

# Employer's Reference Manual – Chapter 19

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## *Public School Employees' Retirement System*

5 N. 5th Street  
Harrisburg PA 17101-1905  
Phone 1.866.353.1844  
Fax 717.772.3860  
Email [ContactESC@.pa.gov](mailto:ContactESC@.pa.gov)  
[www.psers.pa.gov](http://www.psers.pa.gov)



# TABLE OF CONTENTS

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<b>EMPLOYER’S REFERENCE MANUAL – CHAPTER 19 .....</b>	<b>1</b>
<b>TABLE OF CONTENTS.....</b>	<b>1</b>
<b>CHAPTER 19 CONTACTING PSERS .....</b>	<b>1</b>
CONTACTING PSERS EMPLOYER SERVICE CENTER (ESC) .....	1
EMPLOYER SERVICE CENTER CONTACT INFORMATION .....	1
CONTACTING PSERS BY TELEPHONE OR FAX .....	2
CONTACTING PSERS BY MAIL .....	2
CONTACTING PSERS BY EMAIL .....	2
SEND SECURE .....	3
GENERATING REPORTS, CONTACTING PSERS, AND CONTACTING VOYA.....	9
EMPLOYER SUMMARY REPORT .....	12
EMPLOYER TOTAL SERVICE CREDIT REPORT .....	14
EMPLOYER NOTIFICATION CROQ REPORT .....	14
OBTAINING PSERS FORMS .....	15
<i>Forms Within the Online System or From the Forms Page .....</i>	<i>15</i>
FRAUD, WASTE AND ABUSE REPORTING .....	19



