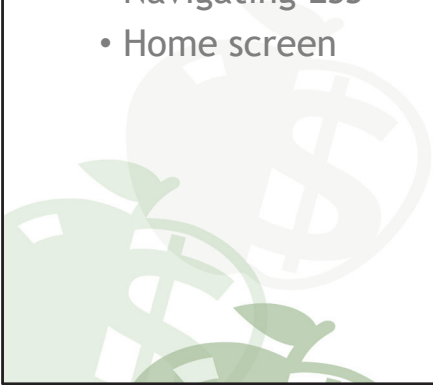


Hello and welcome to STRS Ohio's *Employer Self Service (ESS) Training: Part 1*. My name is Patty Gordon, and joining me is Todd Wolford. Todd will be available to answer your questions during today's webinar.

## Getting Started

- Logging in
- Password requirements
- Navigating ESS
- Home screen



[Go to demo]

- Each user should have his or her own account.
- Show where to log in from employer website home page.
- Password is case sensitive — Must be at least 8 characters and include a special character and a number.
- Show navigation on the home page — Banner menu, Outstanding Reports, Additional Tools and Current Obligations.
- DO NOT use the back button.
- User profile — Explain how to change password and security questions after initial login.

## Navigating Employer Reports

- Work report status
- Sorting
- Filtering
- Editing
- Printing



[Demo]

- Use the banner menu to go to Employer Reports or click on the report in the Outstanding Reports section.
- Sorting — Switch to “All” then sort by inserted date.
- Work Report Status — Initial, Submitted, Complete.
- Report Source — Turn on filter to only see specific reports; clear when done.
- Printing — Click on “Actions” in the Tools column for the report you want to print. Select “Edit” from the drop-down menu. Click on the Tools column heading. Select “Reports” from the drop-down menu. Click “View Work Report.” Then click “Print.”

## New Hire Notifications

- Submit for employees working in an STRS Ohio-covered position
- Due within 10 business days of the educator's first day worked
- Why needed for new members and existing members
- Send via secure file upload or enter in ESS
- SSA-1945 form



[Show screens]

- Submit for employees working in an STRS Ohio-covered position.
- Due within 10 business days of the educator's first day worked.
- Why this is needed for new members and existing members:
  - New members have 180 days from their first date on payroll to select their retirement plan (Defined Benefit, Defined Contribution or Combined Plan)
  - Existing members need to be linked to your school when you submit contributions.
- Send via secure file upload or enter in ESS; state foundation employers can send a file.
- Submit an SSA-1945 form for each new hire.

## Reemployed Retiree Notifications

- Reemployed retirees are individuals who retired from one of the six Ohio pension systems and are returning to public employment
- First date of service after retirement = first date working in your school after their retirement effective date
- Additional requirements – public notice and public meeting

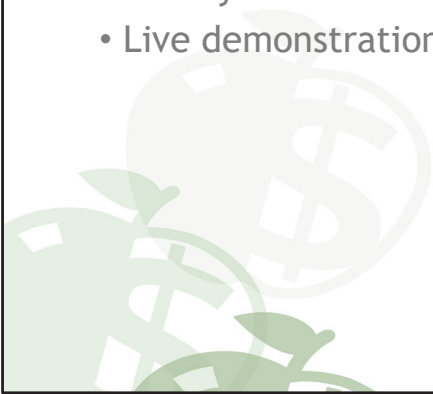


[Show screens]

- Reemployed retirees are individuals who retired from one of the six Ohio pension systems and are returning to public employment (STRS Ohio, SERS, OPERS, OP&F, OHP and Cincinnati Retirement System)
- First date of service after retirement equals first date working in your school after their retirement effective date.
- Additional requirements include a public notice (at least 60 days prior to employment) and a public meeting (between 15 and 30 days prior to employment).

## Service Credit Verification Reports

- Generated for part-time employees after annual report is submitted
- Due by last Thursday in August
- Live demonstration



[Demo]

- Generated for members whose service credit and contributions seem suspect.
- Only need to enter days or percentage of full-time equivalent (FTE) and indicate if the employee is full time or part time.
- The report can be saved with blank lines but can't be submitted until the required information is entered.
- Reports are due as soon as possible or by the last Thursday in August at the latest.

## Accrued Verification Report

- Generated mid-September for any member whose accrued contributions in the annual report do not match accrued contributions in July and August payroll reports
- If you do not receive this report, great job!
- Due within two weeks of receipt (before end of September)
- Live demonstration



### [Demo]

- After STRS Ohio processes your annual report and has received your summer payrolls for July and August, the accrued verification report is generated. This usually occurs around Sept. 15.
- Members will appear on the report if the amount of accrued contributions reported on the annual report do not match amounts received and marked as accrued in summer payrolls.
- Not everyone will receive a report. If you don't receive it, it means everything matched.
- Due by end of September.
- For each member listed, compare the amount listed in the Accrued Payroll column and the Annual Report Accrued Amount column. Choose which amount is correct in the Verification Indicator column.

## Retirement Reporting – Deposit and Service Reports

- Timing
- Tabs – reports to be completed, available for updates, submitted reports



[Show screens]

- Generated 60 days prior to retirement effective date if STRS Ohio has received the member's retirement application.
- If we receive the retirement application less than 60 days before the retirement effective date, the report will be generated once the application is received and entered in our system.
- Reports are due within two weeks after the retirement effective date.
- Walk through the tabs:
  - Reports To Be Completed: Deposit and service reports to be completed
  - Available for Updates: Use only if updating or changing information previously submitted
  - Submitted Reports: View and print information submitted on the deposit and service report



## Available Resources

- Visit our website: [www.strsoh.org/employer](http://www.strsoh.org/employer)
  - ESS instructions and tutorials
  - Recorded webinars
- Call us: 888-535-4050 (toll-free)
- Email us: [report@strsoh.org](mailto:report@strsoh.org)
- Join us: Part 2 on July 11



ESS instructions, tutorial videos and recorded webinars are available on our website at [www.strsoh.org/employer](http://www.strsoh.org/employer). We are also offering *ESS Training: Part 2* on July 11. Please join us.

If you have questions, please call us toll-free at 888-535-4050 or email [report@strsoh.org](mailto:report@strsoh.org).

## Thank You!

- Additional questions?
- Certificates of completion
- Please complete the evaluation after exiting the webinar



- We will stay on the line to address any further questions.
- Certificates of completion will be emailed within two weeks of today.
- An evaluation will pop up as you exit the webinar. Please take a moment to give us your feedback.