

# Employers' Reference Manual – Chapter 4

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## *Public School Employees' Retirement System*

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# Chapter 4

## Member Contract Records

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### What are Member Contract Records?

Member Contract Records provide a way to define the position(s) in which each employee works, in a way that helps automate the pension process. You must provide at least one Member Contract Record for each eligible school employee when you first hire the employee. Refer to Chapter 2 for guidance on which employees are eligible.

Remember, before you can add a Member Contract Record, you must first enter the employee's Member Demographic Information. See the Chapter 3: *Member Demographic Information*. You must create a Member Contract Record before you can add your employee to your Work Report Record.

A Member Contract Record contains the following information:

- Employer's Name and Employer Code
- Employee's Job Title
- Employment Type (part-time or full-time)
- Wage Type (hourly, per diem, or salaried)
- Work Status (e.g., actively working, on leave of absence, terminated, deceased, a membership waiver request, etc.)
- Start Date of the Work Status
- End Date of the Work Status for a previously submitted Member Contract Record
- Expected Months – full time equivalent for a standard school year
- Expected Units (days or hours) – full time equivalent for a standard school year
- Voting Status (certified or non-certified position)
- Items relating to a terminated or deceased employee (Balance of Contract and Outstanding Service Credit status)

In general, a Member Contract Record should be created for EACH job a school employee works. If an employee works for multiple employers, a Member Contract Record needs to be submitted by each employer. If an employee works multiple positions for a single employer, this may or may not require multiple Member Contract Records. To determine whether multiple contract Records are required, see the next section *Employee Working Multiple Jobs for One Employer*.

## Employee Working Multiple Jobs for One Employer

It is not unusual for an employee to work more than one job for a single employer. For example, a teacher may coach a sports team or help at lunchtime. In this case, depending on the types of jobs worked, it may or may not be necessary to submit multiple Member Contract Records for the employee.

## Employee Works a Full-Time Position Plus Other Positions

**Only one Member Contract Record is needed for each full-time position held.** Enter a Member Contract Record for the full-time position(s). If the full-time school employee holds a part-time position(s), no additional Member Contract Record is required.

**Example:** A full-time teacher chaperones a school activity, takes tickets for an event, and oversees a yearbook club. Enter a single Member Contract Record for the full-time teaching position. Report the additional work on the employee's monthly Work Report as follows: Record the additional wages in the "Supplemental Wages" field. Record the extra contributions in the "Contributions" field. Record the extra service in the "Hours" or "Days" field.

## Employee Works Multiple Part-Time Positions but NO Full-Time Position

Each part-time SALARIED position requires its own Member Contract Record. All other part-time positions require only one contract record per wage type (e.g. per diem or hourly).

- Member Contract Record is required for each part-time SALARIED position the employee works.
- Only one Member Contract Record is required for all part-time HOURLY positions the employee works.
- Only one Member Contract Record is required for all part-time PER DIEM positions the employee works.

**Example #1:** An employee works a part-time per diem job as a substitute teacher. She also works a part-time hourly job in the cafeteria and another part-time hourly job teaching a high school science class. You would need to create two Member Contract Records for this employee: one for her per diem position and one for the two hourly positions.

**Example #2:** An employee works a part-time per diem job as a substitute teacher. He also works a part-time salaried job teaching a high school English class and another part-time salaried job coaching a football team. You would need to create three Member Contract Records for this employee: one for his per diem position, one for his salaried teaching position, and one for his salaried coaching position.

In general, there is no harm in creating a Member Contract Record even if it is not required. If you find it easier to create a Member Contract Record for every position an employee works, this is fine.

**Note:** When submitting the associated wages on your monthly Work Report, you will need to report a separate record for each Member Contract Record/Wage Type combination.

- If multiple Member Contract Records for an employee have the same Wage Type (hourly, per diem, or salaried), earnings for these Member Contract Records will be reported on the same Work Report Record in your monthly Work Reports.
- If multiple Member Contract Records for an employee have different Wage Types (hourly, per diem, or salaried), earnings for these Member Contract Records will be reported on a separate row within your monthly Work Reports.

**Example #1:** A member has two part-time hourly positions. The wages from both positions are reported on one line in the work report. The wage type for this member is hourly.

**Example #2:** A member has two part-time positions, one hourly and one per diem. The wages from hourly positions are reported on one line within the work report. The wage type for this Member Contract Record is hourly. The wages from per diem positions are reported on another line within the work report. The wage type for this Member Contract Record is per diem.

*Per the information provided above, it is not required for districts to create multiple contracts for their employees in different circumstances. PSERS processing does review supplemental income to determine if it is retirement covered compensation. If there is not a contract that explains how the salary is earned, they will contact the district to inquire. It is beneficial to the district to create contracts for each position the employee holds at the district.*

## How are Member Contract Records Transmitted to PSERS?

All Member Contract Records are transmitted to PSERS through the Employer Self Service (ESS) portal. There are two ways to submit the information to PSERS using ESS:

1. File Upload – for a batch of employees, by uploading a file into ESS that was exported from your payroll/HR software system
2. Online System - for an individual employee, by entering them into the online system one at a time

Either way, you begin by accessing the system:

1. Access the Employer Services window in the online system. If you are not familiar with how to do this, see Chapter 1: *Accessing the Online System*.
2. Login to ESS and click on the Roster Tab located across the top banner above the **Dashboard**.



Roster

Billing Location: 1004 PA EXAMPLE SD

Search:

Contract Status: All

Upload File

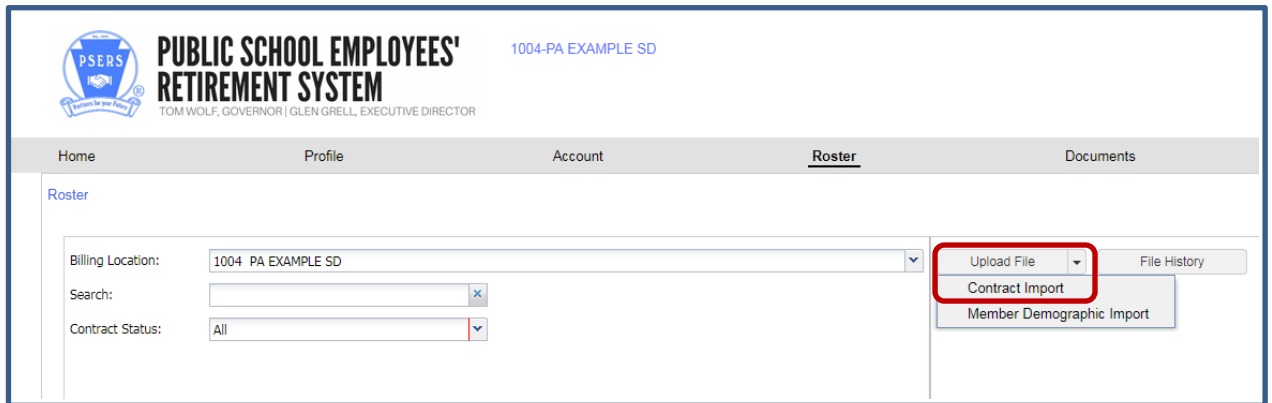
File History

Manual New Hire

## Member Contract Record Sub-Menus

There are 3 action buttons on the Roster Tab

- **Upload File/Contract Import** lets you submit new records and make changes to existing records by uploading a file that was exported from your payroll/HR software system. In this case, you must upload a file in the correct format. See *Uploading a Member Contract Information File* explained later in this chapter.

