

2024 eSERS Guide

ANNUAL PROCESSES



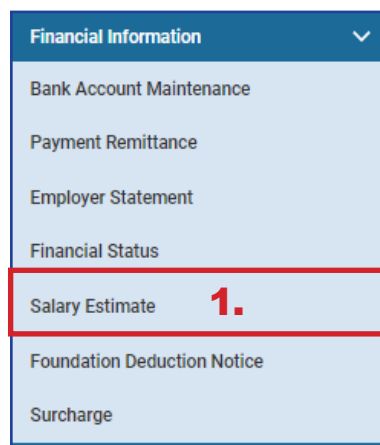
School Employees Retirement System of Ohio
Serving the People Who Serve Our Schools®

Enter New Salary Estimate

Foundation Participating Districts Only

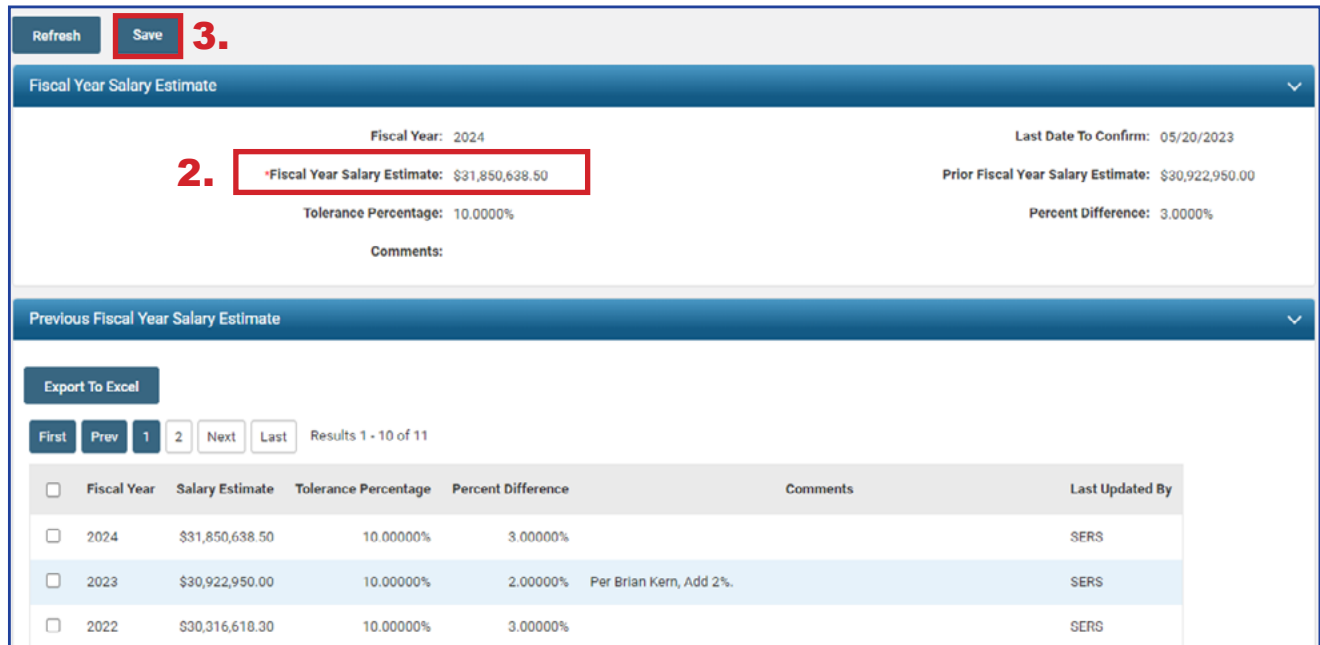
You will receive a message on your message board notifying you when the predetermined window is open to enter your salary estimate information for the upcoming fiscal year. You can update salary estimate information by selecting the Salary Estimate menu option under the Financial Information section of the main menu. The screen will appear as below with fields to enter the required information. Once that predetermined window is closed, you will only have the option to export information to Excel; there will be no editable fields.

