2023 eSERS Guide
eSERS HOME PAGE

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

eSERS Home Page

Unsubmitted Forms
Temporarily saves information that hasn't been submitted and creates a shortcut to the screen you were working on.

Home
Displays the eSERS home screen.

Collapse
Will collapse the entire screen.

Welcome Drop Down
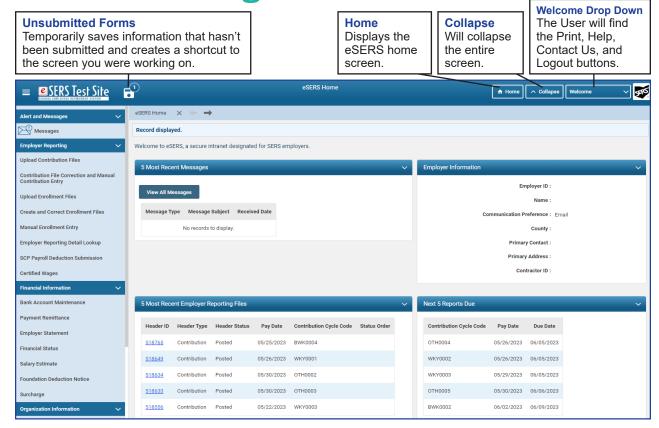The User will find the Print, Help, Contact Us, and Logout buttons.

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.

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.

Menu (sidebar)

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

Organization Information

Organization Information

Employer Demographics
Contacts / Web User Maintenance
Contractor Maintenance
Payroll Schedule Entry
Pickup Plan
ERI Plan
SSA-1945 Upload

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

Others

My Profile
Death Notification
ERI Cost Calculator
FAQ

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.