

Welcome to the 2020 Spring workshop Part 2! Thank you for attending this session with us. This year's workshop has been split into segments and is being shared via webinar because of the COVID-19 pandemic. Part 1 covered the implementation of Act 5 reporting, DC plan statistics for new membership classes, as well as the Voya Employer satisfaction survey results. A review of the COVID-19 legislation and PSERS reporting guidance was also provided. The first part of the workshop has been published to the PSERS website under the Employerpedia.

Today's Topics

- General Reporting Concerns
- Multi-Factor Authentication (MFA)
- ESS system enhancements



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The second part of the workshop begins with discussing general reporting concerns. For example, how to report coaches or entering termination records. Next, we will introduce Multi-factor Authentication, also known as MFA. Finally, we will cover ESS system enhancements and upgrades that will be in effect beginning in June 29, 2020.

General Reporting Concerns

Entering Member Demographic Records in Employer Self-Service (ESS)



Verify SSN and DOB when entering these into the system.



Demographic records should be entered into ESS before starting position at school.



Name Changes.

First up is entering Demographic information.

When you are entering member demographic information, it is important to ensure that the member's date of birth and social security number are correct. If you enter the information incorrectly initially, you cannot correct it through the system. To correct a member's SSN or DOB, you must submit the Demographic Information Change Request form (PSRS-1870).

If you are manually entering your demographic information and you receive a validation error, this means that PSERS already has that SSN in the system, but the name you are trying to enter does not match what we have on file. If this happens, you may email or call the ESC telephone number and a Representative will be able to help you move beyond that point in the wizard by providing the information you need.

If a member changes their name at any time while they are an active employee of your school, it is important that you update that information with PSERS. To do so, you can pull that individual up using the Roster Tab and the search bar in ESS. Click on Actions beside the employee's name to view/edit demographic information. From there you can update the employee's name.

With PSERS Defined Contribution (DC) Plan and Voya's role as an Administrator of the DC Plan, it is very important to have a member's demographic information entered prior to them starting employment if possible.

PSERS Qualification: Full-time and Salaried Employees

- All Full-time and salaried employees are qualified from Day 1
- Reaching qualification makes an employee a **PSERS member**
- Member demographic and contract record information must be entered into ESS by the employee's start date at the school.
- Confirm membership class and contribution rate for new hires
- Withholding should occur for both DB and DC components



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Now we will be covering the qualification rules as it relates to PSERS reporting.

Full-time employees regardless of wage type are qualified from their very first day of employment .

PSERS' definition of full-time may not match yours. For more information and detailed information on what full-time is, see Chapter 2 of the Employer Reference Manual.

All employees with a wage type of salaried, regardless of whether they are full-time or part-time employees, are qualified from day one.

Reaching qualification means that an employee is now a member of PSERS and contributions must be withheld for both the defined benefit component of the plan as well as the defined contribution component of the plan. You should always confirm the rate and class of any new hires, which we will show you how to do in the next few slides.

PSERS Qualification: Part-time hourly and per diem employees

- Prior to being hired the demographic and contract record must be entered into system by the employee's start date at the school.
- Part-time (PT) hourly and per diem employees **must qualify** for PSERS membership.
- PT Hourly must render 500 hours of service in a fiscal year
- PT per diem must render 80 days of service in a fiscal year
- Withhold only DB contributions until you are notified PT employees have qualified.
- **After notification of qualification via CROQ report, withholding should occur for both DB and DC components.**

We discussed the full-time reporting rules, now let's covers the part time reporting rules.

Just like fulltime employees, part time employees must also have their demographic and contract records entered into the system by their start date.

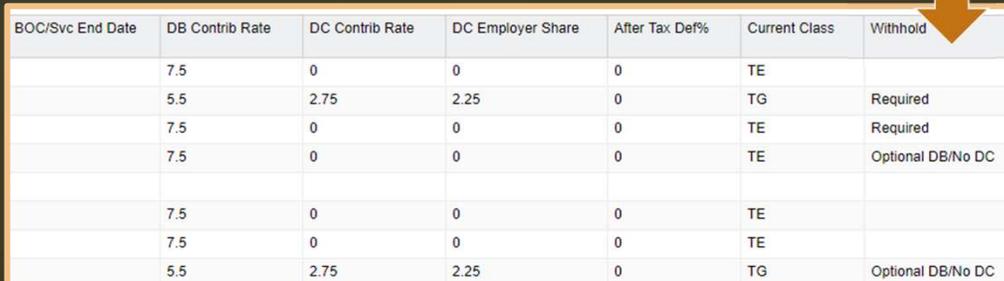
If an employee is Part-Time Hourly or Part-Time Per Diem, they must qualify for PSERS membership first. An hourly individual must work at least 500 hours before reaching qualification. A per diem employee must work at least 80 days before reaching qualification. Withholding contributions from employees that have not yet qualified is still the choice of the employer based on administrative ease. It is only mandatory to withhold contributions once the employee is qualified.