# Chapter 19

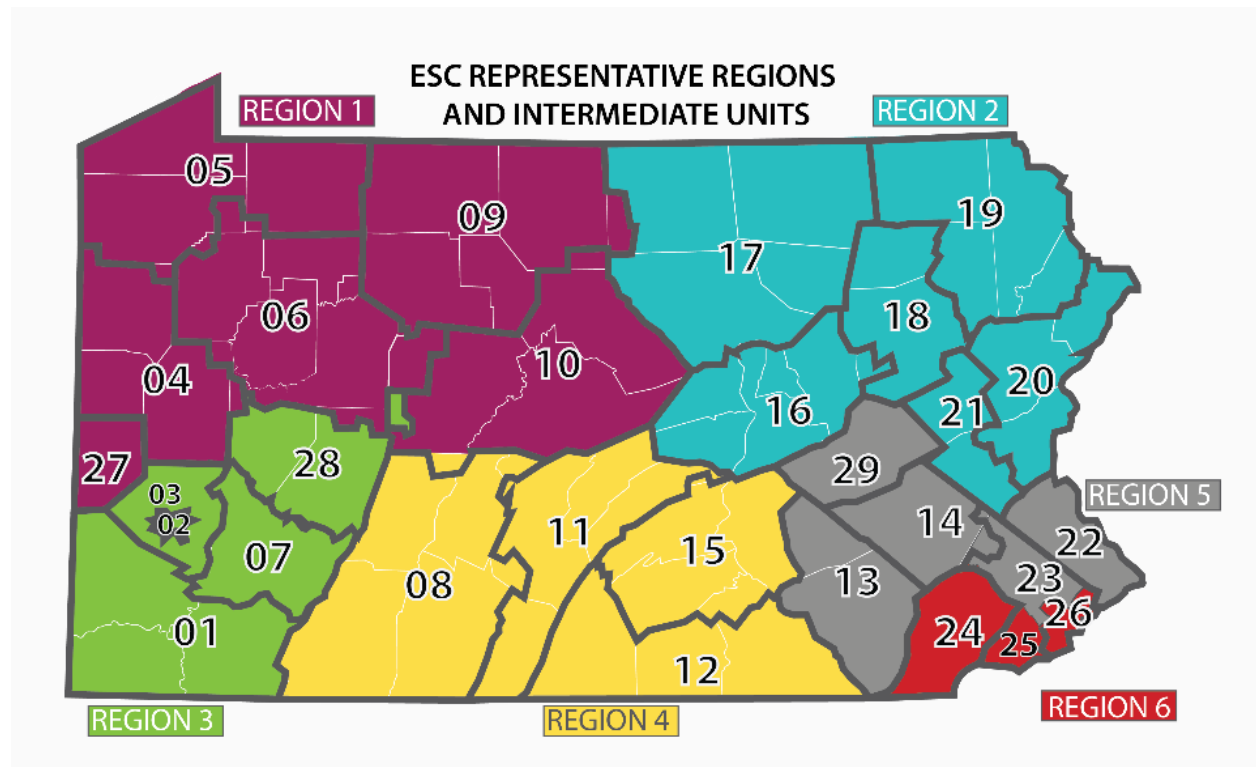
## Contacting PSERS

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### Contacting PSERS Employer Service Center (ESC)

Visit [psers.pa.gov](http://psers.pa.gov) and click on “Employer Service Center” under the “Employers” tab for a list of ESC representatives and contact information.

### Employer Service Center Contact Information



## Contacting PSERS by Telephone or Fax

The Employer Service Center can be reached at:

- Toll Free 866.353.1844 enter your Employer Code at the prompt.
- If you need to fax a form to PSERS, use this fax number: 717.772.3860

## Contacting PSERS by Mail

You may mail forms and letters to PSERS at this address:

Employer Service Center  
Public School Employees' Retirement System  
5 N 5th Street  
Harrisburg, PA 17101-1905

## Contacting PSERS by Email

You may email your Representative at the Employer Service Center via the email addresses listed on the Web.

Please be sure to include your name, school district, and phone number in your message. If it is necessary to email confidential information to PSERS, it is important to ensure that email communications are exchanged in the most secure manner possible. The Commonwealth provides a Send Secure feature to help ensure the security of confidential emails. Confidential information includes all correspondence, including attachments, which contains personal information for a member or members, or which contains any other information that may not be considered public knowledge. Personal information has been defined by the Commonwealth as an individual's first name or first initial and last name in combination with and linked to one or more of the following data elements when the data is not encrypted or redacted:

1. Social Security Number
2. Driver's license number or state identification card number
3. Financial account number, credit or debit card number, in combination with any required security code, access code or password.

In order to utilize the Commonwealth's Send Secure feature, the email exchange must be initiated by a Commonwealth employee from a Commonwealth email address. Recipients can reply from within the Send Secure system but cannot generate Send Secure emails without utilizing the respond feature, unless they have another security process in place for use on their system. If the Send Secure feature does not work with your operating system (see your Information Technology staff for assistance), you will need to continue to mail, fax, or mask personal information in the email exchange with PSERS.

## Send Secure


Encrypted email can be sent using Outlook or using OWA, manually entering specific text in the subject line.

The following tasks must be performed to encrypt a message.


### SEND AN ENCRYPTED MESSAGE USING THE SUBJECT LINE FILTER

Messages can be encrypted if either the word "[ENCRYPT]" or the text "[SEND SECURE]" is entered exactly as shown in the message Subject.

There is no Outlook add-in for O365 Message encryption. Users should just specify either [ENCRYPT] or [SEND SECURE] in the subject line to encrypt messages.

 Example: Manually type [ENCRYPT] as the first word in the Subject line.

---

 Send	From ▼	c-arizwan@pa.gov
	To...	<input type="checkbox"/> arizwan@hotmail.com;
	Cc...	
	Subject	[ENCRYPT]


---

Hello

This is a test from COPA..

 Example: Manually type [SEND SECURE] as the first word in the Subject line.