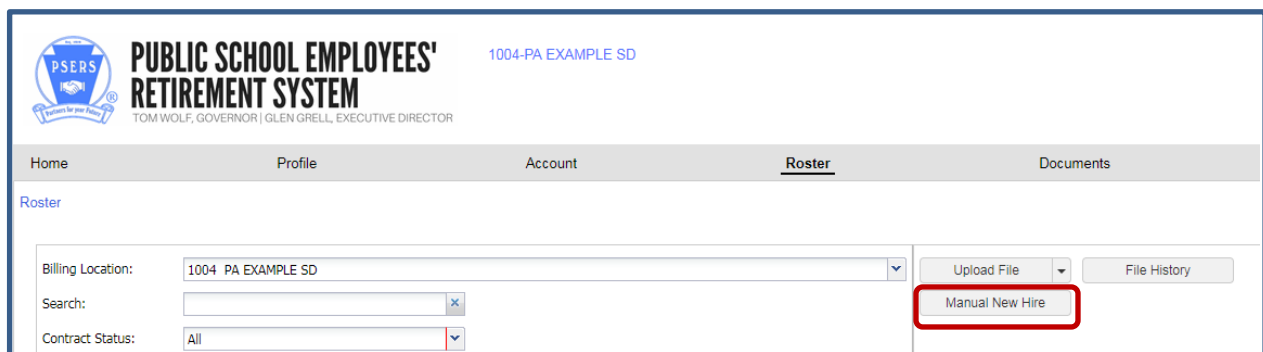


- **File History** is used in connection with the File Upload option. See *Uploading a Member Contract Information File* explained later in this chapter for more information in this option.

The screenshot shows the 'File History' window. It has a 'Close' button at the top left. Below it are filters for 'Report Type' (All), 'Date Range' (11/05/2017 To 01/04/2018), and 'Status' (All). Below the filters is a table with the following data:

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Rows Processed
Actions	400655	Ready	01/04/2018	Contract Import	C003404 Jan ...	Validated with ...	01/04/2018			8	0
Actions	400652	Validated	01/03/2018	Member Dem...	D003404 Jan ...	Validated with ...	01/03/2018	01/04/2018	5 sec	8	8

- **Manual New Hire** for entering Demographic and Contract information for new hires manually.





The screenshot shows a web interface titled "Add Member". At the top, there is a horizontal progress bar with five steps: 1. Person Info (highlighted in blue), 2. Validate Individuals, 3. Member Demographics, 4. Process Employer Enrollment, and 5. Confirmation. Below the progress bar, under the heading "Mandatory Fields", there are four input fields: "SSN:" with a text box, "First Name:" with a text box, "Last Name:" with a text box, and "Date of Birth:" with a date picker showing the format "mm/dd/yyyy".

## Using the Add Member Contract Action Button

### Add Member Contract

To manually enter a contract for a district new hire, please refer to Chapter 3 of the Employers' Reference Manual under the Manual New Hire.

Place the employee's full Social Security Number

Click on the actions button on the left side of the screen next to a members' name, click **"Add Member Contract."**

PSERS PUBLIC SCHOOL EMPLOYEES' RETIREMENT SYSTEM 1004-PA EXAMPLE SD  
TOM WOLF, GOVERNOR | GLEN GRELL, EXECUTIVE DIRECTOR

Home Profile Account **Roster** Documents

Roster

Billing Location: 1004 PA EXAMPLE SD Upload File File History  
Search: x Manual New Hire  
Contract Status: All

Tools	SSN	Member	Start Date	Stop Date	Work Status
Actions	852-16-2604	BLUES, JOHN	03/05/2018		LEAVEN - Any...
Add Member Contract		JOHN	03/06/2018		ACTIVE - Acti...
View/Edit Contract Record		JOHN	03/02/2018	03/04/2018	ACTIVE - Acti...
View/Edit Demographic Info		JOHN	03/02/2018	03/04/2018	ACTIVE - Acti...

This will open a new window that identifies the School District you are creating the record for. Click Continue. The contract record screen will open and you'll want to enter all the data for the new record.

Member Contract

Change

Employer: 1004-PA EXAMPLE SD Billing Entity: 1004 PA EXAMPLE SD  
SSN: 852-16-2604  
Name: BLUES, JOHN

Member Contract

Job Title: CUSTODIAN Employment Type: Full-Time  
Wage Type: Hourly Work Status: LEAVEN - Any Other Le  
Start Date: 03/05/2018 End Date: mm/dd/yyyy  
Expected Months: 12 Expected Units: 2,080  
Voting Status: Non-Certified Contract Status: Eligible  
BOC Flag: BOC Svc Rpt: mm/dd/yyyy Service Flag:

Close

## Member Contract Information Window

The fields at the top of this screen are displayed for reference but cannot be edited. In the other fields on this screen, enter information about the employee's position.

If the employee works more than one job for you, it may or may not be necessary to enter multiple Member Contract Records for this employee. To determine this, see *Employee Working Multiple Jobs for One Employer* referenced earlier in this chapter.

The fields on this screen are:

- **Job Title:** A Job Title must be entered for every Member Contract Record. The Job Title should represent the position for which the school employee is working. This is a required field. This field has a maximum entry of 50 letters and/or characters.

Independent contractors are not eligible for PSERS membership. If you are not sure whether a position (Job Title) is an employee or an independent contractor, see *Membership Eligibility Questionnaire* defined later in this chapter.

- **Employment Type:** Select "Full Time" or "Part Time" from the drop-down menu. See Chapter 2: *Membership – Mandatory, Optional, or Prohibited* for the definition of full-time and part-time employment. PSERS' definition of full-time may be different from yours. You must report the school employee's employment type based on PSERS' definition. Employment Type must be entered for every Member Contract Record. This is a required field.
- **Wage Type:** Select "Hourly," "Per Diem" or "Salaried" from the drop-down menu based on how this position is paid.
- **Work Status:** Use the drop-down menu to select the appropriate work status for this Member Contract Record, such as "ACTIVE - Actively Working."

Work Status is reported in all monthly Work Reports, and the status that is reported must match a Member Contract Record for that employee.

The various Work Status options are described in *Work Status Descriptions* explained later in this chapter.

- **Work Status Start Date – MM/DD/YYYY:** Enter the date the Work Status described in this Member Contract Record begins. For an actively working part-time hourly or per diem employee, enter the first day for which the employee was paid, not the first day contributions were withheld from the employee's salary and reported to PSERS. If the Member Contract Record is for an employee who went on leave, died, or terminated all employment with you, set the Work Status **Start Date** with the date the leave began, or the date of death, or date of termination.

**Example:** A teacher is hired to begin work August 16, 2016. Enter the Work Status as "ACTIVE - Actively Working" and enter the Start Date as 08/16/2016.

