

2023 eSERS Guide

ANNUAL PROCESSES



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

Enter New Salary Estimate

Foundation Participating Districts Only

You will receive a message on your message board notifying you when the predetermined window is open to enter your salary estimate information for the upcoming fiscal year. You can update salary estimate information by selecting the Salary Estimate menu option under the Financial Information section of the main menu. The screen will appear as below with fields to enter the required information. Once that predetermined window is closed, you will only have the option to export information to Excel; there will be no editable fields.

If you need to update your salary estimate later in the year, email Employer Services at employerservices@ohsers.org with what the salary estimate should have been for the entire fiscal year.

Financial Information

Bank Account Maintenance

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Financial Status

Salary Estimate 1.

Foundation Deduction Notice

Surcharge

Steps:

1. Click **Salary Estimate**.
2. Enter the **Fiscal Year Salary Estimate for the Fiscal Year** displayed.
3. Click **Save**.
 - You will not see the new salary estimate in the “Previous Fiscal Year Salary Estimate” panel until the predetermined window to submit Salary Estimates has closed.

Refresh Save **3.**

Fiscal Year Salary Estimate

Fiscal Year: 2024

Last Date To Confirm: 05/20/2023

2. *Fiscal Year Salary Estimate: \$31,850,638.50

Prior Fiscal Year Salary Estimate: \$30,922,950.00

Tolerance Percentage: 10.0000%

Percent Difference: 3.0000%

Comments:

Previous Fiscal Year Salary Estimate

Export To Excel

First Prev 1 2 Next Last


Results 1 - 10 of 11

<input type="checkbox"/>	Fiscal Year	Salary Estimate	Tolerance Percentage	Percent Difference	Comments	Last Updated By
<input type="checkbox"/>	2024	\$31,850,638.50	10.00000%	3.00000%		SERS
<input type="checkbox"/>	2023	\$30,922,950.00	10.00000%	2.00000%	Per Brian Kern, Add 2%.	SERS
<input type="checkbox"/>	2022	\$30,316,618.30	10.00000%	3.00000%		SERS

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View Salary Estimate

You can view salary estimate records by going to the Salary Estimate menu item.

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Salary Estimate 1.


Foundation Deduction Notice

Surcharge

Steps:

1. Select the **Salary Estimate** menu item.
2. View Estimates and/or export records to Excel by clicking **Export To Excel**.

Refresh

Fiscal Year Salary Estimate 

Fiscal Year: 2022

Last Date To Confirm: 05/14/2021


*Fiscal Year Salary Estimate: \$30,316,618.30

Prior Fiscal Year Salary Estimate: \$29,433,610.00

Tolerance Percentage: 10.0000%

Percent Difference: 3.0000%

Comments:

Previous Fiscal Year Salary Estimate 

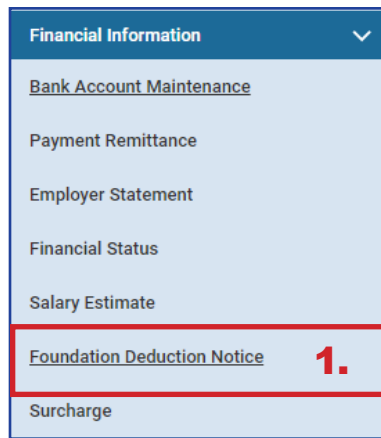
Export To Excel

<input type="checkbox"/>	Fiscal Year	Salary Estimate	Tolerance Percentage	Percent Difference	Comments	Last Updated By
<input checked="" type="checkbox"/>	2022	\$30,316,618.30	10.00000%	3.00000%		SERS
<input checked="" type="checkbox"/>	2021	\$29,433,610.00	10.00000%	2.00000%	COMMENT_7183	SERS
<input checked="" type="checkbox"/>	2020	\$28,856,480.00	10.00000%	3.00000%		SERS
<input checked="" type="checkbox"/>	2019	\$28,016,000.00	10.00000%	3.00000%		SERS
<input type="checkbox"/>	2018	\$27,200,000.00	10.00000%	2.50806%	COMMENT_4440	SERS
<input type="checkbox"/>	2017	\$26,534,500.00	10.00000%	3.00128%		PIR9301

