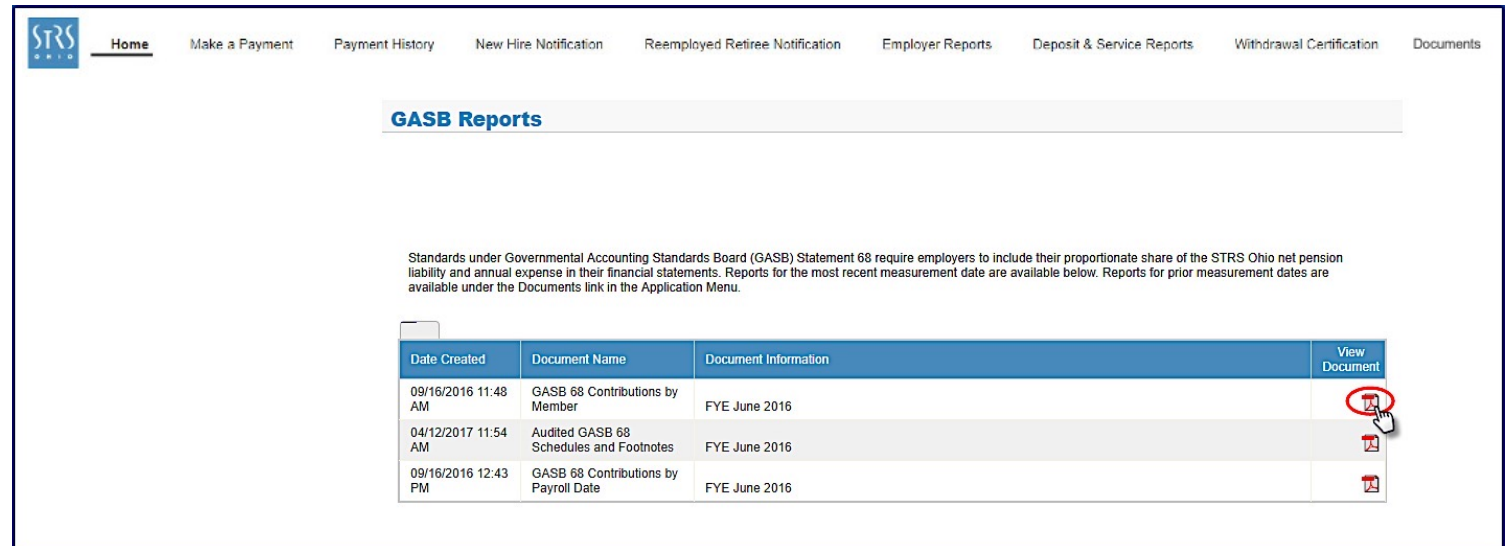
To access GASB Reports on the home page, click on “GASB Reports” in the Additional Tools menu.



