



# **Employer Self Service (ESS) Instructions**

[www.strsoh.org/employer](http://www.strsoh.org/employer)



# Employer Self Service (ESS) Instructions

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[www.strsoh.org/employer](http://www.strsoh.org/employer)

### ***Need assistance?***

*Call us toll-free at  
888-535-4050 or  
view tutorials on  
our website.*

# Section 1

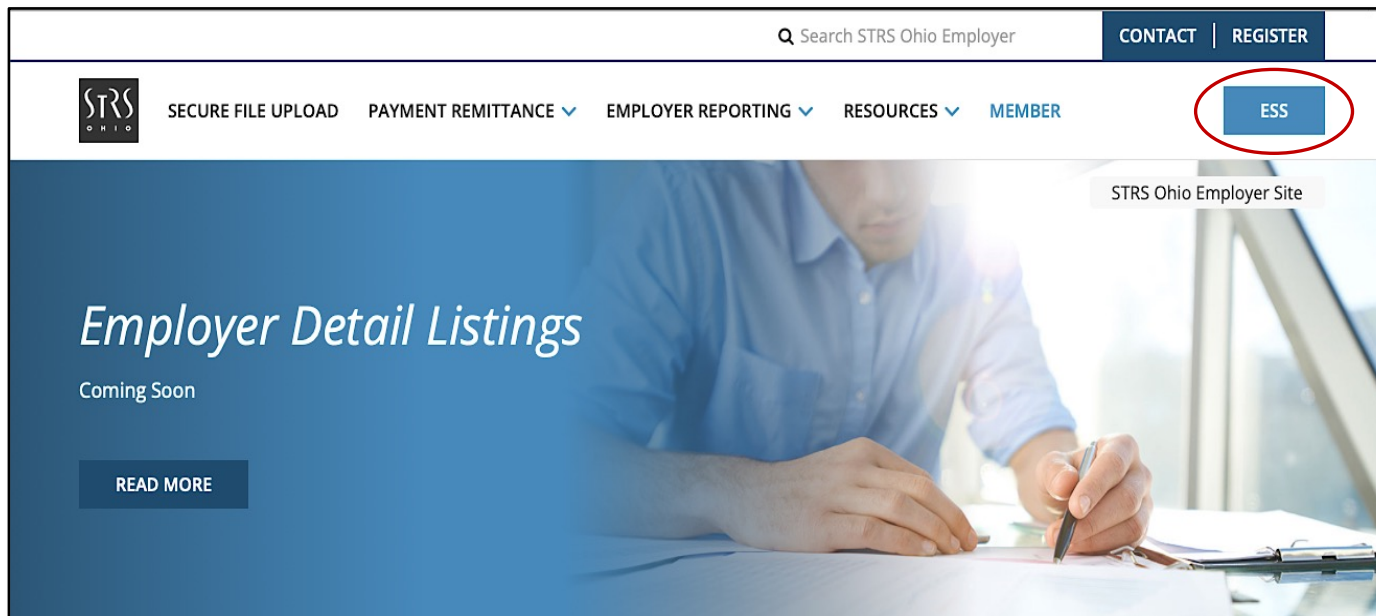
## Getting Started

The following instructions explain how to log in, set up your account, change your password or security questions and navigate pages in ESS.

### Logging In to ESS

1. Go to [www.strsoh.org/employer](http://www.strsoh.org/employer). (Be sure to include [/employer](#) at the end of the address to avoid going to the STRS Ohio member site.)
2. Click “ESS” in the upper right corner of the home page.
3. The ESS login screen will appear. Enter your user name and password. Then click “Login.”

**Note:** You must have your own user name and password to use ESS. Do not use anyone else’s login credentials. Requests for new user accounts must be submitted by a current authorized user. See “Employer Contacts” in Section 20 for more information.



#### Tips!

- Look for “STRS Ohio Employer Site” under the ESS button to be sure you are on the employer website.
- Passwords are case sensitive. Make sure “Caps Lock” is not on.
- Your account may be automatically suspended (locked) if you have not accessed ESS in the past six months.
- If you cannot remember your user name or password, call STRS Ohio toll-free at 888-535-4050.

# Setting Up Your Account (Initial Login)

When you log in to ESS for the first time, you will be asked to provide contact information, set up security questions and create a new password. This is a three-step process (identification, security setup and confirmation). Use the following instructions to set up your account.

## Step 1

Complete all fields on the Identification screen. Then click "Next" to continue to the Security Setup screen.

**Verify User Registration Wizard**

1 Identification 2 Security Setup 3 Confirmation

Please enter the following information so that the new user can register and create the account.

User Name: TTEACHER  
First Name: TIMOTHY  
Last Name: TEACHER  
E Mail: tteacher@ohiolocal.org

Enter the following security identifiers

Account Code: Enter Account Code  
Business Phone: Enter Business Phone Ext: [ ]

STRS Ohio will provide your account code in the verification email.

Cancel Next

## Step 2

Enter all information on the Security Setup screen. Then click "Next" to continue to the Confirmation screen shown on the next page.

**Verify User Registration Wizard**

1 Identification 2 Security Setup 3 Confirmation

Please setup your security questions

Security Question 1: [ ]  
Security Answer 1: Enter your answer  
Security Question 2: [ ]  
Security Answer 2: Enter your answer

Click the arrow to select a security question from the drop-down menu.

Passwords must match the following rules:

- must be at least 8 characters long
- cannot have more than 24 characters
- must contain at least 1 letter
- Password should have a minimum of 2 non alphabetic characters
- must contain at least 1 number
- use at least 1 special character (!, @, #, etc.), excluding: & < % \ . , > ' / ( ) = | \* ;

Enter your new Password: Enter new password here [ ] [ ] [ ] [ ] Strength

Please confirm your password: Enter new password here [ ] [ ] [ ] [ ]

Cancel Back Next

### Step 3

Review the information on the Confirmation screen.

- If all information is correct, click “Confirm.”
- If you need to correct any information, click “Back” to return to the previous screen(s).

The screenshot shows a window titled "Verify User Registration Wizard" with three steps: 1 Identification, 2 Security Setup, and 3 Confirmation. The Confirmation step is active. The screen displays the following information for confirmation:

Please confirm the creation of the following user account.

|                      |  |
|----------------------|--|
| First Name:          | TIMOTHY  |
| Last Name:           | TEACHER  |
| User Name:           | TTEACHER   |
| E Mail:              | tteacher@ohiolocal.org                                 |
| Security Question 1: | What was the color of your first car?                  |
| Security Answer 1:   | yellow   |
| Security Question 2: | What is the street number of the house you grew up in? |
| Security Answer 2:   | 1234   |

At the bottom, there are three buttons: "Cancel", "Back", and "Confirm". A red box with the text "Click 'Confirm' if all information is correct." has a red arrow pointing to the "Confirm" button.

## Changing Your Password or Security Questions

If you want to change your password or security questions after your initial login:

1. Click on your name at the top of any page.
2. In the User Profile box, click "Change Password" or "Change Security Questions."
3. The screen shown on the next page will appear for you to make the changes.

*Note: You can also view your login history by clicking "View Login History."*

The screenshot displays the Ohio Local Schools (9599) user interface. At the top right, the user's name "Steve Smith" is circled in red, with a yellow box containing the number "1" and an arrow pointing to it. Below the navigation bar, there are three main sections: "Additional Tools", "Outstanding Reports", and "Current Obligations". A "User Profile" modal window is open in the center, showing the user's details: User Name: SteveS, Name: Smith, Steve, E Mail: (blank), and Last Logon Date: (blank). At the bottom of the modal, there are three buttons: "Change Password", "Change Security Questions", and "View Login History". A yellow box containing the number "2" and two red arrows points to the "Change Password" and "Change Security Questions" buttons. The "Current Obligations" section contains a table with the following data:

| Due Date   | Description                        | Amount     |
|------------|------------------------------------|------------|
| 09/12/2023 | Payroll-reported contributions due | \$515.78   |
| 09/13/2023 | PSC employer cost-Kimberly K       | \$5,719.60 |
| 09/15/2023 | Monthly PSC deductions due         | \$811.23   |
|            | Payment received - not yet applied | -\$276.65  |

## Change Password

1. Enter your current password.
2. Enter your new password following the rules at the top of the page. Then confirm it.
3. Click "Change."

ESS Change Password

Passwords must match the following rules:

- must be at least 8 characters long
- cannot have more than 24 characters
- must contain at least 1 letter
- Password should have a minimum of 2 non alphabetic characters
- must contain at least 1 number
- use at least 1 special character (!, @, #, etc.), excluding: & < % \ . , > ' / ( ) = | \* ;

Current Password: **1**

New Password: **2**     Strength

Confirm New Password:

**3**

## Change Security Questions

1. Select your preferred security questions from the drop-down menu.
2. Enter your answers to the questions.
3. Click "Change."

Change Security Questions

Security Question 1:   **1**

Security Answer 1:  **2**

Security Question 2:   **1**

Security Answer 2:

**3**

# Navigation Tips

## Navigation on the Home Page

To navigate ESS on the home page:

1. Click a topic in the banner menu at the top of the page, or
2. Click a topic in the Additional Tools menu.

*Note: Options in the banner menu and Additional Tools menu may vary depending on the type of access granted.*

## Navigation on Any Page

To navigate ESS on any page:

1. Click "Home" in the upper left corner of the page to return to the home page, or
2. Click a topic in the banner menu at the top of the page.

The screenshot shows the ESS home page interface. At the top, a red double-headed arrow labeled "banner menu" spans across the navigation links: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The "Home" link is circled in red. Below the banner menu, there are three main content areas: "Additional Tools", "Outstanding Reports", and "Current Obligations". A red arrow points to the "Additional Tools" menu. The "Outstanding Reports" section contains a table with the following data:

| Report Type                     | Number of Reports |
|---------------------------------|-------------------|
| Service Credit Verification     | 1                 |
| Accrued Verification            | 1                 |
| Employment Verification Reports | 3                 |
| Annual Reporting                | 1                 |
| Withdrawal Certification        | 2                 |
| Pay Date Calendar               | 1                 |
| Violation Period Certification  | 1                 |

The "Current Obligations" section contains a table with the following data:

| Due Date   | Description                        | Amount     |
|------------|------------------------------------|------------|
| 09/12/2023 | Payroll-reported contributions due | \$515.78   |
| 09/13/2023 | PSC employer cost-Kimberly K       | \$5,719.60 |
| 09/15/2023 | Monthly PSC deductions due         | \$811.23   |
|            | Payment received - not yet applied | -\$276.65  |

At the bottom of the page, there is a "News & Alerts" section.



## Section 2

# New Hire Notification

The following instructions explain how to submit a new hire notification in ESS and view or print it after it has been submitted.

## Submitting a New Hire Notification

### Step 1

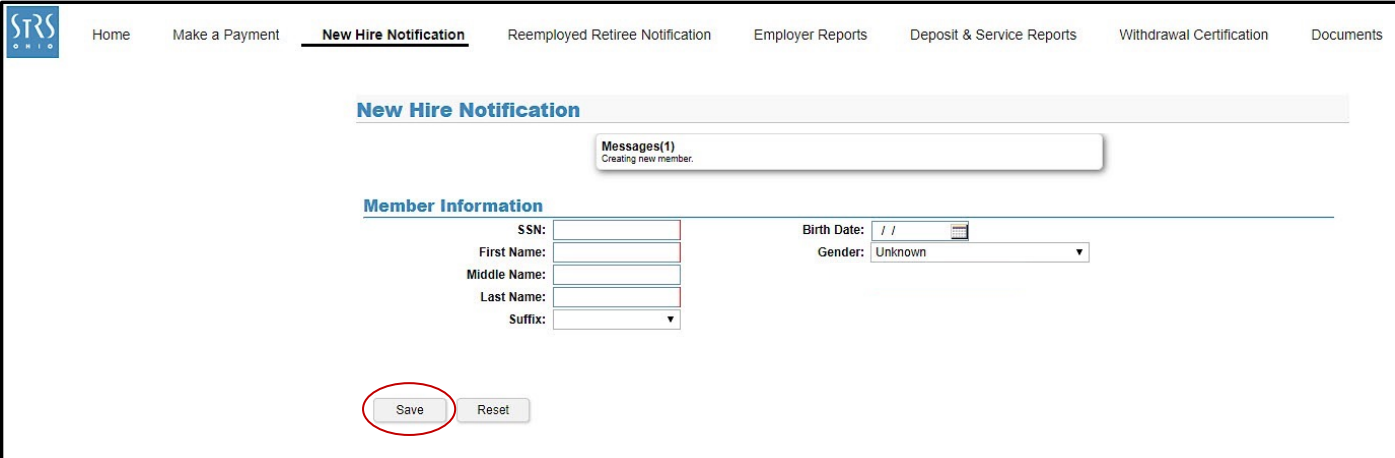
Click on “New Hire Notification” in the banner menu at the top of the home page. *(Screen not shown.)*

### Step 2

Enter the following information for the member:

1. Social Security number (SSN)
2. First name
3. Last name
4. Birth date
5. Gender

Then click “Save.” The screen shown on the next page will appear.



The screenshot shows the 'New Hire Notification' form in the ESS system. The form is titled 'New Hire Notification' and is located under the 'New Hire Notification' menu item. The form includes a 'Messages(1)' section with the message 'Creating new member.' Below this is the 'Member Information' section, which contains the following fields:

- SSN:
- First Name:
- Middle Name:
- Last Name:
- Suffix:
- Birth Date:
- Gender:

At the bottom of the form, there are two buttons: 'Save' and 'Reset'. The 'Save' button is circled in red.

### Step 3a

If the member's information is already on file with STRS Ohio, some fields may be prepopulated. Prepopulated fields cannot be changed. The member must contact STRS Ohio if changes are needed.

1. Enter any missing information, such as phone numbers and a secondary email address.
2. Click "Save." The screen shown on the next page will appear.

### Step 3b

If member information is not prepopulated, enter the following:

1. Street address
2. ZIP code. Then press "Enter" on your keyboard to automatically populate the city and county. If additional city/county options are listed, choose the correct city. (STRS Ohio does not currently track county.)
3. Phone numbers (optional)
4. Email addresses (primary is required; secondary is optional)

Click "Save." The screen shown on the next page will appear.

STRS OHIO

Home Make a Payment **New Hire Notification** Reemployed Retiree Notification Employer Reports Deposit & Service Reports Withdrawal Certification Documents

### New Hire Notification

Messages(1)  
Member has an active address.

#### Address

Address Type: Residence

Address Period: Feb 15, 2019 -

Address 1: 275 EAST BROAD ST

Address 2:

Address 3:

City: COLUMBUS

State: Ohio

County: FRANKLIN

**Tip!** Zip/Postal Code: 43215

Country: U.S. OF AMERICA

Home Phone:

Work Phone: 6142278659

Cell Phone:

Primary Email: wolfordt@strsoh.org

Secondary Email:

Ext 1:

Ext 2:

Save Reset

**Tip!** Once you insert the ZIP code, press "Enter" on your keyboard to automatically populate the city and county.

## Step 4

1. Enter the first date the teacher worked.
2. College and university employers should click on the “ARP Eligible” box if the member is eligible for an alternative retirement plan. (This box will not appear for K–12 employers.)
3. Click “Save.”

The screenshot shows the STRS website's "New Hire Notification" page. The navigation menu includes Home, Make a Payment, **New Hire Notification**, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. A message box at the top right states "Messages(2): Address has been Standardized. Creating new employment record." The form fields include "First Date Worked:" with a date picker and "ARP Eligible:" with an unchecked checkbox. At the bottom are "Save" and "Reset" buttons.

## Step 5

1. A new hire notification document will appear on your screen. Click “Print” to print a copy for your records.
2. To start a new hire notification for another member, click “Add New Record.” If you are finished entering new hire notifications, click “Home” in the banner menu to return to the home page.

The screenshot shows the STRS website's "New Hire Notification" page after a record has been saved. The navigation menu includes Home, Make a Payment, **New Hire Notification**, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. A message box at the top right states "Messages(1): All the changes have been saved." Below the message box are "Add New Record" and "Print" buttons. The "Print" button is circled in red. A red arrow points to the "Add New Record" button. The "Export" link is visible in the top right corner. The main content area displays the STRS logo and contact information: "STATE TEACHERS RETIREMENT SYSTEM OF OHIO", "275 East Broad Street Columbus, OH 43215-3774", "1-888-535-4050", and "www.stsoh.org/employer". Below this is the "New Hire Notification" document details:

|                    |                   |
|--------------------|-------------------|
| Date Created:      | 02/15/2019        |
| SSN:               | 010-93-2113       |
| First Name:        | TODD              |
| Middle Name:       |                   |
| Last Name:         | TODD              |
| Birth Date:        | 12/06/1984        |
| Gender:            | Male              |
| Type:              | Member            |
| Address 1:         | 275 EAST BROAD ST |
| Address 2:         |                   |
| Address 3:         |                   |
| City:              | COLUMBUS          |
| State:             | OH                |
| Country:           | US                |
| Zip / Postal Code: | 432150000         |

## Viewing or Printing a Notification

If you forget to print a copy or you need to find a new hire notification at a later date:

1. Choose “Documents” from the banner menu at the top of any page.
2. A list of documents will appear. Find the notification you are looking for based on date created or document information. Then click on “New Hire\Reemployed Notification” in the Name column for that document.
3. A copy of the document will appear. Click “Print” to print a copy.

The screenshot shows the STRS Ohio website's "Documents" page. The navigation menu includes Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. The "Documents" section displays a table with columns for Date Create, Name, and Document Information. The first document is highlighted, and its name, "New Hire \ Reemployed Notification", is circled in red. Below the table, a preview window shows the document content, which includes the STRS Ohio logo, contact information, and a "New Hire Notification" form with the following details:

|                    |                   |
|--------------------|-------------------|
| Date Created:      | 02/15/2019        |
| SSN:               | 010-93-2113       |
| First Name:        | TODD              |
| Middle Name:       |                   |
| Last Name:         | TODD              |
| Birth Date:        | 12/06/1984        |
| Gender:            | Male              |
| Type:              | Member            |
| Address 1:         | 275 EAST BROAD ST |
| Address 2:         |                   |
| Address 3:         |                   |
| City:              | COLUMBUS          |
| State:             | OH                |
| Country:           | US                |
| Zip / Postal Code: | 432150000         |

## Section 3

# Reemployed Retiree Notification

The following instructions explain how to submit a reemployed retiree notification in ESS and view or print it after it has been submitted.

## Submitting a Reemployed Retiree Notification

### Step 1

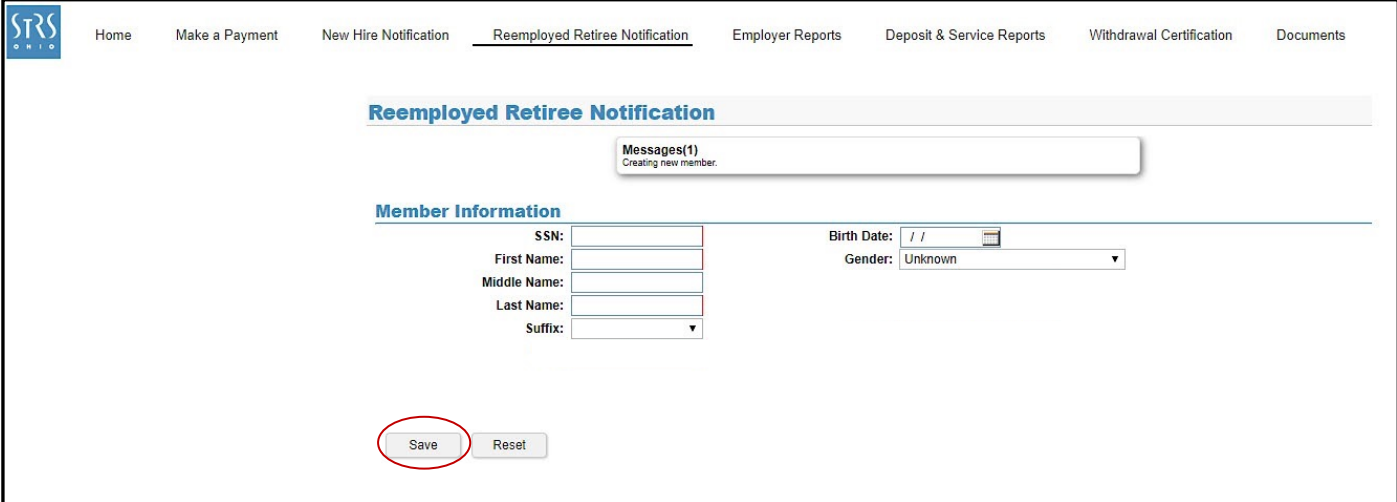
Click on “Reemployed Retiree Notification” in the banner menu at the top of the home page. *(Screen not shown.)*

### Step 2

Enter the following information for the member:

1. Social Security number (SSN)
2. First name
3. Last name
4. Birth date
5. Gender

Then click “Save.” The screen shown on the next page will appear.



The screenshot shows the 'Reemployed Retiree Notification' form in the ESS system. The navigation menu at the top includes: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification (highlighted), Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. The main heading is 'Reemployed Retiree Notification'. Below it is a 'Messages(1)' box with the text 'Creating new member.'. The 'Member Information' section contains the following fields: SSN (text input), First Name (text input), Middle Name (text input), Last Name (text input), Suffix (dropdown menu), Birth Date (date picker), and Gender (dropdown menu with 'Unknown' selected). At the bottom, there are 'Save' and 'Reset' buttons, with the 'Save' button circled in red.

### Step 3a

If the member's information is already on file with STRS Ohio, some fields may be prepopulated. Prepopulated fields cannot be changed. The member must contact STRS Ohio if changes are needed.

1. Enter any missing information, such as phone numbers and a secondary email address.
2. Click "Save." The screen shown on the next page will appear.

### Step 3b

If member information is not prepopulated, enter the following:

1. Street address
2. ZIP code. Then press "Enter" on your keyboard to automatically populate the city and county. If additional city/county options are listed, choose the correct city. (STRS Ohio does not currently track county.)
3. Phone numbers (optional)
4. Email addresses (primary is required; secondary is optional)

Click "Save." The screen shown on the next page will appear.

STRS Ohio navigation: Home, Make a Payment, New Hire Notification, **Reemployed Retiree Notification**, Employer Reports, Deposit & Service Reports, Withdrawal Certification, Documents

### Reemployed Retiree Notification

Messages(1)  
Member has an active address.

#### Address

Address Type: Residence ▼ ⚙️  
Address Period: Feb 15, 2019 - ▼

Address 1:   
Address 2:   
Address 3:   
City:   
State: Ohio  
County:   
**Tip!** Zip/Postal Code:   
Country: U.S. OF AMERICA  
Home Phone:   
Work Phone:   
Cell Phone:   
Primary Email:   
Secondary Email:

Ext 1:   
Ext 2:

**Tip!** Once you insert the ZIP code, press "Enter" on your keyboard to automatically populate the city and county.

## Step 4

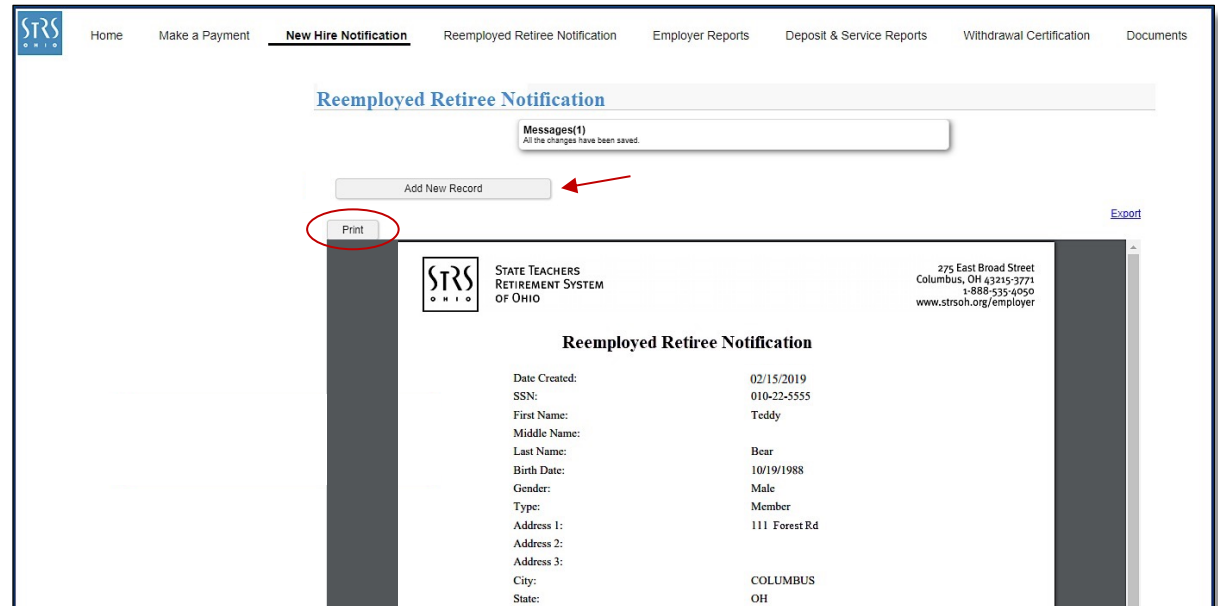
Enter the following information. (Some fields may be prepopulated if member information is already on file.)

1. First date of service with your school **after** retirement.
2. Retirement system paying the benefit. (Select OPERS, SERS, STRS, OP&F, SHP, CRS or ARP from the drop-down menu.)
3. Effective date of retirement. (If the member is an STRS Ohio retiree, the retirement date will always be the first day of the month in which the benefit became effective, e.g., 07/01/2018.)
4. Type of benefit. (Select disability retirement, service retirement or allowance from an ARP from the drop-down menu.)
5. College and university employers should check the box if the member is ARP eligible.
6. Answer the questions about public notices and meeting requirements set forth in Section 3307.353 of the Revised Code. More information about these requirements can be found on our website.
7. Click "Save."

The screenshot shows the STRS Ohio website interface for the "Reemployed Retiree Notification" form. The navigation bar includes links for Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification (active), Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main heading is "Reemployed Retiree Notification". A message box indicates "Messages(1) Creating new employment record." The form fields are: "First date of service after retirement:" (calendar icon), "Retirement System Paying the Benefit:" (dropdown menu), "Effective Date of Retirement:" (calendar icon), "Type of Benefit:" (dropdown menu), and "ARP Eligible:" (checkbox). A red box highlights the "Complete all fields. (Some fields may be prepopulated.)" instruction. Another red box highlights the "Select if ARP eligible (college and university employers only)." instruction with an arrow pointing to the checkbox. Below these are two sets of "Yes/No" radio button questions. The first question is "This retiree was reemployed under Section 3307.353 Revised Code that requires public notices to be given and public meetings to be held for certain rehires:". The second question is "I certify that the requirements for reemployed retirement under Section 3307.353, Revised Code were met.:". A red box highlights the "Answer two questions." instruction. At the bottom, the "Save" button is circled in red, and a "Reset" button is also visible.

