PSERS Employer Bulletin

**Public School Employees'
Retirement System**

5 N 5th Street
Harrisburg PA 17101

Toll-Free
866.353.1844

Local
717.787.1755

FAX
717.783.8760

Email
ContactESC@pa.gov

Preparing for Employer Self-Service (ESS) Portal Launch in March 2018

Technology and system needs change over time, and in an effort to embrace this change, PSERS is implementing a new browser-based system. In addition to upgrades to internal processing and database functionality, as well as an enhanced Member Self-Service portal, the Employer Web will transition to *Employer Self-Service* (ESS) – a more robust reporting system. ESS will provide more information related to work-reporting, make finding members who work at your district more streamlined, and be easier and more efficient to use than the Employer Web portal currently used for PSERS reporting.

Please know that there are no changes to the file formatting for work reports or adjustment templates. Information for when training sessions will be held with be sent out after the new year begins. Until then, there are some action items that we ask of you to complete so you will be prepared to access the new system as quickly as possible when it goes live in March 2018.

To ensure a smooth transition to the new ESS portal, please review and complete the "ESS Action Items for Employers" checklist on page 2.

For a preview of ESS, see "New Features of ESS" on page 3.

ESS
ACTION ITEMS FOR EMPLOYERS

☐ Print/Save any files locally on your computers that you would like to keep from the Employer Web (CROQ reports, Employer SOA's, etc.). You will be able to view them under the Documents tab in the ESS portal, but they may not be formatted as before.

☐ Make sure contact information, specifically email addresses, are up to date in the Employer Web prior to Go-Live of the new system.

☐ Please provide an email address you would like entered into our system to receive PSERS correspondence that would normally come to your main employer address. You may choose a resource account or an individual to be the recipient of these electronically-delivered documents.

☐ Review your payroll schedule to determine when you will be uploading work reports or adjustments, and making contract or demographic changes. There will be a time frame where no transactions can be performed in late March; be sure that you can get your files in prior to the cut-off or understand that you will need to upload them quickly into the new system instead of after the new system launches in late March.

☐ ESS training sessions will begin in late February and run through early March. These will be available on a rolling basis and streamed live prior to going live with the system. More information will be forthcoming!

☐ During the training session, take notes and send us your questions! ESS functions similarly to the old system, but the look is totally different and there are some new features to explore.

For individuals with existing Administrator accounts for the Employer Web:

☐ If you have an Administrator (Admin) account for the Employer Web, please be sure you know your password. You will need this password to register for your Admin account in ESS. If you do not know your password, please contact ESC to ask for this to be changed so you will know your password prior to the late March go live date.

☐ If you have a current Admin account, your Admin name will convert over; anyone new to the system who needs an Admin account in March 2018 or later will need to complete the *PSERS Employer Security Administrator Authorization* (PSRS-1270) form to request a new account. The process will be similar to now where that individual will receive their User ID in the mail and also an email with a temporary password and registration link to complete the process.

☐ Once Admin account registration has occurred, Admins can create users under them.

