



WEB USER MAINTENANCE



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Setting Up a NEW eSERS User

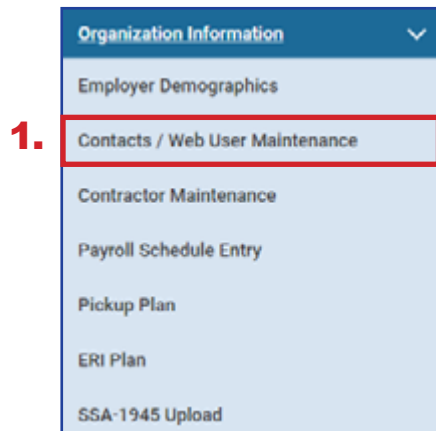
Create and Maintain Contact Information

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

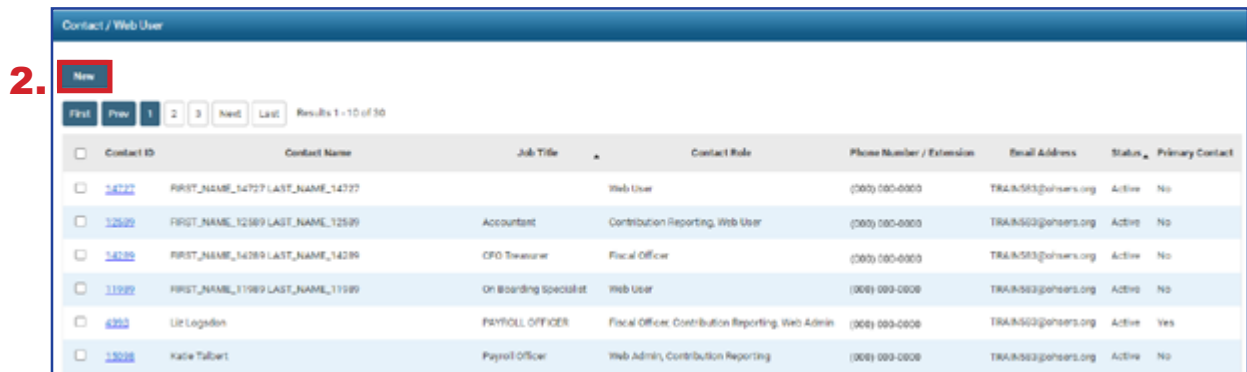
As the EWA, it will be your responsibility to set up other users with access to eSERS as well as unlock accounts. In the next few pages, we will go over how to perform the initial setup of a **new user** and how to update user accounts.

Steps:

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



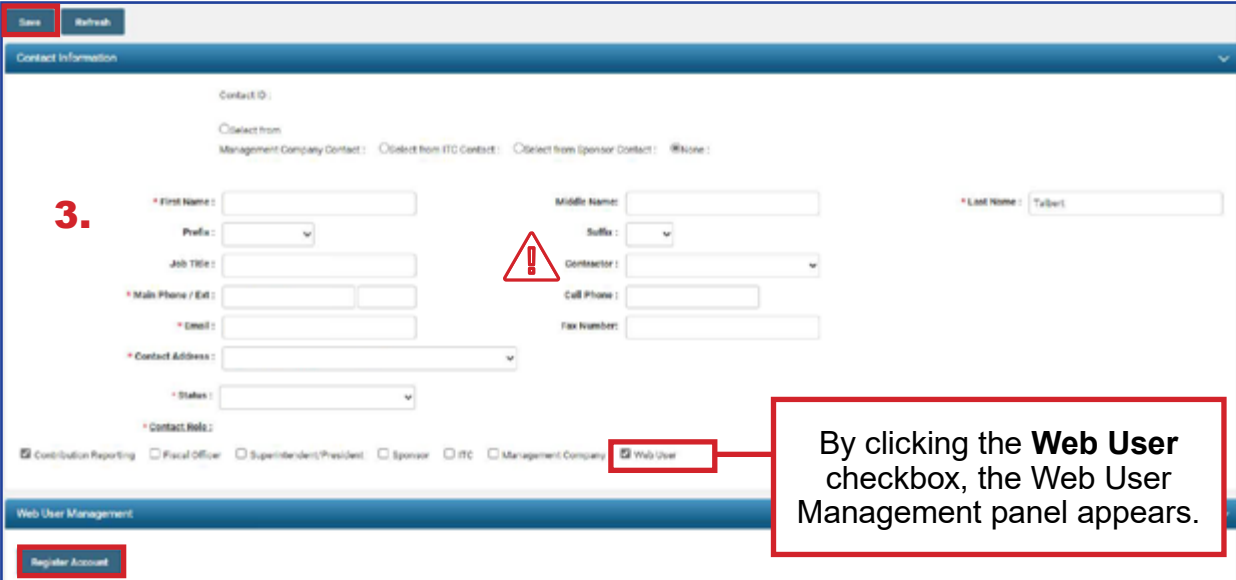
2. Click **New**.