While this amount of service does need to be rendered in a single fiscal year to cause them to qualify, it does not need to be earned at only one school employer. If an employee works for multiple school employers, they could reach qualification sooner than expected. That is why it's important to report part time individuals to PSERS, even if it's only as Wages No Contributions or WNC.

If you are a school that withholds contributions from all of your employees from day one, make sure that you are only withholding the defined benefit (DB) component for those who haven't qualified yet. Voya will not accept contributions for a non-qualified member. Once you are notified via the CROQ report that an employee has reached qualification, start withholding the DC component and report the member to Voya.

DC Component Withholding

- Where can I see if I should be withholding DC contributions?
 - Click Details on your approved Contract record upload
 - Scroll to Far Right and look for Current Class and Withhold columns



BOC/Svc End Date	DB Contrib Rate	DC Contrib Rate	DC Employer Share	After Tax Def%	Current Class	Withhold
	7.5	0	0	0	TE	
	5.5	2.75	2.25	0	TG	Required
	7.5	0	0	0	TE	Required
	7.5	0	0	0	TE	Optional DB/No DC
	7.5	0	0	0	TE	
	7.5	0	0	0	TE	
	5.5	2.75	2.25	0	TG	Optional DB/No DC

The screenshot shows what your contract record upload looks like after it has been processed inside ESS. This can be found under File History after you have uploaded and processed your contract record file.

You can see in the screenshot that the submitted/processed contract record upload will display the DB Contribution Rate, DC Contribution Rate, the DC Employer Share, any After Tax Deductions, the Current Class, and whether Withholding is required or not. The contract record needs to be created first before this information can be accessed. If you are a school employer that enters contract records manually, that is going to be covered on the next slide.

View Membership Class and Qualification

Member Contract			
Employer:	[REDACTED]	Withhold:	Required
SSN:	[REDACTED]	Current Class:	Y
Name:	STARK, ARYA BLAYLOCK-TEST	DB Contrib Rate:	5.5 %
		DC Contrib Rate:	2.75 %
		DC Employer Share:	2.25 %
		After Tax Def%:	0 %
Member Contract			
Job Title:	SAFETY & SECURITY M	Employment Type:	Full-Time
Wage Type:	Salaried	Work Status:	ACTIVE - Actively Work
Start Date:	09/15/2019	End Date:	mm/dd/yyyy

- Another way to verify membership class, rate and qualification:
- Go to the **Roster Tab** and put the full SSN in the Search Field.
- Click **Actions** and **View/Edit Member Contract** beside the open contract.

When entering a demographic and contract record through the ESS manual new hire wizard , you will be able to see the same information shown inside the upload file after it's been processed, though it will be in a slightly different format.

After the information has been entered, you can go to the Roster Tab and type in the social security number. When that individual's newly created contract record comes up, you can click on actions and then click View/Edit Contract Record Info. This will then display the screen shot you are seeing above which has all of the same rate and class information shown in the screenshot of the previous slide.

Viewing the Member Contract allows you to see what membership class an employee should be in your payroll software. The important thing to remember is that this information is only available after the contract record has been created either through an upload or through the creating wizard.

Coaches!



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- Must be reported to PSERS (just like any other employee).
- Hourly and per diem coaches must qualify for membership by reaching 500 hours or 80 days of service.
- Coaches receiving a stipend are considered salaried.
- Salaried coaches qualify for membership on day 1.
- Formula available for calculating part-time service credit

ESC receives many questions on coaches and how they should be reported throughout the year. Coaches must be reported like any other employee. Coaches can be classified as hourly, per diem, or salaried. If reporting an hourly or per diem coach, they must qualify with either 500 hours or 80 days to reach membership. Coaches that receive payment in the form of a stipend, or a predetermined amount of money, are considered salaried and qualify for membership from day one.

PSERS established a formula that can be used to help determine the amount of service credit that should be reported for part-time employees. More information can be found in Chapter 9 of the Employer Reference Manual on how to do service calculations.

Like all other part-time employees, coaches who have qualified for membership have the opportunity to waive membership during the class election timeframe, which we will discuss next.

Enrollment Waiver

Part-time members (salaried, hourly, per diem) may elect to waive membership if they hold an approved IRA or other retirement plan.

Employers no longer have the responsibility to enter an ACTIVW contract to begin waiver process.

Class T-G members will use MSS to elect waiver and certify that they have an approved IRA in their name.

If a member already holds a "waived" status, additional part-time contracts will also be entered as ACTIVW.

Full-time contracts will terminate a member's waived status. The member will have a class election option at that time.

