



2023 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

<input type="checkbox"/>	Pickup ID	Employee Group	Tax Deferred Percentage	Board Paid Percentage	Effective Date	End Date	Pickup On Pickup	Status
<input type="checkbox"/>	<a href="#">6781</a>		0	0	07/01/1989		N	Approved
<input type="checkbox"/>	<a href="#">7474</a>	Classified Employees (Except Administrators)	10.00	0	07/01/2003		N	Approved
<input type="checkbox"/>	<a href="#">7475</a>	Administrators	2.00	8.00	07/01/2003		N	Approved
<input type="checkbox"/>	<a href="#">7476</a>	Treasurer	0	10.00	07/01/2003		Y	Approved

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**.

Upload & Submit

Refresh

Pickup Plan Details

3.

Pickup ID :

Status :

Effective Date :

End Date :

Employee Group :

Pickup on Pickup : ☐

Tax Deferred Percentage : 0.00%

Board Paid Percentage : 0.00%

4.

Upload Board Resolution :

Choose File

Clear

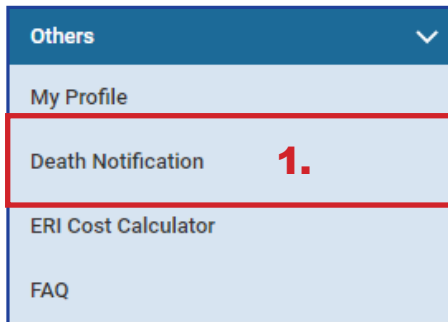
Upload the Board Resolution in PDF file format



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

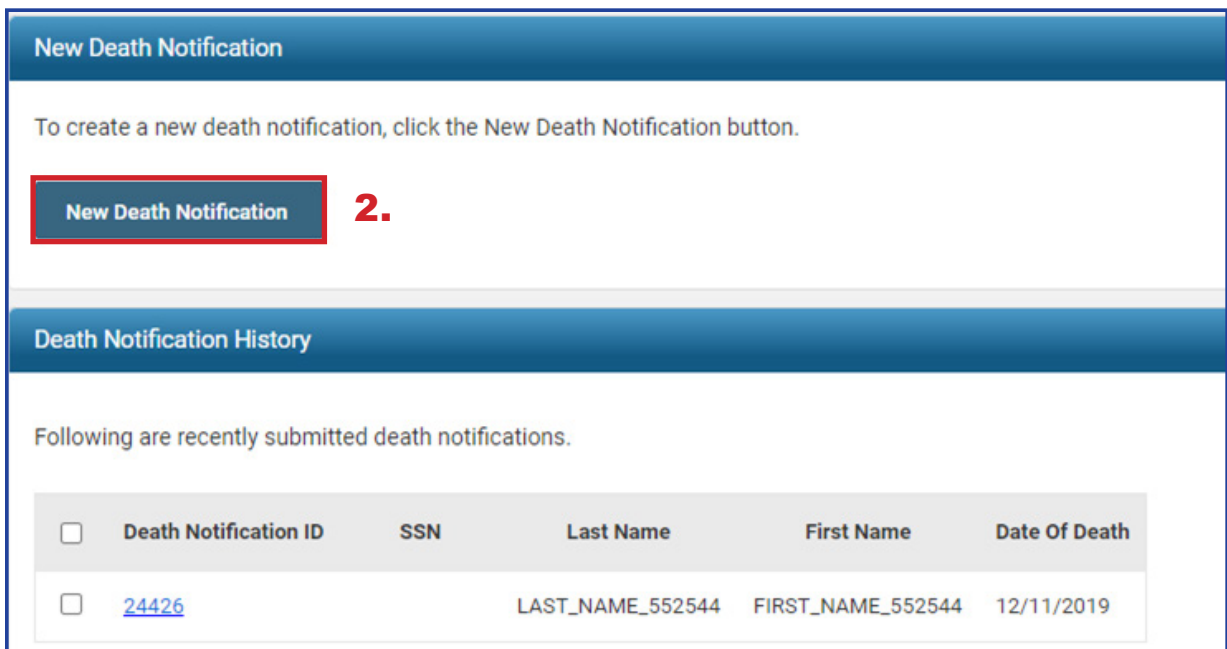
# Submit a Death Notification

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



## Steps:

1. Click the **Death Notification** menu item.
2. Click **New Death Notification**.

A screenshot of the 'New Death Notification' page. The page has a blue header 'New Death Notification'. Below the header, there is a text instruction: 'To create a new death notification, click the New Death Notification button.' Below this text is a button labeled 'New Death Notification' with a red border and a red '2.' next to it. Below the button is a section titled 'Death Notification History'. This section contains a text instruction: 'Following are recently submitted death notifications.' Below this instruction is a table with columns: 'Death Notification ID', 'SSN', 'Last Name', 'First Name', and 'Date Of Death'. The table has one row of data with a checkbox in the first column, a link '24426' under 'Death Notification ID', and placeholder text 'LAST\_NAME\_552544', 'FIRST\_NAME\_552544', and '12/11/2019' under the other columns.