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**.

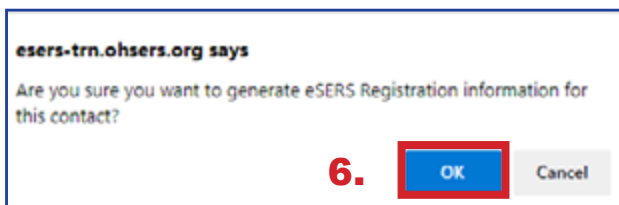
4. 

3. 


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

5. 

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**.

The screenshot shows a web application interface for assigning roles to a user. At the top, there are 'Save' and 'Refresh' buttons. Below that is a 'Contact Information' section. The main section is titled 'Web User Role' and contains 'Add Role' and 'Add all Roles' buttons. Under 'Unassigned Role(s)', there is a table with columns for 'User Role' and 'Security Access'. The table lists various roles, with 'Contribution Processor' and 'Enrollment Processor' checked. A callout box points to the table with the text 'There are two pages of roles that can be assigned'. The 'Assigned Role(s)' section shows 'No records to display'.

9. Save Refresh

Contact Information

Web User Role

Add Role Add all Roles

Unassigned Role(s): Assigned Role(s):

8. First Prev 1 2 Next Last Results 1 - 10 of 19

7. User Role Security Access

<input type="checkbox"/>	User Role	<input type="checkbox"/>	Security Access
<input type="checkbox"/>	Contact Processor	<input type="checkbox"/>	
<input type="checkbox"/>	Contractor Processor	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Contribution Processor	<input type="checkbox"/>	
<input type="checkbox"/>	Death Notification Processor	<input type="checkbox"/>	
<input type="checkbox"/>	Employer Information Processor	<input type="checkbox"/>	
<input type="checkbox"/>	Employer Statement Processor	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Enrollment Processor	<input type="checkbox"/>	
<input type="checkbox"/>	ERI Plan Processor	<input type="checkbox"/>	
<input type="checkbox"/>	Financial Status Processor	<input type="checkbox"/>	
<input type="checkbox"/>	Foundation Deduction Notice Processor	<input type="checkbox"/>	

No records to display.

There are two pages of roles that can be assigned

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.

The screenshot shows a web application interface for managing user roles. At the top, there are 'Save' and 'Refresh' buttons. Below is a 'Contact Information' section, followed by a 'Web User Role' section. This section contains four buttons: 'Add Role', 'Add all Roles', 'Remove Role', and 'Remove all Roles'. There are two main areas: 'Unassigned Role(s):' and 'Assigned Role(s):'. The 'Unassigned Role(s):' area includes a pagination control (First, Prev, 1, 2, Next, Last) and a table with 6 rows of unassigned roles. The 'Assigned Role(s):' area includes a table with 4 rows of assigned roles. The 'Security Access' column in the 'Assigned Role(s)' table is highlighted in red, showing 'Full Access' for all roles.