Part-time members of any wage type, salaried, hourly, or per diem, can elect to waive membership after they have met qualification. The member must have an approved IRA or other retirement plan to be eligible for an enrollment waiver. The waiver process changed last year when new classes with a DC component were introduced. Employers no longer have the responsibility to enter an ACTIVW contract to begin the waiver process. Instead, the responsibility is with the newly qualified Class T-G member to make an election through the Member Self-Service (MSS) portal during their class election timeframe. Members can choose to stay in the current membership class, elect Class T-H or Class DC, or elect to waive membership within that 90 day time period. The member will need to certify they hold an approved IRA in their own name. Just like with any other qualification or election change, you will be notified that you have a member who has waived through the CROQ Report.

If an employee with waived status begins to work for you in a part-time position, the system will only allow you to enter an ACTIVW contract for that member. Full-time contracts will terminate a member's waived status. The member will have a class election option at that time but will no longer be eligible for a waiver moving forward.

For more information about eligibility or qualification, please see Chapter 2 Mandatory, Optional, or Prohibited Membership in the Employer Reference Manual.

Sabbatical Reporting

Requirements for eligibility:

- Must have 10 years of Pennsylvania school service
- At least 5 years with the school
- A subsequent 7 years are needed for each additional sabbatical.
- In order to retain service credit for the period of the sabbatical, a member must return to the employer that granted a sabbatical leave for a period equal to at least one school term immediately following the end of the leave to retain the full sabbatical service credit.

Shifting gears a little, we are going to touch on Sabbatical Reporting. The requirements for eligibility are listed.

In the past year PSERS had to remove the salary and service for several sabbaticals that were reported because the eligibility requirements had not been met. Please ensure that the requirements have been met before reporting an employee under a contributing sabbatical.

Reporting for Sabbatical leave and contributing leave has not changed. If a person is a Class T-G, Class T-H, or Class DC member, the member and employer will continue to contribute the member and employer contribution percentages on the full contracted salary.

Another reason PSERS has had to remove sabbatical leaves is if the member does not return for a full school term after a sabbatical, the amount of credit they will retain is based on how long they returned to school service unless unable to do so because of illness, disability or death.

Pre-arrangements with the employee who is not returning to the school after the sabbatical is prohibited as it relates to PSERS reporting, if it is determined that occurred, the sabbatical would be removed for that reason as well.

BOC (Balance Of Contract) Flag on Termination Records

- Correct BOC flag is critical for identifying when DB refund/retirement benefits can be processed.
- BOC flag will also control distribution date for DC funds.
- Employers cannot change BOC flag once it is entered in system.
- Employers must be able to determine which pay period will be last pay.
- BOC flag is YES (Y) if last work report is in a later month than termination date. (Ex. TD 6/8/2020, last work report is August)
- BOC flag is NO (N) if last work report is for the same month as the termination date. (Ex. 6/8/2020, last work report June)
- Enter PSERS reporting month for when last pay will be received.



Now let's look at Balance of Contract. Employers are aware that the start date of the termination record needs to be the last working day for an employee. However, it appears that there continues to be some confusion regarding the appropriate usage of Balance of Contract or BOC flags.

A BOC flag means that salary and/or service will be submitted for the member on a work report outside of the month of termination. It may be helpful to remember that if an employee is paid beyond the month in which they terminate, the BOC flag needs to be listed as 'Yes'. For example, if a member terminates on June 8th but their final pay will be distributed in August, the BOC flag must be set to 'Yes' and the BOC date should read August 31, 2020. BOC dates must always reflect the last day of the month, regardless of the actual date on which the payment is made. The service flag only needs to be listed as 'Yes' if there will also be additional service reported in that month. Once PSERS passes the term date and eligibility date of distribution to Voya based on what is entered in ESS, PSERS can correctly process a member's benefit. At this time, a member can apply for a distribution with Voya. This also applies in the case of members applying for refunds, not just retirement.

An example of when 'No' could be used for the BOC flag would occur if a member terminated on June 8th and receives their final pay in June, then the BOC flag and Service Flag would be 'No' and a BOC date is not needed.

If inaccurate information is listed on the BOC flags, it could cause a delay in the member getting their DC component refunded back to them.

More information on contract records and specifically BOC flags can be found in Chapter 4 of the Employer Reference Manual.

Reporting BOC (Balance of Contract)

- Balance of Contract needs to be reported in the year it was earned, not paid.
- The July, August and September work reports allow reporting of salary in 2 fiscal years for a single member.
- A member's first pay in July has money in it actually earned in June, that needs to be split between the two fiscal years correctly.

When reporting Balance of Contract over the summer it is important that it is identified in the correct fiscal year. If the money was earned prior to July 1 it belongs in the previous fiscal year on the July work report. If the money was earned on July 1 or later then it belongs in the new fiscal year.

The ESS system allows you to report in 2 different fiscal years for a member in the months of July, August and September. So during those months it is very important that the correct fiscal year is identified for each member.