**Example:** When an employee resigns, his last day of paid work will be the start date of his termination contract. If the employee's last paid day of service was on June 15, 2016, and the resignation is received on August 1, 2016, the Work Status Start Date is 06/15/2016 unless the employee is granted a leave after June 15, 2016.

- **Work Status End Date – MM/DD/YYYY:** Enter the date the Work Status described in this Member Contract Record will end or has ended.

For an employee who is expected to work multiple years, the End Date should be left blank. In this case, the Member Contract Record will renew automatically each school year, remaining in effect until you enter an End Date later (such as when the employee ends work in this position or goes on leave).

If the school employee is initiating a leave of absence or terminating employment, PSERS will automatically enter the End Date on the Member Contract Record that is being end dated based on the submission of the leave or termination record's Start Date. You do not need to submit two transactions.

**Example:** A teacher is hired. The teacher is expected to continue working for multiple school years, so no End Date is entered. In January, the teacher takes a job as Principal, which requires leaving the teaching position. On the existing teacher Member Contract Record, the End Date should be updated to be the last day the employee works as a teacher. A new Member Contract Record must be created for the Principal position.

**Note:** In some cases, the End Date is modified automatically by PSERS. If an employee goes on a non-contributing leave, dies, or terminates all employment with you, you do not need to set the End Date on the employee's existing Member Contract Records. Instead, create a single new Member Contract Record for that employee with the new Work Status (e.g., the type of leave, "DECESD - Deceased," or "TRMNTN – Termination") and with the Work Status **Start Date** set to the date the leave began or the date of death or the date of termination. In response to this new Member Contract Record, PSERS will change the End Date on the entire employee's other Member Contract Records appropriately. When the employee returns from leave, create a new Member Contract Record for each position the employee resumes.

**Example:** The school librarian currently has an open ACTIVE (Actively Working) Contract Record with a Start Date of 08/23/2010. The member is initiating an unpaid leave on 10/01/2017 and you need to update the Member Contract Record for her non-contributing leave. Enter a Member Contract Record with a Work Status equal to LEAVEN (Any Other Leave not Listed) with a Work Status Start Date of 10/01/2017. When the LEAVEN Contract Record is approved, the ACTIVE (Actively Working) Contract Record automatically will be end dated with a date of 09/30/2017. The employer does not need to enter an End Date in the ACTIVE (Actively Working) Contract Record prior to submitting the LEAVEN Contract Record.

- **Expected Months:** Enter the number of months (i.e., 9, 10, 11, or 12) equivalent to a full-time employee working in the position for an entire fiscal (school) year. This field does not represent the number of months this school employee is actually working this fiscal (school) year. PSERS calculates the actual number of months worked for the school employee based on the information provided in your monthly Work Report.

This field must be set if Work Status is set to “ACTIVE - Actively Working” or “ACTIVW - Waiver Request” AND Employment Type is set to “Full Time”; otherwise, this field is optional. If left blank, this field will default to 10.

**Example:** If a full-time teacher is hired to work a 10-month school year, whether or not they are paid over the summer, enter “10” months.

- **Expected Units:** Enter the number of days or hours equivalent to a full-time employee working in the position for an entire fiscal (school) year. This field does not represent the number of days or hours (units) this school employee is actually working this fiscal (school) year. PSERS calculates the actual number of units worked for the school employee based on the information provided in your monthly Work Report. This field must be set if Work Status is set to “ACTIVE - Actively Working” or “ACTIVW - Waiver Request” AND Employment Type is set to “Full Time”; otherwise, this field is optional. If left blank, this field will default to 180 for part-time per diem and salaried employees and 1100 for part-time hourly employees.

**Do not use default values for Full time hourly employees. The Expected Months and Expected Units are used when determining service credit calculates if the Expected Months are set to 9 or 10 months and the Expected Units (hours) are less than 1100 hours. If the values don’t accurately reflect the member’s information, the member will not receive the correct service credit.**

**Example:** A full time hourly secretary works for 9 months at 25 hours per week. The Expected Units for this employee is 900 (9 months times 100 hours). The employee will receive credit for a full year of service if the employer reports 900 hours in the Monthly Work Reports. This only applies to full time hourly employees who work 9 to 10 months.

If an employee is hired partway through the school year, enter the Expected Units that would apply if the position lasted an entire school year. The employee’s service time will be determined from Work Reports, not from Expected Units.

**Example:** If a full-time teacher is hired for a 9 or 10 month school year, the expected number of units would be 180 – 195 days. The range assumed there are 18-22 workdays per month.

**Entering a value outside this range will generate an exception message.** To determine expected units for a part-time, salaried position, such as a coach, see Chapter 9: *Reporting – Service Time*.

**It is extremely important to correctly reflect a school employee's Expected Month and Expected Units. This information is a component in the calculation of the final average salary and full-time hourly employee's service credits as stated above.**

- **Voting Status:** Use the drop-down menu to select "Certified" if this Member Contract Record describes a position that requires certification through the Pennsylvania Department of Education or other licensing agency, such as a teacher position. Otherwise, select "Non-Certified." This classification is used to determine in which election the employee will vote to fill a seat on the PSERS Board. This field must be set if Work Status is set to "ACTIVE - Actively Working" or "ACTIVW - Waiver Request"; otherwise, it is optional. The job titles that shall be considered "Certified" as defined in the Public School Code, Section 1101, 24 PS 11-1101 are as follows:
  - ✓ Teachers
  - ✓ Substitute teachers
  - ✓ Vocational instructors
  - ✓ Supervisors (instructional)
  - ✓ Principals
  - ✓ Assistant principals
  - ✓ Vice-principals
  - ✓ Directors of Vocational education
  - ✓ Superintendents
  - ✓ Assistant Superintendents
  - ✓ IU Executive Directors
  - ✓ IU Assistant Executive Directors
  - ✓ Dental hygienists
  - ✓ Visiting teachers
  - ✓ Home and school visitors
  - ✓ School counselors
  - ✓ Child nutrition program specialists
  - ✓ School librarians
  - ✓ School nurse

Even if a member's certification has recently expired or they have not formally attained certification, PSERS looks at the **position** the member holds, not the unique status of the individual member's certification. If the position does not require certification then the member's voting status is "non-certified".

- **Contract Status:** The contract status will be Eligible for all new contracts except for an Active Waiver Record, in which case the contract status should be set to Pending Waiver.
- **BOC Flag:** This field is to be completed as a result of a termination or death of an employee. You must select either "Yes" or "No" from the drop-down menu. Select "Yes" if additional salary

is to be reported in the month(s) following termination or death of the employee; otherwise, select “No”.

- **Outstanding Service Credit Flag:** This field is to be completed as a result of a termination or death of an employee. Use the drop-down menu to select “Yes” or “No.” Only set this field to “Yes” if the employee has been terminated or has died and has additional service time to be reported after the month of termination or death; otherwise select “No.”
- **BOC/SVC End Date – MM/YYYY:** If either the BOC Flag or the Outstanding Service Credit Flag is set to “Yes,” enter the month in which the last piece of information (e.g., salary, days, hours, etc.) will be reported to PSERS. After the Work Report for that month has been submitted, PSERS will assume that all information has been reported, and Final Benefit Calculation will take place.

