# 2024 eSERS Guide eSERS HOME PAGE

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

### **eSERS Home Page**

<b>Jnsubmitted Forms:</b> Temporarily saves information that hasn't been submitted and creates a shortcut to he screen you were working on				Home: Displays the eSERS home screen.		e V ne t	Collapse: Will collapse the entire screen.		Print: Will print the screen you are on.		Logoff: To exit eSERS.	Welcome Drop Down: The Use will find Help and Contact Us.	
					eSERS Home A Home A Collapse Print Logoff Weacome								
Alert and Messages V	eSERS Home	x + -	Þ.										
Messages	Record displayed.												
Employer Reporting V	Welcome to eSERS, a secure intranet designated for SERS employers.												
Upload Contribution Files	5 Most Recent Messages 🗸 🗸 🗸							Employer Information	on			~	
Contribution File Correction and Manual Contribution Entry		_								Employer IC	D :		
Upload Enrollment Files	View All N	lessages								Name			
Create and Correct Enrollment Files	Message	Туре	Message Subje	et	Received Date			Communication Preference :					
Manual Enrollment Entry	Action Required Contractor File Ready for			Posting	07/11/2024	1/2024			County :				
Employer Reporting Detail Lookup	Action Required Contractor File Ready for			eosting	tioo 07/11/2024			Primary Contact :					
SCP Payroll Deduction Submission	Action Required Contractor File Ready for I			osting 07/11/2024				Primary Address :					
Certified Wages	Action Required Contractor File Ready for F			Posting	ting 07/08/2024			Contractor ID :					
Financial Information	Action Reg	uired <u>Contrac</u>	tor File Ready for F	sting 07/08/2024									
Bank Account Maintenance													
Payment Remittance	5 Most Rec	ent Employer F	Reporting Files				~	Next 5 Reports Due				×	
Employer Statement													
Financial Status	Header ID	Header Type	Header Status	Pay Date	Contribution Cycle C	Code Status O	der	Contribution Cycle (	Code Pay Date	Due Date			
Salary Estimate	615185	Contribution	Posted	07/15/2024	OTH0003			WKY0003	07/08/2024	07/15/2024			
Foundation Deduction Notice	<u>615184</u>	Contribution	Posted	07/15/2024	OTH0002			WKY0004	07/11/2024	07/18/2024			
Surcharge	<u>615183</u>	Contribution	Posted	07/15/2024	OTH0003			BWK0002	07/12/2024	07/19/2024			
Organization Information 🗸 🗸	<u>615069</u>	Enroliment	Posted					BWK0003	07/12/2024	07/19/2024			
Employer Demographics	615046	Contribution	Posted	07/03/2024	WKY0004			WKY0001	07/12/2024	07/19/2024			

**5 Most Recent Messages:** Displays the five most recent unread communications from SERS. The messages may be informational or require action.

**Employer Information:** Displays information that SERS currently has on file for your organization.

**5 Most Recent Employer Reporting Files:** Displays the most recent files that have been submitted, including contractor files. You have quick access to these files by clicking the Header ID hyperlink associated with the file you wish to view.

**Next 5 Reports Due:** Lists the next five contribution reports SERS is expecting you to submit. This is driven from your payroll schedules. If this panel is incorrect, please contact Employer Services.

**Reminder:** Contribution reports and payments are due no later than five business days from the pay date.

#### **Tip: Unsubmitted Forms**

While completing a process within eSERS, there are times a Web User will need to navigate away from their current screen to access information from a different screen. The Unsubmitted Forms will allow you to do so without losing any of the information that you have entered.

To return back to your saved information, you will click on Unsubmitted Forms and choose the application to complete an unprocessed form.

Alert and Messages 🗸 🗸
Messages
Employer Reporting 🗸 🗸
Upload Contribution Files
Contribution File Correction and Manual Contribution Entry
Upload Enrollment Files
Create and Correct Enrollment Files
Manual Enrollment Entry
Employer Reporting Detail Lookup
SCP Payroll Deduction Submission
Certified Wages
Financial Information 🗸
Bank Account Maintenance
Payment Remittance
Employer Statement
Financial Status
Salary Estimate
Foundation Deduction Notice
Surcharge

## **Understanding the Menu**

#### Alert and Messages

**Messages:** Via your message board, you will be sent important information, notifications of when employer reports are processed, or when wage certifications are available, and much more.

### **Employer Reporting**

Upload Contribution Files: Upload your contribution file.

**Contribution File Correction and Manual Contribution Entry:** Review and correct contribution file errors, manually enter your contribution/adjustment data, and find posted contribution files.

Upload Enrollment Files: Upload your enrollment file.

**Create and Correct Enrollment Files:** Review and correct errors on enrollment headers or manually create a new enrollment header.

Manual Enrollment Entry: Manually create an enrollment record.

**Employer Reporting Detail Lookup:** Search for Employer Reporting details by entering various search criteria (i.e. Header Type, Date, Status, Employee, etc.).

**SCP Payroll Deduction Submission:** Create a new SCP payroll deduction submission or view previously submitted records.

**Certified Wages:** Complete pending certification requests; view previously submitted records.

#### **Financial Information**

**Bank Account Maintenance:** Add new bank information for ACH Debit or view existing bank information.

**Payment Remittance**: Create a new payment remittance or view payment remittance history.

**Employer Statement:** Download and view employer statements by fiscal year.

**Financial Status:** View current financial status of the organization based on all fiscal years as well as unassigned payment remittances and details of total of items due.

**Salary Estimate:** Enter new fiscal year salary estimate in a predetermined window or view prior fiscal year salary estimates.

**Foundation Deduction Notice:** Download and view Foundation deduction notices based on fiscal year.

**Surcharge:** View surcharge invoices based on fiscal year or search directly by Social Security number.

# **Understanding the Menu**

### **Organization Information**

**Employer Demographics:** View employer demographics and/or add new address(es).

**Contacts / Web User Maintenance:** The EWA is able to create a new contact, unlock web user accounts, and update user roles by adding or deleting roles previously assigned. Web users can look at contact details.

**Contractor Maintenance:** View contractor details, create a new contractor record, end date a contractor, or activate/deactivate review file submissions.

**Payroll Schedule Entry:** View payroll schedule details, extend, or create a new payroll schedule.

**Pickup Plan:** View existing pickup plan details that were created in eSERS or to create a new pickup plan.

**ERI Plan:** View existing Early Retirement Incentive (ERI) plan details or create new request for an ERI plan.

**SSA-1945 Upload:** Upload a new SSA-1945 form(s) to submit to SERS.

#### Others

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**My Profile:** View your demographic details, contact role, and change password option.

**Death Notification:** View prior death notifications or create a new death notification.

ERI Cost Calculator: Calculate cost for a member for an ERI.

FAQ: Frequently asked questions.

Organization Information

Employer Demographics

Contacts / Web User Maintenance

Contractor Maintenance

Payroll Schedule Entry

**Pickup Plan** 

ERI Plan

SSA-1945 Upload

#### Others

My Profile

**Death Notification** 

**ERI Cost Calculator** 

FAQ