In some cases school districts payroll software will allow for this split so that when the report is created to upload to PSERS it already has this separated out as needed per member. Please pay close attention to this information on the July work report especially again because that first pay in July sometimes has money earned prior to July first.

Class DC Reporting to PSERS

**DC
Members must be
reported on PSERS
DB work reporting**

- DB member contribution rate will be 0%

**Employer
Contributions are
calculated based
on entire payroll.**

- Employer Statement of Account (SOA) includes credit for all DC participants

Members who elect into Class DC will have all contributions withheld reported to Voya. Although these members no longer have a DB member contribution rate percentage, Class DC members must remain on your PSERS DB work reporting. The work report will require Class DC members to have a 0% contribution rate. The wages reported are used to match information received by Voya. PSERS has noticed that some Class DC members have not been reported on the DB work report.

Class DC members are reported on your PSERS monthly work report for compensation review purposes, to calculate the one contribution rate for all classes, and to calculate the credit for contributions made to Voya. We use a blended employer contribution rate to fund current DB benefits, the unfunded liability, and the DC plan. These rates are set by the actuary, and are based on a percentage of total payroll.

Summary and Service Reports

SUMMARY REPORT

1. Displays fiscal year totals for all employees reported from that employer.
2. Shows total salary by wage type including WNC
3. Shows total service in days or hours.

SERVICE REPORT

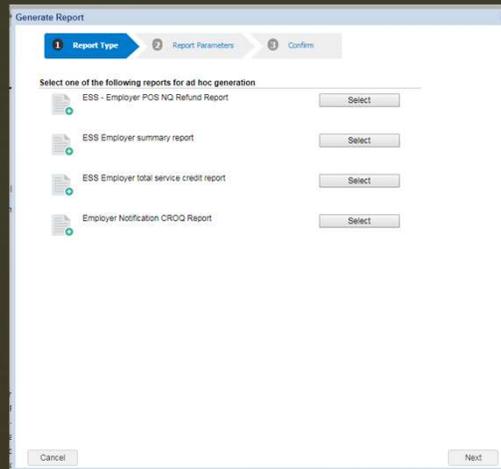
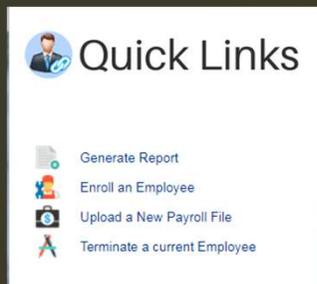
1. Displays total PSERS service for an employee through the end of the previous fiscal year.
2. Member qualification status.
3. Membership rate and class

Moving on to Summary and Service Reports. One of the most valuable tools an employer can use to help with reconciliation on what has been reported for employees are the Summary and Service Reports.

The Summary report provides the fiscal year's totals for all employees reported to PSERS. It includes the salaries reported throughout the year separated by wage type, as well as the days or hours that have been reported for employees. It contains information up to the last work report processed by PSERS for that fiscal year and can be run by you on demand throughout the year.

The Service Report shows the total years of service with PSERS from all employers, not just your own. Typically, in December of each year ESC sends a blast email to all employers reminding them to run this report for the previous fiscal year and explains all the uses this report may have, like GASB, reconciliation, or reviewing the rate and class of all staff.

Summary and Service Report Cont.



To generate these reports, log into your ESS account. On the home page under Quick Links you will see a Generate Report option. Clicking on that will open the Generate Report Wizard. There are four types of reports available. The Summary and Service Report options are in the middle. Follow the 3-step wizard to generate your report so it includes the data you are looking for. The following slides contain examples of what the summary and service report look like

Employer Summary Report



Employer Code 1003

Employer Name : PSERS TRAINING SD

Fiscal Year 2018

Page 1 of 1

Run Date : 03/16/2018

Member Name	SSN	Wage Type	Hours	Days	Base	URCC	OT	SUPP	Total Salary	WNC	Contributions	POS	Mem Savings	EMP SH	EMP PA
YELLOW, JANE	435-01-0009	Hourly	160.00	.00	1,000.00	.00	.00	.00	1,000.00	.00	75.00	.00	75.00	317.40	8.30
PINK, JOHN	435-01-0010	Salary	.00	.00	1,000.00	.00	.00	.00	1,000.00	.00	75.00	.00	75.00	317.40	8.30
ORANGE, SALLY	435-01-0011	Per Diem	.00	20.00	1,000.00	.00	.00	.00	1,000.00	.00	75.00	.00	75.00	317.40	8.30
GREEN, CURTIS	435-01-0012	Hourly	25.00	.00	1,000.00	.00	.00	.00	1,000.00	.00	75.00	.00	75.00	317.40	8.30
PURPLE, FRANK	435-01-0013	Salary	.00	.00	1,000.00	.00	.00	.00	1,000.00	.00	75.00	.00	75.00	317.40	8.30
RED, BARBARA	435-01-0014	Per Diem	.00	20.00	1,000.00	.00	.00	.00	1,000.00	.00	75.00	.00	75.00	317.40	8.30
BLUE, DEB	435-01-0015	Salary	.00	.00	1,000.00	.00	.00	.00	1,000.00	.00	75.00	.00	75.00	317.40	8.30
BLACK, LINDA	435-01-0016	Salary	.00	.00	1,000.00	.00	.00	.00	1,000.00	.00	75.00	.00	75.00	317.40	8.30
RED, JOHN	852-23-1568	Hourly	100.00	.00	1,000.00	.00	.00	.00	1,000.00	.00	75.00	.00	75.00	317.40	8.30