The BOC/SVC End Date cannot be more than three months from the Work Status Start Date.

Example: If an employee terminates on June 3<sup>rd</sup>, the BOC/SVC End Date must be September or earlier.

## Saving the Member Contract Record

When you are done entering information, click “**Save.**” You will be brought to a confirmation screen. If everything is acceptable you’ll want to click “**Confirm**” This will close the screen and a new row will appear for that member in your Roster Tab.

At this point, the record has been saved. You may **not** make additional changes to the contract except to enter a contract end date and changes to the voting status.

The screenshot shows a dialog box titled "Member Contract" with a close button (X) in the top right corner. The dialog contains a confirmation message: "Confirm Changes to My Information. I agree and acknowledge that by clicking Confirm, I am electronically signing this document, with the same legal force and effect as a hand-written signature. I understand and acknowledge the inherent risks associated with electronic transactions and communications, and I consent to conduct this transaction by electronic means. I hereby represent that I have the legal authority to enter into this transaction. I hereby represent that I am the authorized user in question, and agree and acknowledge that I will be deemed to have read, understood and accepted the disclaimers that are part of this site. I agree and acknowledge that this transaction is not effective unless and until PSERS has confirmed it through a pop-up message or a document on the Documents page, and that if I do not receive such confirmation within 24 hours of clicking Confirm, I should contact PSERS to inquire about the status of the transaction. It is my responsibility to retain a copy of such confirmation."

Below the message, the following information is displayed:

Employer:	1004-PA EXAMPLE SD	Billing Entity:	1004 PA EXAMPLE SD
SSN:	852-16-2604		
Name:	BLUES, JOHN		

The "Member Contract" section contains the following fields:

Job Title:	ACCOUNTING ASSOCIA	Employment Type:	Part-Time
Wage Type:	Hourly	Work Status:	ACTIVE - Actively Worki
Start Date:	03/12/2018	End Date:	mm/dd/yyyy
Expected Months:	10	Expected Units:	1,100
Voting Status:	Non-Certified	Contract Status:	Eligible
BOC Flag:		Service Flag:	
BOC Svc Rpt:	mm/dd/yyyy		

At the bottom of the dialog, there are three buttons: "Cancel", "Back", and "Confirm".

The screenshot shows an "Info" dialog box with an information icon (i) in the top left corner. The message inside reads: "Please check to make sure there are no gaps between the start and end dates on the contract records." Below the message is an "OK" button.



## Work Status Descriptions

The Work Statuses are designed to aid the employer in the communications to PSERS regarding the school employee's current work activity. There are 18 Work Statuses available for your use. Because the School Code and the Retirement Code have very specific requirements regarding leaves of absence and their return requirements, PSERS needs you to select the most accurate Work Status that explains the school employee's current work activity. Because school employees on a leave of absence may be eligible to select a contributing or non-contributing leave of absence, PSERS has created separate codes for each situation. For employees on leave, select the Work Status that matches the reason for the leave, as well as whether or not the employee is contributing to their retirement account while on leave. Work Statuses that describe leaves of absence are divided into two categories: the final letter of the Work Status code for any type of leave is either "C" for contributing or "N" for non-contributing, based on whether or not the employee is making retirement contributions while on leave. Some of the non-contributing leaves are eligible for Purchase of Service, while others are not, as indicated for each.

For information on how different Work Statuses affect Work Reports, see Chapter 10: *Reporting – Leaves of Absence*.

- **ACTIVE - Actively Working:** This is the most common status. It is used when an employee is actively working, whether or not the employee is making contributions.
- **ACTIVW - Waiver Request:** Select this Work Status if a part-time employee has requested a waiver from PSERS membership and meets the eligibility requirements outlined in Chapter 2: *Membership – Mandatory, Optional and Prohibited*. PSERS will send a packet of information to the employee automatically, explaining how waivers work and providing a *Membership Waiver* (PSRS-51) form.
- **ACTMLC - Activated Military Leave (Contributing):** You must use this Work Status for employees who make retirement contributions while on a military leave activated prior to July 1, 2013, to fulfill an obligation in the Armed Forces of the United States in time of war or armed conflict. This leave also applies to a reserve member of the armed forces pursuant to an order on or after July 1, 1990, to enter active military service for an order other than to enter into active duty to meet periodic training requirements.

An employee serving the regular 15 days of active duty for Reserves should be reported as if in regular employment (with Work Status set to "ACTIVE - Actively Working").

"ACTMLC - Activated Military Contributing Leave" should not be used to report an employee who **volunteers** to join the Military Service or National Guard. In that case, the Work Status should be "LEAVEN – Any Other Leave Not Listed (Non-Contributing)" or "TRMNTN – Termination" as appropriate.

Employees called to order on or after July 1, 2013 (this excludes military leaves re-activated or extended), may not be reported on "ACTMLC – Activated Military Contributing Leave". The passage of ACT 2013-120 (HEART Act) prohibits individuals who were activated under the Uniformed Services Employment and Reemployment Rights of 1994 (USERRA) Leave to make

contributions to PSERS while on leave. The member may elect to purchase the leave at the time of return to active service. PSERS will contact the member and provide them with the requirements needed to make this purchase. When the member is billed for the USERRA leave, PSERS will send the employer a *Statement of Amount Due* to the employer contributions due for the period of leave.

- **ACTMLN - Activated Military Leave (Non-Contributing):** This Work Status is used for an employee who is on activated military leave and has decided to **discontinue** making or **is not eligible** to make retirement contributions to PSERS during the leave. The service time from this leave may be purchased later if the employee chooses.

Military leaves initiated prior to July 1, 2013, are different from other leaves in that you, [the employer, must continue to contribute the employer's share of retirement contributions whether or not the employee chooses to contribute](#). In limited situations, you may receive a credit for these contributions. See Chapter 10: *Reporting Leaves of Absence for more details*.

For military leaves initiated on or after July 1, 2013, you, the employer, may not make employer contributions while the school employee is on USERRA leave. Unfortunately, you will initially be charged for the employer contributions when your work report is approved, but PSERS will apply a credit to your account for the erroneous charges. PSERS is in the process of enhancing the rules and validations in the pension system to eliminate this charge. When the member returns to active contributing status with PSERS and elects to purchase the USERRA leave, PSERS will send a *Statement of Amount Due* to the employer. You should not remit any funds associated with the USERRA leave until you receive the bill.

[When the employee returns to school employment, the employee must provide a copy of the discharge documentation to you, the employer, so that you can update the Member Contract Record accordingly. A copy of this documentation must be submitted to PSERS.](#)

- **DECESD – Deceased:** Select if the employee died while in active, waived, or leave status. Entering this status on any Member Contract Record automatically ends ALL Member Contract Records for this employee. Because it is important to begin benefits processing quickly after an employee's death, the Contract Record should be submitted within one day of the date in which you learn about the death. Do not wait until the next batch of Member Contract Records is being submitted unless a file will be uploaded that day anyway.
- **EXCHGC - Exchange Teacher Leave (Contributing):** This leave is granted to a school employee who exchanges teaching positions with a teacher from another country and wishes to make retirement contributions while on leave. [The foreign exchange teacher should not be added as a PSERS member and should not be reported through monthly Work Reports.](#)
- **EXCHGN - Exchange Teacher Leave (Non-Contributing):** This Work Status is used for an employee who exchanges teaching positions with a teacher from another country and who does

NOT wish to make retirement contributions while on leave. The employee may choose to purchase the service time from this leave at a later date.

