2023 eSERS Guide

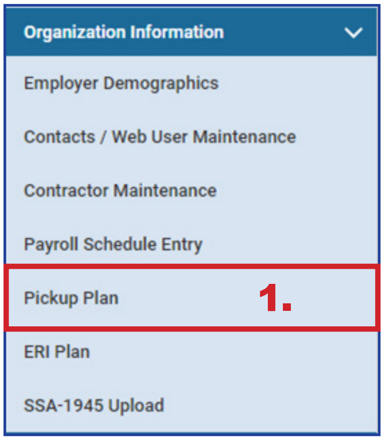
ADDITIONAL SUBMISSIONS

EMPLOYER RESOURCE

School Employees Retirement System of Ohio

Serving the People Who Serve Our Schools®

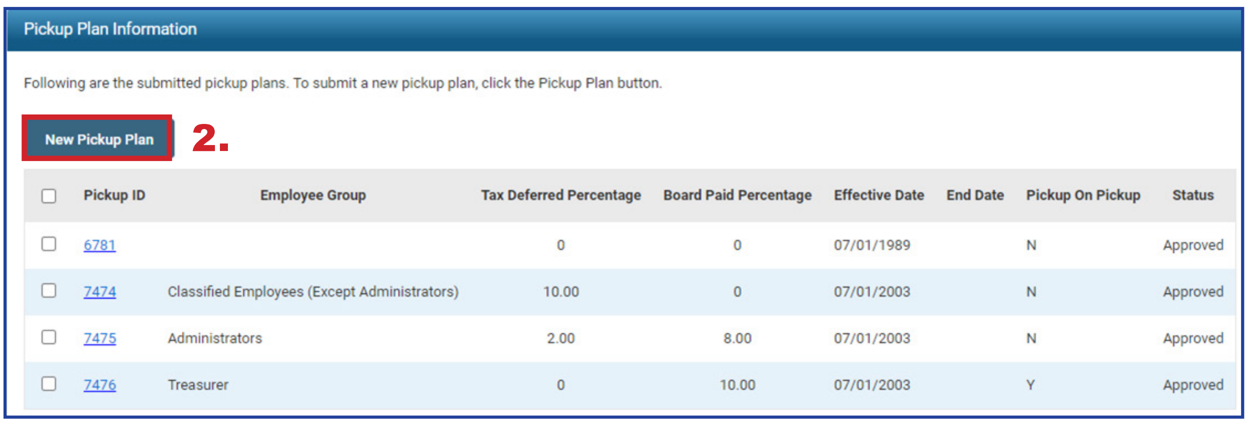
Pick-up Plan Submission



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

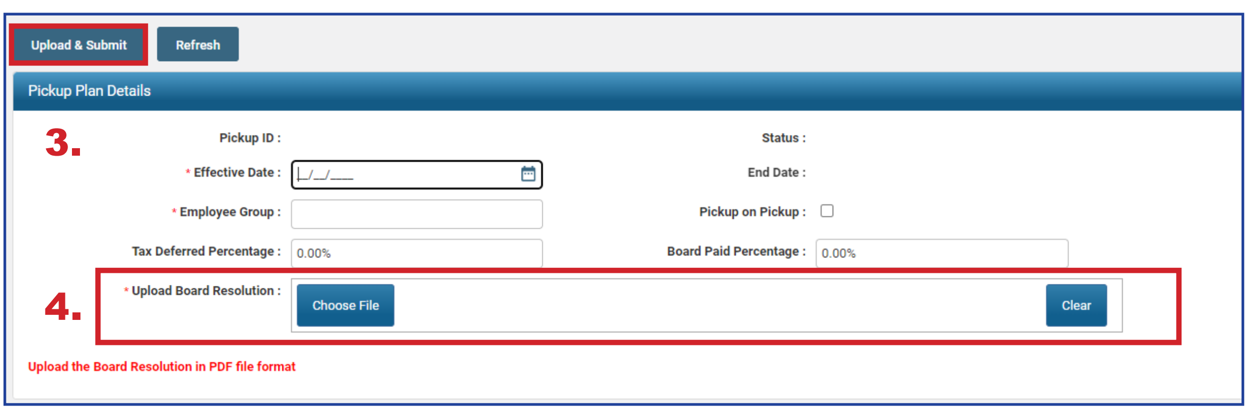
Following are the submitted pickup plans. To submit a new pickup plan, click the Pickup Plan button.

New Pickup Plan 2.

