2024 eSERS Guide ADDITIONAL SUBMISSIONS



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

Pick-up Plan Submission

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

You can submit a Pick-up Plan in eSERS by going to the Pick-up Plan menu option under the Organization Information menu.

Steps:

- 1. Click Pickup Plan.
- 2. On the Pickup Plan Maintenance screen, click **New Pickup Plan**.

Pickup Plan Information									
Following are the submitted pickup plans. To submit a new pickup plan, click the Pickup Plan button.									
New Pickup Plan 2.									
	Pickup ID	Employee Group	Tax Deferred Percentage	Board Paid Percentage	Effective Date	End Date	Pickup On Pickup	Status	
	<u>6781</u>		0	0	07/01/1989		Ν	Approved	
	7474	Classified Employees (Except Administrators)	10.00	0	07/01/2003		Ν	Approved	
	7475	Administrators	2.00	8.00	07/01/2003		Ν	Approved	
	7476	Treasurer	0	10.00	07/01/2003		Y	Approved	
	kup lowin New	Plan Inform Iowing are the sub New Pickup Plan Pickup ID 6701 7474 2425 2426	kup Plan Information Iowing are the submitted pickup plans. To submit a new pickup plan New Pickup Plan Pickup ID 2 Pickup ID Employee Group 6701 2472 Classified Employees (Except Administrators) 2475 Administrators 2476 Treasurer	Rew Plan Information Iowing are the submitted pickup plans. To submit a new pickup plan, click the Pickup Plan butto New Pickup Plan 2 Pickup ID Employee Group Tax Deferred Percentage 6701 0 2474 Classified Employees (Except Administrators) 10.00 2475 Administrators 2.00 2476 Treasurer 0	Plan Information Information	Plan Information Devine are the submitted pickup plans. To submit a new pickup plan, click the Pickup Plan button. Pickup Plan 2. Pickup ID Employee Group Tax Deferred Percentage Board Paid Percentage Effective Date 6 201 0 0 07/01/1099 2 4274 Classified Employees (Except Administrators) 10.00 0.00 07/01/2003 2 4275 Administrators 0 0.00 07/01/2003	Plan Information Display Field pickup plans. To submit a new pickup plan, click the Pickup Plan button. New Pickup Plan 2. Pickup ID Employee Group Tax Deferred Percentage Board Paid Percentage Effective Date End Date 6701 2474 Classified Employees (Except Administrators) 10.00 0 07/01/2003 10.00 2475 Administrators 0 0.00 07/01/2003 10.00 10.00 10.00	Rew Plan Information Information <	

- 3. Enter the following information:
 - Effective Date (cannot be retroactive)
 - Employee Group
- 4. Attach Board Resolution (click **Browse** to open file explorer window)
- 5. Click Upload & Submit.

Pickup Pla	n Details				
3.	Pickup ID :		Status :		
	* Effective Date :	L/_/ 🖻	End Date :		
	* Employee Group :		Pickup on Pickup :		
	Tax Deferred Percentage :	0.00%	Board Paid Percentage :	0.00%	
4.	* Upload Board Resolution :	Choose File		Clear	

Tip: The Tax Deferred Percentage and Board Paid Percentage must equal 10%.

Submit a Death Notification

You can submit a new Death Notification by selecting the Death Notification menu option under the Others section of the main menu.

Others 🗸	Ste
My Profile	1.
Death Notification	2.
ERI Cost Calculator	
FAQ	

- Steps:
 - Click the **Death Notification** menu item.
 - Click New Death Notification.

New D	eath Notification					
To create a new death notification, click the New Death Notification button.						
New Death Notification 2.						
Death	Notification History					
Fellowi		dooth potif	institute			
Followi	ng are recently submitted	death notin	cations.			
	Death Notification ID	SSN	Last Name	First Name	Date Of Death	
	24426		LAST_NAME_552544	FIRST_NAME_552544	12/11/2019	

The system displays the Death Notification Maintenance screen.

- 3. Enter:
 - SSN
 - Date of Death
 - Last and First Names
 - Next of Kin information, if available
- 4. At the top of this screen, click **Submit**.