New Features of ESS

Dashboard Section

- Your "Dashboard" is the Home Page that will display when you log into your account. This will provide Quick Links, Alerts, Notifications, and other widgets with information you need to access to do PSERS reporting. To access different parts of the system, tab are displayed across the top of the screen.
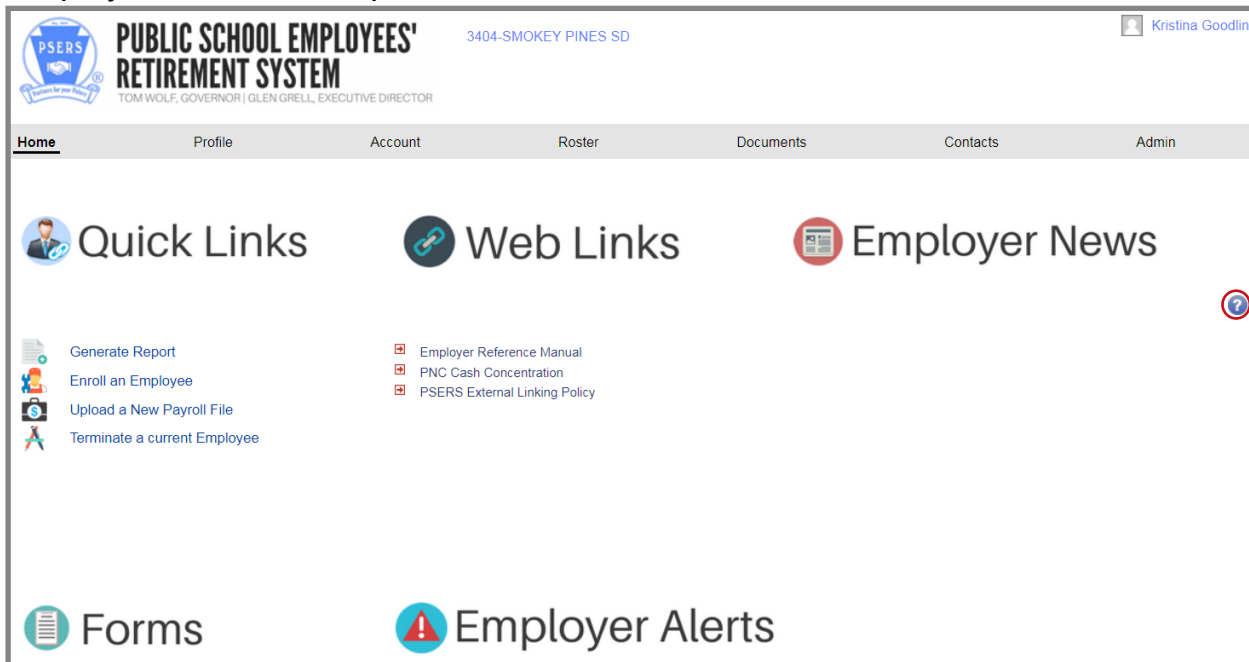
- **All employers** will be part of Paperless Delivery meaning you will receive almost all documents from PSERS electronically. When there is a new document, you will be notified by email and you can access it on your Documents tab in ESS. Please be sure to keep a valid email address on file. If your email address on file is not valid, you may not be able to access your documents in ESS.

- Help text is available to provide reminders about how the system works. The blue help text icon is circled in red above on the dashboard screenshot.

- Training will be provided for ESS in late February/early March and ESC representatives will be on stand-by to assist with your questions and concerns regarding the new system.

- You will be required to change your ESS password every 120 days to enhance security.

- ESS will time-out after 20 minutes of inactivity to remain secure. If you are importing files, the system considers this "active" time and will continue to finish import processing without interruption.

- Under Tools, the Action button will be visible with options in front of transaction rows. The actions listed will offer your available options for actions or details that can be executed for each transaction.