View Foundation Deduction Notice

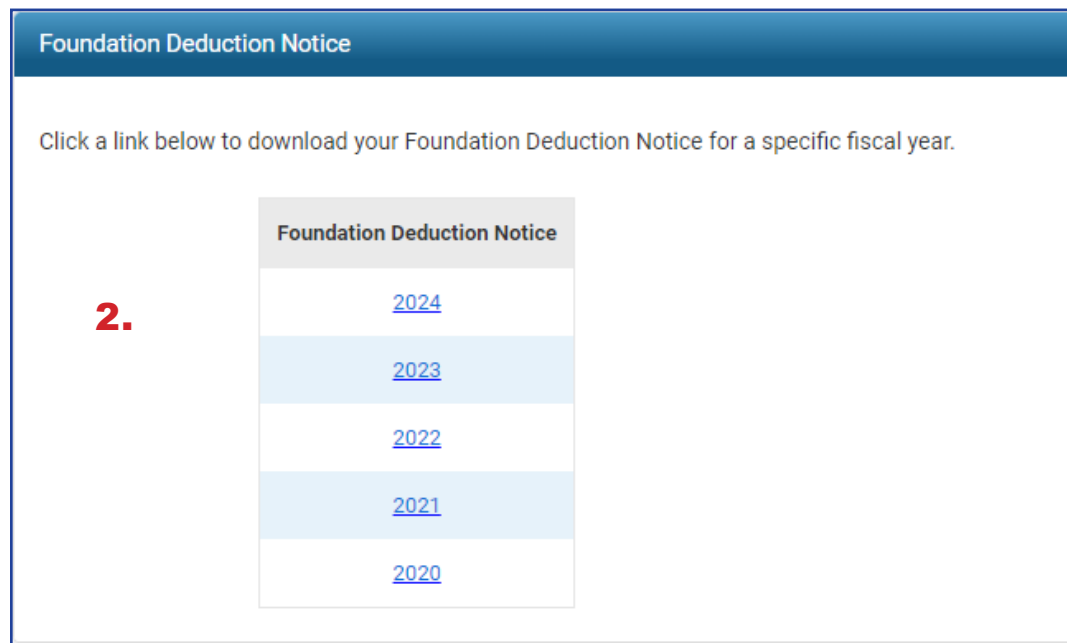
Foundation Participating Districts Only

You will receive a message on your message board notifying you when the Foundation Deduction Notice is available to view.



Steps:

1. Click **Foundation Deduction Notice**.
2. On the Foundation Deduction Notice screen, select the Notice you wish to download by clicking on the hyperlinked year.
3. Download the Foundation Deduction letter to view.



View Employer Statement

You will receive a message on your message board notifying you when the employer statement is available to view.

You also can view employer statements by fiscal year by selecting the Employer Statement menu option.

Financial Information	▼
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Employer Statement	1.
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Steps:

1. Click **Employer Statement**.
2. On the Employer Statement Maintenance screen, select the Employer Statement you wish to download by clicking on the hyperlinked year.
3. Download the Statement to view and/or print.

Employer Statements							
Click a link below to download your employer statement for a specific fiscal year.							
2.	<table><tr><th>Fiscal Year</th></tr><tr><td>2022</td></tr><tr><td>2021</td></tr><tr><td>2020</td></tr><tr><td>2019</td></tr><tr><td>2018</td></tr></table>	Fiscal Year	2022	2021	2020	2019	2018
	Fiscal Year						
	2022						
	2021						
	2020						
2019							
2018							

View Surcharge Information

Financial Information

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Surcharge

You will receive a message on your message board notifying you when surcharge information is available to view.

You can view the surcharge information by selecting the Surcharge menu option under the Financial Information section of the main menu.

Any exemptions to the Surcharge Report are to be emailed to employerservices@ohsers.org during the predetermined window.

Surcharge Year

Select a specific fiscal year and click View Surcharge Details.

Surcharge Year: 2022

View Surcharge Details

Surcharge Information

Fiscal Year: 2022
Proration Days: 180
Raw Surcharge Calculation: \$490,926.04
2% of Member Payroll: \$2,314,364.28
Adjusted For Statewide Limit: \$456,117.32
Surcharge To Be Paid: \$456,117.32

Date Created: 08/15/2022
Surcharge Base Salary: \$25,000.00

Click the Download Surcharge Invoice button to download the surcharge invoice for the fiscal year.

View Surcharge Invoice

Calculation Detail for Included Members

Export to Excel

SSN:

Filter

First Prev 1 2 3 ... 58 59 Next Last

Results 1 - 10 of 585

<input type="checkbox"/>	Member Name	SSN	Earnings	Base - Earnings Difference	Gross Surcharge	Days Worked	Proration Factor	Net Surcharge
<input type="checkbox"/>	Sanders, Maureen		\$228.80	\$24,771.20	\$3,467.97	2	0.011	\$38.15
<input type="checkbox"/>	Harris, Ayanna		\$5,289.40	\$19,710.60	\$2,759.48	51	0.283	\$780.93
<input type="checkbox"/>	Love, Sophia		\$79.60	\$24,920.40	\$3,488.86	1	0.006	\$20.93

To view details by year, select the specific year in the drop-down, and click **View Surcharge Details**.

View the surcharge invoice for that year by clicking **View Surcharge Invoice**.

To print a report of all records, check the box next to the Member Name header, and click **Export to Excel**.



To view details for a specific member, enter the member's SSN, and click **Filter**. To go back to the Calculation Detail for Included Members panel, click View Surcharge Details for the correct fiscal year.