Death Notificat	tion					
3	Death Notification :					
•	* SSN :	L	* Date Of Death :	Ë		
	• Last Name :		• First Name :		Middle Initial :	
	Name Prefix :	~	Name Suffix :	~		
_						
March Of Kin						
Next Of Kin						
Next Of Kin	Last Name :		First Name :		Middle Initial :	
Next Of Kin	Last Name : Name Prefix :		First Name : Name Suffix :		Middle Initial :	
Next Of Kin	Last Name : Name Prefix : Relationship To Member :	· · · · ·	First Name : Name Suffix : Phone Number :		Middle Initial :	
Next Of Kin	Last Name : Name Prefix : Relationship To Member : Address :		First Name : Name Suffix : Phone Number : City :	· · · · · · · · · · · · · · · · · · ·	Middle Initial :	

After you submit a death notification, the following things happen:

- If the deceased member was receiving benefits, those benefits will immediately stop until further action can be taken.
- A SERS employee is notified of the death and is assigned to process any benefits payable from the member's account.
- As the employer, you have 90 days (from date of death) to submit any final contributions for the member.

Submitting an ERI Plan

You can create and submit an ERI Plan in eSERS by going to the ERI Plan menu item under the Organization Information menu.

Steps:

- 1. Click ERI Plan.
- 2. On the ERI Plan Maintenance screen, click New ERI Plan.

Organization Information	ERI Plan Information					
Employer Demographics Contacts / Web User Maintenance	Following are the submitted ERI plans. To submit a new ERI plan, click the New ERI Plan button.					
Contractor Maintenance	New ERI Plan 2.					
Pickup Plan	ERI Plan ID Effective Date End Date Maximum Service Credit Last Available Retirement Date					
ERI Plan 1	No records to display.					

- 3. Enter the following information:
 - Effective Date
 - End Date
 - Maximum Service Credit
 - Last Available Retirement Date
 - Attach the required .pdf file to the record.
- 4. At the top of this screen, click Upload & Submit.
 - Upon clicking Upload & Submit, SERS is notified to review and approved the ERI plan

-	EBI Blan ID :			
3.	ERI Planto.			
	Effective Date :	J 🖾	• End Date :	
* Maximum	Service Credit :		* Last Available Retirement Date :	
	Comments :			
• Upload Bo	ard Resolution :	Choose File		Clear
Upload the Board Resolution	n in PDF file format			

Calculating an ERI Estimate

You can create an ERI Estimate by selecting the ERI Cost Calculator menu option under the Others section of the main menu.

Steps:

- 1. Select the ERI Cost Calculator menu item.
- 2. Enter the following information:
 - Member Age
 - Total Service Credit
 - Highest Annual Salary
 - ERI Credit Purchase
- 3. Click Calculate ERI Cost.

Others		~
My Profile		
Death Notification		
ERI Cost Calculator	1.	
FAQ		

4. Click **Add to List** if you wish to move results to the lower panel.

			Ť	
Generic ERI Plan Participation Cost calculator. No data	is saved.			ERI stands for Early Retirement Incentive program. The minimum required number of ERI participants is 5% the number of your SERS members.
2. • Member Age :				You can purchase a maximum of 5 years of service credit or no more than 1/5 a member's total service credit. If an amployee is not aligible for retirement without participation in the EDI plan, they will incur additional have contained.
* Total Service Credit:	0			Pre SB 341 = 25 Yrs or more Service Credit by 8/1/2017
• Highest Annual Salary:	\$0.00			Post SB 341 = Less Than 25 Yrs or more Service Credit by 8/1/2017
• ERI Credit Purchase:	0			
Member is not eligible for retirement without ERI			Pre SB 341	
			Post SB 341	
3. Calcut	ate ERI Cost			
ERI Participant Cost :	\$0.00			
Health Care Liability :	\$0.00			
Total Participant ERI Cost :	\$0.00			
4. Add To List	Refresh			
Temporary Calculation(s) Holder				*
Remove From List Export To Excel Total To	emporary ERI Co	st: \$0.00		
Member Age Total Service Credit Highest	Annual Salary	ERI Credit Purchase	Eligibility to Re	tire ERI Cost Health Care Cost Total Participant Cost
		No records to displ	ау.	

All calculated results can be exported to Excel by selecting the desired records and clicking **Export to Excel**.