---

 Send	From ▼	c-arizwan@pa.gov
	To...	<input type="checkbox"/> arizwan@hotmail.com;
	Cc...	
	Subject	[SEND SECURE]

---

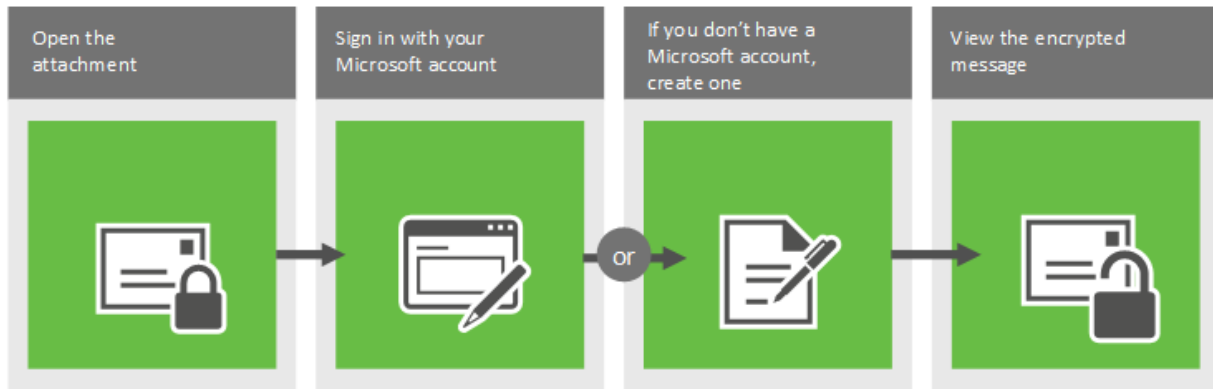
Here is the Social Security # XXXXX

321-34-3872

|

## VIEW AND REPLY TO AN ENCRYPTED MESSAGE

An encrypted email message arrives in the recipient's inbox with an HTML attachment as shown below. After opening the attachment, recipients see instructions for opening and viewing the message. Regardless of their type of email service, the experience is the same. The recipient can choose to sign in with a work account associated with Office 365, with a Microsoft account. Alternatively, the recipient can choose to use a one-time passcode if, for example, they don't have a work account or a Microsoft account and don't want to create a new Microsoft account.



To view an encrypted message using a Microsoft account

1. Follow the instructions in the email message to download and save the attachment.



[ENCRYPT]



Rizwan, Asgar (EMT) <c-arizwan@pa.gov>

Today, 4:15 PM

You ↕



message.html

123 KB



Download Save to OneDrive - Personal

You've received an encrypted message from c-arizwan@pa.gov

**To view your message**

Save and open the attachment (message.html), and follow the instructions.

Sign in using the following email address: arizwan@hotmail.com

This email message and its attachments are for the sole use of the intended recipient or recipients and may contain confidential information. If you have received this email in error, please notify the sender and delete this message.

 Message encryption by Microsoft Office 365



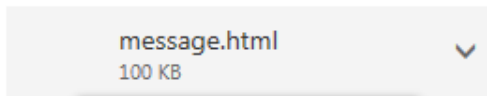
## ENCRYPTI



Rizwan, Asgar <arizwan-stg@beta.pa.gov>

Today, 8:51 PM

You ↕



Download

Download

Save to OneDrive - Personal

You've received an encrypted message from arizwan-stg@beta.pa.gov

### To view your message

Save and open the attachment (message.html), and follow the instructions.

Sign in using the following email address: arizwan@hotmail.com

2.



3.



4. Open the *message.html* file and select **Sign in**.


## Encrypted message

From  
[arizwan-stg@beta.pa.gov](mailto:arizwan-stg@beta.pa.gov)

To  
[arizwan@hotmail.com](mailto:arizwan@hotmail.com)

To view the message, sign in with a Microsoft account, your work or school account, or use a one-time passcode.