If you need to update your salary estimate later in the year, email Employer Services at employerservices@ohsers.org with what the salary estimate should have been for the entire fiscal year.



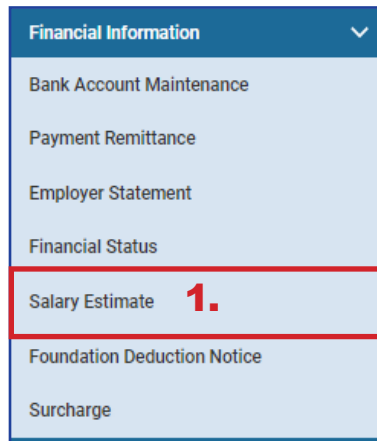
Steps:

1. Click **Salary Estimate**.
2. Enter the **Fiscal Year Salary Estimate for the Fiscal Year** displayed.
3. Click **Save**.
 - You will not see the new salary estimate in the “Previous Fiscal Year Salary Estimate” panel until the predetermined window to submit Salary Estimates has closed.



View Salary Estimate

You can view salary estimate records by going to the Salary Estimate menu item.

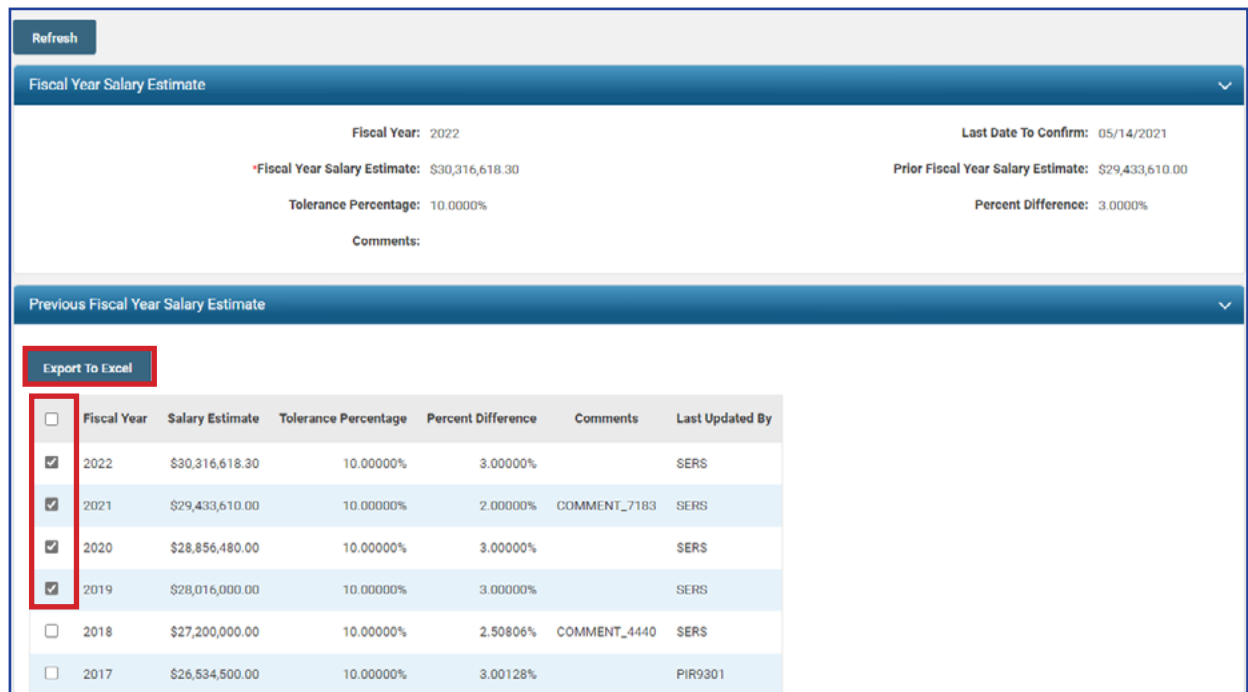


Financial Information

- Bank Account Maintenance
- Payment Remittance
- Employer Statement
- Financial Status
- Salary Estimate 1.**
- Foundation Deduction Notice
- Surcharge

Steps:

1. Select the **Salary Estimate** menu item.
2. View Estimates and/or export records to Excel by clicking **Export To Excel**.