Unassigned Role(s):	Assigned Role(s):
<input type="checkbox"/> User Role	<input type="checkbox"/> Contribution Processor
<input type="checkbox"/> SCP Payroll Deduction Plan Processor	<input type="checkbox"/> Enrollment Processor
<input type="checkbox"/> SCP Payroll Deduction Submission Processor	<input type="checkbox"/> Payment Processor
<input type="checkbox"/> SSA-1945 Upload Processor	<input type="checkbox"/> Pickup Plan Processor
<input type="checkbox"/> Surcharge Processor	
<input type="checkbox"/> Wage Certification Processor	

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

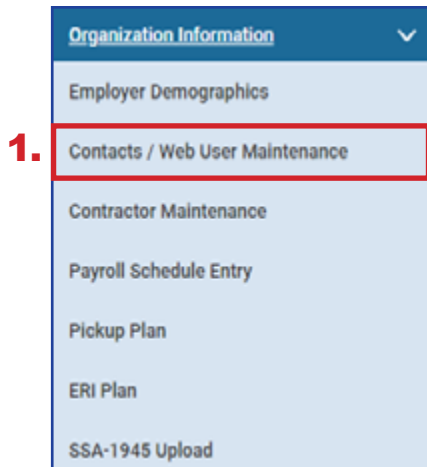
Create and Maintain Contact Information

► **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.

A screenshot of a web application interface showing a table of contact information. The table has columns for Contact ID, Contact Name, Job Title, Contact Role, Phone Number / Extension, Email Address, Status, and Primary Contact. The Contact ID 17565 is highlighted with a red box and a red "2." to its left. The table also includes a "New" button, pagination controls (First, Prev, 1, 2, Next, Last), and "Results 1 - 10 of 17".

Contact ID	Contact Name	Job Title	Contact Role	Phone Number / Extension	Email Address	Status	Primary Contact
6703	FIRST_NAME_6703 LAST_NAME_6703	TREASURER	Fiscal Officer, Web Admin	(614) 456-7890/7114	TRAIN859@ohsers.org	Active	No
11029	FIRST_NAME_11029 LAST_NAME_11029	Director of Financial Services	Contribution Reporting, Web User	(614) 456-7890	TRAIN859@ohsers.org	Active	No
13235	FIRST_NAME_13235 LAST_NAME_13235	Payroll Specialist	Contribution Reporting, Web User	(614) 456-7890	TRAIN859@ohsers.org	Active	No
15000	FIRST_NAME_15000 LAST_NAME_15000	Payroll and Benefit Specialist	Web User, Contribution Reporting	(614) 456-7890	TRAIN859@ohsers.org	Active	No
17531	FIRST_NAME_17531 LAST_NAME_17531	Payroll and Benefits Specialis	Web User, Contribution Reporting	(614) 456-7890	TRAIN859@ohsers.org	Active	No
17565	2 Train	Payroll	Web Admin, Contribution Reporting	(614) 340-1090	ktalbert@ohsers.org	Active	No
17680	1 Trains	Payroll	Web Admin, Contribution Reporting	(614) 340-1090	ktalbert@ohsers.org	Active	No

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.

The screenshot displays the 'Contact Information' form in the eSERS system. At the top, there are 'Save' and 'Refresh' buttons. The form includes fields for 'Contact ID', 'Management Company Contact', 'Select from ITC Contact', 'Select from Sponsor Contact', and 'None'. The 'First Name' is '20', 'Last Name' is 'Train', and 'Job Title' is 'Payroll Officer'. A red number '3.' is placed next to the 'Main Phone / Ext' field. A red number '4.' is placed next to the 'Status' dropdown menu, which is currently set to 'Active' and has 'Inactive' selected. At the bottom, there are checkboxes for 'Contribution Reporting', 'Fiscal Officer', 'Superintendent/President', 'Sponsor', 'ITC', 'Management Company', and 'Web User'.

Unlocking an eSERS User Account

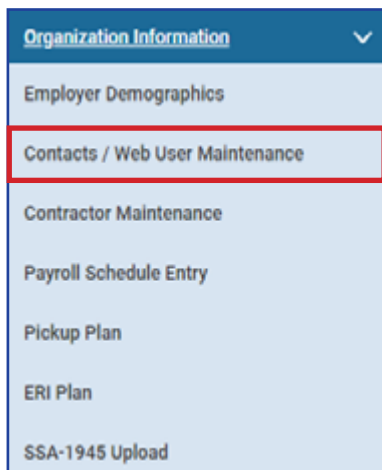
Create and Maintain Contact Information

► **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.