 [Sign in](#)

 [Use a one-time passcode](#)

5. Click on Sign in – Enter your username and password for Microsoft account and then it will display the message.

6. To use a one-time passcode option, click on use a one-time passcode

We sent a single-use code to arizwan@hotmail.com.

Please check your email, enter the single-use code and click continue. The single-use code will expire in 15 minutes.



Single-use code

This is a private computer. Keep me signed in for 12 hours.

 Continue

Didn't receive the single-use code? Check your spam folder or [get another single-use code](#).

Your one-time passcode to view the message

 Microsoft Office 365 Message Encryption <MicrosoftOffice365@messaging.microsoft.com>  
Today, 8:57 PM  
You 

 Office 365



Here is your single-use code

92639378

To view your message, enter the code in the web page where you requested it.

NOTE: This single-use code expires 15 minutes after it was requested.

Don't want to use single-use code every time you get a protected message? Use your email address to [create a Microsoft account](#)

Enter the passcode that you received as shown above and click continue.

Note: Sign in to the encryption portal with a Microsoft account, as instructed in the message. If you don't have a Microsoft account, you can choose the option to create one associated with your email address. (You'll have to fill out a form and complete a verification step.) In order to view the encrypted message, the email address for the Microsoft account must match the address to which the encrypted message was sent. If you're already signed in, you won't have to sign in again.

7. After signing in, you can view the contents of the encrypted message.

To reply to an encrypted message

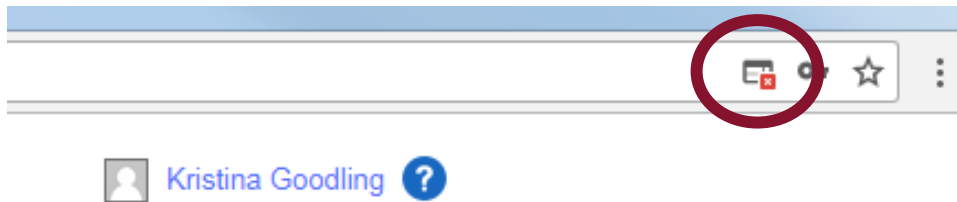
1. Choose Reply or Reply All.

2. On the page that appears, type a reply and choose Send. An encrypted copy of your reply message is sent to you.

## Generating Reports, Contacting PSERS, and Contacting Voya

Any of the report types available to employers may be generated as often as you would like. Two of them require a fiscal year to be entered, while the other two require that you select a specific run date for the report. This will give you the opportunity to ensure the reporting is accurate throughout the fiscal year instead of having to wait for PSERS to generate and send employers reports such as the Summary Report once a year.

The first time you go to generate a report from the Quick Links you will need to change the settings on your computer to allow for pop-ups from this website. Once this option is selected, you should not have to do this again.