## Step 5

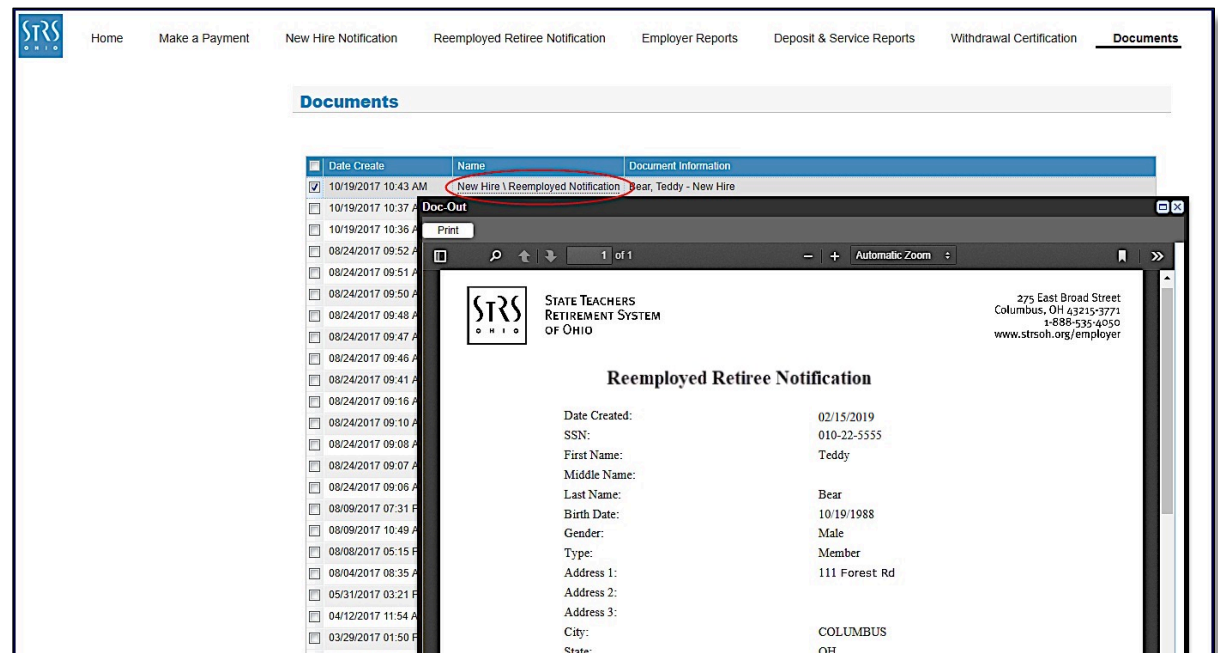
1. A reemployed notification document will appear on your screen. Click "Print" to print a copy for your records.
2. To start a new reemployed retiree notification for another member, click "Add New Record." If you are finished entering reemployed retiree notifications, click "Home" in the banner menu to return to the home page.



## Viewing or Printing a Notification

If you forget to print a copy or you need to find a reemployed retiree notification at a later date:

1. Choose "Documents" from the banner menu at the top of any page.
2. A list of documents will appear. Find the notification you are looking for based on date created or document information. Then click on "New Hire\Reemployed Notification" in the Name column for that document.
3. A copy of the document will appear. Click "Print" to print a copy.





## Section 4

# Navigating Employer Reports

The following instructions explain how to access, sort and print reports in the Employer Reports section of ESS.

## Types of Reports

The Employer Reports section of ESS contains a variety of reports you can view and complete as needed:

- Payroll report (Section 5)
- Payroll adjustment (Section 6)
- Backposting (Section 7)
- Annual report (Section 8)
- Service credit verification report (Section 9)
- Accrued verification report (Section 10)
- Purchase service credit report (Section 11)
- Pay date calendar (Section 14)
- Violation period certification (Section 17)

## Accessing Reports

To access a report from the home page:

1. Click on “Employer Reports” in the banner menu, or
2. Click on the report in the Outstanding Reports section.

The Employer Reports screen shown on the next page will appear.

The screenshot shows the ESS Employer Reports page. The top navigation bar includes links for Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports** (circled in red), Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three sections:

- Additional Tools:** A list of links with right-pointing chevrons: Direct Debit Set Up, Employer Contacts, Employment Verification Reports, Estimated Payroll, GASB Reports, Online Death Notification, Pay Date Calendar, Payroll Summary, Pickup Plan Information, Request Access, Training Registration, and Violation Period Certification.
- Outstanding Reports:** A table with two columns: Report Type and Number of Reports.
- Current Obligations:** A table with three columns: Due Date, Description, and Amount.

| Report Type                     | Number of Reports |
|---------------------------------|-------------------|
| Service Credit Verification     | 1                 |
| Accrued Verification            | 1                 |
| Employment Verification Reports | 3                 |
| Annual Reporting                | 1                 |
| Withdrawal Certification        | 2                 |
| Pay Date Calendar               | 1                 |
| Violation Period Certification  | 1                 |

| Due Date   | Description                        | Amount     |
|------------|------------------------------------|------------|
| 09/12/2023 | Payroll-reported contributions due | \$515.78   |
| 09/13/2023 | PSC employer cost-Kimberly K       | \$5,719.60 |
| 09/15/2023 | Monthly PSC deductions due         | \$811.23   |
|            | Payment received - not yet applied | -\$276.65  |

**News & Alerts**

3. The Employer Reports screen shows a list of work reports. Reports vary by status listed in the Report Status column:
- **Initial** — This means a report has been posted for the employer to review, edit and complete.
  - **Submitted** — This means the employer has completed the report and submitted it to STRS Ohio for review and processing.
  - **Complete** — This means STRS Ohio has reviewed the report and all processing has been completed.

**Employer Reports**

Trans Type: All

Status: All

Work Report Status: Initial

New Report

Payment History

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source      | Date Released | Pay Date   | Trans Identifier                    | Trans #   | Work Report T... |
|---------|---------------|------------------|---------------|--------------------|---------------|------------|-------------------------------------|-----------|------------------|
| Actions | 07/06/2021    | Regular          | Initial       | Service Credit ... |               | 06/30/2021 | 2020-21 Service Credit Verification | 228852429 | \$0.00           |

**Help**

**To open report:**

1. Click "Actions" in the Tools column for the report you want to open.
2. Select "Edit" from the drop down menu.

**To print report:**

1. Click "Actions" in the Tools column for the report you want to print.
2. Select "Edit" from the drop down menu
3. Once the report appears, click on the "Tools" column heading.
4. Select "Reports" from the dropdown menu.
5. Click "View Work Report".
6. The report will appear. Click "Print" in the top left corner of the screen.
7. Report defaults to printing in alphabetical order by last name.

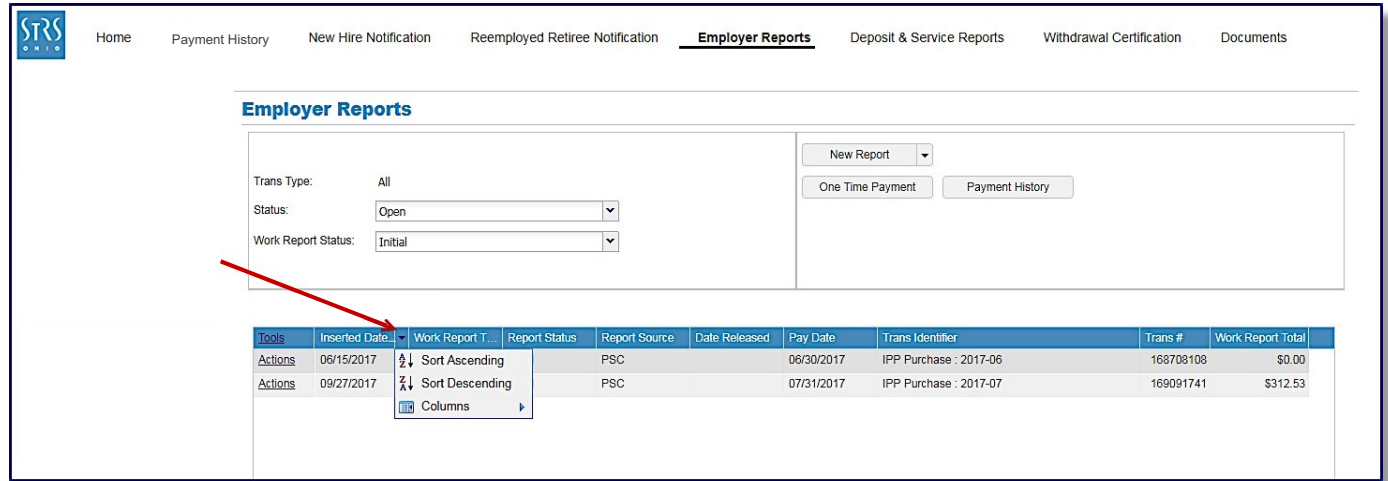
**Tip!** The Employer Reports screen automatically displays reports in initial status. To view all reports (initial, submitted and complete), change the Work Report Status to "All."

## Sorting Reports

Documents listed on the Employer Reports page vary by status. To find the report you're looking for, you can sort the list in ascending/descending order, by work report status or by report type.

### Sort in Ascending/ Descending Order

1. Place the cursor over the column you want to sort by.
2. Click the drop-down arrow that appears next to the column or click the column heading.
3. Choose "Sort Ascending" or "Sort Descending" from the drop-down menu.



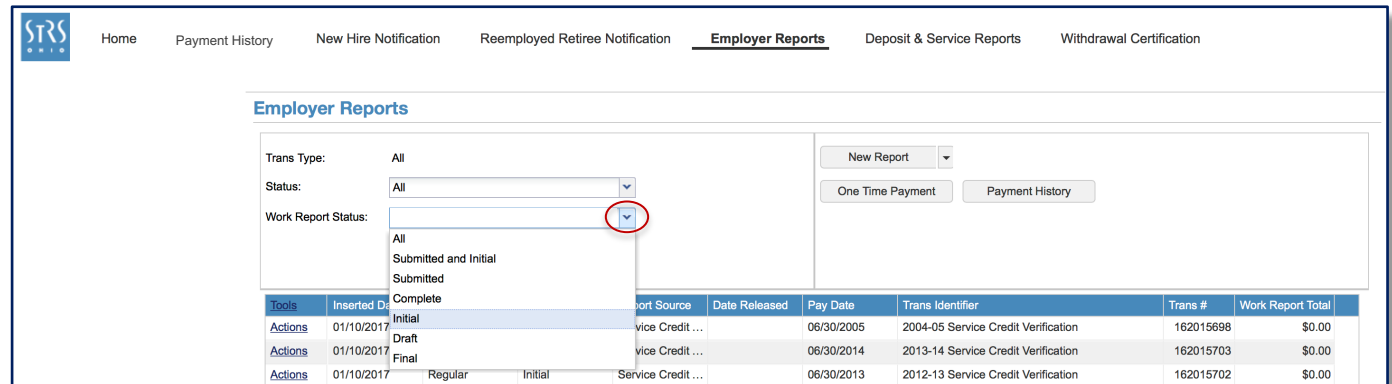
The screenshot shows the 'Employer Reports' page with a table of reports. The table has columns: Tools, Inserted Date, Work Report Total, Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A dropdown menu is open over the 'Work Report Total' column, showing options: 'Sort Ascending', 'Sort Descending', and 'Columns'. A red arrow points to the 'Sort Ascending' option.

| Tools   | Inserted Date | Work Report Total | Report Status | Report Source | Date Released | Pay Date   | Trans Identifier       | Trans #   | Work Report Total |
|---------|---------------|-------------------|---------------|---------------|---------------|------------|------------------------|-----------|-------------------|
| Actions | 06/15/2017    | Sort Ascending    |               | PSC           |               | 06/30/2017 | IPP Purchase : 2017-06 | 168708108 | \$0.00            |
| Actions | 09/27/2017    | Sort Descending   |               | PSC           |               | 07/31/2017 | IPP Purchase : 2017-07 | 169091741 | \$312.53          |

**Tip!** Sort the Inserted Date column in ascending order to find the most recent reports first.

### Sort by Work Report Status

1. Click the down arrow in the "Work Report Status" field.
2. Select the status you want to search by. Once sorted, only reports in that status will appear.



The screenshot shows the 'Employer Reports' page with a table of reports. The table has columns: Tools, Inserted Date, Work Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A dropdown menu is open over the 'Work Report Status' field, showing options: 'All', 'Submitted and Initial', and 'Submitted'. A red circle highlights the dropdown arrow.

| Tools   | Inserted Date | Work Report Status | Report Source      | Date Released | Pay Date   | Trans Identifier                    | Trans #   | Work Report Total |
|---------|---------------|--------------------|--------------------|---------------|------------|-------------------------------------|-----------|-------------------|
| Actions | 01/10/2017    | Complete           |                    |               |            |                                     |           |                   |
| Actions | 01/10/2017    | Initial            | Service Credit ... |               | 06/30/2005 | 2004-05 Service Credit Verification | 162015698 | \$0.00            |
| Actions | 01/10/2017    | Draft              | Service Credit ... |               | 06/30/2014 | 2013-14 Service Credit Verification | 162015703 | \$0.00            |
| Actions | 01/10/2017    | Final              | Service Credit ... |               | 06/30/2013 | 2012-13 Service Credit Verification | 162015702 | \$0.00            |

**Tip!** Sorting work reports by initial status is the quickest way to find reports ready to complete.

## Sort by Report Type

1. Place the cursor over the column you want to sort by. Then click the drop-down arrow that appears next to the column or click the column heading.
2. Select "Filters" from the drop-down menu.
3. Click the down arrow to choose the report type from the list that appears.

The screenshot shows the STRS Employer Reports page. At the top, there are navigation links: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, and Withdrawal Certification. Below the navigation is the "Employer Reports" section with filters for Trans Type (All), Status (All), and Work Report Status (All). A "New Report" dropdown and "One Time Payment" and "Payment History" buttons are also present. A table of reports is displayed with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A dropdown menu is open over the "Report Source" column, showing options: Sort Ascending, Sort Descending, Columns, and Filters. A second dropdown menu is open over the "Trans Identifier" column, showing a list of report types: Payroll, Back Postings, Annual, ARP, Service Credit Verification, PSC, Accrued Verification, Employer, and Health Care. Red boxes and arrows highlight the "Filters" option in the first dropdown and the "Payroll" option in the second dropdown.

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source | Date Released | Pay Date   | Trans Identifier                                 | Trans #   | Work Report Total |
|---------|---------------|------------------|---------------|---------------|---------------|------------|--|-----------|-------------------|
| Actions | 03/21/2013    | Regular          | Complete      | Payroll       | 12/31/2003    | 12/31/2003 | Payroll : 2013-03-26 9430_Payroll_001 1397137... | 139713746 | \$102.86          |
| Actions | 02/06/2010    | Regular          | Complete      | Payroll       | 02/06/2010    | 09/30/2010 | 2003-09-30 9430_Payroll_001 5804228              | 5804228   | \$972.00          |
| Actions | 02/06/2010    | Regular          | Complete      | Payroll       | 02/06/2010    | 09/30/2010 | 2003-10-31 9430_Payroll_001 5804229              | 5804229   | \$972.00          |
| Actions | 02/06/2010    | Regular          | Complete      | Payroll       | 02/06/2010    | 09/30/2010 | 2003-10-31 9430_Payroll_001 5804230              | 5804230   | \$972.00          |
| Actions | 02/06/2010    | Regular          | Complete      | Payroll       | 12/31/2003    | 12/31/2003 | 2003-09-30 9430_Payroll_001 5804231              | 5804231   | \$972.00          |
| Actions | 03/27/2014    | Adjustment       | Complete      | Payroll       | 03/27/2014    | 09/30/2014 | Payroll_001 1470480...                           | 147048009 | \$375.00          |
| Actions | 10/31/2014    | Adjustment       | Complete      | Back Postings | 10/31/2014    | 07/31/2015 | Annual   | 149310264 | \$2.12            |
| Actions | 07/13/2012    | Adjustment       | Complete      | Payroll       | 07/13/2012    | 05/11/2015 | ARP  | 132347016 | \$697.30          |
| Actions | 12/18/2015    | Adjustment       | Complete      | ARP           | 12/18/2015    | 10/30/2015 | Service Credit Verification                      | 153570890 | \$285.00          |
| Actions | 12/18/2015    | Adjustment       | Complete      | ARP           | 12/18/2015    | 09/30/2015 | PSC  | 153570892 | \$285.00          |
| Actions | 12/18/2015    | Adjustment       | Complete      | ARP           | 12/18/2015    | 10/30/2015 | Accrued Verification                             | 153570906 | \$131.25          |
| Actions | 12/18/2015    | Adjustment       | Complete      | Payroll       | 12/18/2015    | 09/30/2015 | Employer   | 153570907 | \$787.51          |
| Actions | 12/18/2015    | Adjustment       | Complete      | Payroll       | 12/18/2015    | 09/30/2015 | Health Care                                      | 153570907 | \$787.51          |
| Actions | 12/18/2015    | Adjustment       | Complete      | Payroll       | 12/18/2015    | 09/30/2015 | Payroll : 2015-09-30 9430_Payroll_001 1535709... | 153570907 | \$787.51          |

# Printing Reports

You can print reports in the Employer Reports section of ESS.

## Step 1

On the Employer Reports page:

1. Click on "Actions" in the Tools column for the report you want to print.
2. Select "Edit" from the drop-down menu.

The Work Report Editor screen shown below will appear.

The screenshot shows the 'Employer Reports' page. At the top, there's a navigation menu with 'Employer Reports' highlighted. Below it, there's a section titled 'Employer Reports' with three dropdown filters: 'Trans Type: All', 'Status: All', and 'Work Report Status: All'. To the right of these filters are buttons for 'New Report' and 'Payment History'. Below the filters is a table with the following columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report T... The table contains several rows of data. A red arrow points to the 'Edit' option in the 'Tools' column of the second row.

## Step 2

On the Work Report Editor screen:

1. Click on the "Tools" column heading.
2. Select "Reports" from the drop-down menu.
3. Click "View Work Report."
4. The report will appear. Click "Print" in the top left corner of the screen. (Screen not shown.)

The screenshot shows the 'Work Report Editor' screen. At the top, there's a 'Close' button. Below it, there's a summary section with the following information: Employer: Ohio Local Schools, Work Report Type: Regular, Report Period: 08/24/2018 - 08/24/2018, # of Participants: 874, Billing Location: 9599 Ohio Local Schools, Work Report Status: Complete, Identifier: #189155329 - Payroll : 2018-08-2..., # of Rows: 923, Report Source: Payroll, Report Start Date: 08/24/2018, Pay Date: 08/24/2018, Billing Type: Contribution, Date Released: 08/27/2018, Date Received: 08/21/2018, Trans#: 189155329, Agreement: 9599\_Payroll\_001, User Released: EXEBATCH, Batch No., Updated By: BENLOAD. Below the summary is a section with 'Summary' and 'Detail' tabs. The 'Detail' tab is selected. Below the tabs, there's a 'Barg Unit Id:' field with 'C002\_PY\_001 - C002\_Payr' and an 'Exception Filter:' dropdown with 'Please Select'. Below that, there's an 'Add Member' button and a 'Deleted' button. Below the buttons is a table with the following columns: Tools, Actions, SSN, Participant Name, Report Stop Date, Report Type, Record Status, Pre tax employee contribution, After tax employee contribution, Accrued Indicator, Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End, and Notes. The table contains several rows of data. A red arrow points to the 'Tools' column heading, and another red arrow points to the 'Reports' option in the 'Tools' dropdown menu.

## Section 5

# Payroll Report

The following instructions explain how to submit a payroll report in ESS. **If you submit payroll reports through an Information Technology Center (ITC) or secure file upload, please disregard these instructions.**

## Submitting a Payroll Report

### Step 1

On the home page, click on “Employer Reports” in the banner menu. *(Screen not shown.)*

### Step 2

To enter a payroll report, you will need to create a new work report. On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click the down arrow on “New Report” and select “Work Report” from the drop-down menu.
3. The Generate Work Report screen shown on the next page will appear.

| Tools                   | Inserted Date | Work Report T... | Report Status | Report Source...   | Date Released | Pay Date   | Trans Identifier                    | Trans #   | Work Report Total |
|-------------------------|---------------|------------------|---------------|--------------------|---------------|------------|-------------------------------------|-----------|-------------------|
| <a href="#">Actions</a> | 03/07/2018    | Regular          | Initial       | Accrued Verifi...  |               | 06/30/2017 | Work Report: Jul-2016               | 171271661 | \$0.00            |
| <a href="#">Actions</a> | 01/31/2018    | Regular          | Initial       | PSC                |               | 12/31/2017 | IPP Purchase : 2017-12              | 171195434 | \$1,413.78        |
| <a href="#">Actions</a> | 01/10/2017    | Regular          | Initial       | Service Credit ... |               | 06/30/2005 | 2004-05 Service Credit Verification | 162015698 | \$0.00            |

**Tip!** Payroll reports and contributions are due to STRS Ohio no later than five business days after the payroll date.

### Step 3

1. In the Agreement Name column, click the box next to “Payroll” to indicate you want to create a payroll report.
2. If this is your school’s first payroll report, enter the first date of the payroll cycle in the Report Start Date column. If you have previously submitted payroll reports, the report start date should automatically populate based on your last payroll report.
3. Enter the pay date in the Pay Date column. This should be the date of your most recent payroll.
4. Click “Generate.” This will take you to the Work Report Editor screen shown on the next page.

The screenshot shows the STRS Ohio Employer Reports interface. A modal window titled "GenerateWorkReport" is open, displaying a table of report entries. The table has the following columns: Agreement Name, Last Report Start Date, Report Start Date, Pay Date, Report Source, and Message. The "9599 Payroll" row is selected. Red arrows point to the "Generate" button (1), the checkbox for "9599 Payroll" (4), the "Report Start Date" field (2), and the "Pay Date" field (3). The "Generate" button is located at the bottom left of the dialog box. The "Report Start Date" field is empty, and the "Pay Date" field contains "08/31/2017".

| Agreement Name                                   | Last Report Start Date | Report Start Date | Pay Date   | Report Source      | Message |
|--|------------------------|-------------------|------------|--------------------|---------|
| <input type="checkbox"/> Backpostings            | 10/27/2017             | 11/01/2008        |            | Back Postings      |         |
| <input type="checkbox"/> Service Credit ...      | 10/27/2017             | 07/01/2017        |            | Service Credit ... |         |
| <input type="checkbox"/> Purchase Serv...        | 10/27/2017             | 09/01/2017        |            | PSC                |         |
| <input checked="" type="checkbox"/> 9599 Payroll | 10/27/2017             | 08/01/2017        | 08/31/2017 | Payroll            |         |
| <input type="checkbox"/> 9599 Annual             | 10/27/2017             |                   |            | Annual             |         |
| <input type="checkbox"/> Accrued Verifi...       | 10/27/2017             | 07/01/2016        |            | Accrued Verifi...  |         |

## Step 4

Each member's name, SSN and contribution amounts from the prior payroll report will appear.

1. If needed, edit the amount of contributions for the current payroll by clicking on the contribution field.
2. If contributions are accrued, enter "Y" for yes in the Accrued Indicator field (July and August payrolls only). Otherwise, leave this field blank. See **Tips!** on this page for details.
3. Review/edit each page of the report.
4. Review the "Report Totals" to ensure the amount matches the payment.
5. If you need to add new members or additional entries, go to [Step 5](#) on the next page.
6. When your payroll report is complete, click "Save." **You must save your report even if no changes were made.** You will automatically return to the Employer Reports page to submit the report.

[Go to Step 6.](#)

**Work Report Editor**

Save Apply Cancel

Employer: 9599 OHIO LOCAL SCHOOLS Work Report Type: Regular Report Period: 08/01/2017 - 08/31/2017 # of Participants: 15  
Billing Location: OHIO LOCAL SCHOOLS Work Report Status: Initial Identifier: #012345678- Payroll : 201-8-3 # of Rows: 15  
Report Source: Payroll Report Start Date: 08/01/2017 Pay Date: 08/31/2017 Billing Type: Contribution  
Date Released: 08/15/2017 Trans#: #012345678 Agreement: 9599\_Payroll\_001  
User Released: Batch No: 67860 Updated By: WOLFORDT

Summary Detail

Barg Unit Id: Exception Filter: Please Select

Add Member Delete Selected

| Tools         | Actions | SSN         | Participant Name... | Report Stop Date | Report Type        | Record Status | Pre tax employee contribution | After tax employee contribution | Accrued Indicator | Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End | Notes |
|---------------|---------|-------------|---------------------|------------------|--------------------|---------------|-------------------------------|---------------------------------|-------------------|---|-------|
|               |         | 123-45-6229 | TEACHER, K...       | 08/31/2017       | Payroll Reporti... | Validated     | \$12.6                        | \$0                             | Y                 |   |       |
|               |         | 123-45-6789 | LEWIS, TONY...      | 08/31/2017       | Payroll Reporti... | Validated     | \$1,484.76                    | \$0                             | Y                 |   |       |
|               |         | 113-45-6787 | ADOBE, ELI...       | 08/31/2017       | Payroll Reporti... | Validated     | \$387.65                      | \$0                             |                   |   |       |
| Page Totals   |         |             |                     |                  |                    |               | \$1,885.01                    | \$0                             |                   |   |       |
| Report Totals |         |             |                     |                  |                    |               | \$1,885.01                    | \$0.00                          |                   |   |       |

Page 1 of 2

1. Review contributions for each member's current pay.  
2. Mark "Y" in the Accrued Indicator field if contributions are accrued.  
3. Review all pages of the report.  
4. Review report totals to ensure the amount matches your payment.

**Accrued contributions are contributions on compensation earned by June 30 of the fiscal year, but not paid until after July 1 of the next fiscal year.**

### **Tips!**

- If you are reporting current year and accrued contributions on the same payroll report in July and August, you must have two entry lines for the member — one for current year contributions and one for accrued contributions. (See [Step 5](#) on the next page to add a member to the report.)
- When you create a new payroll report, the accrued indicator will appear as it was entered on the prior report. Ensure the Accrued Indicator field is blank if contributions were earned and paid during the same fiscal year. For example, if your school year begins in late August, payrolls from September to June will not have accrued contributions so the Accrued Indicator field should be blank.



