



# 2024 eSERS Guide

# **ADDITIONAL SUBMISSIONS**



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

# Pick-up Plan Submission

Organization Information

- Employer Demographics
- Contacts / Web User Maintenance
- Contractor Maintenance
- Payroll Schedule Entry
- Pickup Plan 1.**
- ERI Plan
- SSA-1945 Upload

You can submit a Pick-up Plan in eSERS by going to the Pick-up Plan menu option under the Organization Information menu.

### Steps:

1. Click **Pickup Plan**.
2. On the Pickup Plan Maintenance screen, click **New Pickup Plan**.

Pickup Plan Information

Following are the submitted pickup plans. To submit a new pickup plan, click the Pickup Plan button.

**New Pickup Plan 2.**

<input type="checkbox"/>	Pickup ID	Employee Group	Tax Deferred Percentage	Board Paid Percentage	Effective Date	End Date	Pickup On Pickup	Status
<input type="checkbox"/>	<a href="#">6781</a>		0	0	07/01/1989		N	Approved
<input type="checkbox"/>	<a href="#">7474</a>	Classified Employees (Except Administrators)	10.00	0	07/01/2003		N	Approved
<input type="checkbox"/>	<a href="#">7475</a>	Administrators	2.00	8.00	07/01/2003		N	Approved
<input type="checkbox"/>	<a href="#">7476</a>	Treasurer	0	10.00	07/01/2003		Y	Approved

3. Enter the following information:
  - Effective Date (cannot be retroactive)
  - Employee Group
4. Attach Board Resolution (click **Browse** to open file explorer window)
5. Click **Upload & Submit**.

**5.** Upload & Submit Refresh

Pickup Plan Details

**3.** Pickup ID: Status: Effective Date: [ ] End Date: Employee Group: Pickup on Pickup: [ ] Tax Deferred Percentage: 0.00% Board Paid Percentage: 0.00%

**4.** Upload Board Resolution: Choose File Clear

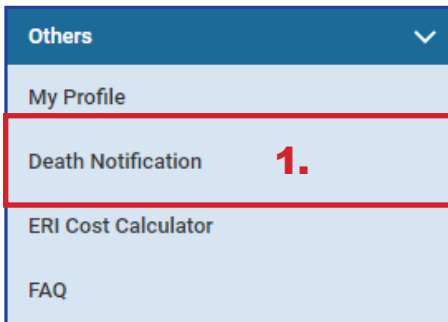
Upload the Board Resolution in PDF file format



**Tip:** The Tax Deferred Percentage and Board Paid Percentage must equal 10%.

# Submit a Death Notification

You can submit a new Death Notification by selecting the Death Notification menu option under the Others section of the main menu.



## Steps:

1. Click the **Death Notification** menu item.
2. Click **New Death Notification**.



The system displays the Death Notification Maintenance screen.

3. **Enter:**

- SSN
- Date of Death
- Last and First Names
- Next of Kin information, if available

4. At the top of this screen, click **Submit**.

4.

Submit Refresh

Death Notification

3.

Death Notification :

\* SSN :

\* Date Of Death :

\* Last Name :

\* First Name :

Middle Initial :

Name Prefix :

Name Suffix :

Next Of Kin

Last Name :

First Name :

Middle Initial :

Name Prefix :

Name Suffix :

Relationship To Member :

Phone Number :

Address :

City :

State :

Zip Code :

**After you submit a death notification, the following things happen:**

- If the deceased member was receiving benefits, those benefits will immediately stop until further action can be taken.
- A SERS employee is notified of the death and is assigned to process any benefits payable from the member's account.
- As the employer, you have 90 days (from date of death) to submit any final contributions for the member.

# Submitting an ERI Plan

You can create and submit an ERI Plan in eSERS by going to the ERI Plan menu item under the Organization Information menu.

## Steps:

1. Click **ERI Plan**.
2. On the ERI Plan Maintenance screen, click **New ERI Plan**.

The screenshot shows two parts of the eSERS interface. On the left is a navigation menu under 'Organization Information' with a dropdown arrow. The menu items are: Employer Demographics, Contacts / Web User Maintenance, Contractor Maintenance, Payroll Schedule Entry, Pickup Plan, **ERI Plan** (highlighted with a red box and a red '1.'), and SSA-1945 Upload. On the right is the 'ERI Plan Information' screen. It has a blue header and contains the text: 'Following are the submitted ERI plans. To submit a new ERI plan, click the New ERI Plan button.' Below this text is a red button labeled 'New ERI Plan' with a red '2.' next to it. Underneath is a table with columns: ERI Plan ID, Effective Date, End Date, Maximum Service Credit, and Last Available Retirement Date. The table is currently empty, with the text 'No records to display.' centered below it.

