



2023 eSERS Guide

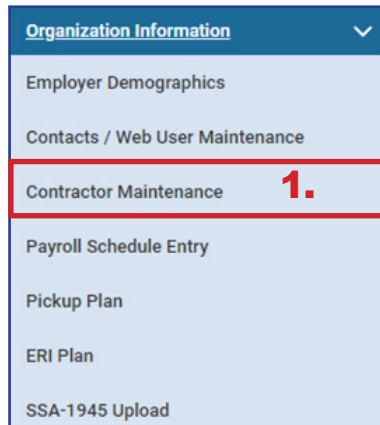
CONTRACTOR MAINTENANCE



School Employees Retirement System of Ohio
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Setting Up Contractor Information

When your district works with a contract company, an initial set up is required. This ensures the reporting is processed correctly. This is necessary regardless if your district enters the reports or you grant web user access for the contractor to enter his or her own reports.



Steps to set up a contract company:

1. Select the **Contractor Maintenance** menu item.
2. Click **New**



Other things of note on this screen:

Contractor ID:

Assigned by system. This number is used when entering information for employees who work for the contract company. This information includes enrollments, contributions, or adding a web user access for the contract company.

Effective Date and End Date:

The effective date appears when the contractor is created in eSERS. When you no longer use that contractor's services, you will be able to enter an end date; however, the record will remain for historical reference. When you end date the contractor, eSERS will automatically terminate all contacts assigned to that contractor, including the contractor's eSERS access.

To update contractor information, click the hyperlinked Contractor ID.

3. In the Contractor Record Maintenance screen, enter the following information and then click **Save**:
 - Contractor Name
 - Contractor Type from drop-down menu
 - Effective Date
 - Review File/Data Submission*

After clicking Save, the system saves the record, assigns a Contractor ID, and updates the effective date to read-only.

3.

The screenshot shows the 'Contractor Information' form. At the top are 'Save' and 'Refresh' buttons. The form fields include: 'Contractor ID' (read-only), 'Contractor Name' (text input), 'Contractor Type' (dropdown menu), 'Effective Date' (calendar input), 'End Date' (calendar input), and 'Review File/Data Submission' (checkbox). A dropdown menu is open for 'Contractor Type', showing options: Custodial, Food Services, Healthcare, Other, Security, and Transportation. A note at the bottom states: 'Note: Contractors must use their Contractor ID in their employer reporting files. For a new contractor record, a new Contractor ID will be assigned upon save.'

*Will require all employer reporting from a contractor to be reviewed by your district, which will be submitted by the district once it has been reviewed. If this box is not checked, the contractor will be able to submit reporting without being reviewed by the district. However, the district will be able to view all reports from the eSERS Homepage.

In the event you need to end this contractor's connection to your organization, you can do so by entering an end date.

Once you enter an end date and click save, the following events will happen:

- All contacts that are identified as connected to this contractor will be updated to inactive.
- All web user roles will be removed from the contacts identified as connected to this contractor.
- All eSERS access roles are revoked.
- An email is generated and sent to affected parties informing them that they will no longer have access.