



SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO

Employer Bulletin

Summer Issue | July 1, 2026

Welcome to FY2027! Employer Services wants to help you begin the fiscal year with a smooth start by providing you with a few useful reminders.

The scope of your SERS responsibilities goes beyond submitting Member Enrollments and Contribution Reports. Below are some reminders about items that you may handle only a few times a year, but they're still important.

Pick-Up Plans

Please remember that when there is a new Pick-up Plan, the district is required to notify SERS. The Pick-up Plan information needs to be submitted through eSERS using the Pick-up Plan application.

For more information on Pick-up Plans and how to submit them, download the [Pick-up of Employee Contributions Fact Sheet](#).

Changes with District Staff

With the beginning of a new fiscal year, there may be new staff members who need access to eSERS. The Employer Web Administrator (EWA) for the district is required to keep eSERS up to date with new and terminated employees. The [Web User Maintenance](#) section of the eSERS Guide provides step-by-step instructions to add or terminate eSERS Web Users.

If the district has a new EWA, the [Employer Web Administrator Registration form](#) will need to be completed.

eSERS Reminder for Web Users

An eSERS Web User will receive notification that their profile has been terminated if it is detected that they have not logged into eSERS for 18 months due to inactivity.

Correct Mailing Address

While Employer Services primarily communicates electronically, there are times when Member Services will mail sensitive information to the district. It is imperative that SERS has the correct address for your district.

You can verify the address SERS has by logging into eSERS, and it will be listed in the Employer Information panel on the eSERS Home screen. If it is incorrect, email employerservices@ohsers.org with the correct address for your office.

Exemption from Membership

There are three instances where an individual can be exempt from SERS membership:

- A student who is not a SERS member at the time of employment and who is employed by the school, college, or university in which the student is enrolled and regularly attending classes; or
- An emergency employee serving on a temporary basis in case of fire, snow, earthquake, flood, or other similar emergency. A substitute employee is not an emergency employee; or,
- An individual employed in a program established under the federal Workforce Investment Act or any other federal job training program.

To be exempt, an employee must complete and file with the employer a [Request for Exemption from Membership](#) form within the first month of employment.

The membership exemption is in effect if the employee is continuously employed and meets the criteria of the exemption.

The Request for Exemption from Membership form will need to be completed, and the school district is required to retain this form indefinitely.

Treatment of Board Member Reporting

When a district selects new school board members, it is important to remember that they have an option in electing SERS membership. If they choose SERS membership, they will submit a completed [New School or Governing Board Member Election for Membership Form to SERS](#) within 30 days of taking office. Once a decision has been made, it is irrevocable while the board members continuously hold office.

SSA-1945 Form

When enrolling a new SERS member, the SSA-1945 Form will need to be submitted to Employer Services.

This form can be uploaded into eSERS using the SSA-1945 Upload or can be faxed to 614-340-1195.

New Contract Companies and eSERS

When a district goes into contract with a third-party vendor, it is important to add the new company to eSERS and assign the contract company contacts to that specific contractor. Please download the [eSERS Guide – “Contractor Maintenance”](#) section to view how to correctly add a new contract company.

Adding a Contractor Contact

Once the contract company has been added into eSERS, the EWA for the district will need to add Web Users. When doing this, contractor Web Users will need to be linked to the company so that they will only be able to see their information.

If the contract company was entered correctly, it will be listed in the Contractor drop down in the New Contact screen. When entering the new contact information, select the contract company from the Contractor drop down box in the New Contact screen.

The screenshot shows the 'New Contact' form in the eSERS system. At the top, there is a navigation bar with 'Contact/ Web User Maint...' and 'Contact Record Maintena...'. Below this is a status bar indicating 'Record displayed. Please make changes and press SAVE.' and buttons for 'Save' and 'Refresh'. The main section is titled 'Contact Information'. It contains several fields: 'Contact ID', 'Select from' (with radio buttons for 'Management Company Contact', 'Select from ITC Contact', 'Select from Sponsor Contact', and 'None'), 'First Name', 'Middle Name', 'Last Name', 'Prefix', 'Suffix', 'Job Title', 'Main Phone / Ext', 'Email', 'Contact Address', 'Status' (set to 'Active'), and 'Contact Role'. The 'Contractor' dropdown menu is highlighted with a red box. At the bottom, there are checkboxes for 'Contribution Reporting', 'Fiscal Officer', 'Superintendent/President', 'Sponsor', 'ITC', 'Management Company', and 'Web User'.

