

Employer Service Center Staff

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Region 1 - Vacant
Temporary Contacts:
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Beaver, Butler, Cameron, Centre, Clarion, Clearfield, Clinton, Crawford, Elk, Erie, Forest, Jefferson, Lawrence, McKean, Mercer, Potter, Venango, and Warren Counties

Region 2 - Mandy Schuchart
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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
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Allegheny, Armstrong, Fayette, Greene, Indiana, Washington, and Westmoreland Counties

Region 4 - Crystal Houser
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Adams, Bedford, Blair, Cambria, Cumberland, Dauphin, Franklin, Fulton, Huntingdon, Juniata, Mifflin, Perry, Somerset, and York Counties

Region 5 - Michael Chappuis
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Berks, Bucks, Lancaster, Lebanon, Montgomery, and Schuylkill Counties

Region 6 - Lynn Wadley
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Chester, Delaware, and Philadelphia Counties

To-Do Prior to July 1, 2019

| Time frame | Task |
|----------------|--|
| Ongoing | See the Employer Self Service and Act 5 Resource section under the Employer tab on the PSERS website; Whitelist the Voya resource account |
| Ongoing | Review 2019 PASBO presentation |
| April-May 2019 | Attend PSERS Employer Spring Workshop |
| May 2019 | Employer Microsite--Business Manager to verify or update banking information with Voya and provide payroll cycles to be ready for DC reporting |
| June 2019 | Attend "Just in Time" training to learn how to use DC reporting portal |
| June 2019 | Plan for DC reporting by reviewing your school's payroll calendar to know when your DC files will need to be sent to Voya |

Voya Training

In June, Voya will provide a web-based training to employers to explain how the Sponsor Web works and how payroll files are submitted. The Sponsor Web is where you will upload DC payroll files.

Trainings will be conducted through large group webinar sessions with opportunities to ask questions. A manual will also be provided as a reference tool, similar to how PSERS provides the online Employer Reference Manual to assist with ESS system questions and reporting guidelines.

More information will be provided in May.

Summer 2019 Checklist

- ✓ Review list of new hires as of 7/1/2019.
- ✓ New hires who are new to PSERS and have a full-time contract or salaried wage type must have demographic and contract information created in ESS prior to their first pay.
- ✓ PSERS will provide your district with a list of employees who have never qualified, but who are currently in the system as Class T-E. These employees will need to be changed in your payroll to Class T-G and their member contributions rate should be changed from 7.5% to 5.5%.
- ✓ (Sept) Review CROQ Report each Monday to see if any employees have made an election to another class.
- ✓

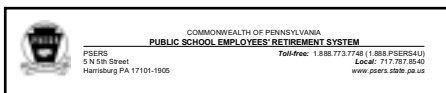
Reminders:

- Collect email addresses
- Enter demo/contract information at time of hire
- Review data reported to Voya and PSERS to be sure salaries match
- Look for CROQ report on Mondays
- Continue to check contribution rates for new hires to your school—have they previously qualified?

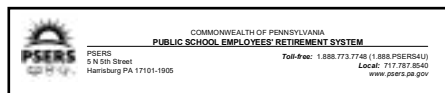
PSERS is Getting a New Look

Starting July 1, 2019, PSERS will transition from our current logo to a brand new one. PSERS' new logo celebrates a new era for PSERS which includes implementing a defined contribution plan and continuing our commitment to providing secure retirement benefits to Pennsylvania public school employees. The new PSERS logo is being introduced as we begin our second century of service to our members.

Current Logo & Letterhead



NEW Logo & Letterhead



Introducing Your New ESC Representative



PSERS is pleased to introduce Mandy Schuchart as the new Employer Service Center Representative for Region 2. Mandy is a veteran of the U.S. Army and she studied Pre-law at Wilson College. Before coming to PSERS, she worked as an Employer Benefits and Retirement Broker for 10+ years. She is a proud mother of two sons; Colby who will be attending Lycoming College to pursue a Criminal Justice and Military Science double major and Conner who is a high school junior with an interest in architecture and design. In her spare time, Mandy enjoys landscaping with her boyfriend Brian and restoring old houses. She also has a passion for baking and cooking to entertain. Mandy enjoys the challenge of thinking outside of the box to problem solve and furthering development through training. As the new ESC representative for Region 2, she looks forward to learning together with her school districts.

Change in Withholding Contributions for Non-Qualifying Part-Time Employees

Employees who have never qualified for membership and do not qualify for membership by June 30, 2019 will be converted into the new default membership class of Class T-G, effective July 1, 2019. Class T-G, the new default class beginning July 1, 2019, is a hybrid class that has a defined benefit and defined contribution component. You may continue reporting such employees to PSERS as Wages No Contributions (WNC). If, however, you are a school that withholds contributions for non-qualified employees anticipating that they may qualify by the end of the fiscal year, the member contribution rate of 7.50% will now decrease to 5.50%, the member contribution rate for Class T-G school employees reported after July 1, 2019. The employee will not be eligible to contribute to the defined contribution component until the employee has qualified for membership. Once qualified, the employee and the employer will be required to contribute an additional defined contribution percentage. Such defined contribution amount, however, cannot be withheld until PSERS notifies the school that the employee has attained qualification for PSERS membership.

