moving FORWARD
EMPLOYER SERVICES

MVECA Year-End Wrap Up

May 29, 2015

Agenda

- Employer's Certification of Final Deposits
- SERS Due Dates
- Upcoming Training Opportunities
- *e*SERS Upgrade
- *e*SERS Training

Employer's Certification of Final Deposits

- SERS will send an **Employer's Certification of Final Deposits form** when we receive a member's Service Retirement Application.
- The **Certification form** helps SERS ensure that service credit and pension amounts are properly calculated.

Employer's Certification of Final Deposits

- SERS will send a **Certification form** pre-filled with the member's information.

SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO
300 E. BROAD ST., SUITE 100, COLUMBUS, OHIO 43215-3746
614-222-5853 • Toll-Free 800-878-5853 • www.ohsers.org

May 29, 2015

EMPLOYER'S CERTIFICATION OF FINAL DEPOSITS
Forms may be faxed to 614-222-5881

District Number: 88-999
ABC Schools
123 Main St.
Columbus OH 43215

Member Name: Katie Talbert
Social Security Number: xxx-xx-1234
Type of Benefit: Service
Effective Date Requested: July 2015

Completing the Certification

1. Must include: used vacation, sick leave, and any other paid days actually used. This does not include severance.
2. Provide the total number of paid days and hours worked from the start of the fiscal year to the last day of service.
3. Provide the month and year in which the member's last contributions were or will be reported to SERS.

Please itemize this member's contributions for the period following July, 2014 and through the month of the last contribution:

(1)	The Member's last day of service, including days worked and used paid leave was.....	MONTH	YEAR
(2)	Total days worked plus total paid leave days and total hours worked from July 1, 2014 to the last day of service listed in (1)	DAYS	HOURS
(3)	The final contribution for this member will be/was..	MONTH	YEAR

Completing the Certification

4. and 5. must equal 10% of the employee's gross earnings.
   – You will need to provide contribution amounts for the two months before and the two months after the effective retirement date to catch any lag in pay.

	(4) TAXED CONTRIBUTIONS	(5) PICK-UP CONTRIBUTIONS
May, 2015		
June, 2015		
July, 2015		
August, 2015		
September, 2015		

Completing the Certification

6. If the employee appears on a **Contribution Detail Report** after the date listed as their last day of service (Step 1), please mark one of the following:

- Balance of Contract: remainder of pay for work already performed
- Payroll Lag: when pay data falls after dates actually worked (typically stretch pay employees)
- Longevity: payments made for length of service/tenure with employer

Completing the Certification

7. List the number of months the employee normally works in a year (e.g. 9, 10, 11, or 12). SERS needs this information to ensure service credit and amounts are calculated correctly.

8. Was your employee **eligible** for health care coverage offered by your district at the time of separation **or** at least three of the last five years of employment? They did not have to be enrolled, only eligible for coverage. This determines their eligibility for the SERS premium subsidy.

Employer's Certification of Final Deposits

- The form must be signed by the district's Treasurer or Payroll Officer.
- Remember to provide contact information in case of any questions regarding the form or the retiring employee.

What Happens Next?

- Once the **Employer's Certification of Final Deposits** is submitted to SERS, it is processed by our Member Services department.
- A Member Services representative will contact you if there are any questions
  - No news is good news.

Upcoming Due Dates - Foundation Deduction Letters

- Foundation Deduction Letters are now available only on *e*SERS.
- Any corrections must be submitted in writing to Employer Services by June 5th.
- Please submit your corrections to employerservices@ohsers.org.

Surcharge and Statement Balances

- Surcharge and Statement Balance dates will be announced in the June *Bulletin*.
- There will not be an Initial Surcharge this year.
- Employer Statements will only be available on *e*SERS.
- Any Surcharge and/or Statement Balance that isn't received by SERS by the due date will be subject to penalties.

Upcoming Training

- The *e*SERS upgrade training has been postponed; future dates will be announced later this summer.
- Outreach is currently creating an Employer 101 workshop to be held in mid-July that will cover employer roles and responsibilities
  - Dates will be announced in a *Special Notice* shortly.

*e*SERS Upgrade

- The new *e*SERS will allow you to:
  - Correct Enrollment and Contribution Reports online in real-time
  - Look up prior Contribution Reports
  - Complete a Wage Certification
  - Submit a Death Notification
  - Maintain Payroll Schedules
  - View Service Credit Purchase Payroll Deduction Plans
  - View current Early Retirement Incentive (ERI) Plans
  - Access ERI Cost Calculator

*e*SERS Upgrade

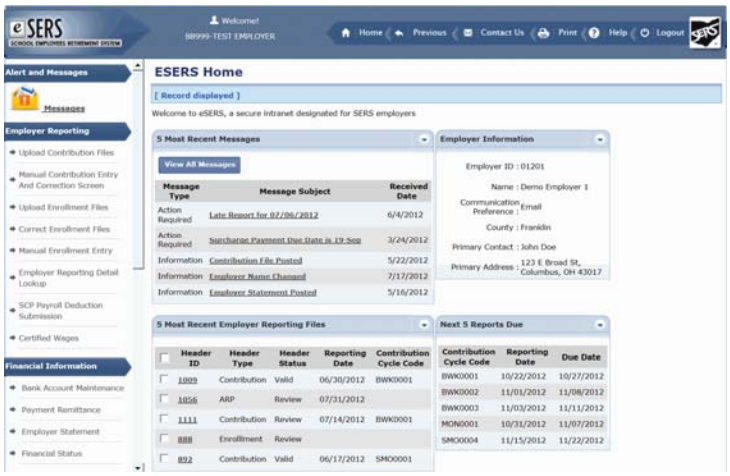
- Contribution Reporting Changes are:
  - Reporting “per pay”
  - Electronic file layout change
  - Real-time error processing
  - Online correction
  - Immediate feedback on errors

*e*SERS Upgrade

- Enrollment changes are:
  - Electronic file layout (minor change)
  - Real-time error processing
  - Online editing

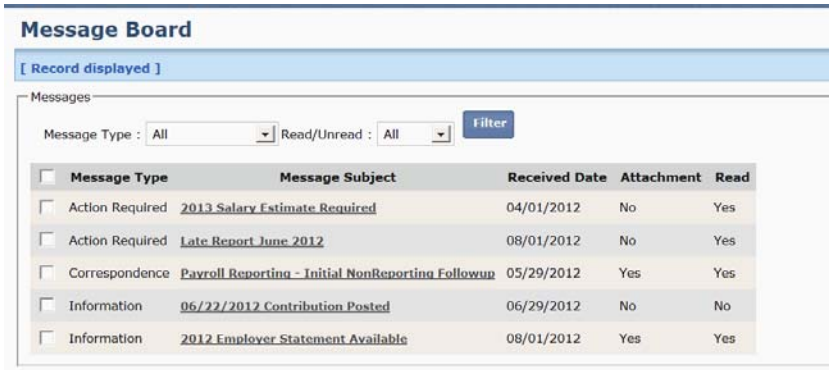
*e*SERS Upgrade

- The New *e*SERS Home Page



*e*SERS Upgrade

- Message Board
  - Important communications
  - Action required



*e*SERS Hotline

- A periodic publication discussing *e*SERS' new features

*e*SERS Training

- At least one person from each district is required to attend
  - Half-day training (100-120 openings per session)
- Dates and locations to be announced
  - Will cover all regions of the state

Training Plan

- Mandatory training will include:
  - In-person assistance by the software vendor along with Outreach Staff
  - How-to workbook
- An online test facility
- Online video simulations

Contact Us

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