



HOW TO

Pull Reports from eSERS

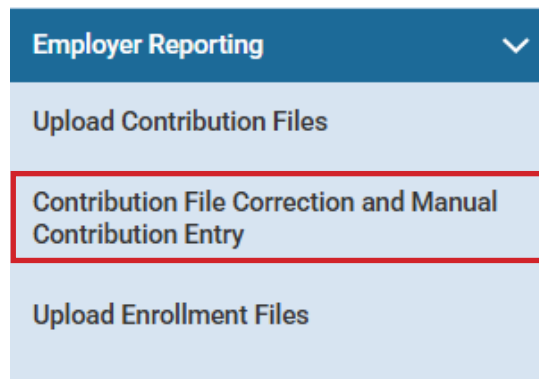
The Export to Excel button is useful to verify reporting information submitted to SERS. This button can be found under the following applications in eSERS:

- Contribution File Correction and Manual Contribution Entry
- Employer Reporting Detail Lookup

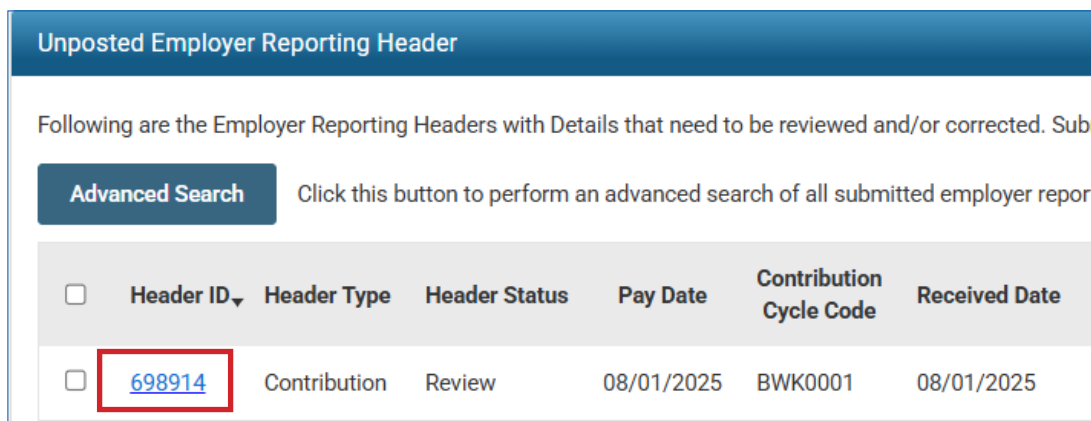
When a school district uploads a contribution file or manually enters a file, it will appear under Contribution File Correction and Manual Contribution Entry Application. The file will either be in Review or Posted status.

To export a contribution file, complete the following steps:

1. Go to Contribution File Correction and Manual Contribution Entry in eSERS.



2. For an unposted file, click the Header ID number under Unposted Employer Reporting Header.



or

- For a posted file, click the Header ID number under Posted Employer Reporting Header.

Posted Employer Reporting Header

Following are previously submitted and posted Employer Reporting Headers with details. Select one of the posted reports, enter the

* Pay Date :  **Copy Forward**

First Prev **1** 2 3 ... 19 20 Next Last Results 1 - 10 of 199

☐	Header ID	Header Type	Header Status	Pay Date	Contribution Cycle Code	Received Date	Posted Date
☐	697731	Contribution	Posted	07/15/2025	MON0001	07/09/2025	07/09/2025
☐	697713	Contribution	Posted with Warnings	07/10/2025	OTH0002	07/09/2025	07/09/2025

- You will be taken to the Header Maintenance screen. In the Contribution Information panel, click the Record Status dropdown to select “All,” and then hit **Filter**.
 - The record status dropdown offers different statuses. If you only want to pull files in a certain status other than “All,” select the specific status.

Contribution Information

New Open Void Record **Export To Excel**

Total Regular Employee Pre-Tax Contributions : \$7,780.00 Total Employee Earnings (System Calculated) : \$80,300.00
 Total Regular Employee Post-Tax Contribution : \$0.00 Total Employee Earnings (Submitted) : \$80,300.00
 Total Reemployed Employee Pre Tax Contribution : \$0.00 Total Employer Contributions (System Calculated) : \$11,242.00
 Total Reemployed Employee Post Tax Contribution : \$0.00

SSN : Earnings Code Type : All

Record Status : All **Filter**

☐	Contribution Record ID	SSN	Name	Period Begin Date	Period End Date	Earnings Code	Service Days	Hours	Earnings	Pre-Tax Contributions	Posted	Record Status
☐	28818972	111-22-1111	Peter Pan	07/14/2025	07/27/2025	01	54	108.00	\$3,000.00	\$300.00	Posted with Warnings	Review
☐			Mickey								Review	

All employees who are on the file will appear in the Contribution Information panel. If you select “All” as your filtered record status, all records, including Void, will appear.