More information was previously provided regarding these membership class changes and can be found on the Employer Section of the PSERS website. If you are withholding member contributions from your employees in anticipation of qualification into PSERS, then please

consider sharing the below information with such employees regarding changes to the amount being withheld from their paycheck for PSERS:

Beginning July 1, 2019, reporting and membership classes under the Pennsylvania's Public School Employees' Retirement System (PSERS) are changing. Employees who never previously qualified for membership in PSERS, but have retirement contributions withheld, will see a reduction in their contribution percentage beginning with service rendered on and after July 1, 2019. Currently, PSERS contributions are withheld at 7.5% of your gross pay. Because you never qualified for membership, these funds were returned to you directly from PSERS around March of each year. Beginning July 1, 2019, the amount withheld from your pay will be reduced from 7.5% to 5.5%, consistent with the new membership Class T-G. If you do not qualify for PSERS membership, PSERS will continue to return the 5.5% of contributions. If, however, you do qualify for membership, you will be enrolled in Class T-G and be eligible to participate in PSERS defined contribution component. Additional information regarding changes to PSERS' membership classes can be found on the PSERS website.

If an employer sponsors or contributes to a 403(b) plan for a school employee, will the employee's after-tax contributions made to the PSERS DC Plan count toward the Internal Revenue Code Section 415 limit applied to the 403(b) plan?

No. After-tax contributions made to the PSERS DC Plan, which is a 401(a) defined contribution plan, are not aggregated when PSERS or the 403(b) plan test for compliance with the IRC section 415(c) limit that sets the maximum employer and employee contributions that can be made to a participant's defined contribution plan account to the lesser of a dollar limit (\$56,000 in 2019), or 100% of the participant's annual compensation.

Class Election Material & Electing Membership through the Member Self-Service (MSS) Portal

Please be aware that members who have registered for the Member Self-Service (MSS) Portal are automatically enrolled in paperless delivery. Through MSS, members may request transactions, including electing a different Class Membership. This means that time-sensitive materials are available electronically and will not be mailed.

What can members do with an MSS account?

- Make class election
- Manage personal information
- Nominate/update beneficiaries
- Create estimates
- See account balances
- View PSERS correspondence
- Access their Voya account

Workshop Schedule - Sign Up with Your ESC Representative

| Workshop Location | Date | Time | Address | City | Zip Code |
|----------------------------------|---------------------------|----------|------------------------------|---------------|----------|
| Midwestern IU 4 | Monday, April 15, 2019 | 10:00 AM | 453 Maple St | Grove City | 16127 |
| Northwest Tri-County IU 5 | Wednesday, April 24, 2019 | 10:00 AM | 252 Waterford St | Edinboro | 16412 |
| Riverview IU 6 | Thursday, April 25, 2019 | 10:00 AM | 270 Mayfield Rd | Clarion | 16214 |
| Seneca Highlands IU 9 | Friday, April 26, 2019 | 9:30 AM | 119 Mechanic St | Smethport | 16749 |
| Central IU 10 | Monday, April 29, 2019 | 10:00 AM | 345 Link Rd | West Decatur | 16878 |
| BLAST IU 17 | Tuesday, April 30, 2019 | 9:30 AM | 33 Springbrook Dr | Canton | 17724 |
| Northeastern Educational IU 19 | Wednesday, May 1, 2019 | 9:30 AM | 1200 Line St | Archbald | 18403 |
| Luzerne IU 18 | Thursday, May 2, 2019 | 9:30 AM | 368 Tioga Ave | Kingston | 18704 |
| Colonial IU 20 | Friday, May 3, 2019 | 9:30 AM | 6 Danforth Dr | Easton | 18045 |
| Colonial IU 20 | Friday, May 3, 2019 | 1:00 PM | 6 Danforth Dr | Easton | 18045 |
| Montgomery County IU 23 | Monday, May 6, 2019 | 10:00 AM | 2 West Lafayette Street | Norristown | 19401 |
| Schuylkill IU 29 | Tuesday, May 7, 2019 | 10:00 AM | 15 Maple Ave | Pottsville | 17901 |
| Berks County IU 14 | Thursday, May 9, 2019 | 10:00 AM | 1111 Commons Blvd | Reading | 19605 |
| Lancaster-Lebanon IU 13 | Friday, May 10, 2019 | 10:00 AM | 1020 New Holland Ave | Lancaster | 17601 |
| Chester County IU 24 | Monday, May 13, 2019 | 10:00 AM | 455 Boot Rd | Downingtown | 19335 |
| Delaware County IU 25 | Tuesday, May 14, 2019 | 10:00 AM | 200 Yale Ave | Morton | 19070 |
| Philadelphia IU 26 | Wednesday, May 15, 2019 | 10:00 AM | Philadelphia District Office | Philadelphia | 19130 |
| Bucks County IU 22 | Friday, May 17, 2019 | 10:00 AM | 705 N Shady Retreat Rd | Doylestown | 18901 |
| Lincoln IU 12 | Monday, May 20, 2019 | 9:30 AM | 65 Billerbeck St | New Oxford | 17350 |
| Appalachia IU 8 Executive Office | Tuesday, May 21, 2019 | 9:30 AM | 4500 6 th Avenue | Altoona | 16602 |
| Appalachia IU 8 Executive Office | Tuesday, May 21, 2019 | 1:00 PM | 4500 6 th Avenue | Altoona | 16602 |
| Tuscarora IU 11 | Wednesday, May 22, 2019 | 9:30 AM | 2527 US Hwy 522 S | McVeytown | 17051 |
| Capital Area IU 15 | Friday, May 24, 2019 | 9:30 AM | 55 Miller St | Summerdale | 17093 |
| Central Susquehanna IU 16 | Tuesday, May 28, 2019 | 9:30 AM | 90 Lawton Ln | Milton | 17847 |
| Central Susquehanna IU 16 | Tuesday, May 28, 2019 | 1:00 PM | 90 Lawton Ln | Milton | 17847 |
| Carbon-Lehigh IU 21 | Friday, May 31, 2019 | 9:30 AM | 4210 Independence Dr | Schnecksville | 18078 |