The Summary Report provides details regarding totals reported for each employee by wage type. This report will indicate the employee's: Social Security Number, Name Hours and/or days of service units you reported, Total Salary (Salary/wages reported in the Work Report fields: Base, URCC, OT, and SUPP), Contributions, and Wages No Contributions "WNC"

Employer Total Service Credit Report									
Run Date 01/24/2020		Employer Code : 9999		Employer Name : ESC Test School		Fiscal Year : 2020		Page 1 of 1	
SSN	Member Name	PSERS Credited Service	DC Eligibility Points	Birth Date	Member Status	Enrollment Date	Contribution Rate	Membership Class	Valid Address
000-00-0000	BRENNAN, MARIACONCETTA	0.00	1.00	01/01/2000	Active	09/03/2019	5.5	TG	Y
000-00-0000	ZAJAC, VICTORIA	0.00	1.00	01/01/2000	Active	10/02/2019	5.5	TG	Y
000-00-0000	CARDUCCI, DANA	0.00	1.00	01/01/2000	Active	08/26/2019	5.5	TG	Y
000-00-0000	YASALONIS, JEFFREY	0.00	1.00	01/01/2000	Active	08/28/2019	5.5	TG	Y
000-00-0000	BALDINGER, BECKI	0.00	1.00	01/01/2000	Active	09/23/2019	5.5	TG	Y
000-00-0000	KOLB, ANNETTE	0.00	1.00	01/01/2000	Active	08/26/2019	5.5	TG	Y
000-00-0000	MCKNIGHT, BETH	0.00	1.00	01/01/2000	Active	08/29/2019	5.5	TG	Y
000-00-0000	FARAS, BRIANA	0.00	1.00	01/01/2000	Active	08/26/2019	5.5	TG	Y
000-00-0000	DIETHORNE, SARA	0.00	1.00	01/01/2000	Active	08/26/2019	5.5	TG	Y

The Service Report includes each member’s total service with PSERS as well as their rate, class, qualification and DC eligibility points.

Both reports are useful tools to check the status and accuracy of your employees’ work reporting. The summary report information will be up to date as of the last work report submitted to PSERS if you were to choose the current fiscal year. It can also help you see in the current year if what PSERS has on file is what you expect to see for each of your staff throughout the year.



Multi-Factor Authentication (MFA)

Enhanced security within any electronic system is a must! In July 2020, PSERS is integrating Multi-Factor Authentication, also known as “MFA” to provide a more secure process for work data to go from your locations to ours.

What is Multi-Factor Authentication? (MFA)

- MFA is an authentication method in which a computer user is granted access only after successfully presenting two or more pieces of information (factors)
- Sensitive data must be kept secure and only be available to authorized users.



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Multi-factor authentication is one of the most effective ways to prevent security threats to secure data. MFA is an authentication method in which a computer user is granted access only after successfully presenting two or more pieces of information, or factors. Personally Identifiable Information (PII), social security numbers, and sensitive financial information must be kept private to protect against identify theft and exposure to outside sources.

Currently employers who are ESS users are required to update your ESS password every 120 days. An MFA transaction will be required on the same schedule that you are asked to change and update your passwords.

MFA at time of Password Change

- You will be prompted to complete the MFA process when password needs changed.
- Select how you wish to receive your MFA verification code.
- After selecting the verification method, the user clicks **Next**.



User Device Registration

In order to protect access to your account, we require you to select an email or a phone number to receive a verification code.

pb*****@pa.gov

(****).***-8957

Send me a Text Message

Call me on this number

Cancel Next

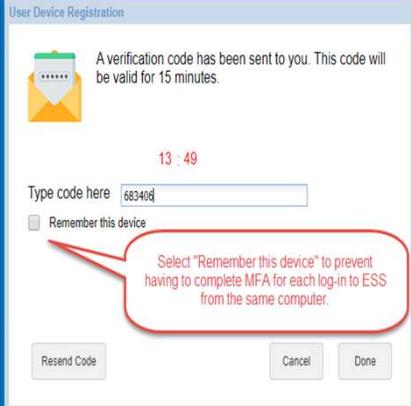
User can select the method for verification. Email will be the default selected.