- Click **Export to Excel**.

Contribution Information

New Open Void Record **Export To Excel**

Total Regular Employee Pre-Tax Contributions : \$7,780.00 Total Employee Earnings (System Calculated) : \$80,300.00
 Total Regular Employee Post-Tax Contribution : \$0.00 Total Employee Earnings (Submitted) : \$80,300.00
 Total Reemployed Employee Pre Tax Contribution : \$0.00 Total Employer Contributions (System Calculated) : \$11,242.00
 Total Reemployed Employee Post Tax Contribution : \$0.00

SSN : Earnings Code Type : All Record Status : All **Filter**

☐	Contribution Record ID	SSN	Name	Period Begin Date	Period End Date	Earnings Code	Service Days	Hours	Earnings	Employee Pre-Tax Contributions	Employee Post-Tax Contributions	Employer Contributions	Record Status
☐	28818972	111-22-1111	Peter Pan	07/14/2025	07/27/2025	01	54	108.00	\$3,000.00	\$300.00	\$0.00	\$420.00	Review
☐	28818973	222-11-2222	Mickey Mouse	07/14/2025	07/27/2025	01	0	0.00	\$70,000.00	\$7,000.00	\$0.00	\$9,800.00	Review

6. This exports the information to Excel. You can remove columns by unchecking the boxes next to the information that isn't needed. Click **Export Excel** again to generate the excel sheet.

Export To Excel

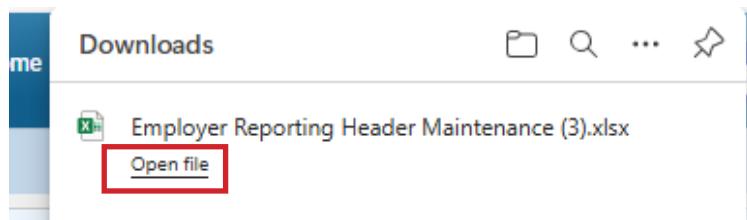
Select/Unselect All: ☒

Select the columns to be exported from the following list:

☒ Contribution Record ID	☒ SSN	☒ Name
☒ Period Begin Date	☒ Period End Date	☒ Earnings Code
☒ Service Days	☒ Hours	☒ Earnings
☒ Employee Pre-Tax Contributions	☒ Employee Post-Tax Contributions	☒ Employer Contributions
☒ Record Status		

Export Excel

7. The Excel sheet will be labeled “Employer Reporting Header Maintenance” and be available as a pop up under Downloads. Click **Open File** to retrieve the Excel sheet.

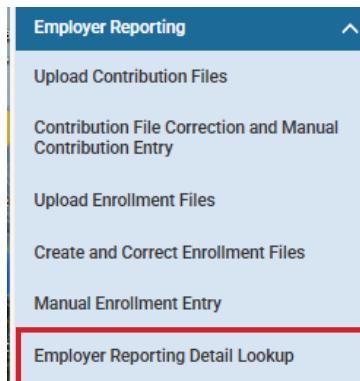


Exporting Payroll Information from Employer Reporting Detail Lookup

The Employer Reporting Detail Lookup application allows the employer to extract enrollment and/or payroll information that has been submitted to SERS.

Steps:

1. Click on Employer Reporting Detail Lookup.



2. In the Criteria panel, enter the information that you want to pull from eSERS. In this example, we are pulling employee payroll reporting.

- Type the Last Name and First Name or Social Security number.

3. Click **Search**.

A screenshot of the 'Criteria' panel in the application. It contains various input fields for search criteria. A red rectangular box highlights the 'Last Name' field with the value 'Mouse', the 'First Name' field with the value 'Mickey', and the 'SSN' field. Below these are fields for 'Header ID', 'Header Type', 'Header Status', 'Contractor ID', 'Reporting Source', 'File Name', 'Detail Record ID', 'Detail Record Status', 'Pay Date', 'Period Begin Date From', 'Period Begin Date To', 'Period End Date From', 'Period End Date To', and 'Unique ID'. At the bottom are three buttons: 'Search' (highlighted with a red box), 'Reset', and 'Store Search'.