- **LEAVEN – Any Other Leave Not Listed (Non-Contributing):** Use this status when the employee is on a leave of absence not defined as one of the contributing or non-contributing leave codes. This leave may last up to 24 months. The employee may NOT purchase service time from this leave.

**Note:** Jury Duty is considered to be active employment rather than a leave. Report employees on Jury Duty as if they were working normally with a Work Status of “ACTIVE – Actively Working.” If you have a policy of paying employees on Jury Duty the *difference* between their regular, full salary and the amount they are paid for Jury Duty, see Chapter 10: *Reporting – Leaves of Absence*.

- **SABTLC - Sabbatical Leave (Contributing):** Select if the employee is on a sabbatical leave as defined in the School Code. The employee must receive at least one-half regular salary during the period of the sabbatical leave. Both you and the employee must make retirement contributions on the full salary that would have been earned had the employee been working. For more information, see Chapter 10: *Reporting – Leaves of Absence*.
- **SSLSSC - Special Sick Leave, School Sponsored (Contributing):** This leave is granted to an employee who is ill and wishes to receive credit towards retirement. Granting of special sick leave is optional and must be approved by your (the employer’s) board of directors. [The leave may not exceed one year.](#)

[To qualify for the leave, the employer must pay for disability insurance sufficient to provide the employee with at least one-half regular salary.](#) Both you and the employee must be willing to contribute based on the employee's full contract salary.

- **SSLSSN - Special Sick Leave, School Sponsored (Non-Contributing):** This leave is granted to an employee who is ill and who does not wish to make retirement contributions while on leave. The employee may choose to purchase the service time from this leave upon return to active PSERS membership. Granting of special sick leave is optional and must be approved by your (the employer’s) board of directors. [The leave may not exceed one year.](#)

[To qualify for the leave, the employer must pay for disability insurance sufficient to provide the employee with at least one-half regular salary.](#)

- **SSLWCC - Special Sick Leave, Worker’s Compensation (Contributing):** This leave is granted to an employee who has been injured on the job and wishes to receive credit towards retirement. Granting of special sick leave is optional and must be approved by your (the employer’s) board of directors. [The leave may not exceed one year.](#)

[To qualify for the leave, the employee must receive at least one-half regular salary through Worker’s Compensation.](#) Both you and the employee must be willing to contribute based on the employee's full contract salary.

- **SSLWCN - Special Sick Leave, Worker’s Compensation (Non-Contributing):** This leave is granted to an employee who has been injured on the job and who does not wish to make retirement contributions while on leave. The employee may choose to purchase the service time from this leave upon return to active PSERS membership. Granting of special sick leave is optional and must be approved by your board of directors. [The leave may not exceed one year.](#)

[To qualify for the leave, the employee must receive at least one-half regular salary through Worker’s Compensation.](#)

- **STUDYC - Professional Study Leave (Contributing):** This Work Status is used for an employee who has been granted a leave for professional study as defined in the School Code and who wishes to make retirement contributions while on leave.

When your board of directors approves a Professional Study Leave, the board minutes should contain a note that the leave is for professional study.

- **STUDYN - Professional Study Leave (Non-Contributing):** This Work Status is used for an employee who has been granted a leave for professional study and who does NOT wish to make retirement contributions while on leave. The employee may choose to purchase the service time from this leave upon return to active PSERS membership.

When your board of directors approves a Professional Study Leave, the board minutes should contain a note that the leave is for professional study.

- **TRMNTN - Termination:** [Select if the employee has ended ALL](#) work for you, the employer. Any other Member Contract Records this employee has with you will be ended automatically. If the employee has only ended one position but is still working for you in another position, do not set the Work Status to “TRMNTN - Termination.” Instead, set the Work Status End Date to indicate this position has ended. If necessary, enter another Member Contract Record to describe the continued employment.

- **UNIONC - Collective Bargaining Unit Leave (Contributing):** Select if the employee has been granted a leave for collective bargaining unit. Report the full contracted salary and service the employee would have worked for your school, not the salary the employee is earning from the collective bargaining unit.

- **WKCMPN - Worker’s Compensation Non-Contributing Leave:** This leave is granted to an employee who has been injured while on the job, is receiving Worker’s Compensation, is not making retirement contributions while on leave or has exceeded the one-year time frame to contribute to PSERS, and is [NOT eligible to purchase service time from this leave.](#) This leave may last up to two years.

[The employee may NOT purchase service time from this leave.](#) Use this Work Status if you, the employer, have not approved a special sick leave as a contributable or purchasable leave.

## Work Status for Non-Contributing Leaves that can be Purchased

- ✓ ACTMLN - Activated Military Leave (Non-Contributing)
- ✓ SSLSSN - Special Sick Leave, School Sponsored (Non-Contributing)
- ✓ SSLWCN - Special Sick Leave, Worker’s Compensation (Non-Contributing)
- ✓ STUDYN - Professional Study Leave (Non-Contributing)

**Note:** To be eligible to purchase a non-contributing leave, the employee must meet the eligibility criteria.

## Work Status for Non-Contributing Leaves that cannot be Purchased

- ✓ WKCMPN - Worker’s Compensation Non-Contributing Leave
- ✓ LEAVEN – Any Other Leave Not Listed (Non-Contributing)

## Work Status Quick Reference Table

Work Status	Description
ACTIVE - Actively Working	The employee is actively working, whether contributing or not.
ACTIVW - Waiver Request	A Waiver Request has been made by an actively working part-time employee, whether contributing or not.
ACTMLC - Activated Military Contributing Leave	The employee is contributing while on activated military leave. This work Status is to be used only for military leaves which began before July 1, 2013.  This Work Status may <u>not</u> be used for any military leave orders activated on or after July 1, 2013.
ACTMLN - Activated Military Leave (Non-Contributing)	The employee is NOT contributing while on activated military leave or the military leave. The employee may choose to purchase the service time from this leave at a later date.
DECESD - Deceased	The employee has died.
EXCHGC - Exchange Teacher Contributing Leave	The employee is contributing while working in a foreign teacher exchange program.
EXCHGN - Exchange Teacher Leave (Non-Contributing)	The employee is NOT contributing while working in a foreign teacher exchange program. The employee may choose to purchase the service time from this leave at a later date.