## Step 5

To add a new member or additional entries to a payroll report:

1. Click "Add Member." This will create a new blank line in the report.
2. Enter the member's SSN or name in the corresponding column.
3. Press "Enter" on your keyboard for a search screen to pop up or the member's SSN/name to appear on the blank line.
4. Enter all required payroll information for the member. See Step 4 (previous page).
5. When you are finished adding additional entries, click "Save." You will automatically return to the Employer Reports page to submit the report.

Go to Step 6.

The screenshot shows the 'Work Report Editor' interface. At the top, there are buttons for 'Save', 'Apply', and 'Cancel'. Below that, a summary section displays report details: Employer: 9599 OHIO LOCAL SCHOOLS, Billing Location: OHIO LOCAL SCHOOLS, Report Source: Payroll, Date Released: 08/15/2017, User Released: 67860, Work Report Type: Regular, Work Report Status: Initial, Report Start Date: 08/01/2017, Batch No: 67860, Report Period: 08/01/2017 - 08/31/2017, Identifier: #012345678- Payroll : 201-8-3, Pay Date: 08/31/2017, Trans#: #012345678, Updated By: WOLFORDT, # of Participants: 15, # of Rows: 15, Billing Type: Contribution, Agreement: 9599\_Payroll\_001.

Below the summary, there are tabs for 'Summary' and 'Detail'. Under 'Detail', there are dropdown menus for 'Barg Unit Id:' and 'Exception Filter:'. A red circle highlights the 'Add Member' button, and a red arrow points to the 'Participant Name' column in the table below.

| Tools         | Actions                  | SSN         | Participant Name | Report Stop Date | Report Type        | Record Status | Pre tax employee contribution | After tax employee contribution | Accrued Indicator | Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End | Notes |
|---------------|--------------------------|-------------|------------------|------------------|--------------------|---------------|-------------------------------|---------------------------------|-------------------|---|-------|
|               | <input type="checkbox"/> |             |                  | 03/02/2018       | Payroll Reporti... |               |                               | \$0                             | \$0               |   |       |
|               | <input type="checkbox"/> | 123-45-6229 | TEACHER, K...    | 08/31/2017       | Payroll Reporti... | Validated     | \$12.6                        | \$0                             | Y                 |   |       |
|               | <input type="checkbox"/> | 123-45-6789 | LEWIS, TONY...   | 08/31/2017       | Payroll Reporti... | Validated     | \$1,484.76                    | \$0                             | Y                 |   |       |
|               | <input type="checkbox"/> | 113-45-6787 | ADOBE, ELI...    | 08/31/2017       | Payroll Reporti... | Validated     | \$387.65                      | \$0                             |                   |   |       |
| Page Totals   |                          |             |                  |                  |                    |               | \$1,885.01                    | \$0                             |                   |   |       |
| Report Totals |                          |             |                  |                  |                    |               | \$1,885.01                    | \$0.00                          |                   |   |       |

At the bottom, there is a pagination control showing 'Page 1 of 2'.

**Tip!** You cannot add a new member to a payroll report until STRS Ohio has received notification of employment. Submit a new hire or reemployed retiree notification within 10 business days of the member's first date on payroll.

## Step 6

### Submit the payroll report.

After saving the report, you will automatically return to the Employer Reports page.

The report status of the payroll report will be listed as "Initial."

To submit the report:

1. Click on "Actions" in the Tools column for the payroll report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

The screenshot shows the 'Employer Reports' page with a table of reports. The 'Actions' column for the first report is highlighted, and a dropdown menu is open with 'Submit' circled in red. A 'Confirm' dialog box is displayed with 'Yes' circled in red. An 'Info' dialog box is also shown with 'OK' circled in red.

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source | Date Released | Pay Date   | Trans Identifier      | Trans #   | Work Report Total |
|---------|---------------|------------------|---------------|---------------|---------------|------------|-----------------------|-----------|-------------------|
| Actions | 10/27/2017    | Regular          | Initial       | Payroll       |               | 08/31/2017 | Work Report: Aug-2017 | 169668940 | \$1,885.01        |

**Tip!** Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

## Section 6

# Payroll Adjustment

The following instructions explain how to correct a current year payroll when you are unable to make the correction in your payroll system.

## Submitting a Payroll Adjustment

### Step 1

On the home page, click on “Employer Reports” in the banner menu. *(Screen not shown.)*

### Step 2

To enter a payroll adjustment, you will need to create a new adjustment. On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click the down arrow on “New Report” and select “Adjustment” from the drop-down menu.
3. The Generate Adjustment Report screen shown on the next page will appear.

| Tools                   | Inserted Date | Work Report T... | Report Status | Report Source...   | Date Released | Pay Date   | Trans Identifier                    | Trans #   | Work Report Total |
|-------------------------|---------------|------------------|---------------|--------------------|---------------|------------|-------------------------------------|-----------|-------------------|
| <a href="#">Actions</a> | 03/07/2018    | Regular          | Initial       | Accrued Verifi...  |               | 06/30/2017 | Work Report: Jul-2016               | 171271661 | \$0.00            |
| <a href="#">Actions</a> | 01/31/2018    | Regular          | Initial       | PSC                |               | 12/31/2017 | IPP Purchase - 2017-12              | 171195434 | \$1,413.78        |
| <a href="#">Actions</a> | 01/10/2017    | Regular          | Initial       | Service Credit ... |               | 06/30/2005 | 2004-05 Service Credit Verification | 162015698 | \$0.00            |



## Step 4

1. On the Adjustment screen, click "Add Members."
2. The "Mass Adjustment" screen will appear. On this screen, click "Add Members."
3. The Search window will appear. Enter the member's SSN or name in the search field at the top of the screen and click "Search."
4. The member's information will appear. Click on the member's SSN. This will add the member to the adjustment report.
5. Then click "X" in the upper right corner of the screen to close the window. You will return to the Mass Adjustment screen.

**Repeat actions 3 and 4 above to add additional members.**

The screenshot displays the 'Adjustment' software interface. The main window is titled 'Mass Adjustment' and contains several sections: 'Report Source: Payroll', 'Billing Location: OHIO LOCAL SCHOOLS', 'Work Report Status: Initial', 'Date Released', 'User Released', 'Agreement Name', 'Category Name: STRS', 'Start Date: 10/10/2017', 'Stop Date: 10/10/2017', and 'Show Dates'. Below these are 'Work Units' and 'Members' tables. A 'Search' window is open, showing a search field with '012-56-3434' and a 'Search' button. A callout box with a red border contains the text: 'Refer to the instructions in Step 4 that correspond with the numbers on this screen.' Red arrows and numbers 1-5 point to specific elements: 1 points to the 'Add Members' button in the 'Mass Adjustment' window; 2 points to the 'Add Members' button in the 'Members' table; 3 points to the search field in the 'Search' window; 4 points to the search field in the 'Search' window; 5 points to the 'X' button in the top right corner of the 'Search' window.

| Tools | Pre tax employee contribution | After tax employee contribution | Annual - Backpost Payroll |
|-------|-------------------------------|---------------------------------|---------------------------|
|       | \$0                           | \$0                             |                           |
|       | \$0                           | \$0                             |                           |

| Tools | SSN         | Participant Name |
|-------|-------------|------------------|
|       | 012-56-3434 | BUCKEYE, B       |

| Tools | SSN         | Sort Name  | Birth Date |
|-------|-------------|------------|------------|
|       | 012-56-3434 | BUCKEYE, B | 7/29/1979  |

## Step 5

Check to make sure the member(s) you added are listed in the Members section.

1. If you need to add additional members, repeat actions 2–5 on the previous page.
2. Click “Save” when finished.
3. Then click “OK.” You will return to the Adjustment screen.

## Step 6

1. Enter the payroll adjustment amount in the Pretax Employee Contribution field.
2. Enter “Y” for yes in the Accrued Indicator field if contributions are accrued. Otherwise, leave this field blank.
3. Add details in the Notes field as needed.
4. Click “Save” when finished. You will automatically return to the Employer Reports page to submit the adjustment.≠

**Tip!** Enter “Y” in the Accrued Indicator field only if the contributions are being reported on a July or August payroll adjustment **and** the amount was or will be included in the annual report as part of accrued contributions.

Go to Step 7.

## Step 7

### Submit the adjustment.

After saving the adjustment, you will automatically return to the Employer Reports page.

The report status of the adjustment will be listed as "Initial."

To submit the adjustment:

1. Click on "Actions" in the Tools column for the adjustment. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the adjustment.
3. Then click "OK."

The screenshot shows the 'Employer Reports' page with the following details:

- Navigation: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, Documents
- Filters: Trans Type: All; Status: Open; Work Report Status: Initial (with a *Tip!* icon)
- Buttons: New Report, One Time Payment, Payment History
- Table Headers: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, Work Report Total
- Table Row 1: Actions, 10/10/2017, Adjustment, Initial, Payroll, 10/10/2017, Payroll : 2017-10-10, \$120.20
- Actions Menu: Details, Edit, **Submit**, Delete
- Confirm Dialog: Are you sure you want to submit this work report? (Yes/No buttons, with 'Yes' circled)
- Info Dialog: The selected work report was submitted successfully. (OK button, circled)

**Tip!** Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

## Section 7

# Backposting

The following instructions explain how to correct previous year(s) contributions by submitting a backposting in ESS.

## Submitting a Backposting

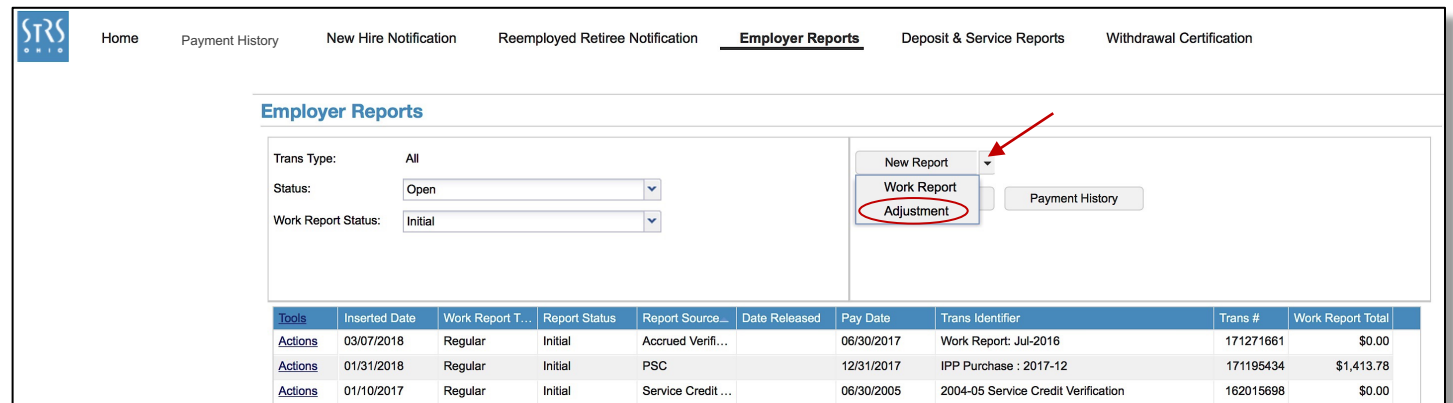
### Step 1

On the home page, click on “Employer Reports” in the banner menu. (*Screen not shown.*)

### Step 2

To enter a backposting, you will need to create a new adjustment. On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click the down arrow on “New Report” and select “Adjustment” from the drop-down menu.
3. The Generate Adjustment Report screen shown on the next page will appear.



The screenshot shows the ESS Employer Reports page. The navigation menu includes Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, and Withdrawal Certification. The main content area is titled "Employer Reports" and contains a form with the following fields:

- Trans Type: All
- Status: Open
- Work Report Status: Initial

On the right side of the form, there is a "New Report" dropdown menu with a red arrow pointing to it. The dropdown menu is open, showing "Work Report" and "Adjustment" (which is circled in red). A "Payment History" button is also visible next to the dropdown.

| Tools                   | Inserted Date | Work Report T... | Report Status | Report Source...   | Date Released | Pay Date   | Trans Identifier                    | Trans #   | Work Report Total |
|-------------------------|---------------|------------------|---------------|--------------------|---------------|------------|-------------------------------------|-----------|-------------------|
| <a href="#">Actions</a> | 03/07/2018    | Regular          | Initial       | Accrued Verif...   |               | 06/30/2017 | Work Report: Jul-2016               | 171271661 | \$0.00            |
| <a href="#">Actions</a> | 01/31/2018    | Regular          | Initial       | PSC                |               | 12/31/2017 | IPP Purchase : 2017-12              | 171195434 | \$1,413.78        |
| <a href="#">Actions</a> | 01/10/2017    | Regular          | Initial       | Service Credit ... |               | 06/30/2005 | 2004-05 Service Credit Verification | 162015698 | \$0.00            |



### Step 3

1. In the Agreement Name column, click the box next to "Backpostings" to indicate you want to create a backposting.
2. Enter the report start date and pay date. These dates should be the same date the contributions were sent to STRS Ohio.
3. Click "Save." This will take you directly to the Adjustment screen shown on the next page.

The screenshot shows the STRS Ohio Employer Reports interface. At the top, there are navigation tabs: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, and Withdrawal Certification. Below the tabs, there is a section for 'Employer Reports' with filters for Trans Type (All), Status (All), and Work Report Status (Initial). There are also buttons for 'New Report', 'One Time Payment', and 'Payment History'.

The main area displays a table with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. A modal window titled 'Generate Adjustment Report' is open, showing a table with the following data:

| Agreement Name                                   | Report Start Date | Pay Date   | Report Source      | Date Received | Billing Type | Active                              | Message |
|--|-------------------|------------|--------------------|---------------|--------------|-------------------------------------|---------|
| <input type="checkbox"/> ARP                     | 10/16/2017        | 10/16/2017 | ARP                | 10/16/2017    | Contribution | <input checked="" type="checkbox"/> |         |
| <input checked="" type="checkbox"/> Backpostings | 10/16/2017        | 10/16/2017 | Back Postings      | 10/16/2017    | Contribution | <input checked="" type="checkbox"/> |         |
| <input type="checkbox"/> Service Credit ...      | 10/16/2017        | 10/16/2017 | Service Credit ... | 10/16/2017    | Contribution | <input checked="" type="checkbox"/> |         |
| <input type="checkbox"/> Purchase Serv.          | 10/16/2017        | 10/16/2017 | PSC                | 10/16/2017    | Contribution | <input checked="" type="checkbox"/> |         |
| <input type="checkbox"/> 9599_Payroll_...        | 10/16/2017        | 10/16/2017 | Payroll            | 10/16/2017    | Contribution | <input checked="" type="checkbox"/> |         |
| <input type="checkbox"/> Accrued Verifi..        | 10/16/2017        | 10/16/2017 | Accrued Verifi..   | 10/16/2017    | Contribution | <input checked="" type="checkbox"/> |         |

At the bottom of the dialog box, there is a 'Save' button and a 'Close' button. A red arrow points to the 'Save' button, and a red circle highlights the 'Report Start Date' and 'Pay Date' columns for the 'Backpostings' row.

## Step 4

1. On the Adjustment screen, click "Add Members."
2. The "Mass Adjustment" screen will appear. On this screen, click "Add Members."
3. The Search window will appear. Enter the member's SSN or name in the search field at the top of the screen and click "Search."
4. The member's information will appear. Click on the member's SSN. This will add the member to the adjustment report.
5. Then click "X" in the upper right corner of the screen to close the window. You will return to the Mass Adjustment screen.

**Repeat actions 3 and 4 above to add additional members.**

The screenshot shows the 'Adjustment' software interface. The main window is titled 'Mass Adjustment' and contains fields for 'Billing Location' (OHIO LOCAL SCHOOLS), 'Agreement Name', 'Category Name' (STRS), 'Work Report Status' (Initial), 'Start Date', 'Stop Date', and 'Show Dates'. Below these are 'Work Units' and 'Members' sections. A 'Search' window is open over the 'Members' section, displaying a search result for SSN 012-56-3434, Sort Name BUCKEYE, B, and Birth Date 7/29/1979. Red arrows and numbers 1-5 indicate the steps: 1. Click 'Add Members' in the 'Members' section. 2. Click 'Add Members' in the 'Search' window. 3. Enter the SSN '012-56-3434' in the search field. 4. Click the search result. 5. Click the 'X' in the top right corner of the search window.

Refer to the instructions in Step 4 that correspond with the numbers on this screen.

## Step 5

Check to make sure the member(s) you added are listed in the Members section.

1. If you need to add additional members, repeat actions 2–5 on the previous page.
2. Click “Save” when finished.
3. Then click “OK.” You will return to the Adjustment screen shown on the next page.

**Adjustment**  
Save Apply Cancel

**Mass Adjustment**  
Save Apply Cancel

Billing Location:   
Agreement Name: Backpostings  
Category Name: STRS

Work Report Status: Initial  
Start Date: 10/16/2017  
Stop Date: 10/16/2017  
Show Dates:

**Work Units**

| Tools | Pre tax employee contribution | After tax employee contribution | Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End | Notes | Accrued Indicator |
|-------|-------------------------------|---------------------------------|---|-------|-------------------|
|       | \$0                           | \$0                             |   |       |                   |
|       | \$0                           | \$0                             |   |       |                   |

**Members**  
Add Members

| Tools  | SSN         | Participant Name |
|--------|-------------|------------------|
| Delete | 012-56-3434 | BUCKEYE, B       |

**Success**  
Save was Successful.  
OK

## Step 6

1. Enter the amount of the backposting in the Pretax Employee Contribution field.
2. If any additional service credit should be given, enter the percentage of service earned associated with this payment (e.g., 0.12).
3. Enter the fiscal year the compensation was earned. This is always the first year of the fiscal year (e.g., FY 2016–2017 is 2016).
4. Verify "Y" is marked in the Y = BPSRY field.
5. You must provide a brief explanation why the correction is needed in the Notes field.
6. Click "Save." You will automatically return to the Employer Reports page to submit the backposting.

Go to Step 7.

**Adjustment**

Save Apply Cancel

|   |                               |
|---|-------------------------------|
| Emp: <span style="border: 1px solid yellow; padding: 2px;">6</span> 9599 OHIO LOCAL SCHOOLS | Work Report Type: Adjustment  |
| Billing Location: OHIO LOCAL SCHOOLS  | Work Report Status: Initial   |
| Report Source: Back Postings  | Report Start Date: 10/16/2017 |
| Date Released:  | Date Received: 10/16/2017     |
| User Released:  | Batch No:                     |

Summary
Detail

Barg Unit Id: BP - Backpostings Exception Filter: Please Select

Delete Selected Add Members

| Tools         | Actions | SSN         | Participant Name | Agreement Name | Report Type | Record Status | Pre tax employee contribution | After tax employee contribution | Service credit | Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End | Y = BPSRY | Notes          |
|---------------|---------|-------------|------------------|----------------|-------------|---------------|-------------------------------|---------------------------------|----------------|---|-----------|----------------|
|               |         | 012-56-3434 | BUCKEYE, B       | Backpostings   | Backposting |               | \$120.2                       | \$0                             | 0.00           | 2016  | Y         | Late time card |
| Page Totals   |         |             |                  |                |             |               | \$120.2                       | \$0                             |                |   |           |                |
| Report Totals |         |             |                  |                |             |               | \$0.00                        | \$0.00                          |                |   |           |                |

## Step 7

### Submit the backposting.

After saving the backposting, you will automatically return to the Employer Reports page.

The report status of the backposting will be listed as "Initial." Please note that the work report total will be listed as \$0.00. (This is okay.)

To submit the backposting:

1. Click on "Actions" in the Tools column for the backposting. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the backposting.
3. Then click "OK."

The screenshot shows the 'Employer Reports' page with a navigation bar at the top containing links for Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation bar is a section titled 'Employer Reports' with filters for Trans Type (All), Status (Open), and Work Report Status (Initial). A 'Tip!' icon is present next to the Work Report Status filter. To the right of the filters are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the filters is a table with the following data:

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source | Date Released | Pay Date   | Trans Identifier                                 | Trans #   | Work Report Total |
|---------|---------------|------------------|---------------|---------------|---------------|------------|--|-----------|-------------------|
| Actions | 10/10/2017    | Regular          | Initial       | Payroll       |               | 07/14/2017 | Work Report: Jul-2017                            | 169119795 | \$108,563.28      |
| Actions | 10/10/2017    | Adjustment       | Initial       | Payroll       |               | 10/10/2017 | Payroll : 2017-10-10 9599 Payroll_001 1691267... | 169126753 | \$0.00            |
| Actions | 06/15/2017    | Regular          | Initial       | PSC           |               | 06/30/2017 | IPP Purchase : 2017-06                           | 168708108 | \$0.00            |
| Actions | 09/27/2017    | Regular          | Initial       | PSC           |               | 07/31/2017 | IPP Purchase : 2017-07                           | 169091741 | \$312.53          |
| Actions | 10/16/2017    | Adjustment       | Initial       | Back Postings |               | 10/31/2017 | BPSRY : 2017-10-16                               | 169133741 | \$0.00            |

A red circle highlights the 'Actions' link in the first row of the table. A red arrow points to the 'Submit' option in the dropdown menu that appears below it. A 'Confirm' dialog box is overlaid on the table, asking 'Are you sure you want to submit this work report?' with 'Yes' and 'No' buttons. The 'Yes' button is circled in red. An 'Info' dialog box is also overlaid, stating 'The selected work report was submitted successfully.' with an 'OK' button circled in red.

**Tip!** Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

## Section 8

# Annual Report

The following instructions explain how to submit your annual report in ESS. **If you submit your report through an Information Technology Center (ITC) or secure file upload, please disregard these instructions.** Annual reports are available in ESS on July 1. Comprehensive annual reporting instructions are available on the STRS Ohio Employer Website.

## Submitting Your Annual Report

### Step 1

On the home page, click on “Employer Reports” in the banner menu or “Annual Report” in the Outstanding Reports section. (*Screen not shown.*)

### Step 2

On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click on “Actions” in the row for the annual report and select “Edit” from the drop-down menu.
3. The Work Report Editor screen shown on the next page will appear.

The screenshot displays the 'Employer Reports' page. At the top, there is a navigation menu with the following items: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the menu is a section titled 'Employer Reports' containing a form with the following fields: 'Trans Type' (set to All), 'Status' (set to Open), and 'Work Report Status' (set to Initial). To the right of these fields are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table with the following data:

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source | Date Released | Pay Date   | Trans Identifier      | Trans # | Work Report Total |
|---------|---------------|------------------|---------------|---------------|---------------|------------|-----------------------|---------|-------------------|
| Actions | 09/22/2017    | Regular          | Initial       | Annual        |               | 06/30/2017 | Work Report: Jul-2016 |         | \$0.00            |
| Details |               | Regular          | Initial       | Payroll       |               | 06/30/2017 | Payroll : 2017-06-30  |         | \$1,189.24        |

A red arrow points to the 'Edit' option in the 'Actions' dropdown menu for the first row.

## Step 3

The Work Report Editor screen displays each member's name and SSN. Enter the following information for each member:

1. Pretax employee contributions.
2. After-tax employee contributions (if applicable).
3. Accrued contributions (contributions earned by June 30 but not paid until July and August).
4. Service credit earned. (Enter service credit as a decimal, e.g., 1.00 for a full year or 0.50 for a half year. For reemployed retirees, enter 0.00.)
5. For membership type code, enter "R" if the member is reemployed. Leave this field blank for active members.
6. Include notes if needed.
7. If the report contains more than one page, click the page navigation arrow at the bottom of the screen to go to the next page.
8. Click "Save" when finished. You will automatically return to the Employer Reports page to submit the report.

### Go to Step 4.

**Work Report Editor**

**Save** **FINISH**

Employer: OHIO LOCAL SCHOOLS    Work Report Type: Regular    Report Period: 07/01/2016 - 06/30/2017    # of Participants: 9

Billing Location: 9599 OHIO LOCAL SCHOOLS    Work Report Status: Initial    Identifier: #21016105- work Report- July 2...    # of Rows: 9

Report Source: Annual    Report Start Date: 07/01/2016    Pay Date: 06/30/2017    Billing Type: Contribution

Date Released:    Date Received: 09/22/2017    Trans#: #21016105    Agreement: 9599 Annual Report

User Released:    Batch No:    Updated By: WOLFORD, T

Summary Detail

Barg Unit Id:     Exception Filter:

Delete Selected

| Tools                    | Actions | SSN         | Participant Name | Report Stop Date | Report Type      | Record Status | Pretax employee contribution | After tax employee contribution | Accrued contribution amount | Service credit | Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End | Membership Type Code | Notes |
|--------------------------|---------|-------------|------------------|------------------|------------------|---------------|------------------------------|---------------------------------|-----------------------------|----------------|---|----------------------|-------|
| <input type="checkbox"/> |         | 000-11-2222 | Smith, T..       | 06/30/2017       | Annual Report... |               | \$0                          | \$0                             | \$0.00                      | 0.00           | 2017  |                      |       |
| <input type="checkbox"/> |         | 000-22-3333 | Rolls, A..       | 06/30/2017       | Annual Report... |               | \$0                          | \$0                             | \$0.00                      | 0.00           | 2017  |                      |       |
| <input type="checkbox"/> |         | 000-33-4444 | Batch, D..       | 06/30/2017       | Annual Report... |               | \$0                          | \$0                             | \$0.00                      | 0.00           | 2017  |                      |       |

1. Enter (edit) "Pre-tax employee contribution" amount. This is just the member contributions.  
 2. If applicable, enter the "After-tax employee contribution amount."  
 3. Enter "Accrued Contribution amount." These are the contributions on the amount paid to a member after July 1, but earned prior to June 30.  
 4. Enter the member's earned service credit for the fiscal year. Enter as a decimal, i.e. 1.00 for full year, 0.50 as a half year.  
 5. If reemployed, type "R" under "Membership Type Code."  
 6. Add any important notes in the "Notes" field.  
 7. Click to move to the next page if applicable.  
 8. Save

Page 1 of 7

## Step 4

### Submit the annual report.

After saving the annual report, you will automatically return to the Employer Reports page.

The report status of the annual report will be listed as "Initial."

To submit the report:

1. Click on "Actions" in the Tools column for the annual report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

The screenshot shows the 'Employer Reports' page with a navigation bar at the top containing links for Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation bar is the 'Employer Reports' section with filters for Trans Type (All), Status (Open), and Work Report Status (Initial). A 'Tip!' icon is visible next to the Work Report Status filter. To the right are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the filters is a table with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains two rows of data. A red arrow points to the 'Actions' dropdown menu for the first row, which includes options for Details, Edit, **Submit**, and Delete. A 'Confirm' dialog box is overlaid on the table, asking 'Are you sure you want to submit this work report?' with 'Yes' and 'No' buttons. The 'Yes' button is circled in red. An 'Info' dialog box is also overlaid, stating 'The selected work report was submitted successfully.' with an 'OK' button circled in red.

