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Employer Self Service (ESS) Training: Part 2

50-406d, 5/23/0

Hello and welcome to STRS Ohio's *Employer Self Service (ESS) Training: Part 2.* My name is Todd Wolford, and joining me is Patty Gordon. Patty will be available to answer your questions during today's webinar.

Withdrawal Certifications

- Two types — member and reemployed retiree
- Tabs — reports to be completed, available for updates, submitted certifications
- Live demonstration

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[Demo]

- Two types of withdrawal certifications — member and reemployed retiree

- Walk through the tabs:

    — Reports To Be Completed: New certifications to complete

    — Available for Updates: Certifications in need of correction; provided by STRS Ohio

    — Submitted Certifications: All submitted certifications available for viewing or printing

- If you indicate the member is still working, it will cancel the member's withdrawal application.

- Enter the required information

- See contributions reported by clicking on current reported payrolls

- For colleges and universities — Indicate if the member is contributing to an ARP and select the ARP provider name

Pay Date Calendar

- Available in ESS in early April
- Due by first Friday in June
- Live demonstration

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[Demo]

- Email sent in early April when your pay date calendar is available to complete in ESS.

- Due by first Friday in June.

- Dates may be prepopulated based on current year pay dates.

- Verify dates are correct.

- Add or change any dates.

- Format – Must be MM/DD/YYYY.

- Explain Save, Reset and Submit buttons.

- Explain print option.

- Submitted calendars are saved in the Documents section of ESS.

- If changes are needed after you submit your calendar, contact your STRS Ohio payroll representative.

Employment Verification Report

- 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
- Employers are notified in early December if reports need to be completed
- Due by Dec. 31
- Live demonstration

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[Demo]

- Sent for any member age 73 who is not actively employed in an STRS Ohio-covered position.

- IRS requires them to take a minimum distribution.

- Available in ESS in early December; due by Dec. 31.

- Indicate if the member is still working.

- If the member is no longer working, provide the additional information requested.

- Click "Save & Submit."

Violation Period Certification

- Generated for members who return to public employment within the first two months following their retirement effective date
- Report earnings for months requested
- Members in violation of the two-month waiting period forfeit retirement benefits for any month of violation

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[Show screens]

- Generated for members who return to public employment within the first two months following their retirement effective date.

- Report earnings for the months requested.

- Members in violation of the two-month waiting period forfeit retirement benefits for any month of violation.

Additional Tools

Payroll Report Summary

• Use July 1 as beginning date of fiscal year

• Interpreting the report

• Live demonstration

Employer Contacts

• Check periodically for accuracy

• Click on "Request Access" in the Additional Tools menu
  to add or modify contacts

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Payroll Report Summary — Use the summary to see contributions over a time period.

• Use fiscal year start and end dates.

• The summary shows contributions by pay and contributions marked as accrued.

• You will need to add or subtract accrued amounts for the fiscal year as needed.

[Show screens]

Employer Contacts — Check periodically to ensure your contacts are accurate.

• 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.

• Each person can have multiple designations.

Additional Tools

GASB Reports
• Who may need the reports (auditors)
• Where to access the reports

Estimated Payroll
• Only for employers participating in state foundation program
• Timing
• What information to provide

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[Show screens]

GASB Reports

- Available in September and early April.

- Auditors may request these reports.

Estimated Payroll

- Only for state foundation employers (city, local, exempted village and community schools)

- Requested in early April; due by end of April.

- Projected amount of your current year payroll is given.

- Indicate upcoming fiscal year estimated payroll for STRS Ohio-covered positions.

- Explanation required for a decrease from the prior year or increase greater than 10% from the prior year.

Additional Tools

Pickup Plan Information

- Review current pickup plans for accuracy
- Notify STRS Ohio if updates are needed

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Pickup Plan Information — Review your current pickup plan information for accuracy and notify STRS Ohio if updates are needed.

Additional Tools

Accessing Pickup Plan Information

Additional Tools

> 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
> Violation Period Certification

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

Additional Tools

Reviewing Pickup Plan Information

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

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- Be sure to check the:

    — Employee groups covered;

    — Plan type;

    — Percentage being picked up; and

    — Effective date.

- If the pickup percentage is less than the current 14% member contribution rate and/or the effective date is not July 1, 2016, or later, new plan documentation is needed.

- If any information is not accurate, notify us by sending new plan documentation.

- Some employers may notice that in place of a specific percentage, "multiple plans" are listed. This occurs if the plan type or percentage varies within an employee group.

Online Death Notification

- Report death of a member in ESS
- Provide all required information before submitting
- Live demonstration

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[Demo]

- Employers can report the death of a member in ESS.

- To do this, click on "Online Death Notification" in the Additional Tools menu on the home page.

- Provide all required information in Step 1. Then complete Steps 2 and 3 before submitting.

- Once this information is received, STRS Ohio will contact the member's family for further documentation.

Direct Debit Payment

Setting Up Direct Debit
• Treasurer and main contact have access
• Timing of approval
• Live demonstration

Making Payments
• Timing of payments
• Two options — transactions or fixed amount

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[Demo]

Setting Up Payments for Direct Debit

• Only treasurer and main contact have access to set up direct debit.

• To request access for someone else, have the treasurer email STRS Ohio.

• Takes two to three business days for the account to be approved.

• Supply basic information — Account number, routing number and draw limit.

• Authorization agreement — Only one chance to print and add additional individuals who should have access to make payments.

Making Direct Debit Payments

• Payments takes two business days to process.

• Two options to pay — We suggest "Specify fixed amount to pay."

• Show payment history and discuss changes.

Available Resources

- Visit our website: www.strsoh.org/employer
  - ESS instructions and tutorials
  - Recorded webinars
- Call us: 888-535-4050 (toll-free)
- Email us: report@strsoh.org

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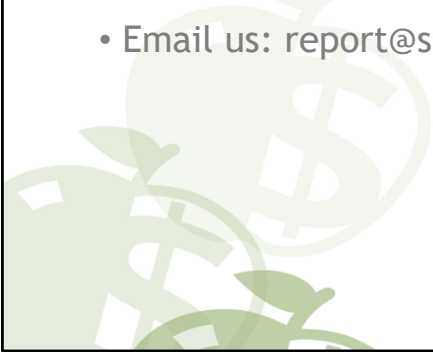
ESS instructions, tutorial videos and recorded webinars are available on our website at www.strsoh.org/employer.

If you have questions, please call us toll-free at 888-535-4050 or email report@strsoh.org.

Thank You!

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

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- 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.