Determining Membership: Independent Contractors, Consultants, and Third-Party Contractors

It is up to the school district to request a Membership Determination when hiring an independent contractor, consultant, or contract company to perform services.

Do not take a vendor's claim that the workers are exempt from SERS membership. Always contact SERS directly to confirm the contract workers' membership status.

The law places the risk of incorrect membership determination on the employer. This means if a membership question arises, and SERS determines the individual is an employee and should be contributing to SERS, you are responsible for the employer and employee contributions, plus interest.

For more details on membership, download the [Employer Fact Sheet: Membership](#).

For membership determinations, Employer Services requires a copy of the job description and/or contract, and at times we will request the [Membership Determination Form](#). This form is needed to help SERS understand the working relationship between the employer and hired contractor.

The district will complete Section I when entering into an agreement with an independent contractor or consultant. Section II will be completed when hiring a contract company to provide a service.

Compensation

Last year, the SERS Board adopted a new definition of compensation that was effective on July 1, 2025. The updated Administrative Rule defines three types of “compensation” that includes all salary, wages, and other earnings paid to an employee by reason of employment. For a comprehensive list of the SERS-covered compensation, please download the [Employer Fact Sheet: Compensation](#).

Documentation for compensation determinations vary depending on the type of payment being issued to the employee. Types of required documentation include copies of contracts, school district policies, collective bargaining agreements, settlement agreements, or grievances.

Helpful Tips: Enrollments

When enrolling a new member, you may get errors or warnings that will stop the enrollment from posting. Please remember that SERS requires accurate reporting, this includes information on the Member Enrollment.

Member Enrollment Errors – Errors cannot be suppressed

If your enrollment has errors listed, they will need to be corrected before the enrollment can be submitted. If you are unsure how to correct the error, do not void your enrollment, please contact Employer Services for help.

Member Enrollment Warnings – Please address the warning before suppressing it

It is possible information was entered wrong, and it will need to be corrected.

Don't Forget to Submit!

There are many times when the enrollment has been corrected but hasn't been submitted for posting. Once your enrollment is valid, you need to hit the Submit for Posting button. If you don't submit your enrollment, the contribution record for that member won't post.

Enrollment Required Error

If you have received the Member Enrollment Required error on a contribution record, go to the Employer Reporting Detail Lookup application on eSERS to see if you submitted an enrollment already. It's possible that the Social Security Number on the enrollment is incorrect or the contribution record is wrong. If you have verified that the member needed to be enrolled, you need to manually enter the enrollment or upload an enrollment file.

Once you have successfully entered the enrollment, **ALWAYS** make sure you go back to your contribution record that is in error status and hit the save button. Doing this sends the contribution

record through the validation process, and eSERS will recognize the enrollment making the contribution record valid.

If the member has been enrolled already, do not enter a new enrollment, call Employer Services with next steps.

Looking Ahead

Updates to Member Enrollment Validations

Employer Services has been working with Member Services on updates to the Member Enrollment validation process in eSERS.

There will be an *eSERS Hotline* in the next month with updates to the validation process for enrollments.

Employer Statements and Surcharge

In late July, Districts will be notified via *Special Notice* and an eSERS Message Board message that Employer Statements and Surcharge are available. Employer Outreach will be hosting a webinar on Wednesday, July 29, 2026, at 9 a.m., to go over the annual process.

[Register here](#)

If you are unable to attend, you can view past webinars on Statement and Surcharge in our [Video Center](#):

[Employer Statement](#)
[Employer Surcharge](#)

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