WEB USER MAINTENANCE

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

# Setting Up a NEW eSERS User

Create and Maintain Contact Information

▶ **Attention: This section is specifically for the EWA of your organization.**
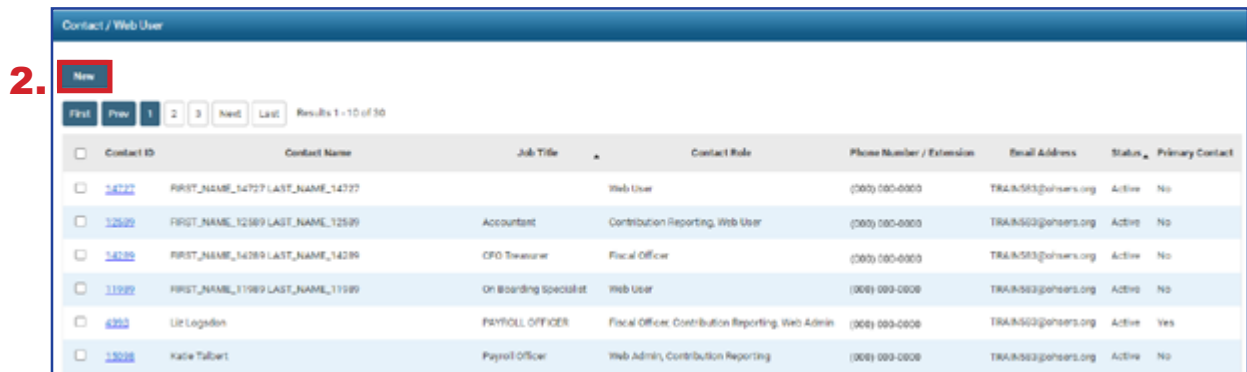
As the EWA, it will be your responsibility to set up other users with access to eSERS as well as unlock accounts. In the next few pages, we will go over how to perform the initial setup of a **new user** and how to update user accounts.

Steps:

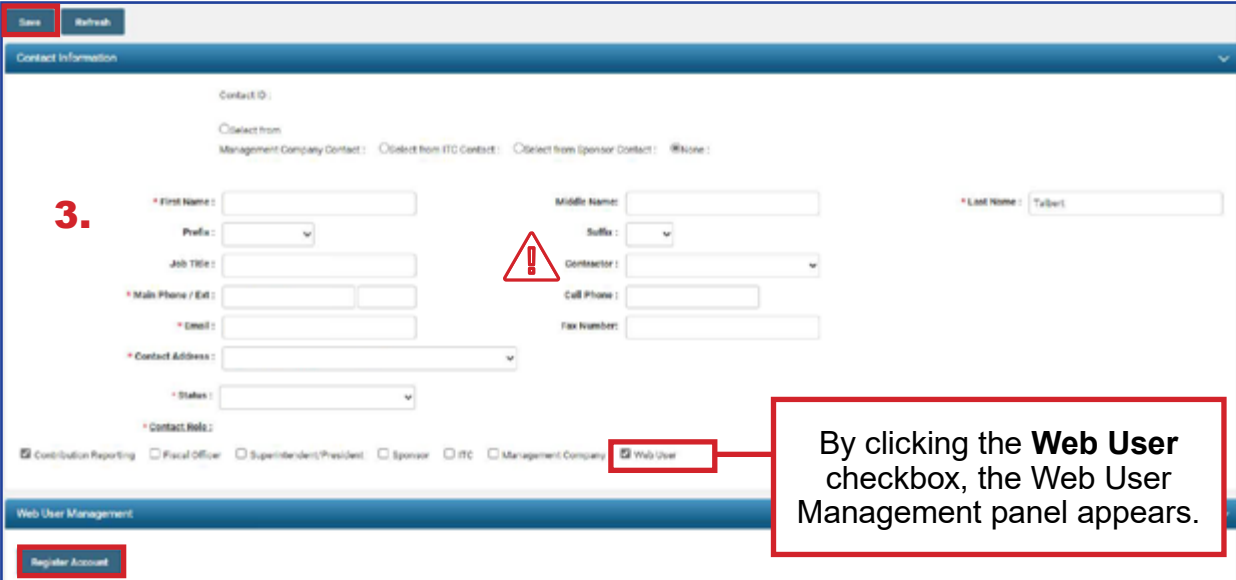1. Select the **Contacts / Web User Maintenance** menu item.