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source | Date Released | Pay Date   | Trans Identifier                                | Trans #   | Work Report Total |
|---------|---------------|------------------|---------------|---------------|---------------|------------|---|-----------|-------------------|
| Actions | 09/22/2017    | Regular          | Initial       | Annual        |               | 06/30/2017 | Work Report: Jul-2016                           | 169070947 | \$0.00            |
| Details | 17            | Regular          | Initial       | Payroll       |               | 06/30/2017 | Payroll : 2017-06-30 D058_Payroll_001 169126... | 169126752 | \$1,189.24        |

**Tip!** Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."



## Section 9

# Service Credit Verification Report

After your annual report is submitted, you may be asked to verify service credit for certain members. The following instructions explain how to submit a service credit verification report in ESS.

## Submitting a Service Credit Verification Report

Please note that Step 3 varies depending on the method you use to calculate service credit.

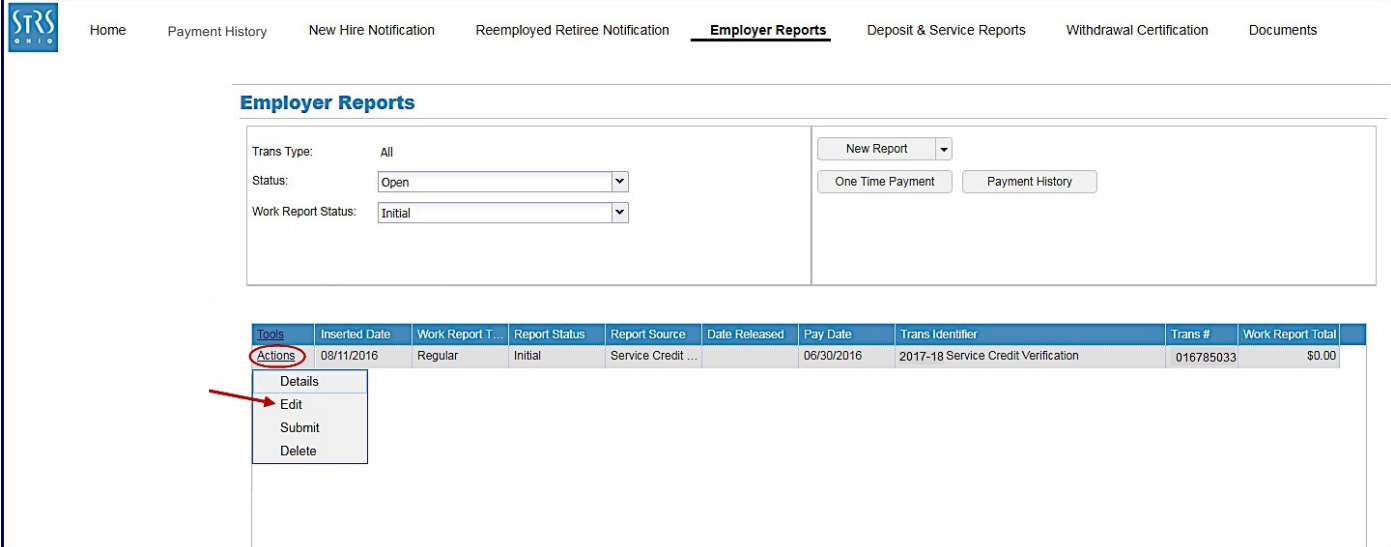
### Step 1

On the home page, click on “Employer Reports” in the banner menu or “Service Credit Verification” in the Outstanding Reports section. *(Screen not shown.)*

### Step 2

On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click on “Actions” in the row for the service credit verification report and select “Edit” from the drop-down menu.
3. The screen shown on the next page will appear with a list of members whose service credit needs to be verified.



The screenshot displays the 'Employer Reports' page in the ESS system. The page features a navigation menu at the top with options: Home, Payment History, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation is the 'Employer Reports' section, which includes a form with the following fields: Trans Type (All), Status (Open), and Work Report Status (Initial). To the right of the form are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table with the following columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row of data: Tools (Actions), Inserted Date (08/11/2016), Work Report T... (Regular), Report Status (Initial), Report Source (Service Credit ...), Date Released (06/30/2016), Pay Date (2017-18 Service Credit Verification), Trans # (016785033), and Work Report Total (\$0.00). A red circle highlights the 'Actions' cell, and a red arrow points to the 'Edit' option in the dropdown menu.

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source      | Date Released | Pay Date                            | Trans Identifier | Trans # | Work Report Total |
|---------|---------------|------------------|---------------|--------------------|---------------|-------------------------------------|------------------|---------|-------------------|
| Actions | 08/11/2016    | Regular          | Initial       | Service Credit ... | 06/30/2016    | 2017-18 Service Credit Verification | 016785033        |         | \$0.00            |

## Step 3a — For Credit Calculated Using Days

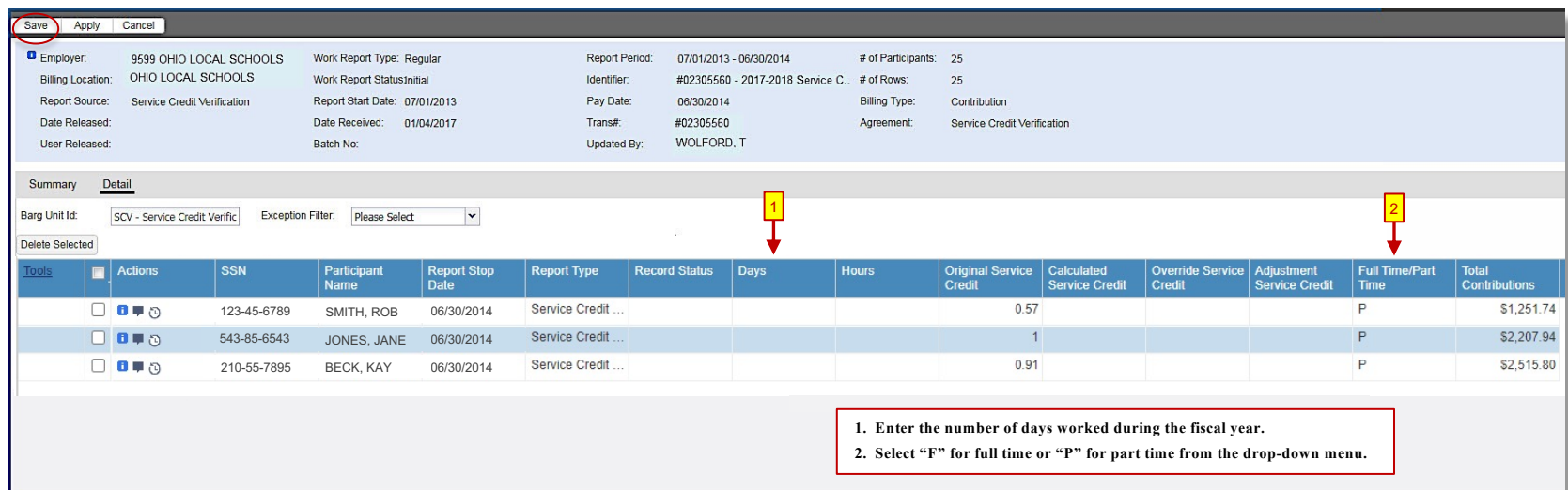
This step applies to **K-12 employers and colleges and universities** that use **days** to calculate service credit. If your college or university uses full-time equivalent (FTE) to calculate credit, go to Step 3b on the next page.

For each member, provide the number of days worked during the fiscal year and indicate work status (part time or full time based on STRS Ohio definitions). Please note that the service credit reported in the annual report will be listed for each member.

1. Click on the Days field to enter the number of days the member worked during the fiscal year.
2. Click on the Full Time/Part Time field and select “F” for full time or “P” for part time from the drop-down menu.
3. Click “Save” when you are finished entering data for each member. You will automatically return to the Employer Reports page to submit the report.

**Note:** If the report contains more than one page, be sure to complete all pages before submitting the report.

**Skip Step 3b and go to Step 4.**



Save Apply Cancel

Employer: 9599 OHIO LOCAL SCHOOLS Work Report Type: Regular Report Period: 07/01/2013 - 06/30/2014 # of Participants: 25  
Billing Location: OHIO LOCAL SCHOOLS Work Report Status: Initial Identifier: #02305560 - 2017-2018 Service C... # of Rows: 25  
Report Source: Service Credit Verification Report Start Date: 07/01/2013 Pay Date: 06/30/2014 Billing Type: Contribution  
Date Released: Date Received: 01/04/2017 Trans#: #02305560 Agreement: Service Credit Verification  
User Released: Batch No: Updated By: WOLFORD, T

Summary Detail

Barg Unit Id: SCV - Service Credit Verific Exception Filter: Please Select

Delete Selected

| Tools | Actions                  | SSN         | Participant Name | Report Stop Date | Report Type        | Record Status | Days | Hours | Original Service Credit | Calculated Service Credit | Override Service Credit | Adjustment Service Credit | Full Time/Part Time | Total Contributions |
|-------|--------------------------|-------------|------------------|------------------|--------------------|---------------|------|-------|-------------------------|---------------------------|-------------------------|---------------------------|---------------------|---------------------|
|       | <input type="checkbox"/> | 123-45-6789 | SMITH, ROB       | 06/30/2014       | Service Credit ... |               |      |       | 0.57                    |                           |                         |                           | P                   | \$1,251.74          |
|       | <input type="checkbox"/> | 543-85-6543 | JONES, JANE      | 06/30/2014       | Service Credit ... |               |      |       | 1                       |                           |                         |                           | P                   | \$2,207.94          |
|       | <input type="checkbox"/> | 210-55-7895 | BECK, KAY        | 06/30/2014       | Service Credit ... |               |      |       | 0.91                    |                           |                         |                           | P                   | \$2,515.80          |

1. Enter the number of days worked during the fiscal year.  
2. Select “F” for full time or “P” for part time from the drop-down menu.

## Step 3b — For Credit Calculated Using FTE

This step applies **only to colleges and universities** that use **full-time equivalent (FTE)** to calculate service credit. If you use days to calculate credit, go to Step 3a on the previous page.

For each member, provide the **percentage** of FTE for each semester worked and indicate work status (part time or full time based on STRS Ohio definitions). Please note that the service credit reported in the annual report will be listed for each member.

1. Click on the Summer FTE, Fall FTE and/or Spring FTE field to enter the percentage of FTE for each semester worked. For example, if a professor was 50% FTE in the fall, enter "50" in the Fall FTE field for that member.
2. Click on the Full Time/Part Time field and select "F" for full time or "P" for part time from the drop-down menu.
3. Click "Save" when you are finished entering data for each member. You will automatically return to the Employer Reports page to submit the report.

**Note:** If the report contains more than one page, be sure to complete all pages before submitting the report.

Go to Step 4.

The screenshot shows a web application interface for entering service credit data. At the top, there are buttons for 'Save', 'Apply', and 'Cancel'. Below this is a summary section with fields for Employer, Billing Location, Report Source, Date Released, User Released, Work Report Type, Work Report Status, Report Start Date, Date Received, Batch No., Report Period, Identifier, Pay Date, Trans#, Updated By, # of Participants, # of Rows, Billing Type, and Agreement. The main section is a table with columns: Tools, Actions, SSN, Participant Name, Report Stop Date, Report Type, Record Status, Days, Hours, Summer FTE, Fall FTE, Spring FTE, Original Service Credit, Calculated Service Credit, Override Service Credit, Adjustment Service Credit, Full Time/Part Time, Total Contributions, and Category Name. The table contains four rows of data for participants BUCK, B, ALPINE, T, MORE, M, and MOON, A. Red annotations highlight the 'Fall FTE' and 'Full Time/Part Time' columns. A red box at the bottom contains the following instructions:

1. Enter the percentage of FTE for each session (e.g., enter 50 for 50%).
2. Select "F" for full time or "P" for part time from the drop-down menu.

## Step 4

*Submit the service credit verification report.*

After saving the service credit verification report, you will automatically return to the Employer Reports page.

The report status of the service credit verification report will be listed as "Initial."

To submit the report:

1. Click on "Actions" in the Tools column for the service credit verification report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

The screenshot shows the 'Employer Reports' page with a table of reports. The 'Actions' column for the first report is highlighted, and a dropdown menu is open with 'Submit' selected. A confirmation dialog box is displayed, asking 'Are you sure you want to submit this work report?' with 'Yes' and 'No' buttons. The 'Yes' button is circled in red. Below the confirmation dialog, an information dialog box shows 'The selected work report was submitted successfully.' with an 'OK' button circled in red.

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source      | Date Released | Pay Date   | Trans Identifier                    | Trans #   | Work Report Total |
|---------|---------------|------------------|---------------|--------------------|---------------|------------|-------------------------------------|-----------|-------------------|
| Actions | 01/04/2017    | Regular          | Initial       | Service Credit ... |               | 06/30/2014 | 2017-18 Service Credit Verification | 016785033 | \$0.00            |

**Tip!** Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

## Section 10

# Accrued Verification Report

After your annual report and summer payrolls have been processed, you may be asked to verify accrued contributions for certain members. The following instructions explain how to submit an accrued verification report in ESS.

## Submitting an Accrued Verification Report

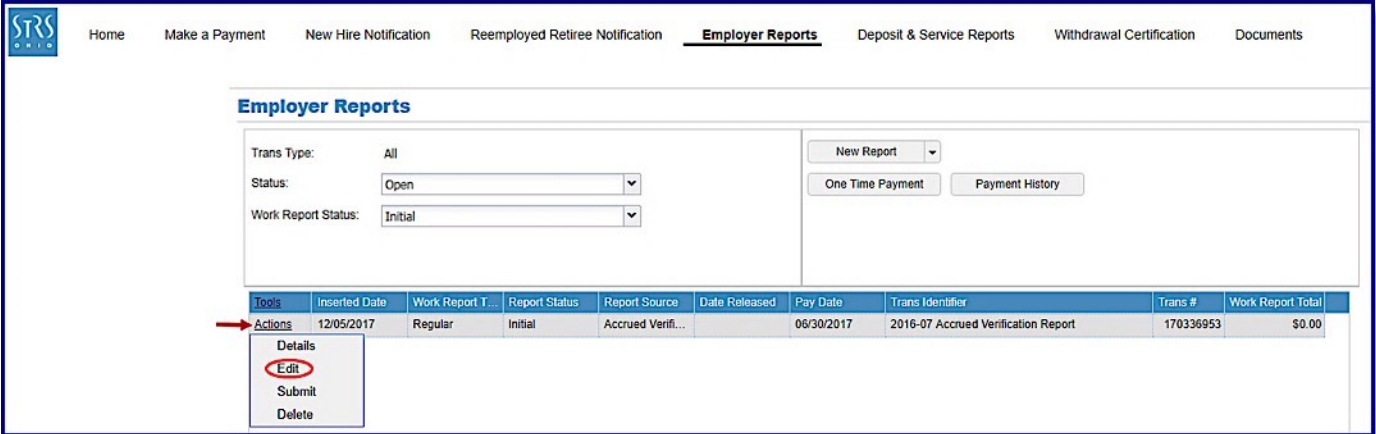
### Step 1

On the home page, click on “Employer Reports” in the banner menu or “Accrued Verification” in the Outstanding Reports section. *(Screen not shown.)*

### Step 2

On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click on “Actions” in the row for the accrued verification report and select “Edit” from the drop-down menu.
3. The Work Report Editor screen shown on the next page will appear.



The screenshot shows the 'Employer Reports' page in the ESS system. The page has a navigation bar with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation bar is the 'Employer Reports' section, which includes a form for creating a new report with fields for Trans Type (All), Status (Open), and Work Report Status (Initial). To the right of the form are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table of reports with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row with the following data: Actions, 12/05/2017, Regular, Initial, Accrued Verif..., 06/30/2017, 2016-07 Accrued Verification Report, 170336953, and \$0.00. A red arrow points to the 'Actions' cell, and a dropdown menu is open showing options: Details, Edit (circled in red), Submit, and Delete.

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source    | Date Released | Pay Date                            | Trans Identifier | Trans # | Work Report Total |
|---------|---------------|------------------|---------------|------------------|---------------|-------------------------------------|------------------|---------|-------------------|
| Actions | 12/05/2017    | Regular          | Initial       | Accrued Verif... | 06/30/2017    | 2016-07 Accrued Verification Report | 170336953        |         | \$0.00            |

## Step 3

The Work Report Editor screen displays individual member accounts with accrued contributions that need to be verified. For each member:

1. Review and compare accrued contributions for payroll and the annual report.
2. Click the drop-down menu in the Verification Indicator field to select the correct amount (payroll, annual or neither).
3. If “Neither” is selected in the Verification Indicator field, enter the correct amount of accrued contributions in the Notes field.
4. Click “Save” when finished verifying accrued contributions for each member listed in the report. You will automatically return to the Employer Reports page to submit the report.

Go to Step 4.

**Work Report Editor**

Save Apply Cancel

Employer: Ohio Local Schools    Work Report Type: Regular    Report Period: 07/01/2016 - 06/30/2017    # of Participants: 1039  
 Billing Location:    Work Report Status: Initial    Identifier: 176846896 - 2016-07 Accrued V...    # of Rows: 1039  
 Report Source: Accrued Verification    Report Start Date: 07/01/2016    Pay Date: 06/30/2017    Billing Type: Contribution  
 Date Released:    Date Received:    Trans#:    Agreement: Accrued Verification Report  
 User Released:    Batch No:    Updated By: DBO

Summary **Detail**

Barg Unit Id: ARV - Accrued Verification    Exception Filter: Please Select

Add Member Delete Selected

| Tools         | Actions | SSN | Participant Name... | Report Stop Date | Report Type       | Record Status | Accrued Payroll Pre Tax | Accrued Payroll After Tax | Annual Report Accrued Amount | Verification Indicator | Annual - Fiscal End / Backposting - Fiscal Start / Payroll - Fiscal End | Notes |
|---------------|---------|-----|---------------------|------------------|-------------------|---------------|-------------------------|---------------------------|------------------------------|------------------------|---|-------|
|               |         |     | Smith, S            | 06/30/2017       | Accrued Verifi... | Validated     | \$725.06                | \$0.00                    | \$0.00                       | Payroll                | 2017  | STRS  |
|               |         |     | Jones, R            | 06/30/2017       | Accrued Verifi... | Validated     | \$710.82                | \$0.00                    | \$975.06                     | Annual                 | 2017  | STRS  |
|               |         |     | Baker, T            | 06/30/2017       | Accrued Verifi... | Validated     | \$0.00                  | \$0.00                    | \$45.50                      | Neither                | 2017  | STRS  |
|               |         |     | Brown, A            | 06/30/2017       | Accrued Verifi... | Validated     | \$580.60                | \$0.00                    | \$793.68                     |                        | 2017  | STRS  |
|               |         |     | Thompson, J         | 06/30/2017       | Accrued Verifi... | Validated     | \$710.82                | \$0.00                    | \$975.06                     |                        | 2017  | STRS  |
|               |         |     | Willis, K           | 06/30/2017       | Accrued Verifi... | Validated     | \$185.05                | \$0.00                    | \$475.98                     |                        | 2017  | STRS  |
|               |         |     | Arms, T             | 06/30/2017       | Accrued Verifi... | Validated     | \$497.52                | \$0.00                    | \$692.59                     |                        | 2017  | STRS  |
|               |         |     | Brooks, B           | 06/30/2017       | Accrued Verifi... | Validated     | \$0.00                  | \$0.00                    | \$623.34                     |                        | 2017  | STRS  |
|               |         |     | Brooks, L           | 06/30/2017       | Accrued Verifi... | Validated     | \$171.64                | \$0.00                    | \$874.41                     |                        | 2017  | STRS  |
|               |         |     | Gordon, P           | 06/30/2017       | Accrued Verifi... | Validated     | \$424.18                | \$0.00                    | \$648.94                     |                        | 2017  | STRS  |
|               |         |     | Rogers, C           | 06/30/2017       | Accrued Verifi... | Validated     | \$412.84                | \$0.00                    | \$0.00                       |                        | 2017  | STRS  |
|               |         |     | Date, C             | 06/30/2017       | Accrued Verifi... | Validated     | \$645.04                | \$0.00                    | \$0.00                       |                        | 2017  | STRS  |
|               |         |     | Andrews, B          | 06/30/2017       | Accrued Verifi... | Validated     | \$445.94                | \$0.00                    | \$0.00                       |                        | 2017  | STRS  |
|               |         |     | Times, N            | 06/30/2017       | Accrued Verifi... | Validated     | \$412.84                | \$0.00                    | \$0.00                       |                        | 2017  | STRS  |
|               |         |     | Jones, B            | 06/30/2017       | Accrued Verifi... | Validated     | \$456.94                | \$0.00                    | \$0.00                       |                        | 2017  | STRS  |
|               |         |     | Frost, J            | 06/30/2017       | Accrued Verifi... | Validated     | \$412.84                | \$0.00                    | \$0.00                       |                        | 2017  | STRS  |
| Page Totals   |         |     |                     |                  |                   |               | \$11,369.16             | \$0.00                    | \$10,455.98                  |                        |   |       |
| Report Totals |         |     |                     |                  |                   |               | \$594,398.82            | \$0.00                    | \$740,100.37                 |                        |   |       |

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## Step 4

Submit the accrued verification report.

After saving the accrued verification report, you will automatically return to the Employer Reports page.

The report status of the accrued verification report will be listed as "Initial."

To submit the report:

1. Click on "Actions" in the Tools column for the accrued verification report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

The screenshot shows the 'Employer Reports' page. At the top, there are navigation links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation is a form with 'Trans Type: All', 'Status: Open', and 'Work Report Status: Initial'. A 'Tip!' icon is next to the 'Work Report Status' field. To the right, there are buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table with columns: Tools, Inserted Date, Work Report T..., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row with 'Actions' in the Tools column, '10/10/2017' in Inserted Date, 'Regular' in Work Report T..., 'Initial' in Report Status, 'Accrued Verifi...' in Report Source, and '\$0.00' in Work Report Total. A red arrow points to the 'Actions' cell. A 'Confirm' dialog box is open with the question 'Are you sure you want to submit this work report?' and 'Yes' selected. An 'Info' dialog box is also open with the message 'The selected work report was submitted successfully.' and 'OK' selected.

**Tip!** Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

## Section 11

# Purchase Service Credit Report

The following instructions explain how to submit a purchase service credit (PSC) report in ESS. If a member is purchasing service credit through payroll deduction, STRS Ohio will notify you via email when a PSC report is ready to complete. These reports are available in ESS by the 20th of each month.

## Submitting a Purchase Service Credit Report

### Step 1

On the home page, click on “Employer Reports” in the banner menu or “Purchase Service Credit” in the Outstanding Reports section. *(Screen not shown.)*

### Step 2

On the Employer Reports page:

1. Verify the Work Report Status field is “Initial.”
2. Click on “Actions” in the row for the PSC report and select “Edit” from the drop-down menu.
3. The screen shown on the next page will appear with a list of all members currently participating in payroll deduction.

| Tools   | Inserted Date | Work Report T... | Report Status | Report Source | Date Released | Pay Date   | Trans Identifier       | Trans #   | Work Report Total |
|---------|---------------|------------------|---------------|---------------|---------------|------------|------------------------|-----------|-------------------|
| Actions | 01/31/2018    | Regular          | Initial       | PSC           |               | 12/31/2017 | IPP Purchase : 2017-12 | 171195434 | \$110.00          |



### Step 3

All members currently participating in payroll deduction will be listed on this screen.

- For each member, review the amounts in the following columns:
  - PSC Expected Amount — This is the amount STRS Ohio expects to receive.
  - PSC Actual Amount — This is the actual amount being remitted.
  - Tax Election — “TD” indicates the amount is tax-deferred/pretax; “PT” indicates the amount is post-tax/after-tax.
- If the amount being remitted is different than the actual amount listed, click on the PSC Actual Amount field to enter the correct amount.

If you need to add members to the report, go to Step 4.

If you are finished, click “Save.” You will automatically return to the Employer Reports page to submit the report. Go to Step 5.

The screenshot shows the 'Work Report Editor' interface. At the top, there are buttons for 'Save', 'Apply', and 'Cancel'. Below this is a summary section with fields for Employer, Billing Location, Report Source, Date Released, User Released, Work Report Type, Work Report Status, Report Start Date, Date Received, Batch No., Report Period, Identifier, Trans#, Updated By, # of Participants, # of Rows, Pay Date, Billing Type, Agreement, and Purchase Service. The 'Detail' tab is active, showing a table with columns: Tools, Actions, SSN, Participant Name, Report Stop Date, Report Type, Record Status, PSC Expected Amount, PSC Actual Amount, PSC Code, Tax Election, Final Pay Amount, Last Payment Amount, Retirement date, Last Payment Month, Final Payment Month, and Category Name. Two rows of member data are visible. Red arrows point from a text box at the bottom to the 'PSC Expected Amount' and 'PSC Actual Amount' columns. A red box highlights the 'Save' button.

| Tools         | Actions | SSN         | Participant Name | Report Stop Date | Report Type      | Record Status | PSC Expected Amount | PSC Actual Amount | PSC Code | Tax Election | Final Pay Amount | Last Payment Amount | Retirement date | Last Payment Month | Final Payment Month | Category Name |
|---------------|---------|-------------|------------------|------------------|------------------|---------------|---------------------|-------------------|----------|--------------|------------------|---------------------|-----------------|--------------------|---------------------|---------------|
|               |         | 016-16-1416 | WOLF, B          | 08/01/2017       | Purchase Serv... |               | \$41.00             | \$41.00           |          | TD           | \$0.00           | \$0.00              |                 |                    |                     | STRS          |
|               |         | 015-15-1315 | FREEMAN, A       | 08/01/2017       | Purchase Serv... |               | \$70.00             | \$70.00           |          | TD           | \$0.00           | \$0.00              |                 |                    |                     | STRS          |
| Page Totals   |         |             |                  |                  |                  |               | \$111.00            | \$111.00          |          |              |                  |                     |                 |                    |                     |               |
| Report Totals |         |             |                  |                  |                  |               | \$111.00            | \$111.00          |          |              |                  |                     |                 |                    |                     |               |

**1. Verify all amounts and the tax election type.**  
**2. If the amount being remitted differs from the actual amount listed, enter the correct amount in the PSC Actual Amount field. (Do not edit any other fields.)**

*Tip!* Be sure to verify all information. If needed, correct the “PSC Actual Amount” before submitting the report. If other information is incorrect, please contact STRS Ohio to make corrections.