Refresh

Fiscal Year Salary Estimate

Fiscal Year: 2022
Fiscal Year Salary Estimate: \$30,316,618.30
Tolerance Percentage: 10.0000%
Comments:

Last Date To Confirm: 05/14/2021
Prior Fiscal Year Salary Estimate: \$29,433,610.00
Percent Difference: 3.0000%

Previous Fiscal Year Salary Estimate

Export To Excel

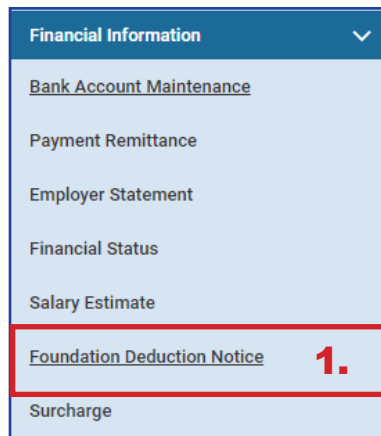
<input type="checkbox"/>	Fiscal Year	Salary Estimate	Tolerance Percentage	Percent Difference	Comments	Last Updated By
<input checked="" type="checkbox"/>	2022	\$30,316,618.30	10.00000%	3.00000%		SERS
<input checked="" type="checkbox"/>	2021	\$29,433,610.00	10.00000%	2.00000%	COMMENT_7183	SERS
<input checked="" type="checkbox"/>	2020	\$28,856,480.00	10.00000%	3.00000%		SERS
<input checked="" type="checkbox"/>	2019	\$28,016,000.00	10.00000%	3.00000%		SERS
<input type="checkbox"/>	2018	\$27,200,000.00	10.00000%	2.50806%	COMMENT_4440	SERS
<input type="checkbox"/>	2017	\$26,534,500.00	10.00000%	3.00128%		PIR9301

2.