1.

2. Click **New**.

2.
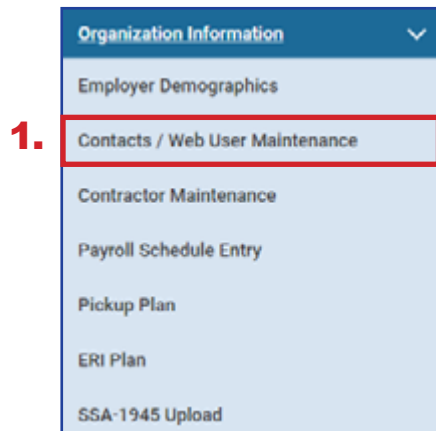
Clicking **New** (in the previous screen) opens the Contact Record Maintenance screen, where you will need to enter required information.

Steps (continued):

3. Enter the required information for the employee.

4. Click **Save**.
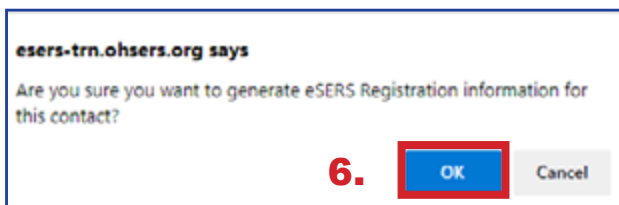
5. Click **Register Account**.

By clicking the **Web User** checkbox, the Web User Management panel appears.

6. Click **OK** on the pop up window.

esers-trn.ohsers.org says

Are you sure you want to generate eSERS Registration information for this contact?

6. [OK] Cancel

⚠️ **Please Note: The contractor drop-down is an important field.** If this contact is a contractor, selecting the contract company will guarantee the appropriate security and access to information, such as bank account information, and submit contribution and enrollment records for that contractor only.

When you register the account for the new web user, you must select the roles to which you would like the web user to have access.

Steps (continued):

7. Check the box next to the role(s) you want assigned to the user. See the definitions for web user and contractor web user roles on the following pages.

8. Click **Add Role** or **Add All Roles**.

9. Click **Save**.

A new grid will now appear on the page, and you will select the security access for the web user from the drop-down box.

Read-Only: The user will be able to view information only.

Full Access: The user will have full access.

Once you have selected the security access for each role, **Save** the information.

An email will be sent to the new web user prompting the new user to go through the registration process. The EWA's part in the registration process is now complete.

Reminder: There may be two pages of roles for the user. If so, you will need to update the security access on the second page, if applicable.
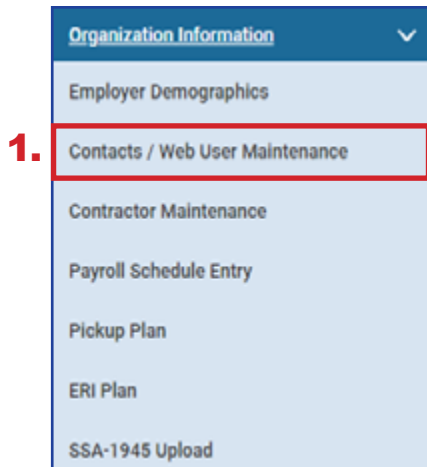
Updating an eSERS User Account

Create and Maintain Contact Information

▶ **Attention: This section is specifically for the EWA of your organization.**

When contact information for an eSERS user in your organization needs updated, follow these steps:

Steps:

1. Select the **Contacts / Web User Maintenance** menu item.

2. Click the hyperlinked **Contact ID** (do not check the box) of the user that needs to be updated.

3. Update or correct the Web User information.

4. To remove a web user, click the drop-down arrow in **Status** box, select **Inactive**, and click **Save**. The user will no longer have access to eSERS.