- You will be able to run more reports on-demand in the new system. Once reporting is complete for the fiscal year, you will be able to generate a Summary Report of all work reporting completed for your members. You will also be able to generate a Service Report at the conclusion of the fiscal year. Currently, PSERS staff sends Service Reports in December.
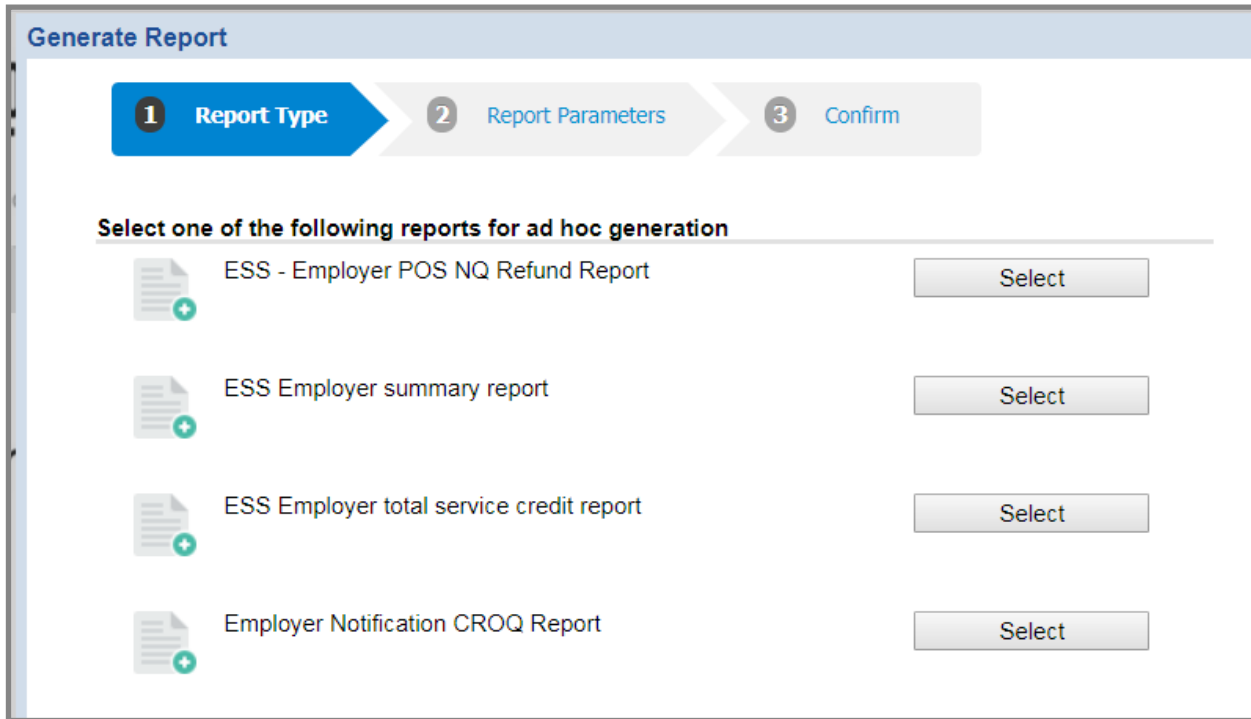
- **You will need to allow pop-ups to access reports through this system.**
- CROQ reports and Act 29 NQPT reports will still be available for you on your Dashboard.
- As you enter new information into the system, you may see a disclaimer message explaining that the district bears responsibility for the accuracy of the data entered on behalf of your employees.

Member Demographics, Contract Records, and Roster Tab

- New Hires entered manually will be created using a "New Hire Wizard" tool that will walk you through entering the member's demographic information and initial contract record at the same time. You can access this wizard using the Manual New Hire feature on the Roster Tab.
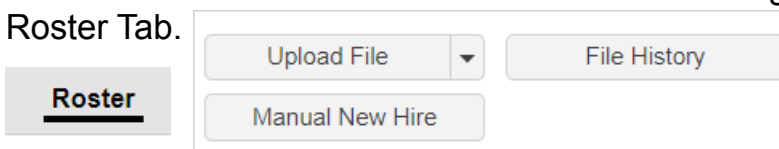
- Addresses/Names will be case sensitive. Please carefully review data entered so the system can "match" information successfully. Remember, no words can be abbreviated when entering into the system. Ex: 123 Main Street needs to be completely spelled out.

- The "Roster" tab will display any member who has ever worked for your district in the past. You can search through the roster and create new contracts for members using the Roster feature.

Accounts Tab, Work History, and Work History Adjustments

- The Accounts tab is a new feature that will show transactions posted to your employer account. This will be a useful tool that can be used in conjunction with your monthly Employer Statement of Account to identify new transaction activity, including payments made, since your last statement was generated. To the right of the screen shot would be all the monetary details associated with each transaction. You will be able to sort/filter by Transaction Type also.