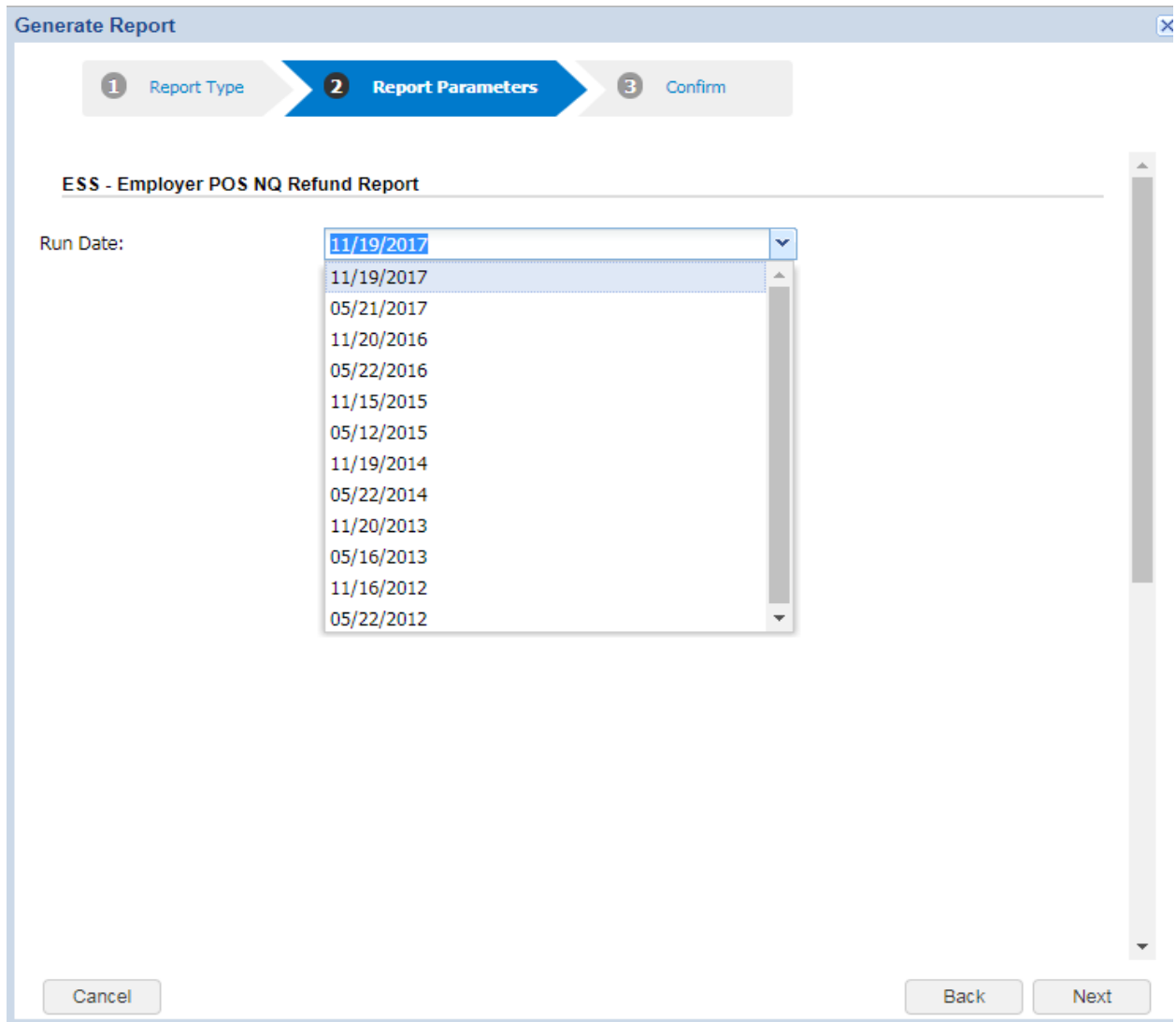


When you click on the Generate Reports link, a three-step wizard will appear that will assist you in creating the report you are seeking. Use the Select button to indicate which report you would like to create and click the Next button in the bottom right of your screen.

## Employer POS/NQ (Purchase of Service/ Non-Qualified) Refund Report

- This report is system generated twice a year, typically in May and November, and provides employers with a reconciliation from the previous quarters for purchases of Non-Qualified time and adjustments that have taken place.
- You may be more familiar with “Act 29” being part of the title of the report.
- To access the report, click the Select button next to this report.
- After selecting the report type, select a Run Date using the pull down arrow.
- All available dates will be visible to select.

Click Next to move to the confirmation page that will generate your report



The third step in the wizard allows you to confirm the type of report. The Run Date and Employer Code the report should be generated for will display on the screen. You may choose which format you would like to view your report. Options include Excel, PDF, and CSV formats. Our recommendation is to use an Excel or CSV format if you would like to be able to filter or manipulate the data within your report. The Confirm button is at the bottom right of the screen after you have chosen your format.

If you support the work reporting for multiple schools you will need to log into each school separately to run the report. This can be done by going to the profile icon in the upper right corner of your Dashboard. There will be a “change school” option.