## Step 4

To add a member to a PSC report:

1. Click on the "Add Member" button. This will create a new blank line in the report.
2. Enter the member's SSN or name. Then press "Enter" on your keyboard for a search screen to pop up or the member's SSN/name to appear on the blank line.
3. Enter the actual amount being remitted in the PSC Actual Amount field.
4. Enter the PSC code. This reference number can be found in the bottom left corner of the paper agreement the member received from STRS Ohio.
5. In the Tax Election field, enter "TD" if the amount is tax-deferred/pretax or "PT" if the amount is post-tax/after-tax.
6. Click "Save" when finished. You will automatically return to the Employer Reports page to submit the report.

Go to Step 5.

The screenshot shows the 'Work Report Editor' interface. At the top, there are buttons for 'Save', 'Apply', and 'Cancel'. Below this, there is a summary section with various fields like 'Employer', 'Billing Location', 'Report Source', etc. The main part of the interface is a table with columns for 'Tools', 'Actions', 'SSN', 'Participant Name', 'Report Stop Date', 'Report Type', 'Record Status', 'PSC Expected Amount', 'PSC Actual Amount', 'PSC Code', 'Tax Election', 'Final Pay Amount', 'Last Payment Amount', 'Retirement date', 'Last Payment Month', 'Final Payment Month', and 'Category Name'. There are three rows of data in the table. Red arrows point to specific fields in the table, labeled 1 through 5. Arrow 1 points to the 'Add Member' button. Arrow 2 points to the 'SSN' field in the second row. Arrow 3 points to the 'PSC Actual Amount' field in the second row. Arrow 4 points to the 'PSC Code' field in the second row. Arrow 5 points to the 'Tax Election' field in the second row.

| Tools         | Actions | SSN         | Participant Name | Report Stop Date | Report Type      | Record Status | PSC Expected Amount | PSC Actual Amount | PSC Code | Tax Election | Final Pay Amount | Last Payment Amount | Retirement date | Last Payment Month | Final Payment Month | Category Name |  |
|---------------|---------|-------------|------------------|------------------|------------------|---------------|---------------------|-------------------|----------|--------------|------------------|---------------------|-----------------|--------------------|---------------------|---------------|--|
|               |         |             |                  | 08/01/2017       | Purchase Serv... |               |                     |                   |          |              | \$0.00           | \$0.00              |                 |                    |                     | STRS          |  |
|               |         | 015-15-1315 | FREEMAN, A       | 08/01/2017       | Purchase Serv... |               | \$70.00             | \$70.00           |          | TD           | \$0.00           | \$0.00              |                 |                    |                     | STRS          |  |
|               |         | 016-16-1416 | WOLF, B          | 08/01/2017       | Purchase Serv... |               | \$41.00             | \$41.00           |          | TD           | \$0.00           | \$0.00              |                 |                    |                     | STRS          |  |
| Page Totals   |         |             |                  |                  |                  |               | \$111.00            | \$111.00          |          |              |                  |                     |                 |                    |                     |               |  |
| Report Totals |         |             |                  |                  |                  |               | \$111.00            | \$111.00          |          |              |                  |                     |                 |                    |                     |               |  |

## Step 5

### Submit the PSC report.

After saving the PSC report, you will automatically return to the Employer Reports page.

The report status of the PSC report will be listed as "Initial."

Payment cannot be applied to the member's account until the report is submitted and processed.

To submit the report:

1. Click on "Actions" in the Tools column for the PSC report. Then select "Submit" from the drop-down menu.
2. Click "Yes" to confirm you want to submit the report.
3. Then click "OK."

The screenshot shows the STS Employer Reports page. At the top, there is a navigation bar with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, **Employer Reports**, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the navigation bar is the 'Employer Reports' section. It contains a form with the following fields: Trans Type: All, Status: Open, Work Report Status: Initial, and a 'Tip!' icon. There are also buttons for 'New Report', 'One Time Payment', and 'Payment History'. Below the form is a table with the following columns: Tools, Inserted Date, Work Report T., Report Status, Report Source, Date Released, Pay Date, Trans Identifier, Trans #, and Work Report Total. The table contains one row with the following data: Actions, 08/15/2017, Regular, Initial, PSC, 08/31/2017, Work Report: Aug-2017, 169318994, \$111.00. A red arrow points to the 'Actions' cell. A dropdown menu is open below the 'Actions' cell, showing 'Details', 'Edit', 'Submit' (circled in red), and 'Delete'. A 'Confirm' dialog box is displayed over the table, asking 'Are you sure you want to submit this work report?' with 'Yes' (circled in red) and 'No' buttons. An 'Info' dialog box is also displayed, showing 'The selected work report was submitted successfully.' with an 'OK' button (circled in red).

**Tip!** Once the report is submitted, it will disappear from your screen. To view submitted reports, change the Work Report Status field to "Submitted."

# Section 12

## Retirement Reporting

The following instructions explain how to submit a deposit and service report as well as a request for additional information in ESS.

### Deposit and Service Report

#### Step 1

You will receive an email when a deposit and service report is ready to complete.

To access the report from the home page:

1. Click on “Deposit & Service Reports” in the banner menu, or
2. Click on “Deposit & Service” in the Outstanding Reports section.

This will take you to the Reports To Be Completed tab on the Deposit and Service Report screen shown on the next page.

The screenshot displays the ESS home page with the following elements:

- Navigation Banner:** Home (underlined), Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, **Deposit & Service Reports** (circled in red), and Withdrawal Certification.
- Additional Tools:** A list of links including Direct Debit Set Up, Employer Contacts, Employment Verification Reports, Estimated Payroll, GASB Reports, Online Death Notification, Pay Date Calendar, Payroll Summary, Pickup Plan Information, Request Access, Training Registration, and Violation Period Certification.
- Outstanding Reports:** A table with columns for Report Type and Number of Reports. A red arrow points to the 'Deposit & Service' row.
- Current Obligations:** A table with columns for Due Date, Description, and Amount.
- News & Alerts:** A section at the bottom right.

| Report Type                     | Number of Reports |
|---------------------------------|-------------------|
| Service Credit Verification     | 1                 |
| Deposit & Service               | 1                 |
| Employment Verification Reports | 3                 |
| Annual Reporting                | 1                 |
| Withdrawal Certification        | 2                 |
| Pay Date Calendar               | 1                 |
| Violation Period Certification  | 1                 |

| Due Date   | Description                        | Amount     |
|------------|------------------------------------|------------|
| 09/12/2023 | Payroll-reported contributions due | \$515.78   |
| 09/13/2023 | PSC employer cost-Kimberly K       | \$5,719.60 |
| 09/15/2023 | Monthly PSC deductions due         | \$811.23   |
|            | Payment received - not yet applied | -5276.65   |

## Step 2

Click on the employee's SSN to open the report. This will take you to the screen shown on the next page.

STRS OHIO Home Make a Payment New Hire Notification Reemployed Retiree Notification Employer Reports **Deposit & Service Reports** Documents

### Deposit & Service Reports

Reports To Be Completed Available for Updates Submitted Reports

| Employee SSN                | Employee Name               | Retirement Date | Notification Date | Benefit Type       |
|-----------------------------|-----------------------------|-----------------|-------------------|--------------------|
| <a href="#">XXX-XX-1284</a> | BAKER, ANDREA MARIE BARTLEY | 07/01/2018      | 05/02/2018        | Service Retirement |
| <a href="#">XXX-XX-9999</a> | WEIBLER, KIMBERLY PELFREY   | 08/01/2018      | 06/04/2018        | Service Retirement |

\* Indicates a partially completed form

Return to Top of Page

### Navigation Notes

- You will automatically be taken to the Reports To Be Completed tab when you access a deposit and service report from the home page.
- The Available for Updates tab contains submitted reports that can be corrected if needed. **Important:** Only click on reports in this tab if you are submitting a revised deposit and service report.
- The Submitted Reports tab contains submitted reports that are available for viewing or printing.
- You may notice two reports are available for the same member. When a member's retirement effective date is between Aug. 1 and Oct. 1, STRS Ohio requires you to complete a deposit and service report for the current year and prior fiscal year while the annual report is being processed.

### Step 3

Complete each section of the report.

#### Earnings

1. Compensation earned during the fiscal year under the most recent contract.
2. Any amounts earned during the fiscal year that were included in the annual report for work under a prior year contract. Only complete this line for members whose contracts cross fiscal years and who work in July.
3. Any amount reported and/or paid in the current year that was earned in the prior fiscal year and not backposted. Do not include accrued contributions.

DEPOSIT AND SERVICE REPORT

To enable us to compute and pay the benefit to the employee listed above, complete and return this report at the earliest date possible after you can accurately determine the total earnings and deposits for the fiscal year. The certification should be executed then, even though final salary may be paid at a later date. Early completion will speed both the processing of the application and the issuance of the first monthly benefit check.

For the STRS Ohio fiscal beginning July 1, 2021 and ending June 30, 2022

| Earnings      |   |             |        |  |  |
|---------------|---|-------------|--------|--|--|
| 1.            | Earnings under employee's 2021-22 Base Contract <input type="text"/>  |             |        |  |  |
| 2.            | <i>Complete only if member's contract crosses fiscal years and member worked under contract in July: Balance of employee's 2020-21 contract earned in the 2021-22 fiscal year</i> <input type="text"/>  |             |        |  |  |
| 3.            | Amount reported in the current fiscal year but earned in the prior fiscal year and not backposted. <i>Do not include accrued contributions.</i> <input type="text"/>  |             |        |  |  |
| 4.            | Supplemental or Additional Earnings (Please Itemize)<br><div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"><input type="button" value="Add"/> <input type="button" value="Delete"/></div> <table border="1" style="width: 100%;"><thead><tr><th>Description</th><th>Amount</th></tr></thead><tbody><tr><td> </td><td> </td></tr></tbody></table> | Description | Amount |  |  |
| Description   | Amount  |             |        |  |  |
|               |   |             |        |  |  |
| 5.            | Pickup included in compensation for retirement purposes Indicate percentage <input type="text"/>  |             |        |  |  |
| 6.            | Total 2021-22 Employee Earnings <input type="text" value="\$0.00"/>   |             |        |  |  |
| Contributions |   |             |        |  |  |
| 7.            | Employee Contributions - <b>After-Tax</b> <input type="text" value="\$0.00"/>   |             |        |  |  |
| 8.            | Employee Contributions - <b>Pre-Tax</b> <input type="text" value="0.00"/>   |             |        |  |  |
| 9.            | Total 2021-22 Employee Contributions <input type="text" value="0.00"/>  |             |        |  |  |

(\*14.00% of total 2021-22 earnings on the line 6. These contributions should agree with those reported on the 2021-22 Annual Report.)

*Partial screen*

4. Any supplemental earnings paid in addition to the regular contract. List and describe each supplemental earning and enter the amount earned.
5. The percentage of pickup **only if** included in compensation for retirement purposes (pickup-on-pickup).
6. Total member earnings.

#### Contributions

7. Taxed contributions reported as after-tax during the fiscal year.
8. Pretax contributions reported as tax-deferred during the fiscal year.
9. 14% of total earnings (line 6 multiplied by 14%).

Step 3 continued on next page.

### Step 3 (continued)

#### Service Credit and Contract Information

10. Service credit earned by the member during the fiscal year.
11. Last pay date that payment was or will be issued to the member.
12. Last date the member worked, including any paid sick leave or vacation days used (other than severance pay for unused benefits).
13. Position held by the member during the fiscal year.
14. Most recent contract salary.
15. Month and day service was contracted to begin and end, and number of days in contract.
16. Percentage increase generally granted to teaching members from previous year to current year.

#### Contact Information/ Certification

17. Treasurer or other fiscal officer authorized to certify the report.
18. Phone number for any necessary follow-up.

#### Comments

Provide any information necessary to process the account.

The screenshot shows a web form with the following sections and items:

- Service Credit and Contract Information:**
  - 10. Service Credit earned in 2020-21 (with a [Calculate Service Credit](#) link)
  - 11. Last pay date
  - 12. Last day employee worked (including paid sick time)
  - 13. Position held
  - 14. Contract salary (please supply full contract amount even if not completed)
  - 15. Beginning date of full contract
  - Contract ending date (typically the last day of school)
  - Number of days in total contract (even if not completed)
  - 16. Percentage increase generally granted to teaching employees
- Contact Information:**
  - 17. Contact person
  - 18. Telephone number for contact person
- Comments:** A large text area for entering comments.

At the bottom of the form, there are several buttons: "Request for Additional Information", "Save Form" (circled in red), "Save And Submit", "Reset", "Return To List", "Save and Exit", "Help", "Print", and "Return to Top of Page". Red arrows point from "Step 5b" to the "Save Form" button and from "Step 5a" to the "Request for Additional Information" button.

*Partial screen*

### Step 4

Click "Save Form" when finished entering information. Then go to Step 5a **or** Step 5b based on the situation.

### Step 5a

If the member had supplemental contracts or additional earnings in the past five fiscal years **or** has a contract that crosses fiscal years, click "Request for Additional Information." This will take you to [Step 1 of Completing a Request for Additional Information](#) on the next page.

### Step 5b

If you do not need to complete a request for additional information, click "Save and Submit" to submit the report.

# Request for Additional Information

If a member had supplemental contracts or additional earnings in the past five fiscal years **or** has a contract that crosses fiscal years, you need to complete a request for additional information after you complete the deposit and service report.

## Step 1

After completing Step 5a on the previous page, you will be taken to the Request for Additional Information screen. Complete each section of the report for each applicable fiscal year.

### General Information

1. The position the member held for the respective fiscal year.
2. The amount of the member's full contract, even if not completed.
3. Deducted amount for board-approved docked days or unearned contract amounts.
4. Any amount reported and/or paid in the current year that was earned in the prior fiscal year and not backposted. Do not include accrued contributions.
5. The beginning date of the respective contract.
6. The ending date of the respective contract.
7. The number of days in the member's full contract.

| Request for Additional Information   |                      |                      |                      |                      |                      |
|--|----------------------|----------------------|----------------------|----------------------|----------------------|
| Complete this form only if the employee had supplemental earnings in 2015-2016 through 2019-2020 or the employee's contract year was August through July and the employee worked in July. Information on this form will assist us in computing the proper final average salary for retiring employees. Please complete the appropriate information in the spaces below and submit this form. |                      |                      |                      |                      |                      |
|  | 2015-2016            | 2016-2017            | 2017-2018            | 2018-2019            | 2019-2020            |
| Member Contribution Rate   | 13.00%               | 14.00%               | 14.00%               | 14.00%               | 14.00%               |
| General Information  |                      |                      |                      |                      |                      |
| 1. Position employee held  | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 2. Contract amount   | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 3. Unearned amount for board approved docked days  | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 4. Amount of compensation reported during the fiscal year listed but earned in the prior fiscal year and not backposted. Do not list accrued wages.  | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 5. Contract specified to begin   | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 6. Contract specified to end   | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 7. Number of days in contract  | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

*Partial screen*

Step 1 continued on next page.





# Section 13

## Withdrawal Certification

The following instructions explain how to certify a member account withdrawal and reemployed retiree payment in ESS.

### Accessing a Withdrawal Certification

#### Step 1

You will receive an email when a withdrawal certification is ready to complete.

To access the certification from the home page:

1. Click on “Withdrawal Certification” in the banner menu, or
2. Click on “Withdrawal Certification” in the Outstanding Reports section.

This will take you to the Reports To Be Completed tab of the Withdrawal Certification screen shown on the next page.

The screenshot shows the ESS Home page with a navigation menu at the top. The 'Withdrawal Certification' link in the menu is circled in red. Below the menu, there are three main sections: 'Additional Tools', 'Outstanding Reports', and 'Current Obligations'. A red arrow points to the 'Withdrawal Certification' link in the 'Outstanding Reports' table.

| Report Type                     | Number of Reports |
|---------------------------------|-------------------|
| Service Credit Verification     | 1                 |
| Accrued Verification            | 1                 |
| Employment Verification Reports | 3                 |
| Annual Reporting                | 1                 |
| Withdrawal Certification        | 2                 |
| Pay Date Calendar               | 1                 |
| Violation Period Certification  | 1                 |

| Due Date   | Description                        | Amount     |
|------------|------------------------------------|------------|
| 09/12/2023 | Payroll-reported contributions due | \$515.78   |
| 09/13/2023 | PSC employer cost-Kimberly K       | \$5,719.60 |
| 09/15/2023 | Monthly PSC deductions due         | \$811.23   |
|            | Payment received - not yet applied | -\$276.65  |

## Step 2

1. Click on the employee's SSN to open the certification.
2. This will take you directly to the withdrawal certification screen for the member withdrawal (Page 3) or the reemployed payment (Page 4).

| Employee SSN                | Employee Name | Notification Date | Benefit Type       |
|-----------------------------|---------------|-------------------|--------------------|
| <a href="#">XXX-XX-4385</a> | DEJA, DEJA    | 07/15/2023        | Member Withdrawal  |
| <a href="#">XXX-XX-2842</a> | ABBED, ABBED  | 06/19/2023        | Reemployed Payment |

### Navigation Notes

- You will automatically be taken to the Reports To Be Completed tab when you access a withdrawal certification from the home page. Two types of certifications may be listed: member withdrawal and reemployed payment.
- The Available for Updates tab lists existing certifications in need of correction. STRS Ohio will notify you if a correction is needed. Once notified, click on this tab to make the necessary corrections.
- The Submitted Reports tab contains submitted certifications that are available for viewing or printing. Click on this tab if you want to view or print a certification.

# Certifying a Member Account Withdrawal

Once you click on the employee's SSN for a member withdrawal, you will be taken to the certification screen.

## Step 1

Enter the following information for the member applying for account withdrawal:

1. Last day of service.
2. Last pay date.
3. Service credit earned for each year listed.
4. The alternative retirement plan (ARP) question appears for colleges and universities only. Click "Yes" if the member is currently contributing to an ARP. Then select the ARP provider from the drop-down menu. Otherwise, leave the selection marked as "No."
5. Include any comments necessary to help STRS Ohio process the withdrawal.

## Step 2

When finished, click "Save & Submit."

To print a copy of the certification after it has been submitted, click on the Submitted Certifications tab.

The screenshot shows the 'Withdrawal Certification' page on the STRS Ohio website. The navigation bar includes 'Home', 'Make a Payment', 'New Hire Notification', 'Reemployed Retiree Notification', 'Employer Reports', 'Deposit & Service Reports', 'Withdrawal Certification', and 'Documents'. The main heading is 'Withdrawal Certification', with tabs for 'Reports To Be Completed', 'Available for Updates', and 'Submitted Certifications'. A note states: '(For an STRS Ohio Member Applying for Account Withdrawal)'. A warning box says: 'Under Ohio law, employers must verify information and certify only accurate and correct information about an applicant's service credit and contributions. This information is used to determine payment due to the applicant. Employers are required to reimburse STRS Ohio for any overpayment of funds resulting from an error in employer certification.' Employee information is shown: 'Employee: DEJA, DEJA' and 'SSN: XXX-XX-4385'. A tip indicates: 'The member is still active because he or she has not terminated employment, is an applicant for employment, is on a leave of absence or has agreed to teach in the future. I cannot complete the certification at this time. I understand this will cancel the member's withdrawal application process.' Fields for 'Last Day of Service' and 'Last Pay Date' are present. A table for 'Information to be reported on Annual Report' shows columns for 'FY 2023-2024' and 'FY 2022-2023' with a 'Service Credit Calculator' link. A question asks: 'Is this applicant currently contributing to an Alternative Retirement Plan (ARP) in an STRS Ohio-covered position with your school?' with 'Yes' selected. An 'ARP Provider Name' dropdown menu is open, showing options: AXA EQUITA, FIDELITY I, LINCOLN NA, MASS MUTUA, NATIONWIDE, TIAA, VALIC, and VOYA FINAN. A disclaimer box states: 'By submitting this Employer Certification, you are certifying that to the best of your knowledge the member named above, who is applying for an STRS Ohio account withdrawal, is not currently under contract with your school in an STRS Ohio-contributing position as defined in retirement law; is not on a leave of absence from such employment; does not have any other contractual status; is not an applicant for such employment, including substitute teaching; and is under no verbal or written agreement for future teaching.' Buttons for 'Back to List' and 'Save & Submit' are at the bottom.

**Tip!** If the member is still working, click the box under the member's name and Social Security number. (A check mark will appear.) Then click "Save & Submit."

# Certifying a Reemployed Retiree Payment

Once you click on the employee's SSN for a reemployed payment, you will be taken to the certification screen.

## Step 1

Enter the following information for the member applying for a reemployed payment:

1. Last day of service.
2. Last pay date.
3. Employee contributions for each year listed.
4. Include any comments necessary to help STRS Ohio process the payment.

## Step 2

When finished, click "Save & Submit."

To print a copy of the certification after it has been submitted, click on the Submitted Certifications tab.

The screenshot shows the 'Withdrawal Certification' page on the STRS Ohio website. The navigation bar includes 'Home', 'Make a Payment', 'New Hire Notification', 'Reemployed Retiree Notification', 'Employer Reports', 'Deposit & Service Reports', 'Withdrawal Certification', and 'Documents'. The main heading is 'Withdrawal Certification'. Below it are three tabs: 'Reports To Be Completed', 'Available for Updates', and 'Submitted Certifications'. A note states: '(For an STRS Ohio Reemployed Retiree Applying for Reemployed Payment)'. A warning box says: 'Under Ohio law, employers must verify information and certify only accurate and correct information about an applicant's contributions. This information is used to determine payment due to the applicant. Employers are required to reimburse STRS Ohio for any overpayment of funds resulting from an error in employer certification.' Employee information is listed: 'Employee: ABDED, ABDED' and 'SSN: XXX-XX-2842'. A tip with a checkbox asks: 'The reemployed retiree is still active because he or she has not terminated employment, is an applicant for employment, is on a leave of absence or has agreed to teach in the future. I cannot complete the certification at this time. I understand this will cancel the reemployed retiree's application process.' Below this are dropdown menus for 'Last Day of Service' and 'Last Pay Date'. A section for 'FY 2022-2023' includes a field for 'Employee contributions' with a dollar sign and a yellow input box. There is also a text area for 'Optional comments (max 500 characters)'. A final warning box states: 'By submitting this Employer Certification, you are certifying that to the best of your knowledge the member named above, who is applying for an STRS Ohio reemployed payment, is not currently under contract with your school in an STRS Ohio-contributing position as defined in retirement law; is not on a leave of absence from such employment; does not have any other contractual status; is not an applicant for such employment, including substitute teaching; and is under no verbal or written agreement for future teaching.' At the bottom are 'Back to List' and 'Save & Submit' buttons.

**Tip!** If the member is still working, click the box under the member's name and Social Security number. (A check mark will appear.) Then click "Save & Submit."

## Section 14

# Pay Date Calendar

The following instructions explain how to submit your pay date calendar in ESS. Each spring, STRS Ohio asks employers to send their pay dates for the upcoming fiscal year. This allows us to alert you when we haven't received an expected payroll report.

## Submitting Your Pay Date Calendar

### Step 1

To access the report from the home page:

1. Click on "Pay Date Calendar" in the Additional Tools menu or Outstanding Reports section.
2. This will take you to the Pay Dates screen shown on the next page.

The screenshot shows the STRS Ohio ESS home page. The navigation bar includes: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three sections: Additional Tools, Outstanding Reports, and Current Obligations. In the Additional Tools section, 'Pay Date Calendar' is circled in red. In the Outstanding Reports section, a red arrow points to the 'Pay Date Calendar' row. The Current Obligations section contains a table with the following data:

| Due Date   | Description                        | Amount     |
|------------|------------------------------------|------------|
| 09/12/2023 | Payroll-reported contributions due | \$515.78   |
| 09/13/2023 | PSC employer cost-Kimberly K       | \$5,719.60 |
| 09/15/2023 | Monthly PSC deductions due         | \$811.23   |
|            | Payment received - not yet applied | -\$276.65  |

Below the Current Obligations section is a 'News & Alerts' section.

## Step 2

### Include main pay dates only. Do not include supplemental pay dates.

Your pay dates may be prepopulated based on last year's pay schedule. Review each date for accuracy.

If all dates are correct, click "Submit." The screen shown on the next page will appear. If corrections are needed, choose an option below:

1. To change a pay date, click on the calendar icon next to the date and select the correct date.
2. To add a pay date, click "Add Another Pay Date." Then click on the calendar icon in the blank field and select the date.
3. To delete a pay date, highlight the date and click the delete button on your keyboard. Then leave the field blank.
4. To clear all pay dates and enter new dates, click "Reset." Then click on the calendar icon in the blank field and select the correct date.

When all dates are correct, click "Submit." The screen shown on the next page will appear. If you want to review the dates before submitting the report, click "Save." Be sure to submit the report to STRS Ohio after reviewing it.

STRS Ohio

Home Make a Payment New Hire Notification Reemployed Retiree Notification Employer Reports Deposit & Service Reports Withdrawal Certification

Verify the 2021-2022 FY pay dates listed below are correct and click on 'Submit'. To change a date, click the calendar and select the correct date. To clear all pay dates and manually enter, click the 'Reset' button. To add an additional pay date, click 'Add Another Pay Date' and select the dates from the calendar. To manually enter a date, you must use the format mm/dd/yyyy.

**Pay Dates**

|            |   |
|------------|---|
| 07/01/2021 | 📅 |
| 07/30/2021 | 📅 |
| 08/15/2021 | 📅 |
| 08/30/2021 | 📅 |
| 09/15/2021 | 📅 |
| 09/30/2021 | ? |
| 10/15/2021 | 📅 |
| 10/30/2021 | 📅 |
| 11/15/2021 | 📅 |
| 11/30/2021 | 📅 |
| 12/15/2021 | 📅 |
| 12/30/2021 | 📅 |
| 01/15/2022 | 📅 |
| 01/30/2022 | 📅 |
| 02/15/2022 | 📅 |
| 02/28/2022 | 📅 |
| 03/15/2022 | 📅 |
| 03/30/2022 | 📅 |
| 04/15/2022 | 📅 |
| 04/30/2022 | 📅 |
| 05/15/2022 | 📅 |
| 05/30/2022 | 📅 |
| 06/15/2022 | 📅 |
| 06/30/2022 | 📅 |

**Tip!**

Add Another Pay Date

Save Reset Submit

**Tip!** When making corrections, use the calendar to select the correct date. If you want to manually enter a date, you must use the format mm/dd/yyyy.

### Step 3

Once the report is submitted, a copy of your pay date schedule will appear. Click "Print" to print a copy for your records.

You can also view or print a copy of the submitted report in the Documents section.