3. Enter the following information:
  - Effective Date
  - End Date
  - Maximum Service Credit
  - Last Available Retirement Date
  - Attach the required .pdf file to the record.
4. At the top of this screen, click **Upload & Submit**.
  - Upon clicking Upload & Submit, SERS is notified to review and approved the ERI plan

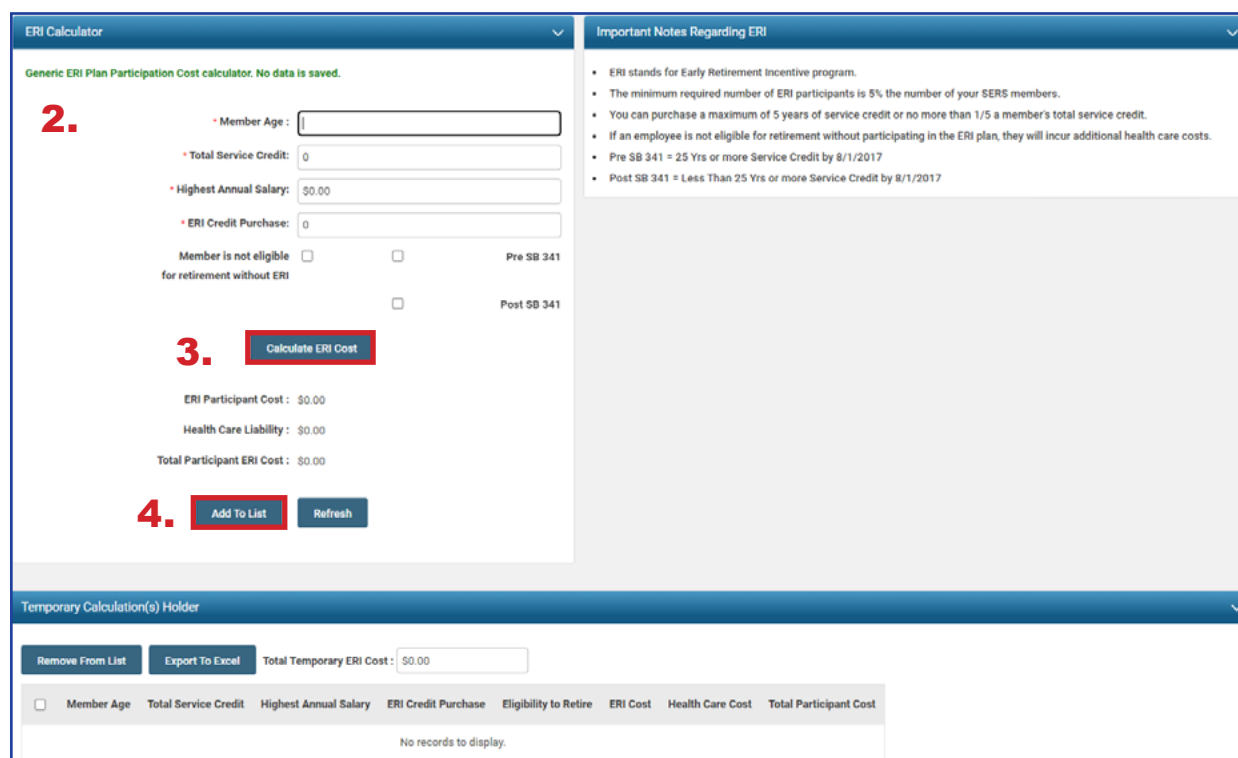
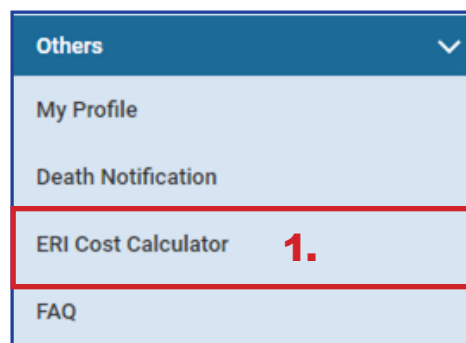
The screenshot shows the 'ERI Plan Details' form. At the top left, there are two buttons: 'Upload & Submit' (highlighted with a red box and a red '4.') and 'Refresh'. The form fields include: 'ERI Plan ID' (text input), 'Effective Date' (calendar picker), 'End Date' (calendar picker), 'Maximum Service Credit' (text input), and 'Last Available Retirement Date' (calendar picker). There is a large text area for 'Comments'. At the bottom, there is a section for 'Upload Board Resolution' with a 'Choose File' button and a 'Clear' button. Below this section, there is a red text instruction: 'Upload the Board Resolution in PDF file format'.

# Calculating an ERI Estimate

You can create an ERI Estimate by selecting the ERI Cost Calculator menu option under the Others section of the main menu.

## Steps:

1. Select the **ERI Cost Calculator** menu item.
2. Enter the following information:
  - Member Age
  - Total Service Credit
  - Highest Annual Salary
  - ERI Credit Purchase
3. Click **Calculate ERI Cost**.
4. Click **Add to List** if you wish to move results to the lower panel.



All calculated results can be exported to Excel by selecting the desired records and clicking **Export to Excel**.