A screenshot of a table titled "Contact / Web User". The table has columns: Contact ID, Contact Name, Job Title, Contact Role, Phone Number / Extension, Email Address, Status, and Primary Contact. The row for Contact ID 15120 is highlighted with a red box.

Contact ID	Contact Name	Job Title	Contact Role	Phone Number / Extension	Email Address	Status	Primary Contact
<input type="checkbox"/> 14227	FIRST_NAME_14727 LAST_NAME_14727		Web User	(900) 000-0000	TRAIN503@ohsers.org	Active	No
<input type="checkbox"/> 12509	FIRST_NAME_12509 LAST_NAME_12509	Accountant	Contribution Reporting, Web User	(900) 000-0000	TRAIN503@ohsers.org	Active	No
<input type="checkbox"/> 14209	FIRST_NAME_14209 LAST_NAME_14209	CFO Treasurer	Fiscal Officer	(900) 000-0000	TRAIN503@ohsers.org	Active	No
<input type="checkbox"/> 11909	FIRST_NAME_11909 LAST_NAME_11909	On Boarding Specialist	Web User	(900) 000-0000	TRAIN503@ohsers.org	Active	No
<input type="checkbox"/> 8208	Liz Logsdon	PAYROLL OFFICER	Fiscal Officer, Contribution Reporting, Web Admin	(900) 000-0000	TRAIN503@ohsers.org	Active	Yes
<input type="checkbox"/> 15028	Katie Tabbert	Payroll officer	Web Admin, Contribution Reporting	(900) 000-0000	TRAIN503@ohsers.org	Active	No
<input type="checkbox"/> 15029	Elena Victoria	Payroll Officer	Web User, Contribution Reporting	(900) 000-0000	TRAIN503@ohsers.org	Active	No
<input type="checkbox"/> 15120	Marleen Hearn	Payroll Officer	Contribution Reporting, Web User	(900) 000-0000	TRAIN503@ohsers.org	Active	No

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.

3.

The screenshot displays the 'Web User Management' section of a user interface. At the top, there are 'Save' and 'Refresh' buttons. Below are expandable sections for 'Contact Information', 'Web User Role', and 'Web User Management'. The 'Web User Management' section is expanded, showing three buttons: 'Unlock Account' (highlighted with a red box), 'Re-Enroll', and 'Delete Web User Profile'. The user details for 'MHearn18121' are shown, including 'User Account Status: EWP User account is locked' and a message: 'User Account locked due to wrong password'. Other details include 'Registration Completed: Y', 'Is One Time Password Set: Y', and 'One Time Password Expiry Date: 06/28/2023'.

User Name :	MHearn18121	User Account Status :	EWP User account is locked
Password Last Changed :		Registration Completed :	Y
Last Successful Login :	06/21/2023	Is One Time Password Set :	Y
Previous Login :		Password Exp Flag :	N
Successful Login Attempts :	1	Is Registration Set :	Y
Total Number Of Unsuccessful Attempts :		One Time Password :	
Number of Unsuccessful Attempts Since Last Success :		One Time Password Expiry Date :	06/28/2023
Message :	User Account locked due to wrong password		


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.

The screenshot shows a web application interface for user management. At the top, there are 'Save' and 'Refresh' buttons. Below are three main sections: 'Contact Information', 'Web User Role', and 'Web User Management'. The 'Web User Management' section contains 'Re-Enroll' and 'Delete Web User Profile' buttons. The user details for 'User Name : MHearn18121' are displayed in two columns. A message box at the bottom states: 'Message : User Account is unlocked, temporary password is sent, need activation'.

User Name : MHearn18121	User Account Status : Active User
Password Last Changed :	Registration Completed : Y
Last Successful Login : 06/21/2023	Is One Time Password Set : Y
Previous Login :	Password Exp Flag : N
Successful Login Attempts : 1	Is Registration Set : Y
Total Number Of Unsuccessful Attempts :	One Time Password :
Number of Unsuccessful Attempts Since Last Success :	One Time Password 06/20/2023 Expiry Date :

Message : User Account is unlocked, temporary password is sent, need activation

 **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.