View Foundation Deduction Notice

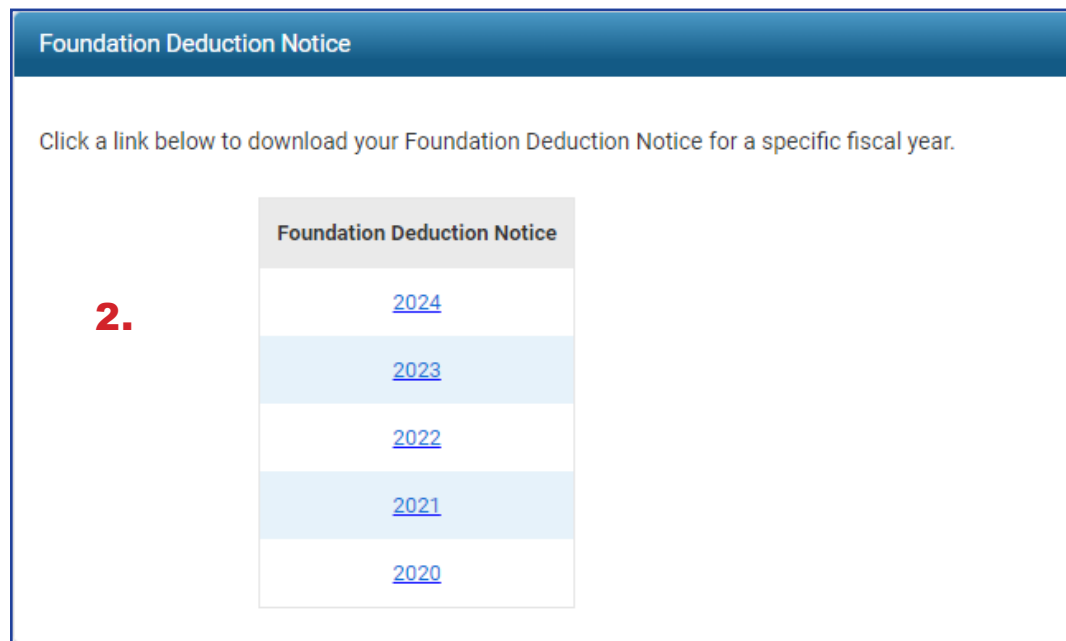
Foundation Participating Districts Only

You will receive a message on your message board notifying you when the Foundation Deduction Notice is available to view.



Steps:

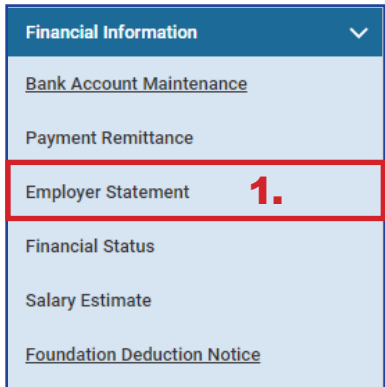
1. Click **Foundation Deduction Notice**.
2. On the Foundation Deduction Notice screen, select the Notice you wish to download by clicking on the hyperlinked year.
3. Download the Foundation Deduction letter to view.



View Employer Statement

You will receive a message on your message board notifying you when the employer statement is available to view.

You also can view employer statements by fiscal year by selecting the Employer Statement menu option.



Steps:

1. Click **Employer Statement**.
2. On the Employer Statement Maintenance screen, select the Employer Statement you wish to download by clicking on the hyperlinked year.
3. Download the Statement to view and/or print.



View Surcharge Information

Financial Information ▾

- Bank Account Maintenance
- Payment Remittance
- Employer Statement
- Financial Status
- Salary Estimate
- Foundation Deduction Notice
- Surcharge**

You will receive a message on your message board notifying you when surcharge information is available to view.

You can view the surcharge information by selecting the Surcharge menu option under the Financial Information section of the main menu.

Any exemptions to the Surcharge Report are to be emailed to employerservices@ohsers.org during the predetermined window.

Surcharge Year ▾

Select a specific fiscal year and click View Surcharge Details.

Surcharge Year: 2022 ▾

View Surcharge Details

Surcharge Information ▾

Fiscal Year: 2022 Date Created: 08/15/2022

Proration Days: 180 Surcharge Base Salary: \$25,000.00

Raw Surcharge Calculation: \$490,926.04

2% of Member Payroll: \$2,314,364.28

Adjusted For Statewide Limit: \$456,117.32

Surcharge To Be Paid: \$456,117.32

Click the Download Surcharge Invoice button to download the surcharge invoice for the fiscal year.

View Surcharge Invoice

To view details by year, select the specific year in the drop-down, and click **View Surcharge Details**.

View the surcharge invoice for that year by clicking **View Surcharge Invoice**.

Calculation Detail for Included Members ▾

Export to Excel

SSN: **Filter**

First Prev 1 2 3 ... 58 59 Next Last Results 1 - 10 of 585

<input type="checkbox"/>	Member Name	SSN	Earnings	Base - Earnings Difference	Gross Surcharge	Days Worked	Proration Factor	Net Surcharge
<input type="checkbox"/>	Sanders, Maureen		\$228.80	\$24,771.20	\$3,467.97	2	0.011	\$38.15
<input type="checkbox"/>	Harris, Ayanna		\$5,289.40	\$19,710.60	\$2,759.48	51	0.283	\$780.93
<input type="checkbox"/>	Love, Sophia		\$79.60	\$24,920.40	\$3,488.86	1	0.006	\$20.93

To print a report of all records, check the box next to the Member Name header, and click **Export to Excel**.



To view details for a specific member, enter the member's SSN, and click **Filter**. To go back to the Calculation Detail for Included Members panel, click View Surcharge Details for the correct fiscal year.