Pickup ID	Employee Group	Tax Deferred Percentage	Board Paid Percentage	Effective Date	End Date	Pickup On Pickup	Status
6781		0	0	07/01/1989		N	Approved
7474	Classified Employees (Except Administrators)	10.00	0	07/01/2003		N	Approved
7475	Administrators	2.00	8.00	07/01/2003		N	Approved
7476	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**.

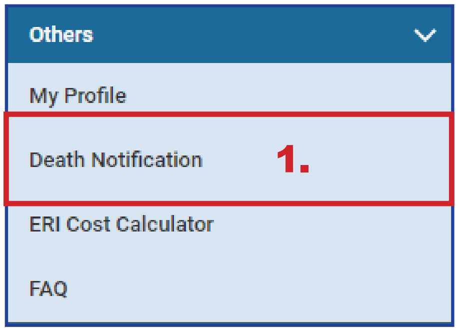
5.



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

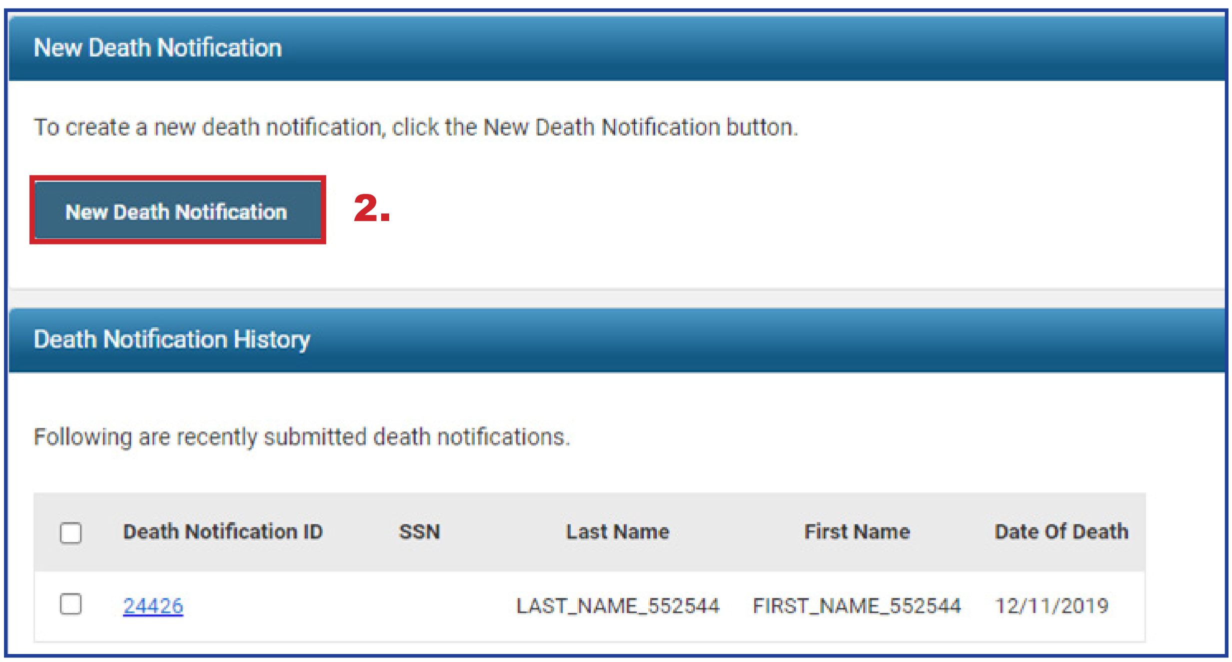
Submit a Death Notification

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



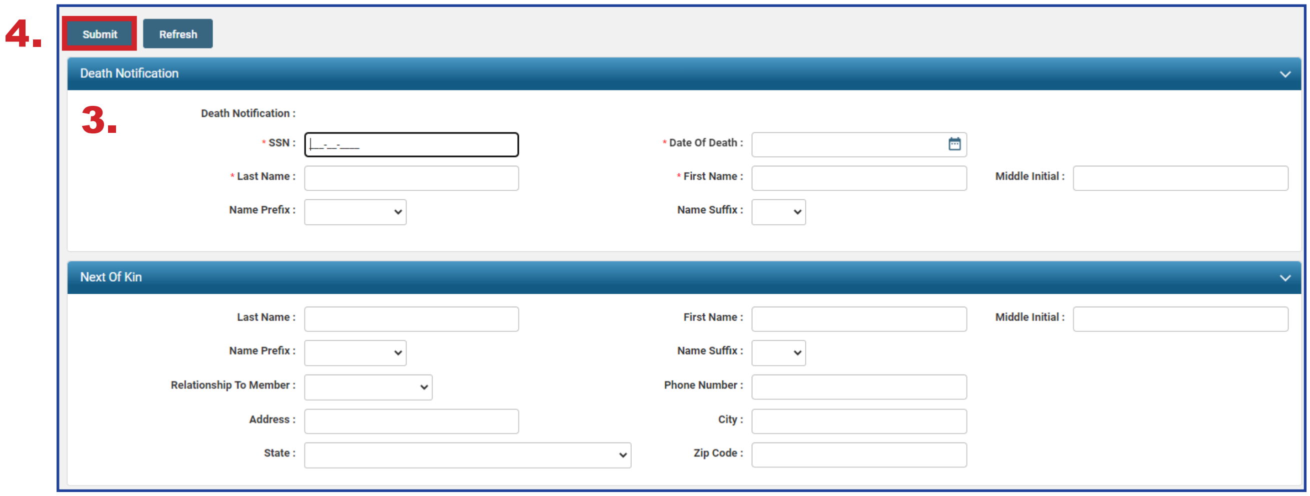
Steps:

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