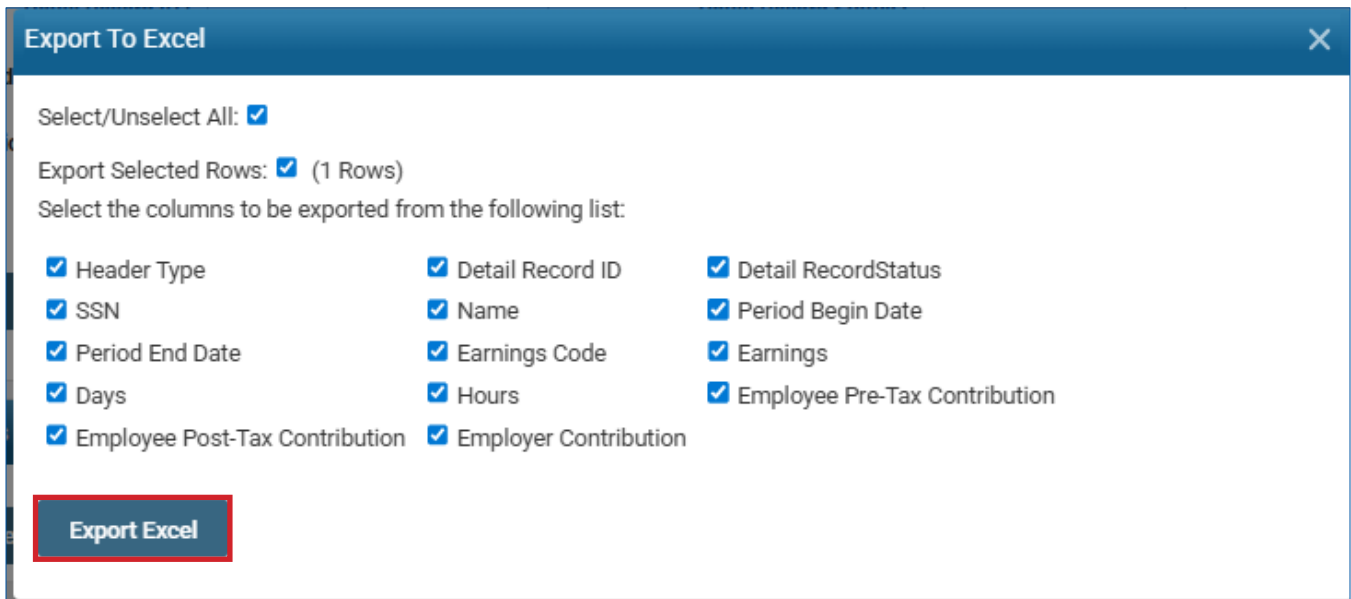
4. Under the Search Results panel, all the payroll information for that specific employee is provided.

5. Mark the box next to any payroll line to add to the Excel file.

6. Click **Export to Excel**.

A screenshot of the 'Search Results' panel. At the top, there are two buttons: 'Export To Excel' (highlighted with a red box) and 'Open'. Below is a table with the following columns: a checkbox, 'Header Type', 'Detail Record ID', 'Detail Record Status', 'SSN', 'Name', 'Period Begin Date', 'Period End Date', 'Earnings Code', 'Earnings', 'Days', 'Hours', 'Employee Pre-Tax Contribution', 'Employee Post-Tax Contribution', and 'Employer Contribution'. There are two rows of data. The first row is for a 'Contribution' with ID '28818993', status 'Review', SSN '222-11-2222', name 'Mickey Mouse', period '07/14/2025' to '07/27/2025', earnings code '01 - Regular Contribution', earnings of '\$70,000.00', and contributions of '\$7,000.00' (pre-tax), '\$0.00' (post-tax), and '\$9,800.00' (employer). The second row is for an 'Enrollment' with ID '370636', status 'Posted', SSN '222-11-2222', name 'Mickey Mouse', earnings of '\$0.00', and contributions of '\$0.00' (pre-tax), '\$0.00' (post-tax), and '\$0.00' (employer). A red rectangular box highlights the checkboxes for both rows.

This will export the information to Excel. You can remove columns by unchecking the boxes next to the information that isn't needed.