Unlocking an eSERS User Account
Create and Maintain Contact Information

▶ **Attention: This section is specifically for the EWA of your organization.**

When an eSERS user in your organization needs help unlocking an account, follow these steps:

Steps:

1. Select the **Contacts / Web User Maintenance** menu item.
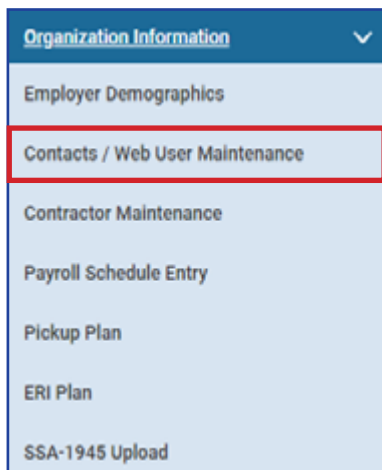
2. Click the hyperlinked **Contact ID** (do not check the box) of the user that has been locked out of the account.

Inactive Web Users:

The system will detect anyone who has not signed into eSERS for 18 months or more, and automatically delete that profile due to inactivity. The user will receive an email when his or her profile is terminated.

In the Web User Management panel, the User Account Status is locked, and a message appears near the bottom stating the account is locked due to the wrong password being entered.

3. Click **Unlock Account** to unlock the web user's account.

The screen will update, and the User Account Status will change to Active User. There will be a message at the bottom of the screen indicating the account was unlocked and a one-time password has been sent, but not yet used.

The user has **24 hours** to use this password before it expires, at which point you would need repeat this process again.

Tip: This screen can be used for more than just unlocking an account. An EWA can update a user's contact information, status, and add or remove contact roles. To do this, the EWA enters the new information, and then clicks **Save**.

Web User Roles by Definition

Enrollment Processor	A web user with this role can manually create enrollment records and upload enrollment files.
Contribution Processor	A web user with this role can manually create contribution records, adjustment records, and upload contribution files. If any employer participates in an ARP plan, this role also has the ability to create and upload ARP records.
Wage Certification Processor	A web user with this role can complete and submit wage certifications generated by SERS.
SCP Payroll Deduction Submission Processor	A web user with this role can submit a payroll deduction for members who currently have a service credit purchase in progress.
Payment Processor	A web user with this role can create and maintain bank information. This role also can create payment remittances and process payments.
Employer Statement Processor	A web user with this role can view the current and previous year's Annual Employer Statements.
Financial Status Processor	A web user with this role can view Financial Status details.
Salary Estimate Processor	A web user with this role can create Annual Salary Estimates and view previous year's estimates.
Foundation Deduction Notice Processor	A web user with this role can view Foundation Deduction Notices.
Surcharge Processor	A web user with this role can view annual surcharge information.
Contractor Processor	A web user with this role can create and maintain contractor information.
Payroll Schedule Entry Processor	A web user with this role can create and maintain payroll schedule information.
Death Notification Processor	A web user with this role can create a death notification.
Employer Information Processor	A web user with this role can create and maintain employer information.
Pickup Plan Processor	A web user with this role can create and submit pickup plans.
ERI Plan Processor	A web user with this role can create and submit ERI plans.
Contact Processor	A web administrator will have this role to create and maintain contact information. A web user may view information only.
SCP Payroll Deduction Plan Processor	A web user with this role can upload and submit a SCP Payroll Deduction plan.
SSA-1945 Upload Processor	A web user with this role can upload SSA-1945 Files.

Contractor Web User Roles

Enrollment Processor	A web user with this role can manually create enrollment records and upload enrollment files.
Contribution Processor	A web user with this role can manually create contribution records, adjustment records, and upload contribution files. If any employer participates in ARP plan, then this role also has the ability to create and upload ARP records.
Payment Processor	A web user with this role can create and maintain bank information. This role also can create payment remittances and process payments.
Payroll Schedule Entry Processor	A web user with this role can create and maintain payroll schedule information.
SSA-1945 Upload Processor	A web user with this role can upload SSA-1945 Files.