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**.



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

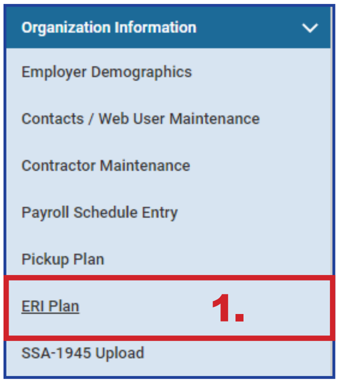
- If the deceased member was receiving benefits, those benefits will immediately stop until further action can be taken.
- A SERS employee is notified of the death and is assigned to process any benefits payable from the member's account.
- As the employer, you have 90 days (from date of death) to submit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

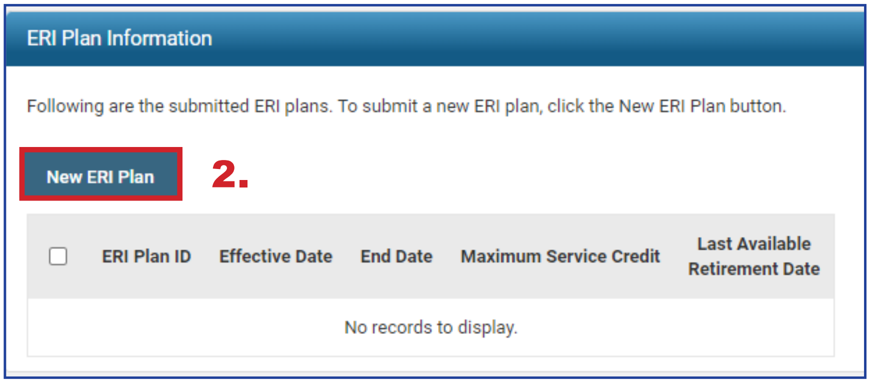
Submitting an ERI Plan

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

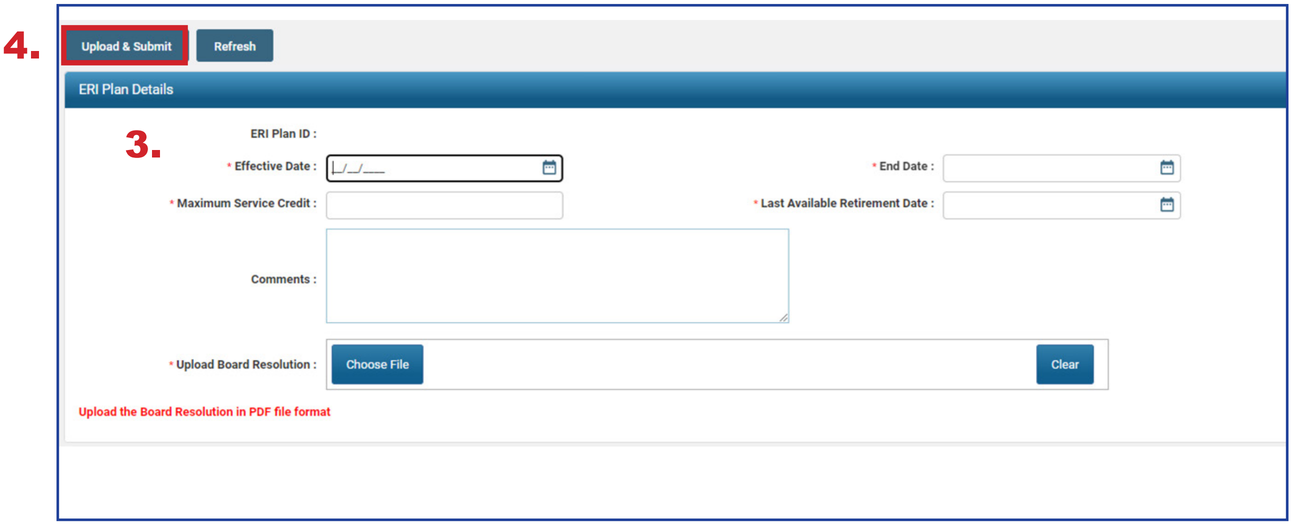
Steps:

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





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

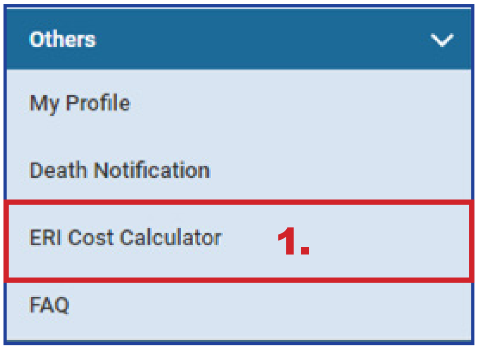


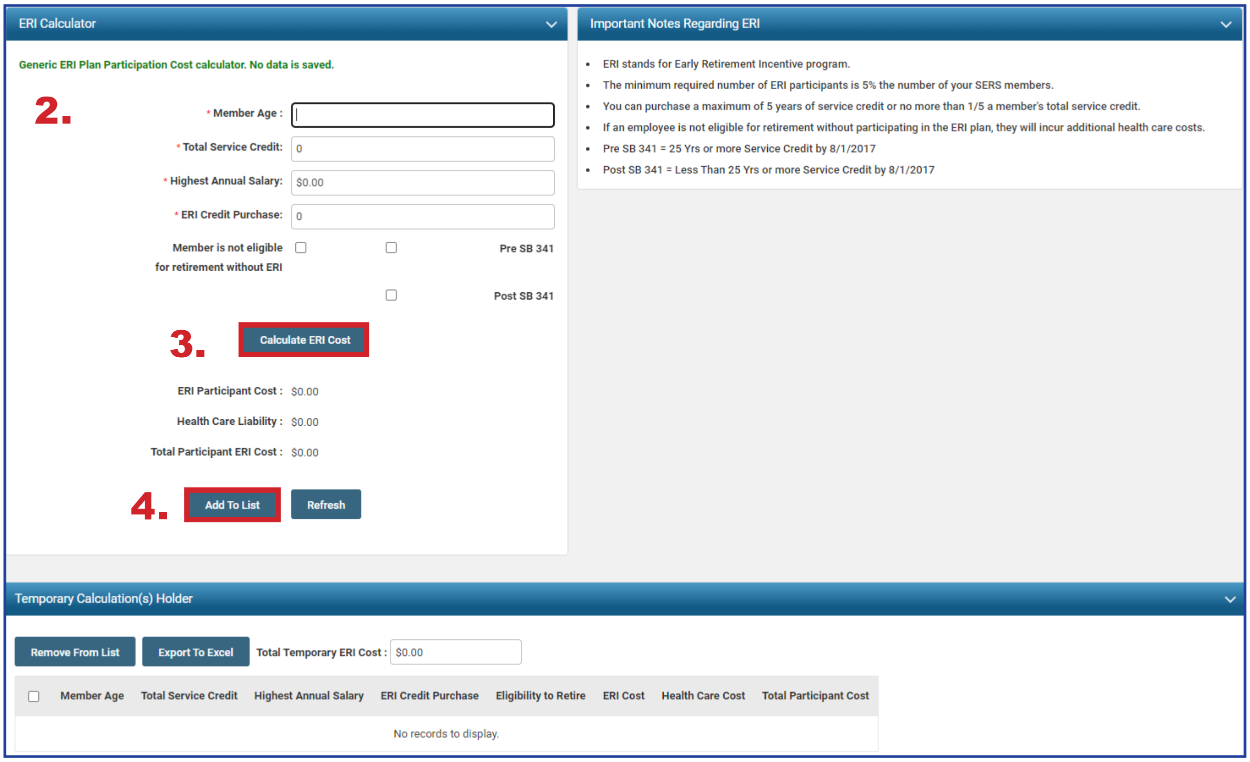
Calculating an ERI Estimate

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.





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