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

## Step 2

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

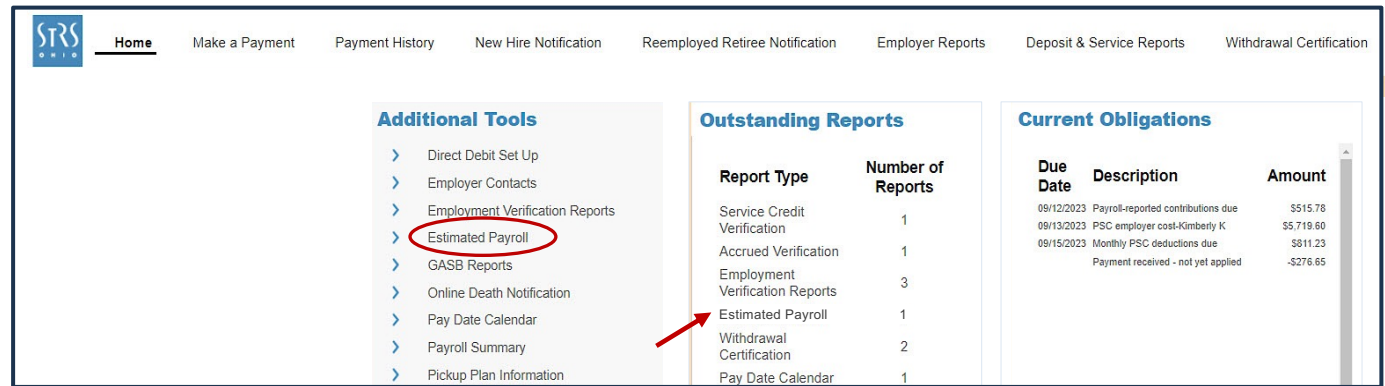


# Estimated Annual Payroll

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

## Step 1

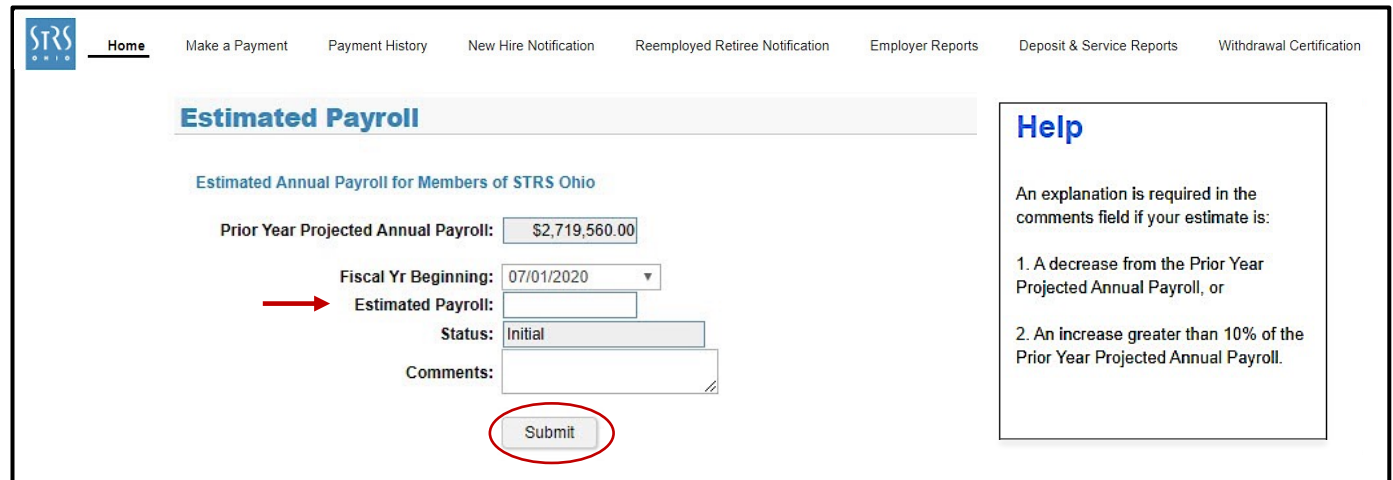
To access the report from the home page, click on "Estimated Payroll" in the Additional Tools menu or the Outstanding Reports section.



## Step 2

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

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



**Tip!** If you need to correct the report after you submit it, email [report@strsoh.org](mailto:report@strsoh.org). Corrections cannot be made in ESS.

# Pickup Plan Information

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

## Step 1

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

## Step 2

Your pickup plan information will appear.

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

The screenshot shows the STRS Ohio ESS Home page. The navigation bar includes links for Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three sections: Additional Tools, Outstanding Reports, and Current Obligations. The 'Additional Tools' menu is expanded, and 'Pickup Plan Information' is highlighted with a red circle. The 'Outstanding Reports' section displays a table with columns for Report Type and Number of Reports. The 'Current Obligations' section displays a table with columns for Due Date, Description, and Amount.

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

## Online Death Notification

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

### Step 1

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

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

### Online Death Notification

**Online Death Notification**

Step 1 Step 2 Step 3 Complete

Please enter the information below.

#### Deceased Member/Recipient's Information

\* Indicates required field

Name:     
\*First name Middle initial \*Last name

\*Date of birth:    
MM/DD/YYYY

\*STRS Ohio ID or Last 4 of SSN:   
Choose one

\*ZIP code:

\*Date of death:    
MM/DD/YYYY

CANCEL NEXT



## Step 2 and Step 3

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

### Online Death Notification

ESS Online Death Notification Front Page | ESS Online Death Notification

#### Online Death Notification

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

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

Surviving spouse name:  
  
First and last name

Surviving child(ren) name(s):  
  
First and last name - separate multiple names by comma

Surviving parent(s) name(s):  
  
First and last name - separate multiple names by comma

County of death:  State of death:

Country of death (if outside US):

### Online Death Notification

ESS Online Death Notification Front Page | ESS Online Death Notification

#### Online Death Notification

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

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

#### Contact's Information

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

Name:  
   
First name Last name

Relationship:

#### Address

Street:

City:  State:  ZIP code:

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

## Complete

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