**Generate Report**

1 Report Type → 2 Report Parameters → 3 Confirm

Please confirm that the following information is correct.

**ESS - Employer POS NQ Refund Report**

Report Parameter:

Run Date: 11/19/2017  
 Employer Code: 9912

Export As: 

- Excel
- Pdf
- Csv

Your report (after you allow for pop-ups!) will appear in the bottom left corner as a downloaded file.

- Click on the file to open the report.

## Employer Summary Report





- The Employer summary report is used to review reporting for the fiscal year after all work reports have been approved, but can also be used to check on a monthly or quarterly basis that reporting is accurate up to the point of the last released work report.
- The purpose of this report is to be sure that salary and service information reported by the employer is accurate for all members per fiscal year.



**Generate Report**

1 Report Type → 2 Report Parameters → 3 Confirm

Select one of the following reports for ad hoc generation

 ESS - Employer POS NQ Refund Report	Select
 ESS Employer summary report	Select
 ESS Employer total service credit report	Select
 Employer Notification CROQ Report	Select

This report requires a specific fiscal year to be entered.

- Only one fiscal year can be entered at a time.
  - **Correct Example: 2018**
  - Not accepted: 17/18 or 2017/2018
- Click Next at the bottom right to confirm your report.

**Generate Report**

1 Report Type → 2 Report Parameters → 3 Confirm

**ESS Employer summary report**

Fiscal Year:

The Fiscal Year entered in the parameters and your Employer Code will populate on the screenshot shown below.

You may choose which format the report is exported into. Our suggestion is to export as an Excel or CSV document so you can filter and sort information to review data for your own purposes.

**Generate Report**

1 Report Type → 2 Report Parameters → 3 **Confirm**

Please confirm that the following information is correct.

**ESS Employer summary report**

Report Parameter:

Fiscal Year: 2018  
Employer Code: 1003

Export As:  (dropdown menu open showing: Excel, Pdf, Csv)

## Employer Total Service Credit Report

This report will show the total service credit your staff has with PSERS including all districts and all years as well as including their qualification status with PSERS. It will operate the same way as the Summary Report when creating it (can be seen starting at page 6).

**Generate Report**

1 **Report Type** → 2 Report Parameters → 3 Confirm

Select one of the following reports for ad hoc generation

- ESS - Employer POS NQ Refund Report
- ESS Employer summary report
- ESS Employer total service credit report**
- Employer Notification CROQ Report

## Employer Notification CROQ Report

The CROQ Report Stands for Change in Member Class/Rate or Obtaining Qualification

What notifications does the CROQ report provide?

1. Employees who have met membership qualification
2. Employees who have made a class election (T-H or DC)
3. Employees who have waived membership
4. Participants who have elected or changed an After-Tax contribution percentage

The CROQ Report is generated every Monday.

Where can I find the CROQ Report?

1. Under Documents Tab in ESS
2. Use Generate Reports link on ESS Home page

If there are no dates to select, there is no CROQ Report available for your district.

Generate Report

1 Report Type 2 Report Parameters 3 Confirm

Select one of the following reports for ad hoc generation

ESS - Employer POS NQ Refund Report	Select
ESS Employer summary report	Select
ESS Employer total service credit report	Select
Employer Notification CROQ Report	Select

Cancel Next

## Obtaining PSERS Forms

### Forms Within the Online System or From the Forms Page

The most commonly used forms are available directly in the online system. Here is a link to the Employer Forms Page: <https://www.psers.pa.gov/FPP/Forms/Pages/EmployerForms.aspx>

1. Hover over the Employers link on the main PSERS website.
2. When the drop down appears select Employer Forms.

[PSERS > Forms, Publications, and Presentations > Forms > Employer Forms](#)

## Employer Forms

[Click here to view Information for New School Employees.](#) (PDF)