Export To Excel

Select/Unselect All: ☒

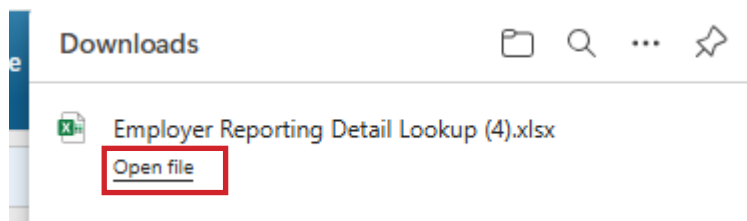
Export Selected Rows: ☒ (1 Rows)

Select the columns to be exported from the following list:

☒ Header Type	☒ Detail Record ID	☒ Detail RecordStatus
☒ SSN	☒ Name	☒ Period Begin Date
☒ Period End Date	☒ Earnings Code	☒ Earnings
☒ Days	☒ Hours	☒ Employee Pre-Tax Contribution
☒ Employee Post-Tax Contribution	☒ Employer Contribution	

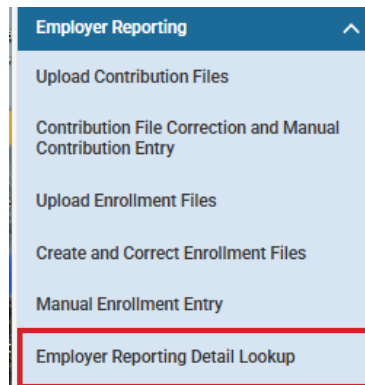
Export Excel

- Click **Export Excel** again to generate the Excel sheet. The Excel sheet will be labeled “Employer Reporting Detail Lookup” and be available as a pop up under Downloads. Click Open File to retrieve the Excel sheet.



Printing an Enrollment from Employer Reporting Detail Lookup

1. Click on Employer Reporting Detail Lookup.



2. In the Criteria panel, enter the Last Name and First Name or the Social Security number.
3. Chose Enrollment from the Header Type dropdown.
4. Click **Search**.

A screenshot of the 'Criteria' panel in a web application. The panel contains several input fields for search criteria: 'Last Name' (Mouse), 'First Name' (Mickey), 'SSN' (empty), 'Header ID' (empty), 'Contractor ID' (empty), 'Detail Record ID' (empty), 'Period Begin Date From' (empty), 'Period End Date From' (empty), 'Unique ID' (empty), 'Header Type' (Enrollment), 'Reporting Source' (ARP), 'Detail Record Status' (Contribution), 'Period Begin Date To' (empty), 'Period End Date To' (empty), 'Header Status' (dropdown), 'File Name' (empty), and 'Pay Date' (empty). The 'Header Type' dropdown is open, showing 'Enrollment' selected. The 'Search' button is highlighted with a red rectangular box.

5. Under Search Results, click on the Detail Record ID number.

Search Results														
Export To Excel Open														
☐	Header Type	Detail Record ID	Detail Record Status	SSN	Name	Period Begin Date	Period End Date	Earnings Code	Earnings	Days	Hours	Employee Pre-Tax Contribution	Employee Post-Tax Contribution	Employer Contribution
☐	Enrollment	370636	Posted	222-11-2222	Mickey Mouse				\$0.00	0	0	\$0.00	\$0.00	\$0.00

6. The enrollment details screen will open.

Employer Reporting Header Information		
Employer Reporting Header ID : 698899	Header Type : Enrollment	Header Status : Posted

Enrollment Person Information		
Enrollment Record ID : 370636	Record Status : Posted	Suppress Warnings: ☐
* SSN : 222-11-2222	* Date Of Birth : 03/16/1980	* Gender : Male
* First Name : Mickey	Middle Name :	* Last Name : Mouse
Name Prefix :	Name Suffix :	
* Street Address : 300 E. Broad St	Apt/Ste :	
* City : COLUMBUS	* State : Ohio	* Zip Code/ Plus 4 : 43215
Cell Phone : 3302322386	* Personal Email : ktaibert@ohsers.org	Marital Status : Married

Enrollment Employment Information	
* First Date Of Service : 06/01/2025	* Job Classification : Administrative
ARP Eligible Job Classification :	Contractor ID :

7. Click the **Print** button on the upper right-hand side of your screen for a copy of the enrollment.



Tip: Enrollments entered prior to February 2017 will not be available on eSERS. Please contact Employer Services for assistance.