The screenshot shows the STRS Ohio website interface. At the top, there is a navigation menu with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. Below the menu, there is a 'Close' button and an 'Export' link. The main content area features the STRS Ohio logo and the text 'STATE TEACHERS RETIREMENT SYSTEM OF OHIO'. To the right, contact information is provided: '275 East Broad Street, Columbus, OH 43215-3771, 888-535-4050, www.strsoh.org/employer'. The central focus is a 'Pay Date Schedule' for '9599 - OHIO LOCAL SCHOOLS' covering 'July 2021 - June 2022'. A 'Print' button is circled in red, and a list of dates is displayed below the heading.

| <u>Pay Dates</u> |
|------------------|
| 07/01/2021       |
| 07/30/2021       |
| 08/15/2021       |
| 08/30/2021       |
| 09/15/2021       |
| 09/30/2021       |
| 10/15/2021       |
| 10/30/2021       |
| 11/15/2021       |
| 11/30/2021       |
| 12/15/2021       |
| 12/30/2021       |
| 01/15/2022       |
| 01/30/2022       |
| 02/15/2022       |
| 02/28/2022       |
| 03/15/2022       |
| 03/30/2022       |
| 04/15/2022       |
| 04/30/2022       |



# Section 15

## Direct Debit Payment

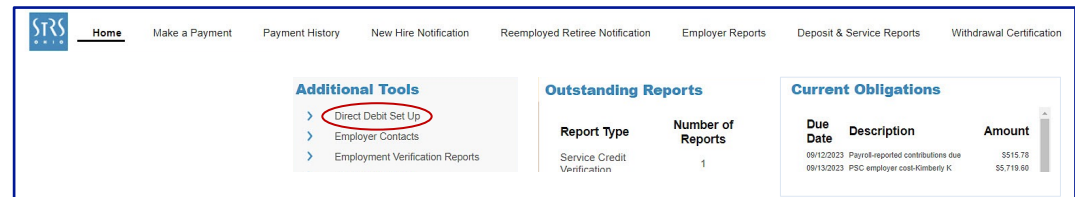
The following instructions explain how to set up a direct debit account and make a payment in ESS.

### Setting Up a Direct Debit Account

STRS Ohio's preferred payment method for employers is direct debit in ESS. Before a direct debit payment can be scheduled, you must set up your direct debit account. Only treasurers and main contacts are granted access to set up account information. If you prefer payroll personnel enter this information, the treasurer or CFO should email [report@strsoh.org](mailto:report@strsoh.org) requesting direct debit access be granted to that individual.

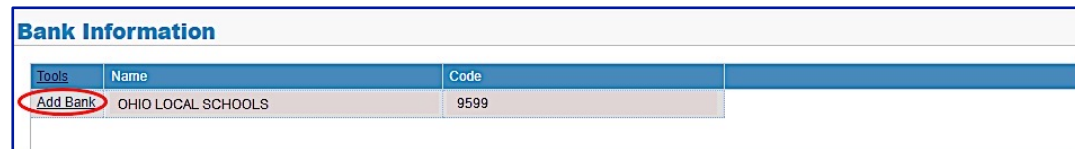
#### Step 1

On the home page, click on "Direct Debit Set Up" in the Additional Tools menu.



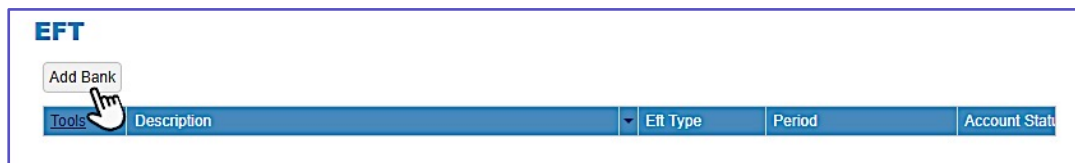
#### Step 2

On the Bank Information page, click "Add Bank" in the Tools column.



#### Step 3

On the EFT page, click "Add Bank." The Details screen shown on the next page will appear.



## Step 4

On the Details screen, provide the following information:

1. **Start Date** — Enter the date you want to activate the bank account to make payments. STRS Ohio recommends using today's date.

*Note: It will take up to three business days from the date entered to approve the account before payments can be made.*

### Do not enter a Stop Date.

2. **Description** — Enter a nickname for the account (e.g., "Employee Account" or "Employer Account").
3. **Bank Account Number** — Enter your bank account number.
4. **Re-enter Bank Account Number** — Enter your bank account number again.
5. **Click "Search."** The Financial Institution Search screen shown on the next page will appear.

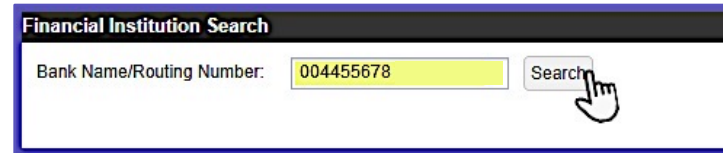
The screenshot shows a 'Details' window with the following fields and values:

|                               |                        |  |
|-------------------------------|------------------------|--|
| Start Date:                   | MM/dd/yyyy             |  |
| Stop Date:                    | MM/dd/yyyy             |  |
| Payment Account:              | Employer Bank Accounts |  |
| Eft Type:                     | Bank                   |  |
| Description:                  |                        |  |
| Account Status:               | Pending                |  |
| Bank Name:                    |                        |  |
| Bank Routing Number:          |                        |  |
| Bank Account Number:          |                        |  |
| Re-enter Bank Account Number: |                        |  |
| Bank Account Type:            | Checking               |  |

Buttons: Cancel, Save, Search (with a hand cursor pointing to it).

## Step 5

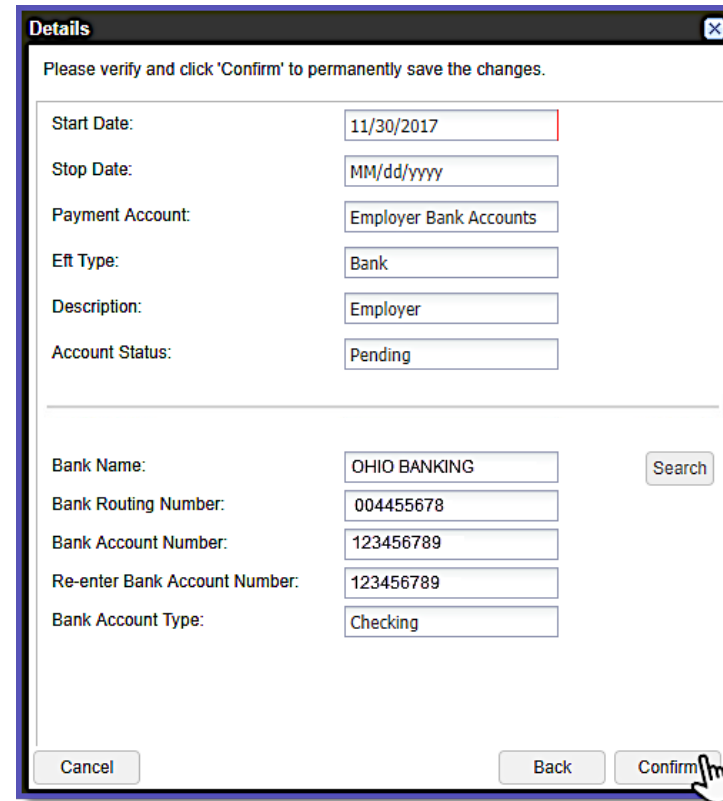
1. Enter the Routing Number.
2. Click "Search."
3. Click "Save." (Screen not shown.)



The image shows a dialog box titled "Financial Institution Search". It contains a text input field labeled "Bank Name/Routing Number:" with the value "004455678" entered. To the right of the input field is a "Search" button. A mouse cursor is pointing at the "Search" button.

## Step 6

1. Verify all information is correct and click "Confirm."
2. The Authorization Agreement screen shown on the next page will appear.



The image shows a dialog box titled "Details" with a close button (X) in the top right corner. The main text reads: "Please verify and click 'Confirm' to permanently save the changes." Below this text are several form fields:

- Start Date: 11/30/2017
- Stop Date: MM/dd/yyyy
- Payment Account: Employer Bank Accounts
- Eft Type: Bank
- Description: Employer
- Account Status: Pending

---

Below the horizontal line are more form fields:

- Bank Name: OHIO BANKING
- Bank Routing Number: 004455678
- Bank Account Number: 123456789
- Re-enter Bank Account Number: 123456789
- Bank Account Type: Checking

At the bottom of the dialog box are three buttons: "Cancel", "Back", and "Confirm". A mouse cursor is pointing at the "Confirm" button.

## Step 7

**You must print the authorization agreement, complete it and send it to STRS Ohio via secure file upload.**

1. Click "Print" to print the authorization agreement.
2. List all individuals authorized to initiate employer payments.
3. Complete and sign the bottom portion of the form. (The name and title of the individual responsible for financial information will already be filled in.)
4. Send the form to STRS Ohio via secure file upload on the STRS Ohio Employer Website.

**Important:** Online payments cannot be scheduled until STRS Ohio receives the agreement and the bank approves the direct debit request. Bank approval may take up to three business days from the date STRS Ohio receives the signed agreement.

Once the bank account is approved, the school's main contact will receive an email from STRS Ohio confirming direct debit payments can be made in ESS.

Doc-Out

Print

### AUTHORIZATION AGREEMENT FOR DIRECT PAYMENT THROUGH ACH DEBIT

Complete the bottom portion of this agreement and send to STRS Ohio via secure file upload.

|                                     |                                |
|-------------------------------------|--------------------------------|
| <b>Employer:</b> OHIO LOCAL SCHOOLS | <b>Employer No:</b> 9599       |
| <b>Account Type:</b> Checking       | <b>Bank Name:</b> OHIO BANKING |
| <b>Routing No:</b> 004455678        | <b>Account No:</b> 123456789   |

**AUTHORIZATION RULES**  
This *Authorization Agreement for Direct Payment Through ACH Debit* ("Agreement") explains the terms and conditions governing Employer's access and use of the online payment service ("Service") for direct payments through ACH debits via the ESS website operated by State Teachers Retirement System of Ohio ("STRS Ohio"). The Service will enable the Employer to pay electronically amounts due to STRS Ohio including, but not limited to, employee and employer contributions, interest, penalties and costs to purchase service credit.

**AUTHORIZATION**  
Employer represents and warrants it is legally authorized to use the bank account identified above on the STRS Ohio ESS website. Employer hereby authorizes STRS Ohio to debit Employer's account identified above in such amounts and at such times as requested by Employer through the Service. Employer acknowledges the origination of ACH transactions to its account must comply with the rules of the National Automated Clearing House Association and provisions of U.S. and Ohio law. Employer agrees to maintain balances sufficient to pay all requested payments and to be solely liable for any overdraft or insufficient fund situation or charge (including, but not limited to, finance charges, late fees or similar charges) caused by its failure to maintain funds sufficient to pay all payments issued through the Service. Employer agrees to promptly notify STRS Ohio of any changes to the financial institution account information by submitting a new *Authorization Agreement for Direct Payment Through ACH Debit*. Employer understands and agrees that use of the Service does not waive any penalties and/or interest for any payments or reports that are not completed or filed timely.

**TERMS AND TERMINATION**  
This Agreement shall remain in force until terminated by either party. Employer may terminate this Agreement by submitting a request in writing to STRS Ohio, provided the delivery of such termination request shall provide STRS Ohio a reasonable opportunity to act on it. STRS Ohio may terminate this Agreement at any time by giving written notice. The termination of this Agreement shall not affect any payments or charges already due to STRS Ohio from Employer.

**DISCLAIMER OF WARRANTY**  
Employer expressly agrees the use of the Service is at Employer's sole risk and the Service is provided "as is" with no warranties whatsoever including, without limitation, warranties of availability, reliability, usefulness, course of performance or fitness for a particular purpose.

**Please list individuals authorized to initiate Employer payments using the Service:**

---

|                                  |             |
|----------------------------------|-------------|
| Certified by <u>TODD WOLFORD</u> | Phone _____ |
| Title <u>Treasurer</u>           | Email _____ |
| Signature _____                  | Date _____  |

## Making a Direct Debit Payment

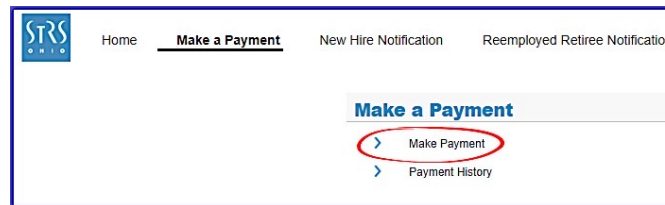
Once the bank account is approved, you can begin making direct debit payments. Please note that these are **one-time** payments. Recurring payments cannot be scheduled in ESS.

### Step 1

To schedule a payment, select “Make a Payment” from the banner menu at the top of the home page. *(Screen not shown).*

### Step 2

Select “Make Payment.”



### Step 3

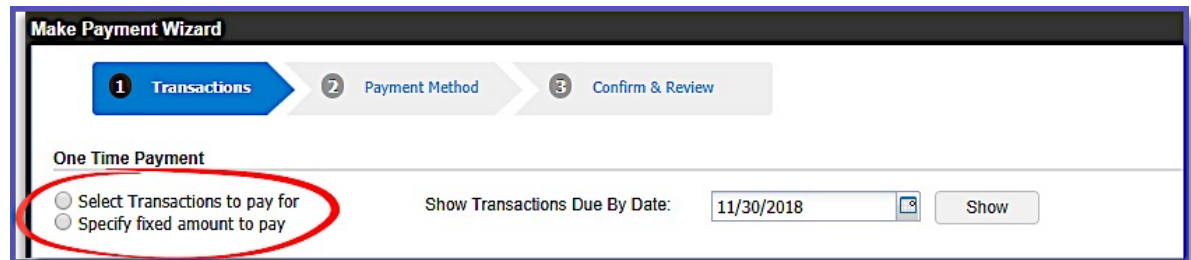
On the Make Payment Wizard screen, you will need to choose which option you will use to make the payment.

#### Option 1 — Select transactions to pay for

This option allows you to make a payment related to an open work report. Refer to Step 3a on next page.

#### Option 2 — Specify fixed amount to pay

This option allows you to make a payment not related to an open work report. Refer to Step 3b on Page 8.



## Step 3a

### Option 1 — Select transactions to pay for

The following instructions are for making a payment **related to** an open work report, such as payroll.

#### Transactions

1. Click “Select Transactions to pay for.”
2. Click the “Show” button next to the Show Transactions Due By Date field. A list of work reports will appear.
3. Click on the work report you want to make a payment for.
4. The payment amount will appear in the Payment Amount field.
5. Enter the payment date (must be today’s date or later). Also enter a description if needed.
6. Click “Next.” This will take you to the Payment Method screen shown on the next page.

Step 3a continued on next page.

Make Payment Wizard

1 Transactions 2 Payment Method 3 Confirm & Review

One Time Payment

Select Transactions to pay for  
 Specify fixed amount to pay

Show Transactions Due By Date: 11/30/2018 Show

Payment Amount:  
Payment Date: MM/dd/yyyy  
Description:

| <input type="checkbox"/>            | Transaction Date | Trans#    | Type             | Identifier           | Status | Due Date   | Total Balance | Applied Amount | Balance  | Scheduled Payment |
|-------------------------------------|------------------|-----------|------------------|----------------------|--------|------------|---------------|----------------|----------|-------------------|
| <input checked="" type="checkbox"/> | 11/30/2017       | 170270617 | Work Report A... | Payroll : 2017-11-30 | Open   | 12/07/2017 | \$100.00      | \$0.00         | \$100.00 | \$100.00          |

Cancel Next

### Step 3a (continued)

#### Payment Method

1. Click the down arrow in the Payment Account field and select the account from the drop-down menu.
2. Click "Next." This will take you to the Confirm & Review screen.

Make Payment Wizard

1 Transactions 2 **Payment Method** 3 Confirm & Review

Payment Method

Payment Account: Employer xxxx12536

Cancel Back Next

#### Confirm & Review

1. Verify the payment information is correct.
2. Click "Confirm."
3. The Info box will appear letting you know your payment was successful. Click "OK." This will take you to the Employer Reports page shown on Page 10.

[See Payment History on Page 10.](#)

Make Payment Wizard

1 Transactions 2 Payment Method 3 **Confirm & Review**

One Time Payment

Pay By: Transactions Bank Name:  
Payment Amount: \$100.00 Bank Account Type: Checking  
Payment Date: 11/30/2017 Bank Routing Number:  
Description: Employee Contributions Bank Account Number:

Selected Transactions

| Transaction Date | Trans#    | Type             | Identifier          | Status | Due Date  | Total Balance | Scheduled Payment |
|------------------|-----------|------------------|---------------------|--------|-----------|---------------|-------------------|
| 11/30/2017       | 170270617 | Work Report A... | Payroll: 2017-11-30 | Open   | 12/7/2017 | \$100.00      | \$100.00          |

Cancel Back Confirm

**Info**  
PAYMENT\_SUCCESS  
OK

## Step 3b

### Option 2 — Specify fixed amount to pay

The following instructions are for making a payment **not related to** an open work report, such as an invoice.

#### Transactions

1. Click “Specify fixed amount to pay.”
2. Enter the payment amount, payment date (must be today’s date or later) and a description.
3. Click “Add” to bring up payment details.
4. Enter information about the payment: payment order detail type (description of payment), pay date **or** invoice number, and the payment amount. If needed, repeat this action to add additional details.
5. Once all details are added, click “Next.” This will take you to the Payment Method screen shown on the next page.

Step 3b continued on next page.

Make Payment Wizard

1 Transactions 2 Payment Method 3 Confirm & Review

One Time Payment

Select Transactions to pay for

Specify fixed amount to pay

Payment Amount:

Payment Date:

Description:

Add Delete

| Tools                               | Payment Order Detail Type | Pay Date | Invoice Number | Amount |
|-------------------------------------|---------------------------|----------|----------------|--------|
| <input checked="" type="checkbox"/> |                           |          |                | \$0.00 |

Cancel Next

Help

If you have selected the option "Specify fixed amount to pay", follow the instructions below.

1. Enter Payment Amount, Payment Date and Description.
2. Click "Add" to enter required details.
3. Click on the first line under Payment Order Detail to see drop down options. Select the option that describes this payment.
4. Tab over and enter Pay Date for all options except Payment for Invoice. If paying invoice no pay date is needed. Tab over to Invoice Number and choose invoice from drop down menu.
5. Enter the amount of this payment under the final column. If you need to add another line of detail for this payment, click "Add" button again and repeat these steps.
6. Click "Next" once all details have been entered.

**Tips!** If you are making an invoice payment, click on the Invoice Number field and select the invoice number from the drop-down menu. Leave the pay date field blank.

If you are making a payment for payroll deduction for purchase service, a pay date is required. The month of the pay date must match the month of the report you are paying. For example, for an August purchase service credit report, the pay date should be 08/dd/yyyy.



## Step 3b (continued)

### Payment Method

1. Click the down arrow in the Payment Account field and select the account from the drop-down menu.
2. Click "Next." This will take you to the Confirm & Review screen.

Make Payment Wizard

1 Transactions 2 **Payment Method** 3 Confirm & Review

Payment Method

Payment Account: Employer xxxx12536

Cancel Back Next

### Confirm & Review

1. Verify the payment information is correct.
2. Click "Confirm."
3. The Info box will appear letting you know your payment was successful. Click "OK." This will take you to the Employer Reports page shown on the next page.

See Payment History on the next page.

Make Payment Wizard

1 Transactions 2 Payment Method 3 **Confirm & Review**

One Time Payment

Pay By: Fixed Amount Bank Name:  
Payment Amount: \$5,000.00 Bank Account Type: Checking  
Payment Date: 11/30/2017 Bank Routing Number:  
Description: Bank Account Number:

One Time Payment

| Payment Order Detail Type | Pay Date | Invoice Number | Amount     |
|---------------------------|----------|----------------|------------|
| Employee Con...           | 11/30/17 |                | \$5,000.00 |

Cancel Back Confirm

**Info**  
PAYMENT\_SUCCESS  
OK

## Payment History

You can view a record of your direct debit payments by clicking the "Payment History" button on the Employer Reports page.



**Employer Reports**

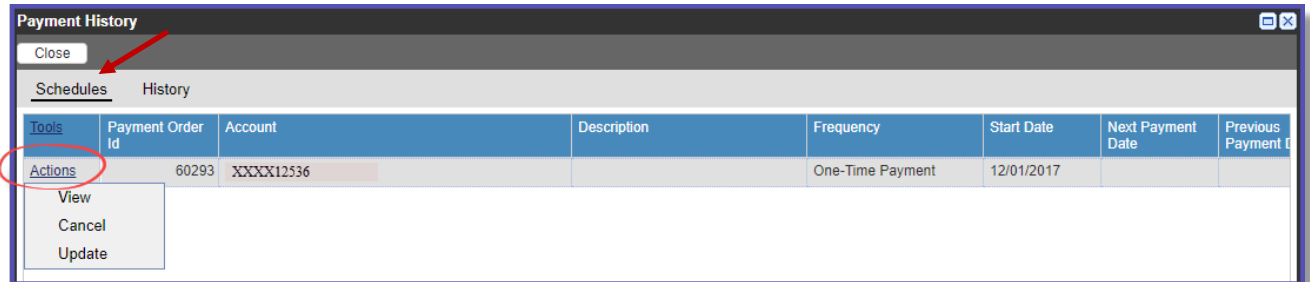
Trans Type: All  
Status: All  
Work Report Status: Initial

New Report  
One Time Payment  
**Payment History**

## Schedules

Under "Schedules," you can view current payments waiting to be processed by STRS Ohio.

- To view, cancel or update a payment, click "Actions" in the Tools column and select an option from the drop-down menu.
- A payment will appear under "Schedules" until it is processed. Once processed, it will appear under "History."



**Payment History**

Close

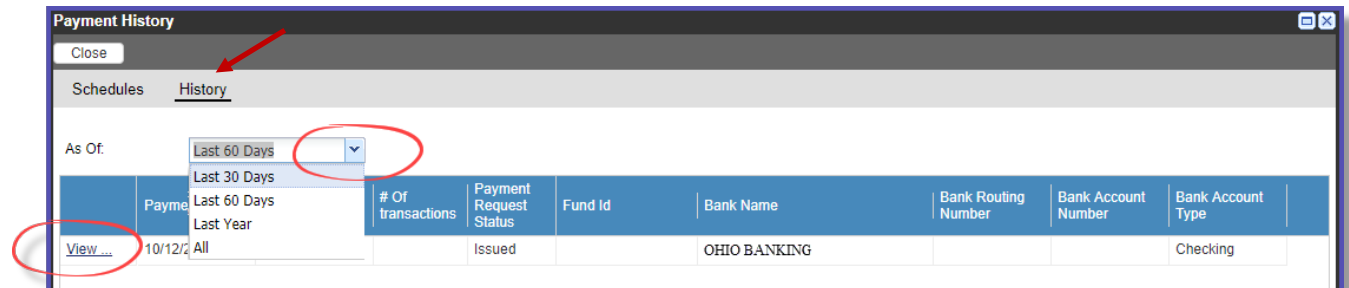
Schedules History

| Tools                                      | Payment Order Id | Account    | Description | Frequency        | Start Date | Next Payment Date | Previous Payment Date |
|--|------------------|------------|-------------|------------------|------------|-------------------|-----------------------|
| <b>Actions</b><br>View<br>Cancel<br>Update | 60293            | XXXXX12536 |             | One-Time Payment | 12/01/2017 |                   |                       |

## History

Under "History," you can view past payments issued to STRS Ohio.

- To sort payments, click the down arrow in the As Of field, and select the time frame you want to sort by.
- To view payment details, click "View" in the row for the payment.



**Payment History**

Close

Schedules History

As Of: Last 60 Days  
Last 30 Days  
Last 60 Days  
Last Year

| Payment Order Id | Account | # Of transactions | Payment Request Status | Fund Id | Bank Name    | Bank Routing Number | Bank Account Number | Bank Account Type |
|------------------|---------|-------------------|------------------------|---------|--------------|---------------------|---------------------|-------------------|
| 10/12/2          | All     |                   | Issued                 |         | OHIO BANKING |                     |                     | Checking          |

View...

# Section 16

## Employment Verification Report

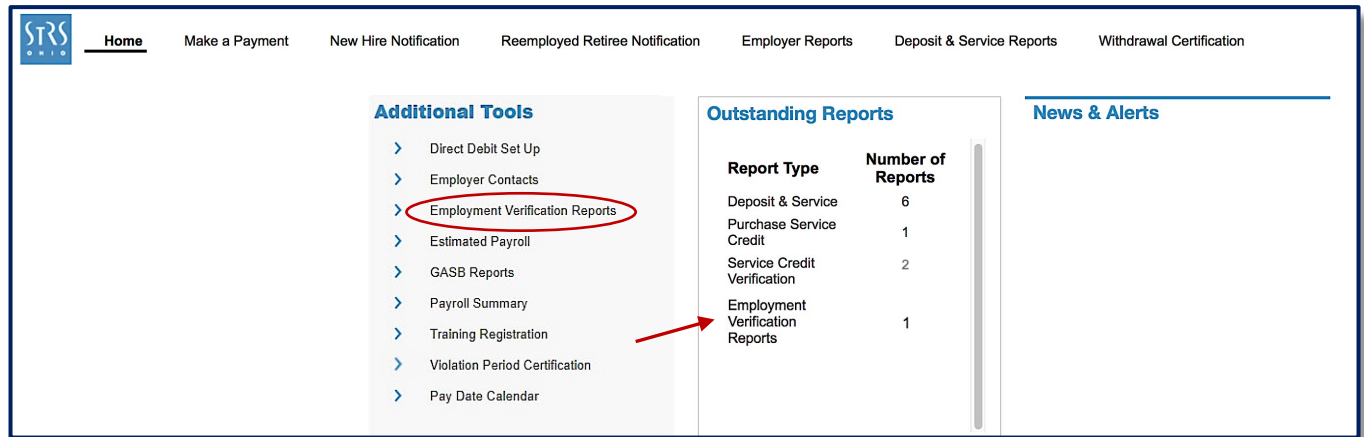
In late fall, you may receive a request to complete employment verification reports. IRS tax regulations require any individual age 73 who is not actively employed in an STRS Ohio-covered position to take a minimum distribution from his or her retirement plan. To comply with these regulations, STRS Ohio identifies reemployed retirees who may meet this criteria and sends this request to their most recent employers to certify current employment status. STRS Ohio also needs final contribution and pay date information from employers if individuals meeting these requirements are no longer working.