- [Questionnaire to determine the applicant's eligibility for PSERS membership](#) (PDF) - PSRS-349
- [Authorization Agreement for Restricted \(ACH\) Debits](#) (PDF) - PSRS-610
- [Approved Leave of Absence - Employer Verification](#) (PDF) - PSRS 709A
- [Service Adjustments \(For Years 1977-2004\)](#) (PDF) - PSRS 726
- [Charter School Employer Information](#) (PDF) - PSRS 1233
- [PSERS Employer Security Administrator Authorization](#) (PDF) - PSRS 1270
- [PSERS Retirees Returning to Service](#) (PDF) - PSRS 1299
- [Merged Employer Salary and Service Adjustment](#) (PDF) - PSRS 1307
- [Service Adjustments \(PRIOR TO FY 1977\)](#) (PDF) - PSRS 1310


From the list of Employer forms, you may:

- **View** the form on your screen
- **Print a blank form or** Complete the form, then print

If you don't see the form you need or you have questions on a form, contact your ESC Regional Representative for assistance.

Another Option to retrieve employer forms is to log into ESS and you'll see the forms listed on the Home Tab:

Home	Profile	Account	Roster
Enroll an Employee		PNC Cash Concentration	05/02/201
Upload a New Payroll File		PSERS External Linking Policy	each Thur
Terminate a current Employee		2017 PSERS GASB 68 Final Report	maintenan
		2017 PSERS GASB 68 Supplemental Information	
		2017 PSERS GASB 75 Final Report	
		2017 PSERS GASB 75 Supplemental Information	
			PNC Cas
			04/10/201



## Forms

- Questionnaire to determine the applicant's eligibil
- Authorization Agreement for Restricted (ACH) De
- Approved Leave of Absence - Employer Verificati
- Service Adjustments (For Years 1977-2004)
- Charter School Employer Information
- PSERS Employer Security Administrator Authoriz
- PSERS Retirees Returning to Service
- Merged Employer Salary and Service Adjustmen
- Service Adjustments (PRIOR TO FY 1977)
- Demographic Information Change Request



## Employer Alerts

Comments	
1	Pending Adjus...

## Sponsor Web

Voya has created a website referred to as the Sponsor Web to assist employers in reporting their staff for the DC component of the new hybrid classes T-G, T-H and DC. This is what will be used each payroll cycle to ensure that the DC component reporting is done in a timely manner ensuring participant funds are invested as quickly as possible.

To access the Sponsor Web where you will complete your DC payroll reporting using the Voya Data Gateway tool, please go to: <https://sponsor.voya.com>

## Voya Contact Information

<b>For Questions Relating to Reporting Defined Contribution Plan</b>
<b>Phone: Employer Payroll Help Line (9am-5pm)</b> <b>877.806.5652</b>
<b>Email: <a href="mailto:ID-PSERSS@voyacom">ID-PSERSS@voyacom</a></b>
Please reference 4-digit Employer Code with the Subject Line
<b>Please do not use the 'Contact Us' Link on Voya's website.</b>



## **Fraud, Waste and Abuse Reporting**

The Fraud, Waste and Abuse Reporting section of the website is for anyone to contact PSERS to provide information about retirees who have incorrectly returned to work for a Pennsylvania public school employer or money that has been inadvertently reported as retirement-covered compensation, etc.

To report any of these situations go to the following link: <https://www.psers.pa.gov/Fraud-Reporting/Pages/default.aspx> Once there, you may select the option by which you contact PSERS to report these situations.

This contact is used by PSERS regarding pension-related issues of which PSERS should be made aware. Anyone can call, write, or email to inform PSERS about retirees who have incorrectly returned to work for a Pennsylvania public school employer, money that has been inadvertently reported as retirement-covered compensation, etc.

PSERS understands that we all play a vital role in ensuring that the rules established by the Pennsylvania State Legislature are followed. With your help, we can ensure the pension laws are administered fairly and equally to all PSERS members.