Tools	Posting Date	Activity Date	Trans #	Trans Type	Trans Identifier
Actions	12/13/2017	12/13/2017	1968296	WH Adj.	Test
Actions	12/11/2017	12/11/2017	1967177	WH Adj.	proof adj
Actions	11/20/2017	11/01/2017	1966575	WH Report	Billing Rpt 2017-11
Actions	11/20/2017	11/20/2017	1966573	WH Adj.	Adjustment Rpt. - FY 2018
Actions	11/20/2017	11/20/2017	1966574	WH Adj.	Adjustment Rpt. - FY 2016
Actions	11/20/2017	11/20/2017	1966572	WH Adj.	Adjustment Rpt. - FY 2017
Details	11/08/2017	08/10/2017	1965027	Payment	Dep. Date 08/10/2017
Details	10/10/2017	10/10/2017	1741947	Payment	Dep. Date 10/10/2017

- Work Reports will now be referred to as "Work History" reports and this information can be accessed using the "Accounts" tab. The Accounts tab has similar buttons to the Roster tab that can be used to import or manually create work history reports and adjustments.

Account	Upload File ▼	File History
	Manual Report ▼	

- Imported files will be uploaded and validated similar to the way they are in the Employer Web. You will have the ability to make corrections prior to submitting files. Warning and Invalid identifiers will be slightly different and will not be highlighted in orange or red but you will still be able to filter to find which rows are flagged with an error and a colored icon will appear at the beginning of the transaction row.

- Work history reporting and adjustment templates are formatted the same as with the Employer Web and will also still work in ESS.

- Using the Manual Report button, work history reports and adjustments can also be done manually, like the current Employer Web system.

Employer Service Center Staff

Kristina Goodling
Regional Office Administrator
krgoodling@pa.gov

Region 1 - Glenda Lopez-Rodriguez
glopez@pa.gov
Beaver, Butler, Cameron, Centre, Clarion, Clearfield, Clinton, Crawford, Elk, Erie, Forest, Jefferson, Lawrence, McKean, Mercer, Potter, Venango, and Warren Counties

Region 2 - Crystal Houser
crhouser@pa.gov
Bradford, Carbon, Columbia, Lackawanna, Lehigh, Luzerne, Lycoming, Monroe, Montour, Northampton, Northumberland, Pike, Snyder, Sullivan, Susquehanna, Tioga, Union, Wayne, and Wyoming Counties

Region 3 - Jonathan Malnick
jmalnick@pa.gov
Allegheny, Armstrong, Fayette, Greene, Indiana, Washington, and Westmoreland Counties

Region 4 - Carolina Baez
cbaez@pa.gov
Adams, Bedford, Blair, Cambria Cumberland, Dauphin, Franklin, Fulton, Huntington, Juniata, Mifflin, Perry, Somerset, and York Counties

Region 5 - Michael Chappuis
michappuis@pa.gov
Berks, Bucks, Lancaster, Lebanon, Montgomery, and Schuylkill Counties

Region 6 - Vacant
Temporary Contact:
michappuis@pa.gov; jmalnick@pa.gov; cbaez@pa.gov; or crhouser@pa.gov
Chester, Delaware, and Philadelphia Counties

Documents

- Documents for your district will appear under your Documents tab. This will include letters, your monthly Employer Statement of Account, forms and reports. You can filter by both incoming and outgoing documents. Documents converted into the new system may be formatted differently than the original document.

Documents

Documents

		Name	Scan Date	Received Date	Date	Type
Actions	☐	Employer Contract Record...		12/16/2017	12/16/2017	Doc-Out
Actions	☐	Emp POS Qualification S...		12/01/2017	12/01/2017	Doc-Out
Actions	☐	Employer Statement of Ac...		12/01/2017	12/01/2017	Doc-Out
Actions	☐	Employer SOA Detail Report		12/01/2017	12/01/2017	Doc-Out

Employer Statement of Account and the Accounts Tab

- The Employer Statement of Account (SOA) will still be generated on the first of each month.

- The SOA will have a different format and will be easier to read. You will receive two documents on the first of each month; an SOA Summary Report which will show starting and ending balances for the previous month, and an SOA Detailed Report which will show transactions and payments made within the past month.

- Due dates will not be included on your SOA although payment is still due within 90 days of the posting date. Delinquent work reports will be listed on your SOA Summary Report also.