Work Status	Description
LEAVEN - Any Other Leave Not Listed (Non-Contributing)	The employee is on a leave of absence not defined as one of the contributing or non-contributing leave statuses. The employee CANNOT purchase the service time from this leave.
SABTLC - Sabbatical Leave (Contributing)	The employee is contributing while on sabbatical. The employee must receive at least 1/2 regular salary during this leave.
SSLSSC - Special Sick Leave, School Sponsored (Contributing)	The employee is contributing while on a special sick leave. The board of directors must approve this leave. The employer must pay for disability insurance sufficient to provide the employee with at least 1/2 regular salary.
SSLSSN - Special Sick Leave, School Sponsored (Non-Contributing)	The employee is NOT contributing while on a special sick leave. The board of directors must approve this leave. The employer must pay for disability insurance sufficient to provide the employee with at least 1/2 regular salary. The employee may choose to purchase the service time from this leave at a later date.
SSLWCC - Special Sick Leave, Worker's Compensation (Contributing)	The employee is contributing while on a special sick leave. This leave must be approved by your board of directors, and the employee must be receiving at least 1/2 regular salary through Worker's Compensation.
SSLWCN - Special Sick Leave, Worker's Compensation (Non-Contributing)	The employee is NOT contributing while on a special sick leave. The board of directors must approve this leave and the employee must be receiving at least 1/2 regular salary through Worker's Compensation. The employee may choose to purchase the service time from this leave at a later date.
STUDYC - Professional Study Leave (Contributing)	The employee is contributing while on a leave for professional study.
STUDYN - Professional Study Leave (Non-Contributing)	The employee is NOT contributing while on a leave for professional study. The employee may choose to purchase the service time from this leave at a later date.
TRMNTN - Termination	The employee has ended ALL employment with you. If only some positions have ended, instead set the Work Status End Date on the appropriate Member Contract Records.

Work Status	Description
UNIONC - Collective Bargaining Unit Leave (Contributing)	The employee is contributing while on a leave for collective bargaining.
WKCMPN - Worker's Compensation Leave (Non-Contributing)	The employee is NOT contributing while on leave and receiving partial salary from Worker's Compensation. The employee CANNOT purchase the service time from this leave.

## View/Edit Member Contract

### End Dating an Employee's Member Contract Record

From the Roster Tab click the **Action** button next to the contract record you want to end date, [click "View/Edit Contract Record"](#) to view and/or end date an employee's current Member Contract Record.

The Member Contract Record Window appears. See the *Create Member Contract* for the window layout.

- You can end date an employee's position when the employee is not terminating all employment with you. This should be done prior to submitting the new position information in a new Member Contract Record.
- You can correct an employee's Voting Status.

## Uploading a Member Contract Information File

### Member Contract Records – Create by Uploading a File

You can submit multiple Member Contract Records at once, by uploading a file to the online system. You may use this procedure to submit as few or as many Member Contract Records as you want, but if you only need to submit a small number of Member Contract Records, you may find it easier to enter them directly online – see *Create Member Contract* explained earlier in this chapter.

Submit Member Contract Records to PSERS whenever you hire a new employee and whenever an employee's work status and/or position change.

Before a Member Contract Record can be submitted for an employee, Member Demographic Information must be on file with PSERS for that employee. See Chapter 3: *Member Demographic Information* for more information.



Roster

Billing Location: 1004 PA EXAMPLE SD  
Search:   
Contract Status: All

Upload File   
File History   
Contract Import  
Member Demographic Import

**Upload Contract Import**

1 File Upload 2 Processing

Import Filename:  Browse...  
Import Description: C001004  
No Parameters

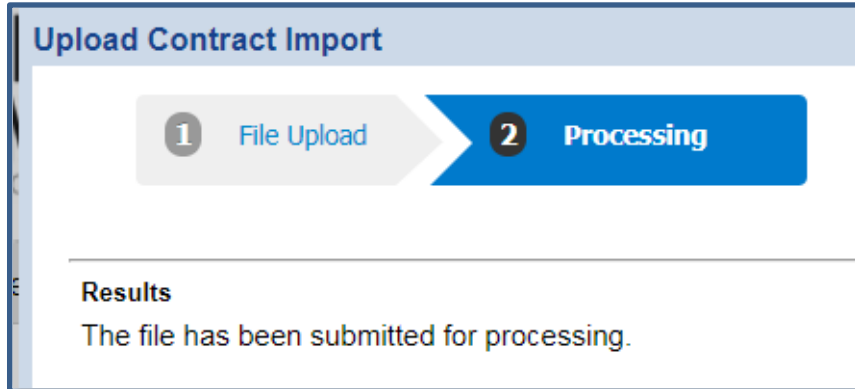
Cancel Next

**Upload Contract Import**

1 File Upload 2 Processing

Import Filename: 3404 CONTRACT.txt Browse...  
Import Description: C003404 Jan 2018 Contract Update  
No Parameters





There are seven steps involved in submitting a file upload:

1. **Create** a file in the correct format. In most cases, this involves exporting the file from your payroll/HR software system. Name the file as specified in the PSERS Filename Convention, described later in this chapter. The file format is detailed under Chapter 18: *Standard File Format*.
2. **Upload** the file to PSERS, as described later in this chapter.
3. **Validate** the file to check for any errors or exceptions. PSERS will validate the file immediately upon submission.
4. **Fix** the records with errors. Go into the details of the file by clicking "**Details**". Any records that contain errors or exceptions will be flagged for you to examine. Exceptions are shown for your information. You may submit records with exceptions still in place, but you should be aware of what the issue is with the record before doing so.
5. **Save** the file after completing the changes.
6. **Validate** the file
7. **Process** the file once all exceptions are verified and all errors are corrected.

First, access the **Roster Tab**.

- Click the action button "**File upload**"
- Click "**Contract Import**"
- Click "**Browse**" to locate the file created by your payroll software to be uploaded to PSERS. This file must be in the correct format. Name the file as specified in the PSERS Filename Convention:

A **Contract Information** filename must begin with your PSERS Employer Code followed by the 2-digit month, and the 4-digit year.

**Example:** Employer 1234 is submitting a Member Contract Record file in July 2018. The file would be named: cntr001234072018.v3d

- After selecting the file, you must enter a brief description of the file in the **Description** field. After the file is transmitted, you will no longer see the file name. Instead, you will only see the description you entered.

The description should contain the following:

- ✓ Your Employer Code.
- ✓ Name of the File on which you are working.
- ✓ The 4-digit year and the 2-digit month.