How is this going to work? When you are prompted to change your ESS password, you will receive a message on your screen to complete the MFA process, like the picture on the right. You may select the method you prefer. Your options include receiving an email, a text or a phone call to a specific phone number to receive a verification code. If you are selecting one of the displayed phone numbers, you must specify if the verification code should be delivered via text or a phone call to that number.

The phone numbers listed for you to choose from are pulled from your contact information from the Contacts tab in ESS. If one of those fields is blank in your contact record then the field will not display on the screen so it's important to put in as much information as possible when creating a new contact inside ESS. Additionally, you must update this information if there is a change to your phone number or email address.

MFA Verification Code

- The MFA verification code is sent via the method the user selected.
- There is a 15-minute time limit in which to enter the verification code.
- The User enter the code into the screen, then click **Done**.



The screenshot shows a 'User Device Registration' window. At the top, it states: 'A verification code has been sent to you. This code will be valid for 15 minutes.' Below this is a timer showing '13 : 49'. A text input field labeled 'Type code here' contains the code '683406'. There is a checkbox labeled 'Remember this device' which is currently unchecked. A red callout bubble points to this checkbox with the text: 'Select "Remember this device" to prevent having to complete MFA for each log-in to ESS from the same computer.' At the bottom, there are three buttons: 'Resend Code', 'Cancel', and 'Done'.

Employers will be prompted to choose the verification method. After the MFA verification code is received and entered on the screen, click Done.

If you do not enter the code within the 15 minute time limit, a pop up message will appear, Your verification code has expired. Click Resend Code to receive a new code. At that time, the Done button is grayed out. Either click Resend Code or Cancel.

Please note, the verification code is looking for a 6-digit number. In testing we have learned that if you receive your verification code by text or email and double-click on it to copy and paste, an extra space is sometimes also brought forward. If the system seems to be rejecting your verification code, look to see if there is an extra space behind the last number.

If that code is not received, or if the code expires, click Resend Code to send a new code via the selected verification method. The 15-minute countdown restarts when this new code is sent.

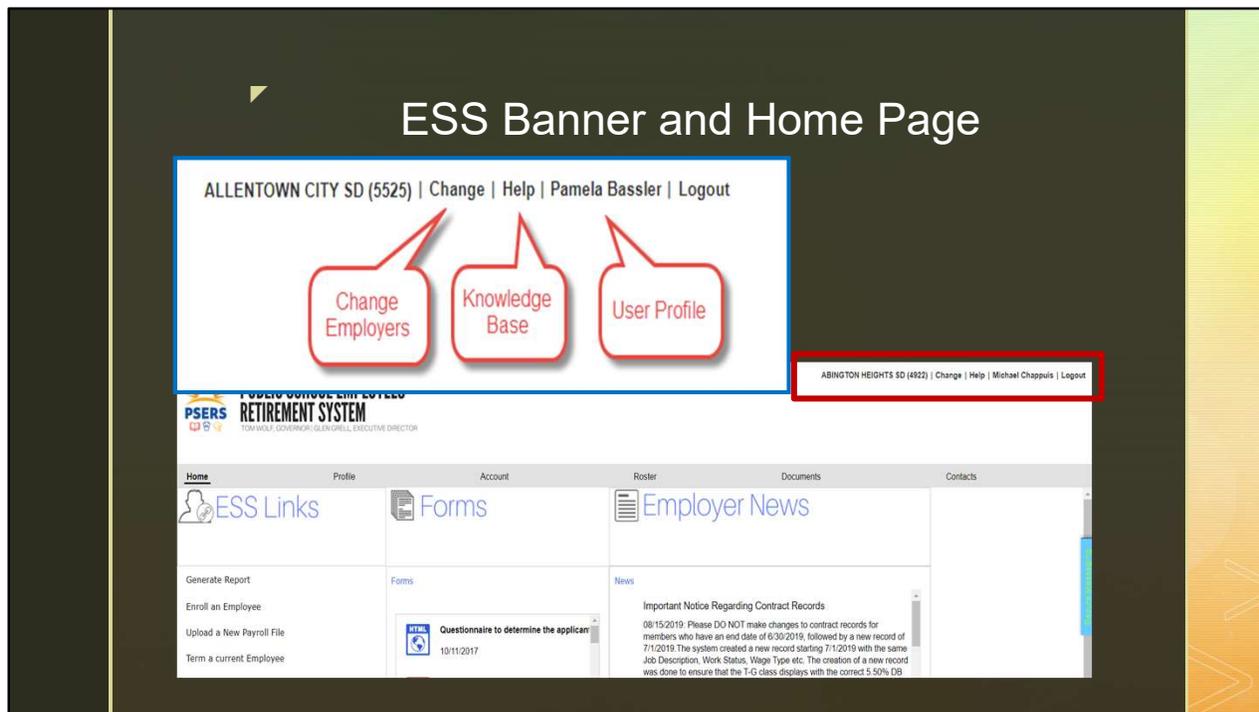
If a different verification method is preferred while on this screen, click Cancel and restart the login process.