### Completing an Employment Verification Report

#### Step 1

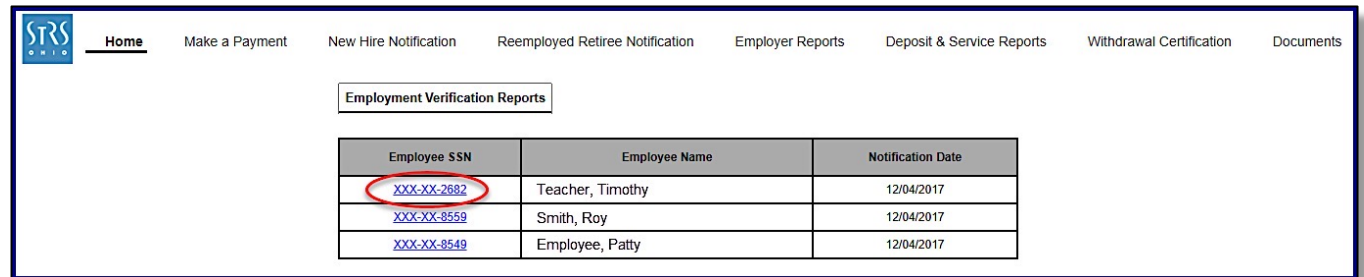
To access the report from the home page:

1. Click on "Employment Verification Reports" in the Additional Tools menu, or
2. Click on "Employment Verification Reports" in the Outstanding Reports section.



#### Step 2

On the Employment Verification Reports screen, click on the member's Social Security number. The report shown on the next page will appear.



### Step 3

Indicate if the member is still working for your school during the specified calendar year.

If the member **is still working**:

1. Click “Y” for yes.
2. Then click “Save & Submit.” You will automatically return to the Employment Verification Reports screen to complete any remaining reports.

The screenshot shows the STS Ohio web portal interface. At the top, there is a navigation menu with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the menu, the employee information is displayed: Employee: Teacher, Timothy and SSN: XXX-XX-2682. The main form area is titled 'Still Working Calendar Year 2018' and contains two radio buttons: 'Y' (selected and circled in red) and 'N'. At the bottom of the form are three buttons: 'Cancel', 'Save', and 'Save & Submit'. A mouse cursor is pointing at the 'Save & Submit' button.

If the member is **no longer working**:

1. Click “N” for no. Additional fields will appear.
2. Enter the last day of service, last day on payroll and contributions for the fiscal year.
3. Then click “Save & Submit.” You will automatically return to the Employment Verification Reports screen to complete any remaining reports.

The screenshot shows the STS Ohio web portal interface. At the top, there is a navigation menu with links: Home, Make a Payment, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, Withdrawal Certification, and Documents. Below the menu, the employee information is displayed: Employee: Teacher, Timothy and SSN: XXX-XX-2682. The main form area is titled 'Still Working Calendar Year 2018' and contains two radio buttons: 'Y' and 'N' (selected and circled in red). Below the radio buttons are three input fields: 'Last Day of Service', 'Last Day on Payroll', and 'Contributions for Fiscal Year 2017-2018', each with a yellow background and a calendar icon. At the bottom of the form are three buttons: 'Cancel', 'Save', and 'Save & Submit'. A mouse cursor is pointing at the 'Save & Submit' button.

**Tip!** If the member is a substitute and you are unsure if services will be provided, click “Y” if it is possible the member may work during the calendar year.

**Repeat Steps 2–3 until all reports have been submitted.** The list on the Employment Verification Reports screen will be empty when you’ve successfully submitted all reports.

## Section 17

# Violation Period Certification

Employers may receive a request to complete a violation period certification when employing a reemployed retiree. Section 3307.35, Revised Code, stipulates that public employees who retire under one of the five Ohio retirement systems are prohibited from returning to work in public employment for **two months** after their retirement effective date. Any retiree who violates this restriction will forfeit monthly benefits for any month in which he or she is in violation.

## Completing a Violation Period Certification

### Step 1

To access the certification from the home page:

1. Click on “Violation Period Certification” in the Additional Tools menu, or
2. Click on “Violation Period Certification” in the Outstanding Reports section.

The screenshot shows the STRS Ohio website home page. The navigation bar includes: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three sections: Additional Tools, Outstanding Reports, and Current Obligations. In the Additional Tools section, 'Violation Period Certification' is circled in red. In the Outstanding Reports section, a table lists various report types and their counts, with 'Violation Period Certification' having a count of 1, indicated by a red arrow. The Current Obligations section shows a table with due dates, descriptions, and amounts.

| Report Type                     | Number of Reports |
|---------------------------------|-------------------|
| Service Credit Verification     | 1                 |
| Accrued Verification            | 1                 |
| Employment Verification Reports | 3                 |
| Annual Reporting                | 1                 |
| Withdrawal Certification        | 2                 |
| Pay Date Calendar               | 1                 |
| Violation Period Certification  | 1                 |

### Step 2

On the Violation Period Certification screen, click on the employee’s SSN to open the certification. The report shown on the next page will appear.

The screenshot shows the Violation Period Certification screen. At the top, there is a button labeled 'Violation Period Certification'. Below it is a table with three columns: Employee SSN, Employee Name, and Notification Date. The SSN 'XXX-XX-1938' is circled in red.

| Employee SSN | Employee Name | Notification Date |
|--------------|---------------|-------------------|
| XXX-XX-1938  | Teacher, Todd | 12/20/2018        |

### Step 3

If the member **did** return to work after retirement, enter the following information:

1. The first day the member worked with your school after retirement.
2. The amount of earnings during the first month after retirement.
3. The amount of earnings during the second month after retirement.
4. Include any comments necessary to help STRS Ohio process the certification.

### Step 4

When finished, click "Save & Submit."

To print a copy of the certification after it has been submitted, click "Print Summary." (*Screen not shown.*) To complete additional certifications, click "Back to List." Then repeat Steps 2–4 until all certifications have been submitted. The list on the Violation Period Certification screen will be empty when you've successfully submitted all certifications.

The screenshot shows the 'Violation Period Certification' form in the STRS Ohio system. The form includes a navigation bar with links like 'Home', 'Make a Payment', and 'Payment History'. The main content area contains a title 'Violation Period Certification' and a paragraph of text explaining the purpose of the form. Below this, there is a section for employee information: 'Employee: Teacher, Todd', 'SSN: XXX-XX-1038', 'Retirement Effective Date: 08/01/2018', and 'Reported Returned to Work Date: 08/02/2018'. There are three input fields: 'First Day Worked With Your School After Retirement' (containing '1/1'), 'Earnings First Month (08/01/2018 - 8/31/2018)', and 'Earnings Second Month (09/01/2018 - 9/30/2018)'. A 'Tip!' section contains a checkbox labeled 'Member did not work after retirement'. Below this is a text area for 'Optional comments (max 250 characters)'. At the bottom, there are three buttons: 'Back to List', 'Save', and 'Save & Submit'.

**Tip!** If the member did not return to work after retirement, click the box to indicate the member did not work after retirement. (A check mark will appear.) Add a note in the comments section and click "Save & Submit."

# Section 18

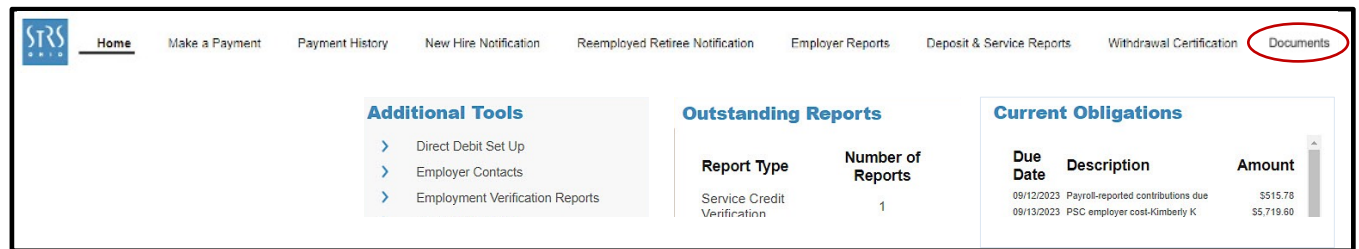
## Documents

You can access some documents that were previously submitted in ESS or mailed directly to you. These documents include new hire and reemployed retiree notifications, *Employer Detail Listings*, employer statements, pay date calendars and GASB schedules.

### Viewing Documents

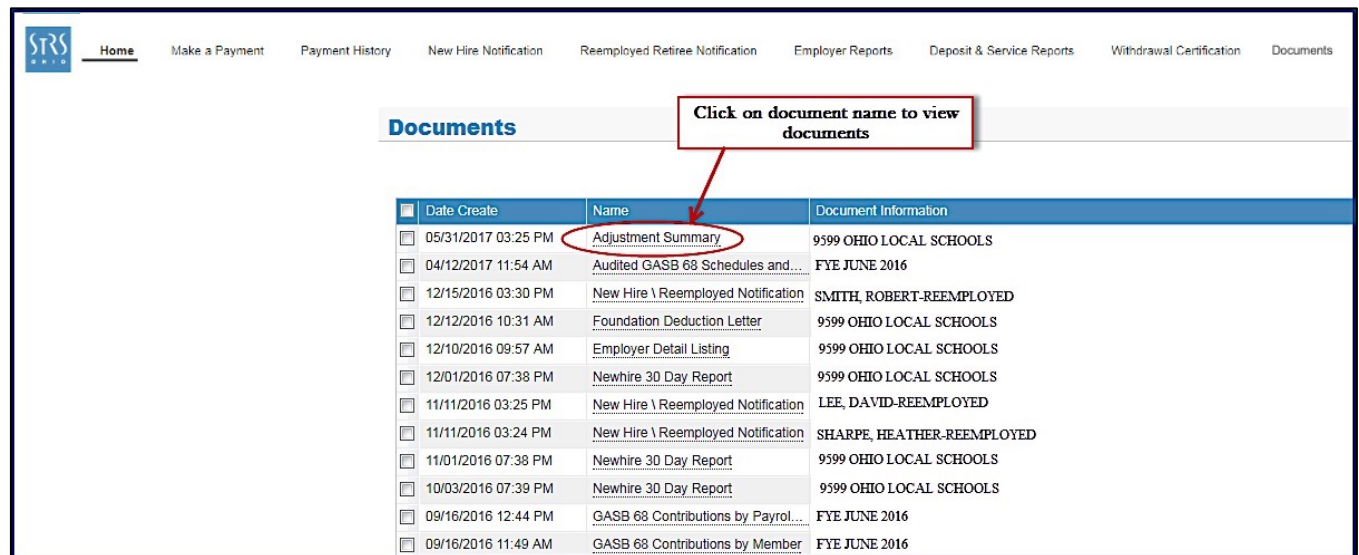
#### Step 1

To access a document, click on “Documents” in the banner menu at the top of the home page.



#### Step 2

In the Name column, click on the name of the document you want to view. A copy of the document will appear.



**Tip!** Click on any column header to sort in ascending or descending order.

# Section 19

## Training Registration

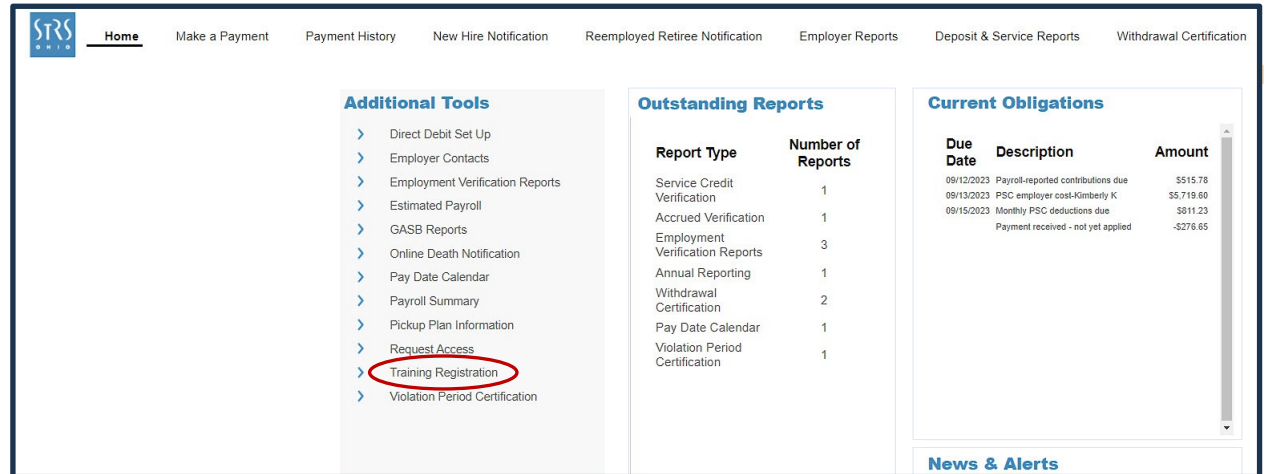
The following instructions explain how to register for employer training sessions and workshops, as well as view or cancel a registration.

### How to Register

#### Step 1

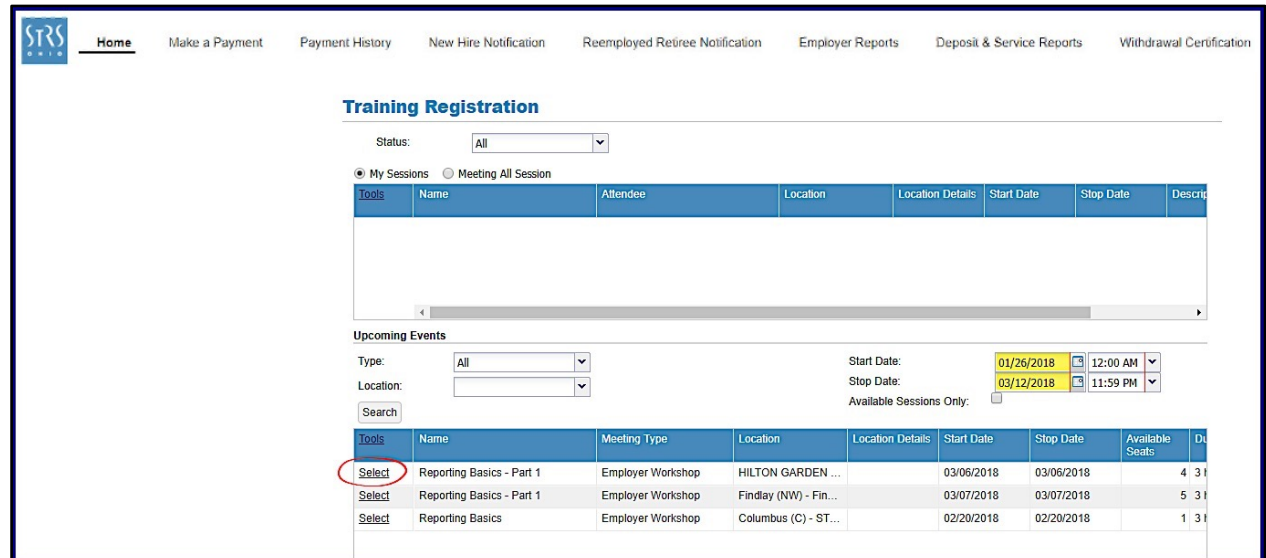
You will receive an email when registration for an education program is available.

To register, click on "Training Registration" in the Additional Tools menu on the home page.



#### Step 2

1. Under "Upcoming Events," enter the start and stop dates for the time period you are searching for and click "Search."
2. A list of programs will appear. Click "Select" next to the program date and location you want to attend.
3. The Seminar Participant screen shown on the next page will appear.





### Step 3

1. Click on the gray "A" box.  
(If program capacity is full, a blue "WL" box will appear. Click on it to be added to the waitlist.)
2. Click "Next."



**Tip!** The Help screen on the right side of each page provides instructions.

### Step 4

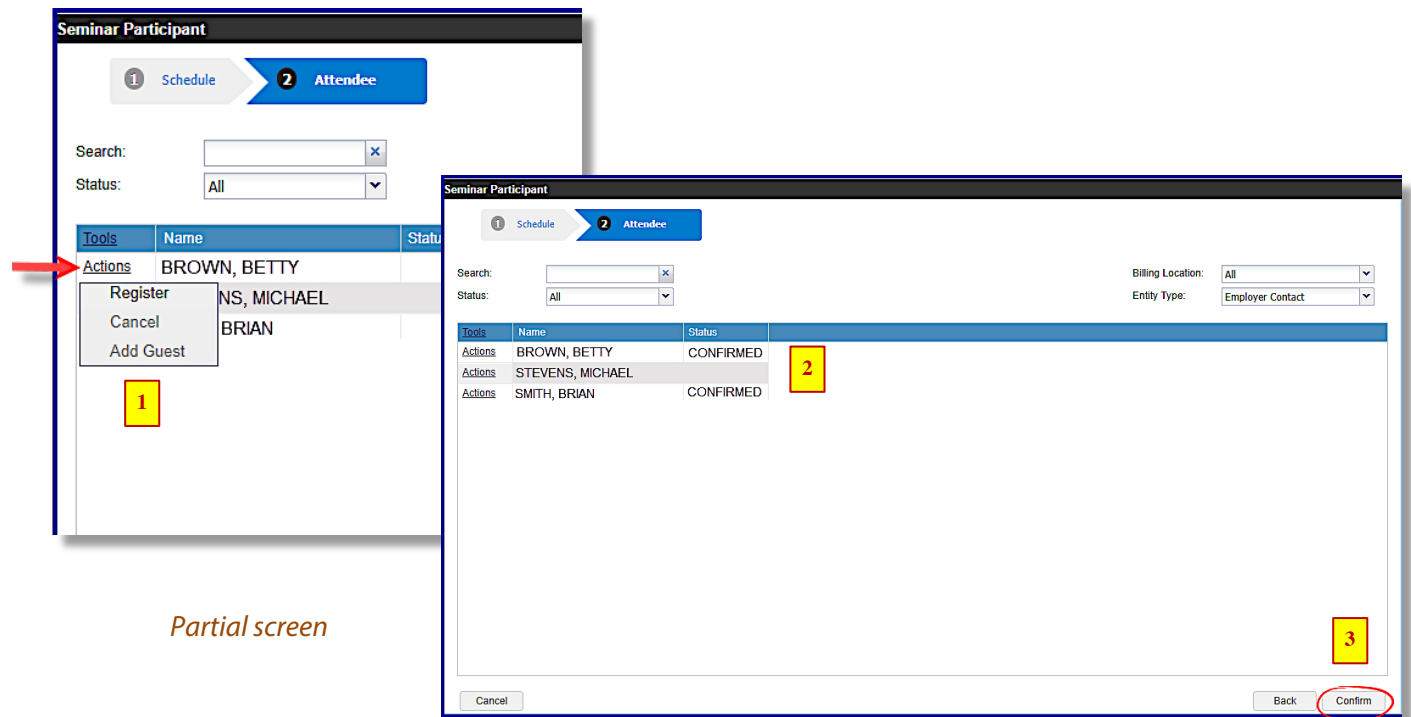
A list of employer contacts on file with STRS Ohio will appear. To register one or more attendees:

1. Click "Actions" next to the person you want to sign up and select "Register."
2. The status will change to "Confirmed" or "Waitlist" depending on space available.

*Repeat to register more attendees.*

3. When finished registering all attendees, click "Confirm."

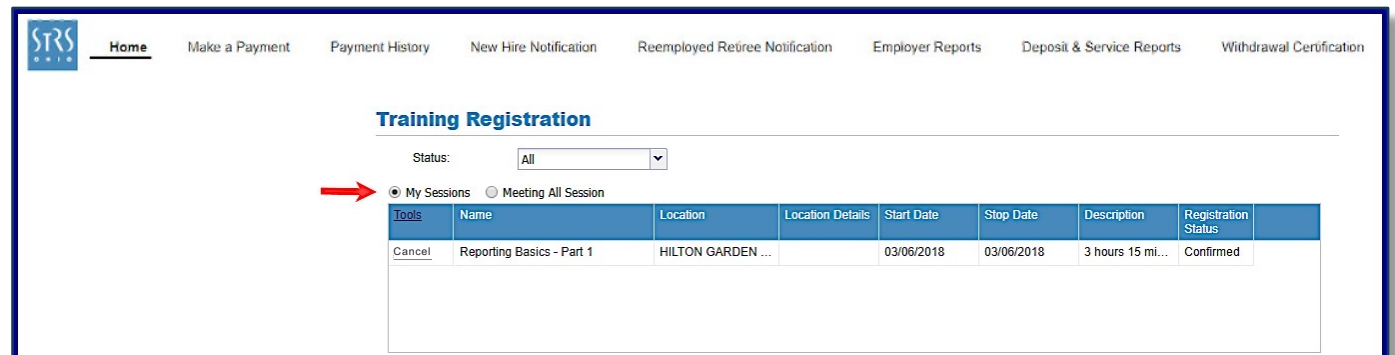
You will return to the Training Registration screen shown on the next page.



## Viewing Registrations

### Your Registrations Only

To view education programs you are currently registered to attend, click on **“My Sessions”** on the Training Registration screen.

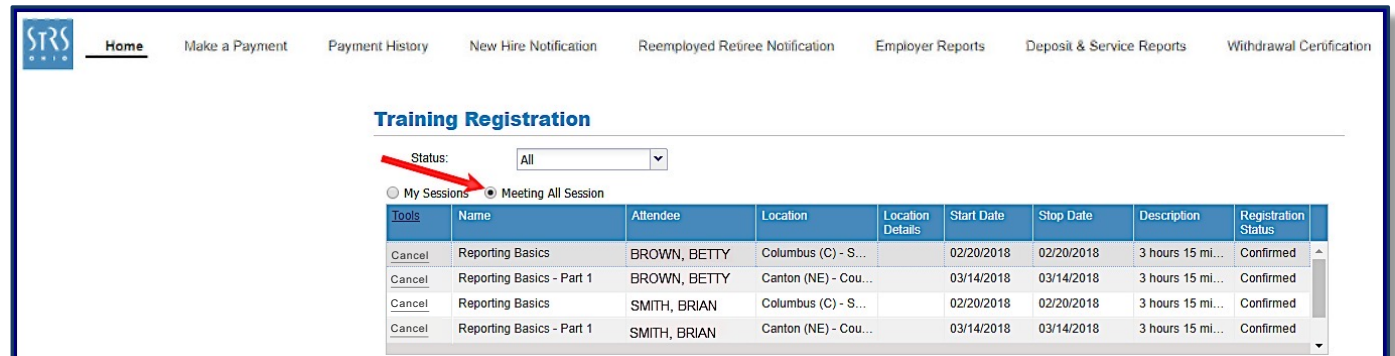


The screenshot shows the 'Training Registration' page with the 'My Sessions' radio button selected. A red arrow points to this button. The table below shows a single registration entry.

| Tools  | Name                      | Location          | Location Details | Start Date | Stop Date  | Description      | Registration Status |
|--------|---------------------------|-------------------|------------------|------------|------------|------------------|---------------------|
| Cancel | Reporting Basics - Part 1 | HILTON GARDEN ... |                  | 03/06/2018 | 03/06/2018 | 3 hours 15 mi... | Confirmed           |

### Registrations for You and Other Attendees

To view education programs you or other individuals in your school are currently registered to attend, click on **“Meeting All Session”** on the Training Registration screen.



The screenshot shows the 'Training Registration' page with the 'Meeting All Session' radio button selected. A red arrow points to this button. The table below shows four registration entries.

| Tools  | Name                      | Attendee     | Location             | Location Details | Start Date | Stop Date  | Description      | Registration Status |
|--------|---------------------------|--------------|----------------------|------------------|------------|------------|------------------|---------------------|
| Cancel | Reporting Basics          | BROWN, BETTY | Columbus (C) - S...  |                  | 02/20/2018 | 02/20/2018 | 3 hours 15 mi... | Confirmed           |
| Cancel | Reporting Basics - Part 1 | BROWN, BETTY | Canton (NE) - Cou... |                  | 03/14/2018 | 03/14/2018 | 3 hours 15 mi... | Confirmed           |
| Cancel | Reporting Basics          | SMITH, BRIAN | Columbus (C) - S...  |                  | 02/20/2018 | 02/20/2018 | 3 hours 15 mi... | Confirmed           |
| Cancel | Reporting Basics - Part 1 | SMITH, BRIAN | Canton (NE) - Cou... |                  | 03/14/2018 | 03/14/2018 | 3 hours 15 mi... | Confirmed           |

# Canceling Registrations

To cancel a registration:

1. Click "Cancel" in the Tools column next to the name of the attendee you want to cancel.
2. Click "Yes" to confirm.

The screenshot displays the STRS Training Registration page. At the top, there is a navigation menu with links: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main heading is "Training Registration". Below this, there is a "Status:" dropdown menu set to "All". There are two radio buttons: "My Sessions" (unselected) and "Meeting All Session" (selected). A table lists training sessions with columns: Tools, Name, Attendee, Location, Location Details, Start Date, Stop Date, Description, and Registration Status. A red arrow points to the "Cancel" link in the "Tools" column of the first row. Below the table is an "Upcoming Events" section with filters for Type, Location, Start Date, and Stop Date. A "Confirm" dialog box is overlaid on the table, asking "Are you sure you want to cancel the meeting?" with "Yes" and "No" buttons. A red arrow points to the "Yes" button.

| Tools  | Name                      | Attendee     | Location             | Location Details | Start Date | Stop Date  | Description      | Registration Status |
|--------|---------------------------|--------------|----------------------|------------------|------------|------------|------------------|---------------------|
| Cancel | Reporting Basics          | BROWN, BETTY | Columbus (C) - S...  |                  | 02/20/2018 | 02/20/2018 | 3 hours 15 mi... | Confirmed           |
| Cancel | Reporting Basics - Part 1 | BROWN, BETTY | Canton (NE) - Cou... |                  | 03/14/2018 | 03/14/2018 | 3 hours 15 mi... | Confirmed           |
| Cancel | Reporting Basics          | SMITH, BRIAN | Columbus (C) - S...  |                  | 02/20/2018 | 02/20/2018 | 3 hours 15 mi... | Confirmed           |
| Cancel | Reporting Basics - Part 1 | SMITH, BRIAN | Canton (NE) - Cou... |                  | 03/14/2018 | 03/14/2018 | 3 hours 15 mi... | Confirmed           |

| Tools  | Name                      | Meeting Type      | Date       | Stop Date  | Available Seats | Duration            |
|--------|---------------------------|-------------------|------------|------------|-----------------|---------------------|
| Select | Reporting Basics - Part 1 | Employer Workshop | 02/20/2018 | 03/06/2018 | 2               | 3 hours 15 minut... |
| Select | Reporting Basics - Part 1 | Employer Workshop | 03/07/2018 | 03/07/2018 | 5               | 3 hours 15 minut... |
| Select | Reporting Basics          | Employer Workshop | 02/20/2018 | 02/20/2018 | 1               | 3 hours 15 minut... |

## Section 20

# Additional Tools

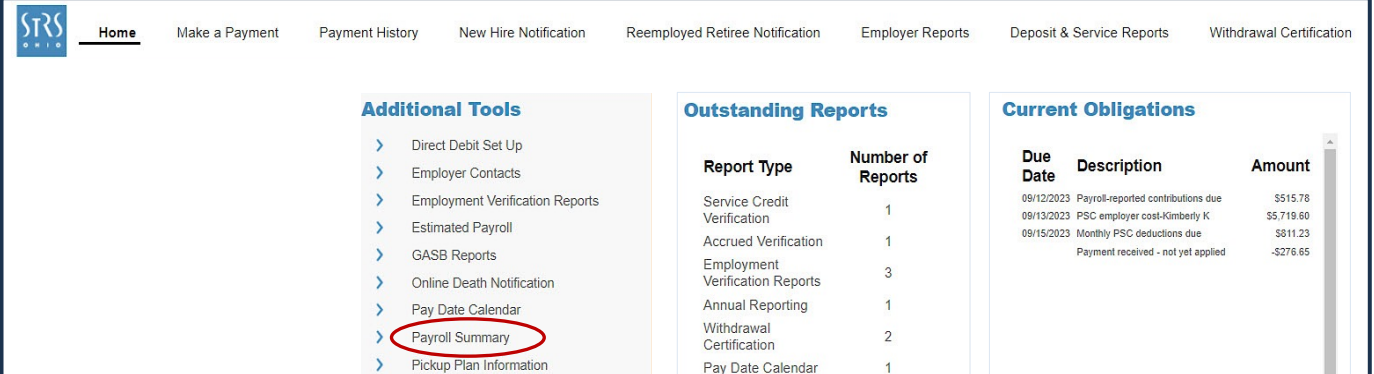
The following instructions explain how to generate a payroll report summary, review employer contact information, access GASB reports and submit an estimated annual payroll in ESS.

