

2023 eSERS Guide

WEB USER MAINTENANCE



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

Setting Up a NEW eSERS User

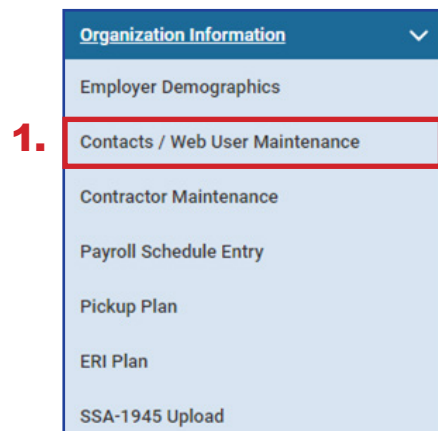
Create and Maintain Contact Information

► **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.



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. **Save** Refresh

Contact Information

Contact ID :
☐ Select from
Management Company Contact : ☐ Select from ITC Contact : ☐ Select from Sponsor Contact : ☒ None :

3. * First Name : Middle Name : * Last Name :
Prefix : Suffix :
Job Title : Contractor :
* Main Phone / Ext : / Alternate Phone/Ext : /
* Email : Fax Number :
* Contact Address :
* Status : Active
* Contact Role :
☒ Contribution Reporting ☐ Fiscal Officer ☐ Superintendent/President ☐ Sponsor ☐ ITC ☐ Management Company ☒ Web User

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

5. **Register Account**

Web User Management

User Name :	User Account Status :
Password Last Changed :	Registration Completed :
Last Successful Login :	Is One Time Password Set :
Previous Login :	Password Exp Flag :
Successful Login Attempts :	Is Registration Set :
Total Number Of	One Time Password :

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**.

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.

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

There are two pages of roles that can be assigned

<input type="checkbox"/>	User Role	Security Access
No records to display.		

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.

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.

Save **Refresh**

Contact Information

Web User Role

Add Role **Add all Roles** **Remove Role** **Remove all Roles**

Unassigned Role(s) :

First Prev 1 2 Next Last Results 11 - 15 of 15

<input type="checkbox"/>	User Role
<input type="checkbox"/>	SCP Payroll Deduction Plan Processor
<input type="checkbox"/>	SCP Payroll Deduction Submission Processor
<input type="checkbox"/>	SSA-1945 Upload Processor
<input type="checkbox"/>	Surcharge Processor
<input type="checkbox"/>	Wage Certification Processor

Assigned Role(s) :

<input type="checkbox"/>	User Role	Security Access
<input type="checkbox"/>	Contribution Processor	Full Access ▼
<input type="checkbox"/>	Enrollment Processor	Full Access ▼
<input type="checkbox"/>	Payment Processor	Full Access ▼
<input type="checkbox"/>	Pickup Plan Processor	Full Access ▼

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.

Unlocking an eSERS User Account

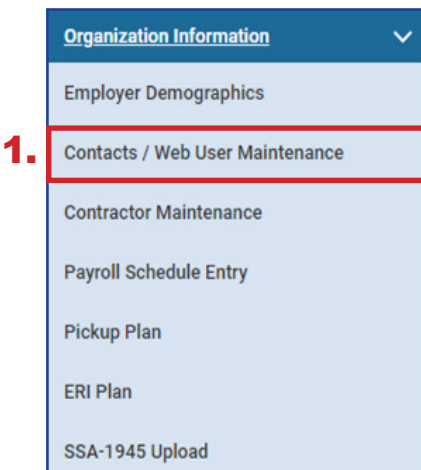
Create and Maintain Contact Information

► **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 web application's 'Contact / Web User' table. The table has a header row with columns: Contact ID, Contact Name, Job Title, Contact Role, Phone Number / Extension, Email Address, Status, and Primary Contact. The table contains 8 rows of data. The first row has a 'New' button above it. The table is paginated with 'First', 'Prev', '1', '2', '3', '4', 'Next', and 'Last' buttons, and 'Results 1 - 10 of 32'. The 'Contact ID' column contains hyperlinks. The last row, with Contact ID 15100, is highlighted with a red box and a red '2.'.

Contact ID	Contact Name	Job Title	Contact Role	Phone Number / Extension	Email Address	Status	Primary Contact
14727	FIRST_NAME_14727 LAST_NAME_14727		Web User	(000) 000-0000	TRAIN583@ohsers.org	Active	No
12589	FIRST_NAME_12589 LAST_NAME_12589	Accountant	Contribution Reporting, Web User	(000) 000-0000	TRAIN583@ohsers.org	Active	No
14289	FIRST_NAME_14289 LAST_NAME_14289	CFO Treasurer	Fiscal Officer	(000) 000-0000	TRAIN583@ohsers.org	Active	No
11989	FIRST_NAME_11989 LAST_NAME_11989	On Boarding Specialist	Web User	(000) 000-0000	TRAIN583@ohsers.org	Active	No
4938	Liz Logsdon	PAYROLL OFFICER	Fiscal Officer, Contribution Reporting, Web Admin	(000) 000-0000	TRAIN583@ohsers.org	Active	Yes
15098	Katie Talbert	Payroll Officer	Web Admin, Contribution Reporting	(000) 000-0000	TRAIN583@ohsers.org	Active	No
15099	Elena Victors	Payroll Officer	Web User, Contribution Reporting	(000) 000-0000	TRAIN583@ohsers.org	Active	No
15100	Mariann Hearn	Payroll Officer	Contribution Reporting, Web User	(000) 000-0000	TRAIN583@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 web application. At the top, there are 'Save' and 'Refresh' buttons. Below them are three expandable sections: 'Contact Information', 'Web User Role', and 'Web User Management'. The 'Web User Management' section is expanded, revealing three buttons: 'Unlock Account' (highlighted with a red box), 'Re-Enroll', and 'Delete Web User Profile'. Below these buttons, user details for 'MHearn18121' are shown in two columns. The left column includes fields for 'Password Last Changed', 'Last Successful Login' (06/21/2023), 'Previous Login', 'Successful Login Attempts' (1), 'Total Number Of Unsuccessful Attempts', and 'Number of Unsuccessful Attempts Since Last Success'. The right column includes 'User Account Status' (EWP User account is locked), 'Registration Completed' (Y), 'Is One Time Password Set' (Y), 'Password Exp Flag' (N), 'Is Registration Set' (Y), 'One Time Password', and 'One Time Password Expiry Date' (06/28/2023). A message at the bottom states: 'User Account locked due to wrong password'.

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 06/28/2023	
		Expiry Date :	
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.

Save

Refresh

Contact Information

Web User Role

Web User Management

Re-Enroll

Delete Web User Profile

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

One Time Password :

Unsuccessful Attempts :

One Time Password 06/28/2023

Number of Unsuccessful

Expiry Date :

Attempts Since Last Success :

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**.