**Sample Description:** Employer 1234 is submitting a Member Contract Record file in August 2018. The description should be:

1234 CR 201808

**If you want to clear the information you entered into this window, click “Cancel.” This will empty all the fields on the screen so you can start over.**

- When you are ready to transmit the file, click **“Next”** This transmits the file to PSERS. *Do not click this button more than once, even if it seems to be taking a long time.*
- Once the file has processed you can close the window and use the **File History** button which will display the following:

Records Transmitted: 330 *shows number of records that were transmitted from the file*

Records Validated: 330 *shows number of records that were validated*

Valid Records: 327 *shows number of records that passed validation check*

Invalid Records: 3 *shows number of records that failed validation check*

Exception Records: 3 *shows number of records with exceptions*

Elapsed Time: 900ms *shows amount of time the upload and validation check took*

You can then click on the **Action button** and click **“Details”** to view the file. Or you can click the **“Details”** button directly from the File Processed successfully window after you clicked **“Next”**

## Member Contract Info Work Area – File History

After uploading a file, you can click the “File History” button. The File History screen displays:

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By	Comments
Actions	406291	Completed	03/06/2018	Contract Import	C001004	Processed Su...	03/06/2018	03/06/2018	4 sec	6	6	6	0	0			EMP_TRNG	
Actions	406290	Completed	03/06/2018	Member Dem...	D001004	Processed wit...	03/06/2018	03/06/2018	8 sec	6	6	4	0	2			EMP_TRNG	
Actions	406282	Completed	03/05/2018	Contract Import	C001004 Oct...	Processed Su...	03/05/2018	03/05/2018	1 sec	8	8	8	0	0			EMP_TRNG	
Actions	406281	Completed	03/05/2018	Member Dem...	D001004 Oct...	Processed wit...	03/05/2018	03/05/2018	9 sec	8	8	7	0	1			EMP_TRNG	
Actions	406272	Processed wit...	03/02/2018	Contract Import	C001004	Processed wit...	03/02/2018	03/02/2018	2 sec	8	7	7	1	0			EMP_TRNG	
Actions	406271	Completed	03/02/2018	Member Dem...	D001004	Processed wit...	03/02/2018	03/02/2018	9 sec	8	8	5	0	3			EMP_TRNG	

## Viewing the Work Area

### Created by File Upload

The Work Area window displays the file that was just uploaded as well as files that were uploaded in the past. From the Work Area window, you have the following options:

- **Status:** Use this drop-down menu to view only files that meet a certain criterion.

**All** - displays all files you have transmitted to the system. You will see an option to continue to the next “page” in the file list if there are more files than fit on the screen.

**Validated** - displays only files that have been through the validation check but have not yet been approved

- **Actions-** Click on process to approve the file once all edits have been made.

**Note:** When you are ready to approve a file, change the status in the drop-down box from “All” to “Validated” so that the only files visible are those that have not been approved yet. Select

the desired file clicking the “**Actions**” button the click “**process**” Use the **Void** button to delete the file.

- Select one or more files and click “Validate” to validate the records in the selected file(s). Validation checks that the records in the uploaded file are in the correct format and that all necessary information is included. You will need to correct any records that do not pass the validation check before they can be submitted to PSERS.
- **Delete File:** Click the “**Actions**” button and click “**Void**”. This can only be done before a file has been approved for submission to PSERS. Use this if a file contains too many errors to correct and you want to delete it and upload a new file instead.
- **Approve:** You should only approve the files after you have made all the necessary changes and you are ready to submit the records. Once you approve the file, you cannot delete or change it. For efficiency purposes, PSERS releases Work Reports and Work Report Adjustment files twice daily (mid-day and early evening).

If you approve the file but some of the records still contain errors, those records will NOT be posted to the system. At this point, they cannot be fixed and submitted to PSERS. Instead, use the “View/Edit Member Contract Info” back in the **Roster Tab** to correct the record(s) that erred and did not post.

For all of these reasons, a file should only be approved if the display indicates that ALL of the records in the file are valid. The number in the “Valid Rows” column should match the number in the “Rows Imported” column and in the “Rows Processed” column. The “Not Processed Rows” and “Invalid Rows” columns should both show “0.”

If the file contains any invalid records, those will be indicated in the “Invalid Rows” column. In this case, click “Detail” to view the records and correct the errors before approving the records.

- **Detail:** Click to view the individual records in the file. This option allows you to edit the information for a particular employee, add additional records, or delete an employee’s record.

Clicking “Detail” will take you to the Record Detail window described in *Member Contract Info Import details* –explained later in this chapter.

## Member Contract Info Import Details

The Record Detail window in the Member Contracts is used to add to, delete, or edit the individual Member Contract Records that are included in an uploaded file.

**Note:** The file must be validated before the Record Detail window can be accessed for that file.

The Record Detail window looks similar to the following example:

The screenshot shows the 'Record Detail' window for the Public School Employees' Retirement System. The window title is '1004-PA EXAMPLE SD'. The main content area displays a table of import records. The table has columns for 'Seq No', 'Import Message', 'Import Detail Status', 'Resubmit Flag', and 'Header'. The first row shows a record with 'Seq No' 1, 'Import Message' 'Processed Successfully', 'Import Detail Status' 'Processed Successfully', 'Resubmit Flag' (unchecked), and 'Header' 'C001004000006010120180101'. Below this, there is a 'New Row' button and a 'Download' button. A second table below shows a list of records with columns for 'Seq No', 'Import Detail Status', 'Resubmit Flag', 'Name', 'Last Name', 'First Name', 'Birth Date', 'Job Title', 'Employment Type', 'Wage Type', 'Work Status', and 'SSN'. The records listed are for RINGO, CLEVELAND, CARTER, BARBARA, PETER, and LOIS, all with 'Import Detail Status' 'Processed Successfully'.

The screenshot shows the 'Record Detail' window for a file named 'C003404 Jan 2018 Contract Update'. The window title is 'File Load Date 01/04/2018'. The main content area displays a table of import records. The table has columns for 'Seq No', 'Import Message', 'Import Detail Status', 'Resubmit Flag', and 'Header'. The first row shows a record with 'Seq No' 1, 'Import Message' 'Validated Successful', 'Import Detail Status' 'Validated Successful', 'Resubmit Flag' (checked), and 'Header' 'C003404000000120180101'. Below this, there is a 'New Row' button and a 'Download' button. A second table below shows a list of records with columns for 'Seq No', 'Import Detail Status', 'Resubmit Flag', 'Name', 'Last Name', 'First Name', 'Birth Date', 'Job Title', 'Employment Type', 'Wage Type', 'Work Status', and 'SSN'. The records listed are for RINGO, CLEVELAND, CARTER, BARBARA, PETER, and LOIS, all with 'Import Detail Status' 'Validated Successful'. An error message is displayed: 'ERR- Date of birth does not match existing record' and 'WRN- Expected units should be 900-2600'.

You have the following options from the Record Detail window:

- Status:** Use this drop-down menu to view only records that meet a certain criterion:
  - All** - displays all of the records in the selected file. Records with errors or exceptions will be highlighted in the list
  - Non validated** - displays records that have been added or edited and have not yet been validated.

**Valid** - displays only records that have been through the validation check and are found to be in a valid format.

**Exceptions** - Records with non-standard data. They are shown for your reference so you can verify that the non-standard data is correct. These are often contribution rate discrepancies.

**Invalid** - displays records that have been through the validation check and are found to contain errors. You must correct all errors before the record can be submitted to PSERS.

- **Scroll:** Use the vertical scroll bar to see additional records. Use the horizontal scroll bar to view the fields in a particular record without editing that record.
- **Action Button/Delete:** Select the “Delete” check box for any records that you should delete rather than submit to PSERS. After you checked all desired records, click “Save”, located under the SSN – Name column.
- **Edit:** If you need to change the information in a record, you can do so by clicking in the desired field and changing that field on the spot. If preferred, you can click “Edit” to the left of the record to edit the information in the Edit window. This window provides more information about the error(s) and exception(s) in the record. It also validates the information you add or edit.