## Payroll Report Summary

Payroll report summary is a useful reference when preparing deposit and service reports, withdrawal certifications, annual reports and post annual reporting documents. The following instructions explain how to generate the report.

### Step 1

To generate a payroll report summary from the home page, click on "Payroll Summary" in the Additional Tools menu.



The screenshot shows the ESS Home page with a navigation bar at the top containing: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. Below the navigation bar, there are three main sections: 'Additional Tools', 'Outstanding Reports', and 'Current Obligations'. The 'Additional Tools' section is expanded, showing a list of options: Direct Debit Set Up, Employer Contacts, Employment Verification Reports, Estimated Payroll, GASB Reports, Online Death Notification, Pay Date Calendar, Payroll Summary (circled in red), and Pickup Plan Information. The 'Outstanding Reports' section contains a table with columns for Report Type and Number of Reports. The 'Current Obligations' section contains a table with columns for Due Date, Description, and Amount.

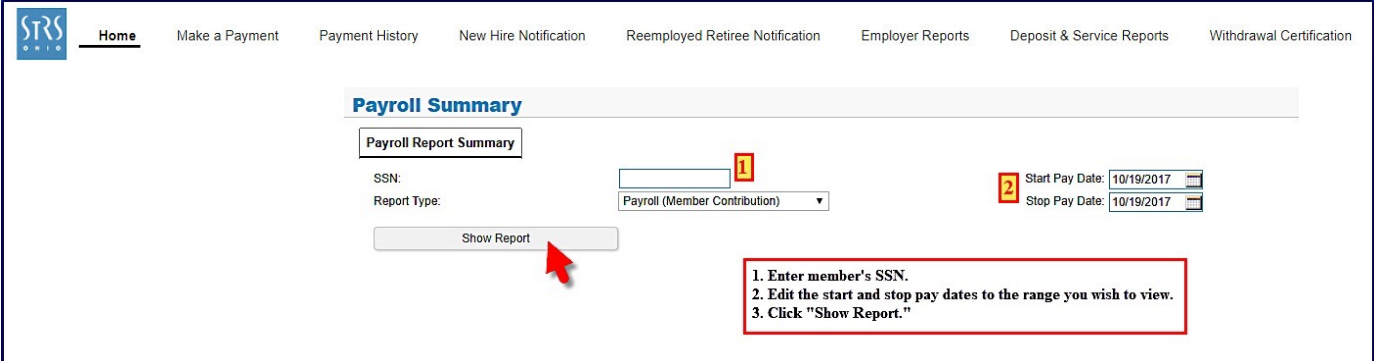
| Report Type                     | Number of Reports |
|---------------------------------|-------------------|
| Service Credit Verification     | 1                 |
| Accrued Verification            | 1                 |
| Employment Verification Reports | 3                 |
| Annual Reporting                | 1                 |
| Withdrawal Certification        | 2                 |
| Pay Date Calendar               | 1                 |

| Due Date   | Description                        | Amount     |
|------------|------------------------------------|------------|
| 09/12/2023 | Payroll-reported contributions due | \$515.78   |
| 09/13/2023 | PSC employer cost-Kimberly K       | \$5,719.60 |
| 09/15/2023 | Monthly PSC deductions due         | \$811.23   |
|            | Payment received - not yet applied | -\$276.65  |

### Step 2

On the Payroll Summary screen:

1. Enter member's SSN.
2. Select start and stop pay dates.
3. Click "Show Report."



The screenshot shows the Payroll Summary screen with a form for generating a report. The form includes a 'Payroll Report Summary' section with fields for SSN (with a red '1' above it), Report Type (set to 'Payroll (Member Contribution)'), Start Pay Date (10/19/2017), and Stop Pay Date (10/19/2017). A red '2' is above the date fields. A 'Show Report' button is at the bottom, with a red arrow pointing to it. A red box at the bottom right contains the following instructions:

1. Enter member's SSN.
2. Edit the start and stop pay dates to the range you wish to view.
3. Click "Show Report."

### Step 3

1. A PDF of all reported member contributions for the selected time period will appear.
2. To print a copy of the report, click "Print."

Home Make a Payment Payment History New Hire Notification Reemployed Retiree Notification Employer Reports Deposit & Service Reports Withdrawal Certification

### Payroll Summary

Payroll Report Summary

SSN:  Start Pay Date: 07/01/2016

Report Type: Payroll (Member Contribution) Stop Pay Date: 06/30/2017

Show Report [Export](#)

**Print**

**STRS** STATE TEACHERS RETIREMENT SYSTEM OF OHIO 275 East Broad Street Columbus, OH 43215-3771 688-237-3977 www.strsobh.org

#### PAYROLL REPORT SUMMARY

| Report Type | Payroll (Member Contribution) | Start Pay Date:     | 07/01/2016 |
|-------------|-------------------------------|---------------------|------------|
| SSN:        | XXX-XX-9471                   | Stop Pay Date:      | 06/30/2017 |
| Pay Date    | Report Status                 | Contribution Amount |            |
| 06/23/2017  | Complete                      | 328.41              |            |
| 06/09/2017  | Complete                      | 328.41              |            |
| 05/26/2017  | Complete                      | 328.41              |            |
| 05/12/2017  | Complete                      | 328.41              |            |
| 04/28/2017  | Complete                      | 328.41              |            |
| 04/13/2017  | Complete                      | 328.41              |            |
| 03/31/2017  | Complete                      | 328.41              |            |
| 03/17/2017  | Complete                      | 328.41              |            |
| 03/03/2017  | Complete                      | 328.41              |            |
| 02/17/2017  | Complete                      | 328.41              |            |
| 02/03/2017  | Complete                      | 328.41              |            |
| 01/20/2017  | Complete                      | 328.41              |            |
| 01/06/2017  | Complete                      | 328.41              |            |
| 12/16/2016  | Complete                      | 328.41              |            |
| 12/09/2016  | Complete                      | 328.41              |            |
| 11/22/2016  | Complete                      | 328.41              |            |
| 11/10/2016  | Complete                      | 328.41              |            |
| 10/28/2016  | Complete                      | 328.41              |            |
| 10/13/2016  | Complete                      | 328.41              |            |
| 09/30/2016  | Complete                      | 328.41              |            |
| 09/16/2016  | Complete                      | 328.41              |            |
| 09/02/2016  | Complete                      | 328.41              |            |
| 08/19/2016  | Complete                      | 298.97              | ACCRUED    |
| 08/05/2016  | Complete                      | 298.98              | ACCRUED    |
| 07/22/2016  | Complete                      | 298.98              | ACCRUED    |
| 07/08/2016  | Complete                      | 298.98              | ACCRUED    |
|             |                               | <b>8,420.93</b>     |            |

# Employer Contacts

STRS Ohio needs current contact information for personnel who are involved with STRS Ohio reporting. To ensure these individuals receive timely information from STRS Ohio, you should periodically check your school's contact information in ESS and submit updates as needed.

## Review Contacts

### Step 1

To access your school's contact information from the home page, click on "Employer Contacts" in the Additional Tools menu.

### Step 2

A list of contacts will appear.

1. Verify the individuals still work for your school.
2. Verify all information, including the spelling of names.
3. Look for "Web" notifications in the Contact Type column to ensure the individual is receiving emails when reports are ready to complete in ESS.
4. If your list is more than one page, check all pages for accuracy.
5. If updates are needed, click on the link in the Help box and complete the Request Access form. You will receive confirmation of changes once the form is submitted.

The screenshot shows the STRS Ohio home page with a navigation bar at the top containing links like Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. Below the navigation bar, there are three main sections: 'Additional Tools', 'Outstanding Reports', and 'Current Obligations'. In the 'Additional Tools' section, the 'Employer Contacts' link is circled in red.

The screenshot shows the 'Contacts' page with a table of contact information. The table has columns for Name, Contact Type, Phone, Primary Email, and Address. The 'Help' link is circled in red. A red arrow points to the 'Request Access form' link in the help text.

| Tools | Name          | Contact Type               | Phone             | Primary Email         | Address                               |
|-------|---------------|----------------------------|-------------------|-----------------------|---------------------------------------|
|       | JOHN SMITH    | Web Installment Purcha...  | B: (513) 555-1234 | SmithJ@myschool.com   | 100 Joyous Lane<br>Sunshine, OH 45678 |
|       | AMANDA JONES  | ESS User                   | B: (513) 555-4321 | JonesA@myschool.com   |                                       |
|       | JOHN SMITH    | Web Service Credit Veri... | B: (513) 555-1234 | SmithJ@myschool.com   | 100 Joyous Lane<br>Sunshine, OH 45678 |
|       | KAYLA ROBERTS | Web Service Credit Veri... | B: (513) 555-9876 | RobertsK@myschool.com | 100 Joyous Lane<br>Sunshine, OH 45678 |
|       | KAYLA ROBERTS | Web Employer Reportin...   | B: (513) 555-9876 | RobertsK@myschool.com | 100 Joyous Lane<br>Sunshine, OH 45678 |
|       | KAYLA ROBERTS | Main Contact               | B: (513) 555-9876 | RobertsK@myschool.com | 100 Joyous Lane<br>Sunshine, OH 45678 |

**Tip!** Web notifications are available for these contact types: annual reporting, deposit and service reports (includes withdrawal certifications), employer reporting (includes payroll report notifications), installment purchase service credit, service credit verification and accrued verification. If "Web" is not listed in the Contact Type column, email or call STRS Ohio to add notifications for these individuals.

## Add or Modify Contacts

### Step 1

To add a new contact or modify access for an existing contact, click on “Request Access” in the Additional Tools menu on the home page.

### Step 2

The Request Access screen will appear. Select an option:

1. Add new contact and register for access, or
2. Add or modify access for existing contact.

### Step 3

The Request Access form for the option you selected will appear. Enter all required information and click “Submit.” (Screen not shown.)

You will receive confirmation of changes once the form is submitted.

The screenshot shows the STS Home page with a navigation bar at the top containing links for Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three columns: 'Additional Tools', 'Outstanding Reports', and 'Current Obligations'. The 'Additional Tools' menu is expanded, showing a list of options with 'Request Access' circled in red. The 'Outstanding Reports' table lists various report types and their counts. The 'Current Obligations' table shows due dates, descriptions, and amounts for various contributions and deductions. A 'News & Alerts' section is visible at the bottom right.

| Report Type                     | Number of Reports |
|---------------------------------|-------------------|
| Service Credit Verification     | 1                 |
| Accrued Verification            | 1                 |
| Employment Verification Reports | 3                 |
| Annual Reporting                | 1                 |
| Withdrawal Certification        | 2                 |
| Pay Date Calendar               | 1                 |
| Violation Period Certification  | 1                 |

| Due Date   | Description                        | Amount     |
|------------|------------------------------------|------------|
| 09/12/2023 | Payroll-reported contributions due | \$515.78   |
| 09/13/2023 | PSC employer cost-Kimberly K       | \$5,719.60 |
| 09/15/2023 | Monthly PSC deductions due         | \$811.23   |
|            | Payment received - not yet applied | -\$276.65  |

The screenshot shows the STS Request Access screen. The navigation bar at the top is identical to the previous screenshot. The main content area features a 'Request Access' heading followed by two options, each with a right-pointing chevron icon:

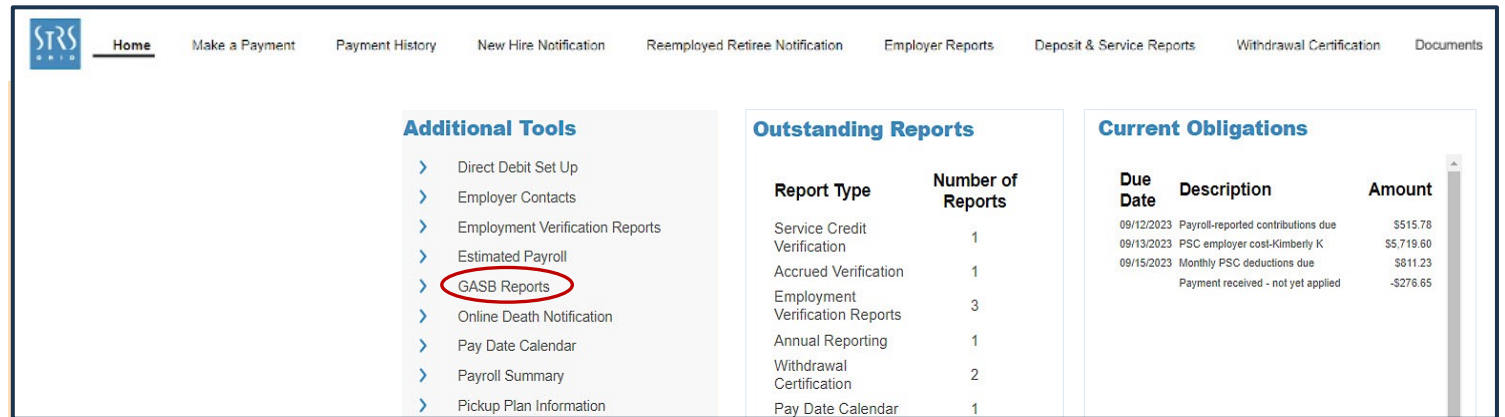
- > Add new contact and register for access
- > Add or modify access for existing contact

# GASB Reports

The Governmental Accounting Standards Board (GASB) requires employers to report their proportionate share of STRS Ohio’s net liability and annual expense for pensions (GASB 68) and other post-employment benefits (GASB 75) in their financial statements. The following instructions explain how to access allocation schedules and other data needed to comply with these standards.

## Step 1

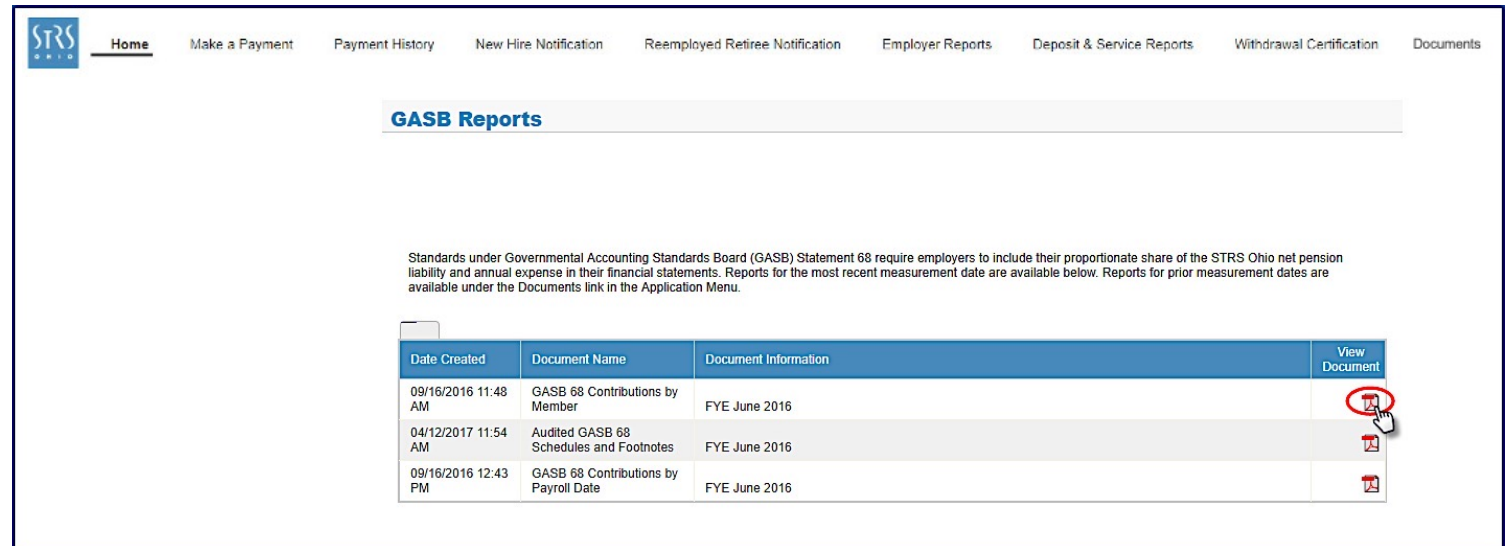
To access GASB Reports on the home page, click on “GASB Reports” in the Additional Tools menu.



*Tip! GASB reports can also be found in the Documents section of ESS.*

## Step 2

A list of available reports will appear. To view or print a report, click the PDF icon in the View Document column.



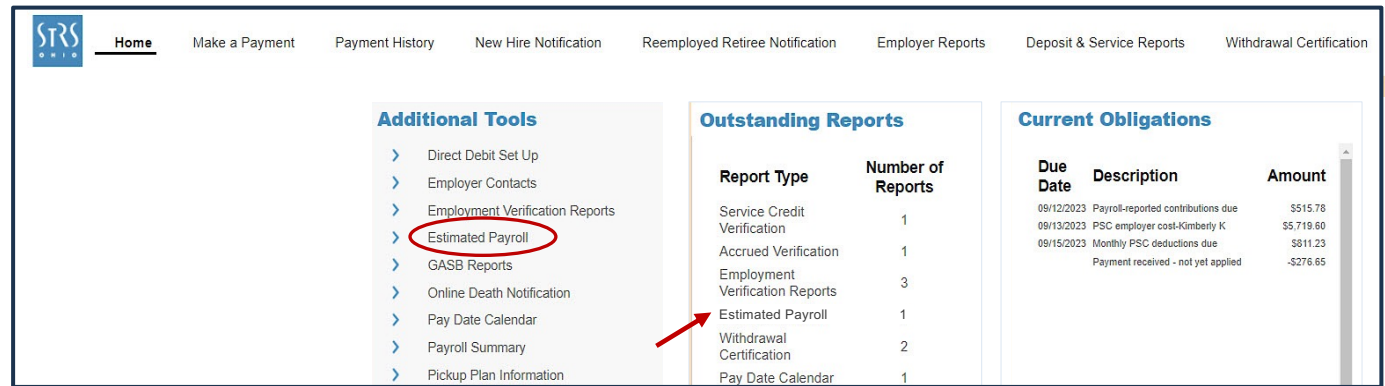


# Estimated Annual Payroll

This information applies only to employers participating in the state foundation program. You will receive an email from STRS Ohio in April notifying you it is time to provide your estimated annual payroll for the upcoming fiscal year. This information is used to calculate employer contributions due from the state foundation program.

## Step 1

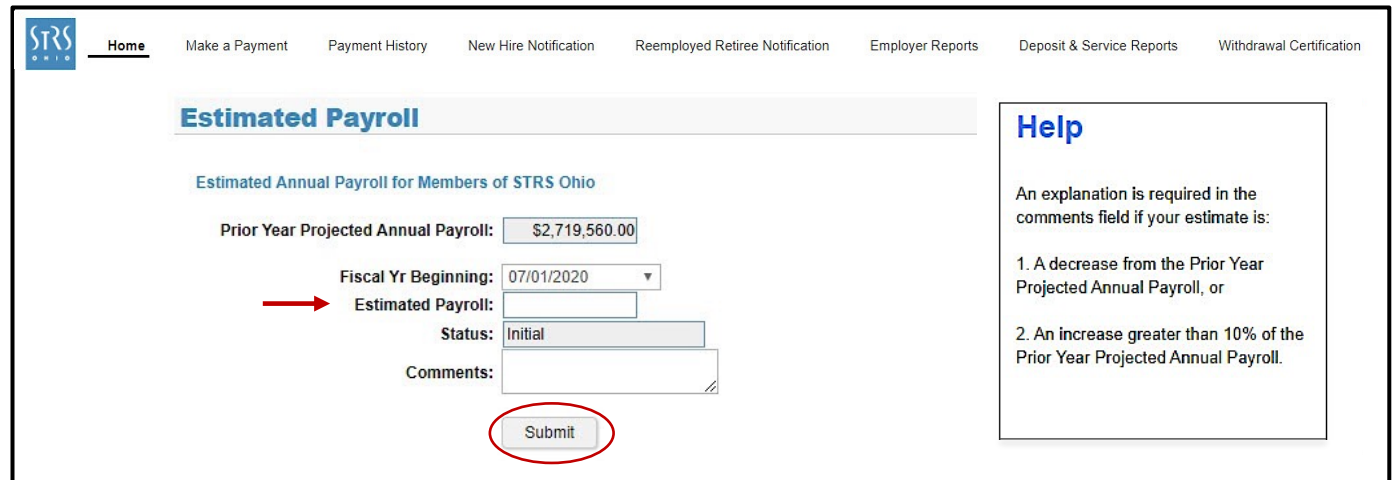
To access the report from the home page, click on "Estimated Payroll" in the Additional Tools menu or the Outstanding Reports section.



## Step 2

To help you prepare an accurate payroll estimate, the projected amount of your current payroll is prepopulated in the Prior Year Projected Annual Payroll field. The start date of the upcoming fiscal year is also prepopulated in the Fiscal YR Beginning field.

To complete the report, enter your estimated payroll for the upcoming fiscal year (July 1–June 30) in the Estimated Payroll field. Then click "Submit."



**Tip!** If you need to correct the report after you submit it, email [report@strsoh.org](mailto:report@strsoh.org). Corrections cannot be made in ESS.

# Pickup Plan Information

STRS Ohio needs accurate pickup plan information for your school. You should check your pickup plan information in ESS and submit new plan documentation if updates are needed.

## Step 1

To access pickup plan information from the home page, click on "Pickup Plan Information" in the Additional Tools menu.

## Step 2

Your pickup plan information will appear.

1. Review the employee groups covered, plan type, percentage being picked up and effective date.
2. If the total pickup percentage is less than the current 14% member contribution rate and/or the effective date is not 7/1/2016 or later, new plan documentation is needed.
3. If any information is not accurate, email new plan documentation to report@strsoh.org.
4. If "multiple plans" is listed in place of a specific percentage, the plan type or percentage varies within an employee group.

The screenshot shows the STRS Ohio ESS Home page. The navigation bar includes: Home, Make a Payment, Payment History, New Hire Notification, Reemployed Retiree Notification, Employer Reports, Deposit & Service Reports, and Withdrawal Certification. The main content area is divided into three columns:

- Additional Tools:** A list of links with right-pointing chevrons. 'Pickup Plan Information' is circled in red.
- Outstanding Reports:** A table with columns 'Report Type' and 'Number of Reports'.
- Current Obligations:** A table with columns 'Due Date', 'Description', and 'Amount'.

| Pickup Plan Information |                  |                |                |
|-------------------------|------------------|----------------|----------------|
| Group Covered           | Pickup Plan Type | Pickup Percent | Effective Date |
| Administrators          | Salary Reduction | 14             | 7/1/2016       |
| Superintendents         | Pickup-on-Pickup | 14             | 8/1/2016       |
| Teachers                | Salary Reduction | 14             | 7/1/2016       |

## Online Death Notification

Employers can report the death of a member in ESS. The sooner STRS Ohio is notified of a member's death, the sooner benefits are paid to the member's beneficiaries. Understandably, sometimes the family does not think about notifying STRS Ohio right away, so this notification allows the employer to start the process.

### Step 1

1. To access the online death notification from the home page, click on "Online Death Notification" in the Additional Tools menu. *(Screen not shown.)*
2. The first screen of the online death notification will appear. Enter the member's name, date of birth, STRS Ohio ID or last four digits of the Social Security number, ZIP code and date of death. Then click "Next."

**Error message:** If you do not know all this information or the information you enter does not match a member in our system, an error message will appear indicating the person is not found. If this occurs, you can reenter the correct information or contact STRS Ohio's Member Services Center to provide the information you know. You will not be able to submit the notification online if any required information is incorrect or missing.

### Online Death Notification

**Online Death Notification**

Step 1 Step 2 Step 3 Complete

Please enter the information below.

#### Deceased Member/Recipient's Information

\* Indicates required field

Name:     
\*First name Middle initial \*Last name

\*Date of birth:    
MM/DD/YYYY

\*STRS Ohio ID or Last 4 of SSN:   
Choose one

\*ZIP code:

\*Date of death:    
MM/DD/YYYY

CANCEL NEXT

## Step 2 and Step 3

Providing information on these screens is optional but preferred. If you know some or all the requested information, enter it and click "Next." If you do not know any of the information, click "Next" to continue.

### Online Death Notification

ESS Online Death Notification Front Page | ESS Online Death Notification

#### Online Death Notification

Step 1 > **Step 2** > Step 3 > Complete

Please enter the information below to expedite the processing of any available death benefits.

Surviving spouse name:  
  
First and last name

Surviving child(ren) name(s):  
  
First and last name - separate multiple names by comma

Surviving parent(s) name(s):  
  
First and last name - separate multiple names by comma

County of death:  State of death:

Country of death (if outside US):

### Online Death Notification

ESS Online Death Notification Front Page | ESS Online Death Notification

#### Online Death Notification

Step 1 > Step 2 > **Step 3** > Complete

Please provide the information below to expedite the processing of any available death benefits. The contact person is the individual handling the deceased member's affairs.

#### Contact's Information

Please enter the information below if available to expedite the processing of any available death benefits.

Name:  
   
First name Last name

Relationship:

#### Address

Street:

City:  State:  ZIP code:

Email:  Phone:   
sample@email.com (XXX) XXX-XXXX

## Complete

Clicking "Next" on the Step 3 screen will submit the notification to STRS Ohio. A message on the "Complete" screen confirming successful submission will appear. *(Screen not shown.)*