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**.

4.

The screenshot shows a web application interface for 'Death Notification Maintenance'. At the top, there are two buttons: 'Submit' (highlighted with a red border) and 'Refresh'. Below the buttons is a section titled 'Death Notification' with a dropdown arrow. Inside this section, there is a large red number '3.' followed by the text 'Death Notification :'. Below this, there are several input fields: 'SSN :', 'Date Of Death :', 'Last Name :', 'First Name :', 'Middle Initial :', 'Name Prefix :', and 'Name Suffix :'. The 'SSN' and 'Date Of Death' fields have a small red asterisk. Below the 'Death Notification' section is another section titled 'Next Of Kin' with a dropdown arrow. This section contains input fields for 'Last Name :', 'First Name :', 'Middle Initial :', 'Name Prefix :', 'Name Suffix :', 'Relationship To Member :', 'Phone Number :', 'Address :', 'City :', 'State :', and 'Zip Code :'. The 'Relationship To Member' field has a dropdown arrow.

**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**.

The screenshot shows the eSERS interface. On the left, the 'Organization Information' menu is open, and the 'ERI Plan' option is highlighted with a red box and the number '1.'. On the right, the 'ERI Plan Information' screen is displayed. It contains a 'New ERI Plan' button, which is highlighted with a red box and the number '2.'. Below the button is a table with columns: ERI Plan ID, Effective Date, End Date, Maximum Service Credit, and Last Available Retirement Date. The table is currently empty, showing '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

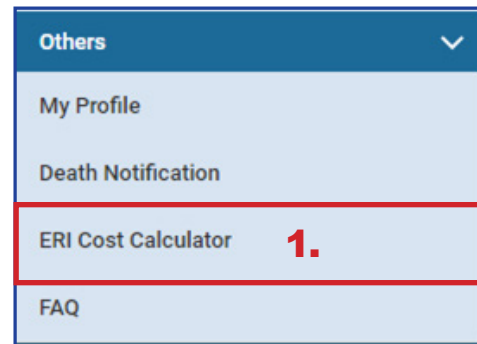
The screenshot shows the 'ERI Plan Details' form. At the top, the 'Upload & Submit' button is highlighted with a red box and the number '4.'. The form fields are labeled with a red '3.' and include: ERI Plan ID, Effective Date, End Date, Maximum Service Credit, Last Available Retirement Date, Comments, and Upload Board Resolution. The 'Upload Board Resolution' field has a 'Choose File' button and a 'Clear' button. A red note at the bottom states: 'Upload the Board Resolution 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**.
4. Click **Add to List** if you wish to move results to the lower panel.

A screenshot of the 'ERI Calculator' web application. The interface is divided into two main panels. The left panel, titled 'ERI Calculator', contains input fields for 'Member Age', 'Total Service Credit', 'Highest Annual Salary', and 'ERI Credit Purchase'. Below these are checkboxes for 'Member is not eligible for retirement without ERI' with options 'Pre SB 341' and 'Post SB 341'. A red number '2.' is next to the input fields. A red number '3.' is next to the 'Calculate ERI Cost' button. Below the button, the results are displayed: 'ERI Participant Cost : \$0.00', 'Health Care Liability : \$0.00', and 'Total Participant ERI Cost : \$0.00'. A red number '4.' is next to the 'Add To List' button. The right panel, titled 'Important Notes Regarding ERI', contains a list of bullet points. At the bottom of the application is a 'Temporary Calculation(s) Holder' section with buttons for 'Remove From List' and 'Export To Excel', a 'Total Temporary ERI Cost' field showing '\$0.00', and a table with columns: 'Member Age', 'Total Service Credit', 'Highest Annual Salary', 'ERI Credit Purchase', 'Eligibility to Retire', 'ERI Cost', 'Health Care Cost', and 'Total Participant Cost'. The table currently shows 'No records to display.'

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