Near the top of the window, you will see any errors that need to be corrected for this record as well as any exceptions that you should verify are correct.

Edit the information in each field to correct any errors. When done editing, click “Save” to accept the changes you made and exit from this window. Click “Cancel” to exit from this window without saving any changes.

- **Add:** Click to add another record to the current batch. You will be prompted to enter the additional employee’s social security number. A new record with this social security number will be added to the Record Detail window. The other fields for this employee will be blank and will need to be filled in by editing the record. Use the “Add” function when an employee is left out of the batch by mistake or if an employee’s social security number was incorrect in the file that was submitted. The social security number field cannot be edited so you would need to delete the incorrect record and add a correct record.
- **Save:** Click to save any changes you made to the records. [Do this after you have finished all adding, deleting, and editing of records. If you exit the Record Detail window \(for example, if you log out or go to another part of the system\) without saving, you will lose ALL changes you made since the last save.](#) In this case, any records you added will be lost, any records you deleted will be restored, and any records you edited will be returned to their previous information. It is advisable to save your work periodically during the editing session if you are editing extensively. Save twice!
- **Close:** to return to the File History Screen

You will be ready to submit your records to PSERS after you have...

- Finished adding, deleting, and editing records in the Record Detail window.
- Clicked “**Save**” to save your changes.

Click “**Close**” in the details screen to submit your finalized, saved file. This will return you to the File History window.

Change “**Status**” to display only “**Validated**” files. Then, click the “**Actions**” button of the file you want to submit and finally click “**Process**” to send the file to PSERS.

NOTE: To delete a file - change “**Status**” to display only “**Validated**” files. Then, click the **Action button** to select the file and finally click “**Void.**”

When you click “**process**” you will see: [Completed under the Process Flag column when processing is complete.](#)

The file has now been submitted to PSERS. It will continue to show in the File History Screen for review if needed, though no changes can be made at that time.

## **Saving Your Changes**

After adding, deleting, or editing any records in the Record Detail window always save your work. To save, click “**Apply**” to stay in edit mode. Click “**Save**” will save the information and take you out of edit mode.

## **Submitting the Records to PSERS**

For information on how to submit a Member Contract Record to *PSERS* see *Uploading a Member Contract Information File* explained earlier in this chapter.

## **Member Contract Records – Changing Information for an Employee**

When an Employee...

- goes on leave
- terminates all jobs with you
- dies
- is furloughed

Submit a single new Member Contract Record with Work Status set to the appropriate leave, or “TRMNTN - Termination,” or “DECESD - Deceased.” Set the Work Status Start Date to the date the leave began, or the date of termination or the date of death. In the case of termination or death, also set the BOC Flag, Outstanding Service Credit Flag, and BOC/Svc End Date fields to appropriate values. All of the employee’s other Member Contract Records will be end-dated automatically.

When an Employee...

- returns from a leave
- begins a new job with you
- receives a waiver denial

Submit a new Member Contract Record for each job the employee will be working for you. If the employee is returning from leave, the Member Contract Record(s) showing the leave will be end-dated automatically. (Waiver denials require the employer to manually end-date previous "ACTIVW" record.) If a member furloughs submit a LEAVEN record.

When an Employee...

- requests a waiver from PSERS membership

Submit a single new Member Contract Record with Work Status set to "ACTIVW - Waiver Request" and Work Status Start Date set to the date the waiver was requested. Do not edit the existing Member Contract Record(s) for this employee.

When an Employee...

- terminates one job with you but continues working for you in another job

End-date the Member Contract Record for the position being ended as described under *End-Dating an Employee's Member Contract Record*. Contact the Employer Service Center for further assistance. See Chapter 19: *Contacting PSERS*.

**Member Contract Records cannot be changed once they are created. Employers may only edit the End Date and voting status of a contract.**

If an error is found in an old Contract Record, call the Employer Service Center for assistance.

### **Correcting an Error in a Member Contract**

If you make an error when you submit a Member Contract Record, follow the directions under *End-Dating a Member Contract Record*.

If you do not catch the error until after you have submitted your next monthly Work Report, you can only change the Work Status End Date field. To change another field, contact PSERS' Employer Service Center.

### **Changing Member Contract Records by Submitting a File**

This process is the same as submitting new Member Contract Records. See *Member Contract Records – Create by Uploading a File* for details on this process. The only field that you can edit on a Member Contract is the End Date field.



## Examples

The following examples detail how to create Member Contract Records when an employee's work status changes.

**Example #1:** A teacher takes on a job as Principal, which involves leaving the teaching job. End-date the existing teacher Member Contract Record by setting Work Status End Date to the last date the employee will work as a teacher. Then, create a new Member Contract Record for the Principal position, with Work Status Start Date as the following day. (The first day the employee works as a Principal.)

**Example #2:** An employee works multiple positions for you and goes on leave. Submit a single new Member Contract Record with Work Status set to the appropriate type of leave and Work Status Start Date set to the date the leave began. PSERS will modify all of the employee's existing Member Contract Records with you automatically to reflect the leave.

If an employee works multiple positions for you and is only going on leave from one or some of these positions, contact PSERS to set just the appropriate Member Contract Records to leave and keep the others open. See Chapter 19: *Contacting PSERS*.

When an employee returns from leave, submit new Member Contract Records for the position(s) being resumed. PSERS will automatically end-date all of the leave Contract Records.

**Example #3:** An employee dies. Submit a single new Member Contract Record with Work Status set to "DECESD – Deceased" and Work Status Start Date set to the date of death. Also set the BOC Flag, Outstanding Service Credit Flag, and BOC/Svc End Date fields to appropriate values. PSERS will modify all of the employee's existing Member Contract Records with you automatically.

Any Member Contract Records the employee has with other employers will not be affected, since the employee may have different Balance of Contract and Outstanding Service values with each employer.

**Example #4:** An employee terminates all employment with you. Submit a single new Member Contract Record with Work Status set to "TRMNTN – Termination" and Work Status Start Date set to the date of termination. Also set the BOC Flag, Outstanding Service Credit Flag, and BOC/Svc End Date fields to appropriate values. PSERS will modify all of the employee's existing Member Contract Records with you automatically.

If the employee is only terminating one or more positions with you and is still working another position, do not set the Work Status to "TRMNTN - Termination." Instead, change the Work Status End Date for the positions that are ending.

**Example #5:** A part-time employee requests a waiver from PSERS membership. Submit a single new Member Contract Record with Work Status set to "ACTIVW - Waiver Request." Set the Work Status Start Date to the day of employment for the position being waived.

Only part-time employees can request a waiver from PSERS membership. To make sure the employee qualifies for the waiver, see *Determining if a Part-Time Employee may Waive Membership in PSERS*, found in Chapter 2: *Membership: Mandatory, Optional, and Prohibited*. When you set an employee's Work Status to indicate a waiver has been requested (ACTIVW contract), PSERS will send an informational letter to the employee automatically. This letter will explain how to contact a member field office so the employee can be counseled on how waivers work and provide a *Membership Waiver* (PSRS-51) form to be submitted by the employee. The employer is no longer required to provide this form to the employee, only to verify the existence of a qualified IRA plan.