There is a check box beside Remember this Device by selecting that check box the MFA does not need to be completed for each login. This is only an option for employers accessing the ESS portal. As we stated before you will still be prompted to use Multi Factor Authentication when prompted to update your password.

The slide features a background with a vertical gradient from dark green on the left to bright yellow on the right. A large, faint, stylized number '1' is visible in the background. The title 'ESS System Enhancements' is centered in white, sans-serif font.

ESS System Enhancements

During the next part of the presentation we will be covering several of the system upgrades. These upgrades are to occur at the end of June within the ESS system, this includes security enhancements, as well as layout changes and system upgrades. These changes will help you to use the ESS portal when accessing information and processing your reporting.



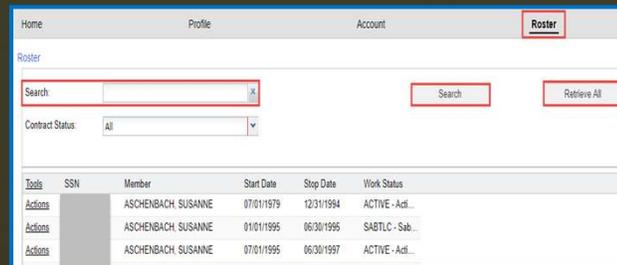
The ESS Banner on the Home Page will have a slightly different look. The name of your employer has moved to the right side of the banner.

The profile button has been removed and instead displays separate function buttons. If you report for multiple employers you will use the Change button. You will click on your name to update security questions or your password. There is also a separate button for logging out of the system. To access information on how to use the ESS portal, you may use the Help button which replaces the blue question mark icons within the system.

Lastly, the Employer News section on your Home Page has been expanded so it is easier to read important messages we need to share with you!

ESS Roster Tab

- Search functionality has been expanded to be able to search by **SSN** or **name**.



The screenshot shows the ESS Roster Tab interface. At the top, there are navigation tabs: Home, Profile, Account, and Roster (highlighted). Below the tabs, there is a search section with a text input field, a search button, and a 'Retrieve All' button. A 'Contract Status' dropdown menu is set to 'All'. Below the search section is a table with columns: Tools, SSN, Member, Start Date, Stop Date, and Work Status. The table contains three rows of data for 'ASCHENBACH SUSANNE'.

Tools	SSN	Member	Start Date	Stop Date	Work Status
Actions		ASCHENBACH SUSANNE	07/01/1979	12/31/1994	ACTIVE - Act...
Actions		ASCHENBACH SUSANNE	01/01/1995	06/30/1995	SABTLC - Sab...
Actions		ASCHENBACH SUSANNE	07/01/1995	06/30/1997	ACTIVE - Act...

Some of you may remember when the system originally went live in 2018, you were able to search by name and or by social security number. At that time it took too long to load the entire roster so the functionality was hidden. The load time has been reduced so this feature can now be used again. To search by name you will start with the last name, comma, and then the first name. You can also search via partial last name.

Another change is that the Roster tab will now automatically load and display your employee list and contract records.

ESS Roster Tab Continued

- Contracts will be end-dated by the system AFTER a new contract has been entered.
 - This was always the case however; the system logic was tightened to make sure employers weren't simply end-dating active records when they should have been creating a termination contract.



There are some changes on the Roster tab relating to end dating records. PSERS discovered situations where active records were end dated but no other record was being entered such as a termination record. This was causing back end system issues when reading the contract history. Because of this, schools can no longer end date a record first without entering a new one. The new record must be entered first and then if it does not automatically end date the previous record, the school can go in and add the end date themselves.

The first error is displayed when schools are trying to end date the only open contract record for that member. Schools will still be able to void records as needed.

The second error displays if a contract record is being entered that both has the start and end date already in place.

Header and Details Tab

The image shows two screenshots of a software interface. The top screenshot shows the 'Header' tab selected, displaying a table with one row of data. The bottom screenshot shows the 'Details' tab selected, displaying a table with two rows of data. Both screenshots show a 'Details' header with 'Save', 'Apply', and 'Cancel' buttons. The top screenshot shows 'Report Type: Member Demographic Import', 'Import Description: D001655 VAL Testing', 'Status: Validated with Errors', 'Inserted By: PBASSLER on 01/29/2020', and 'Processing Status: Ready'. The bottom screenshot shows 'Report Type: Member Demographic Import', 'Import Description: D001655 VAL Testing', 'Status: Validated w', 'Inserted By: PBASSLER on 01/29/2020', and 'Processing Status: Ready'. The bottom screenshot also shows 'Import Detail Status: All' and 'Exception Filter: All' dropdown menus, and a table with columns 'Seq No', 'Import Detail Status', 'Resubmit Flag', 'Name', 'SSN', and 'Last Name'.

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated With Errors	<input checked="" type="checkbox"/>	C001655000200011320201101

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	SSN	Last Name
Actions	2	Not Processed	<input checked="" type="checkbox"/>		401010001	TESTA
Actions	3	Not Processed	<input checked="" type="checkbox"/>		401010002	TESTB

When reviewing the Details screen for your uploaded files, you will notice that you must view the header row details from its own tab, separate from the rest of the details of the file. Header row formatting remains the same.

The Details tab will contain the rest of the rows of your file so you can correct any exceptions or errors found within the work history information.

If you notice that all the rows of your file display as Not Processed, please check under the exception filter to look for an Import Error. You will click on the Header Tab to view the error and will be able to make any corrections needed from this tab. Once those changes have been completed you can validate the file again to update the status of your file rows.

Message Display Viewing Errors and Exceptions

Before

After

Tools	Seq	Message
	2	1 IMPORT_SSN_NOT_VALID SSN [] should be 9 digits

Tools	Row	Type	Seq No	Exception Filter	Message
	1	Error	1	IMPORT_SSN_NOT_VALID	SSN [] should be 9 digits
	2	Exception	1	IMPORT_ADDRESS_APPROVAL	Address will be standardized to postal specification upon file approval

Another change you may notice is the way that exception and error messages are displayed. The picture on the left shows how errors and exception messages are currently separated out by type. Sometimes to see all message, you need to scroll up or down to see all messages.

On the right, is an example of how the errors and exceptions will display in the same part of the window. They are no longer separated into categories for Exceptions or Errors but are specifically identified under the type column as shown in the red box. This should help to quickly determine what the issue is with either the file or an individual member record within the file.

Document Tab Changes

Before

	Name	Received Date	Scan Date	Date	Type	Recipient	Description	Status
Actions	Employer Notif...	04/27/2020		04/27/2020	Doc-Out	ALLENTOWN...	Email Notified	
Actions	Employer Con...	04/19/2020		04/19/2020	Doc-Out	ALLENTOWN...	Printed	
Actions	Employer Con...	04/19/2020		04/19/2020	Doc-Out	PL: E1 10314...	Print e:	
Actions	Employer Stm...	04/17/2020		04/17/2020	Doc-Out	ALLENTOWN...	Printed	
Actions	Employer Con...	04/17/2020		04/17/2020	Doc-Out	ALLENTOWN...	Printed	
Actions	Address Verifi...	04/16/2020		04/16/2020	Doc-Out	ALLENTOWN...	Printed	
Actions	Employer Con...	04/16/2020		04/16/2020	Doc-Out	ALLENTOWN...	Email Notified	

After

Name	Received Date	Scan Date	Date	Type	Description	Recipient	Status
Employee Notification (CRIC)	04/27/2020		04/27/2020 02	Doc-out	Employee Notif...	ALLENTOWN...	Email Notified
Employee Apply Cash Error Letter	04/23/2020		04/23/2020 02	Doc-out	Employee Appl...	ALLENTOWN...	Email Notified
Employee Notification (CRIC)	04/20/2020		04/20/2020 02	Doc-out	Employee Notif...	ALLENTOWN...	Email Notified
Employee Notification (CRIC)	04/13/2020		04/13/2020 02	Doc-out	Employee Notif...	ALLENTOWN...	Email Notified
Visit Reversible Notification to Employer	04/04/2020		04/04/2020 02	Doc-out			
Employee Notification (CRIC)	03/30/2020		03/30/2020 02	Doc-out			
Act 25 Employer Salary Report Document	03/27/2020		03/27/2020 07	Doc-out			
Act 25 Employer Cover Letter	03/27/2020		03/27/2020 07	Doc-out			

Show: Received & Sent

- Received & Sent
- Archived
- All

The Documents tab is getting a little bit of a facelift as well. There will no longer be an action button or the check mark box to the left of each document. Instead the first column will be the name of each document. The filter feature has been moved to the far right where you can decide what to show. Currently employers are unable to archive documents. This type of functionality has been suggested to our software developers and may be included in a future build.

Employers will continue to view documents received by clicking on the name of the document.

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PA_PSERS invests assets & provides retirement benefits for Pennsylvania's public school employees. (Retweets & content of followers ≠ endorsements)

Harrisburg, PA
psers.pa.gov
Joined September 2019

@PA_PSERS

@PennPSERS

PSERS is now on social media. For information on Retirement and Investment information, follow us **@PA_PSERS** on Twitter and **@PennPSERS** on Facebook for news and updates that may affect you! This is also a great way to find out when local FFYF presentations are happening and other helpful information.



Thank you for attending!

Questions?

Thank you for attending this portion of the Spring Workshop! If you haven't already entered your employer name on the Q/A, please do so now. That helps us to know who has attended today's presentation. We will also be answering questions you may have through the Q/A feature.