Employer Self-Service (ESS) Training for Employers

Presented by PSERS’ Employer Service Center, February/March 2018

Objectives

- Learn how to access, navigate, and report your employees to PSERS using the ESS Browser system
- Identify new features available in ESS and how to use them
- Learn about Paperless Delivery

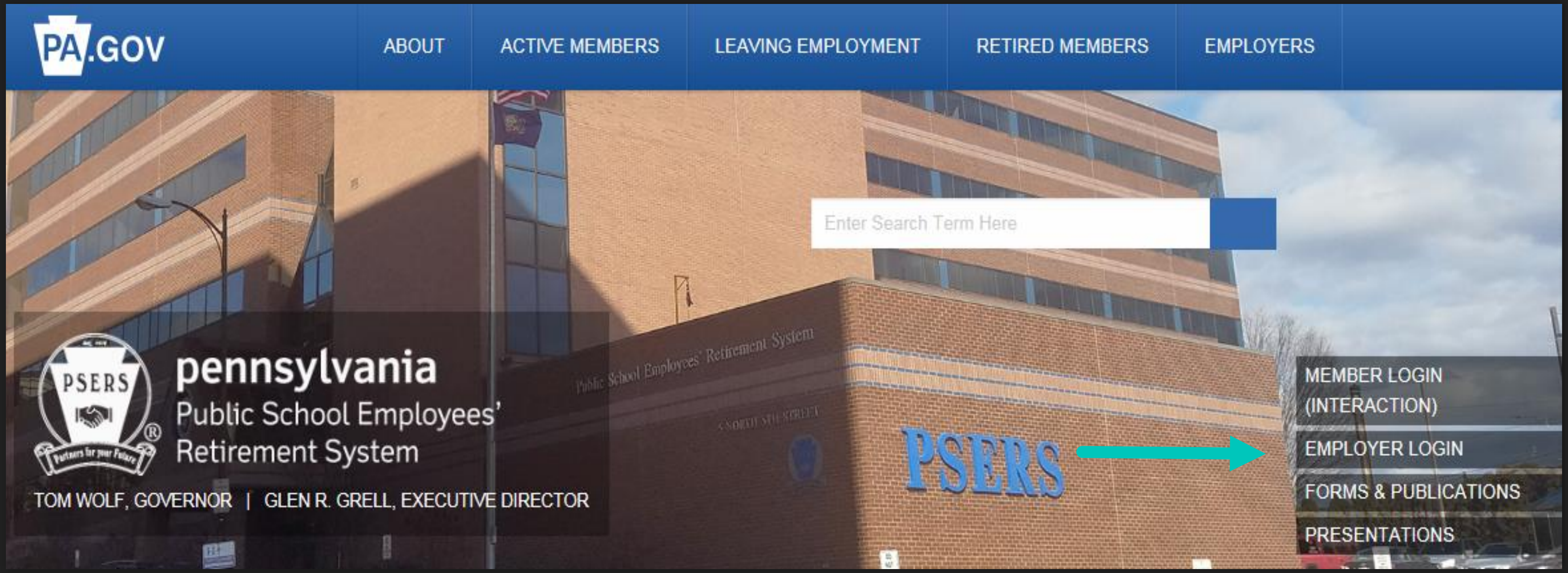
Accessing ESS and Understanding your Dashboard Screen

ESS is a browser-based system that will replace the Employer Web portal that is currently used for PSERS reporting.

How will I access ESS?

- The ESS Log in button will be on the right-hand side of the banner of the PSERS website in the same location as where you access the Employer Web currently.
- ESS works best with Google Chrome, but will work with other browsers.

www.psers.pa.gov

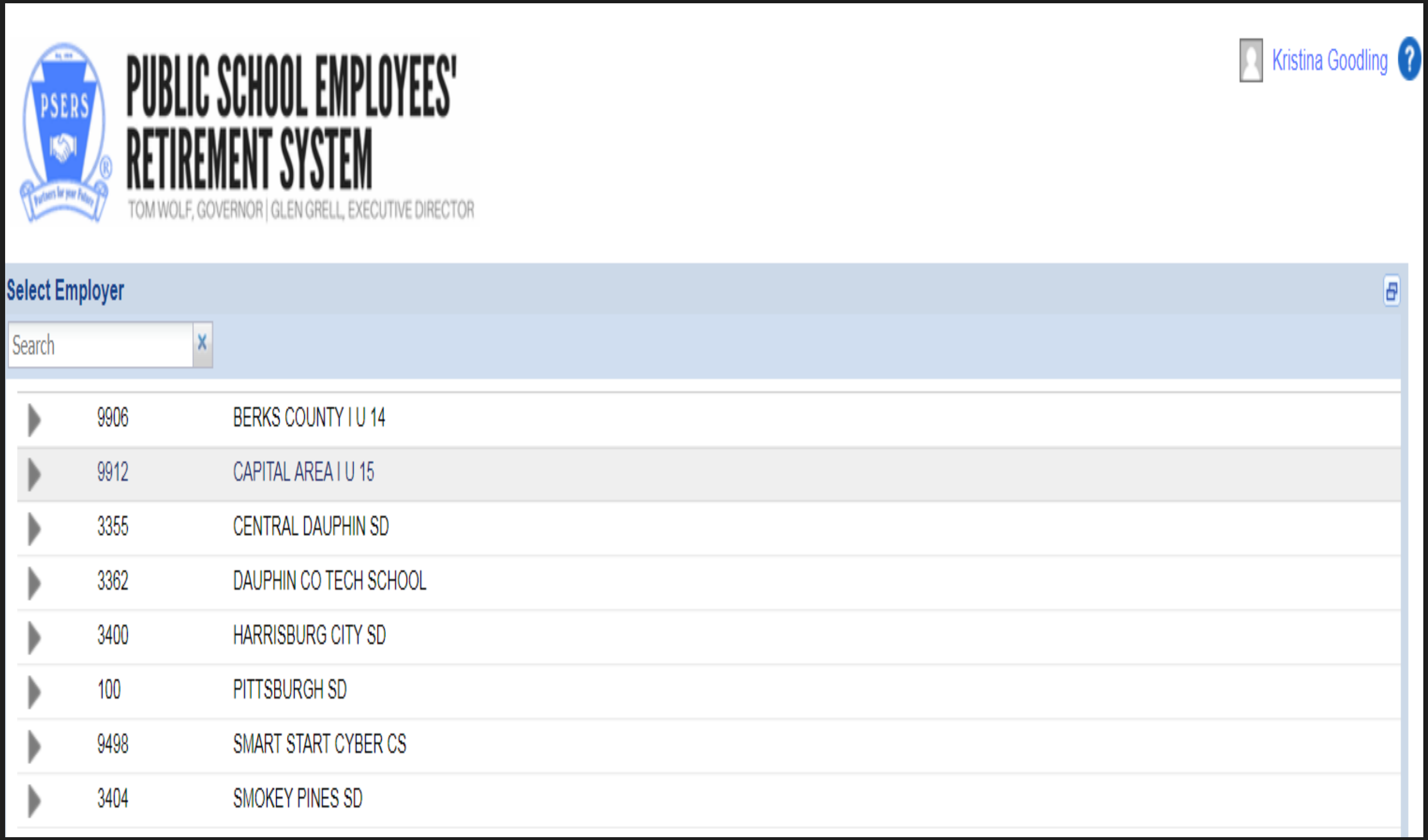


Log In Screen

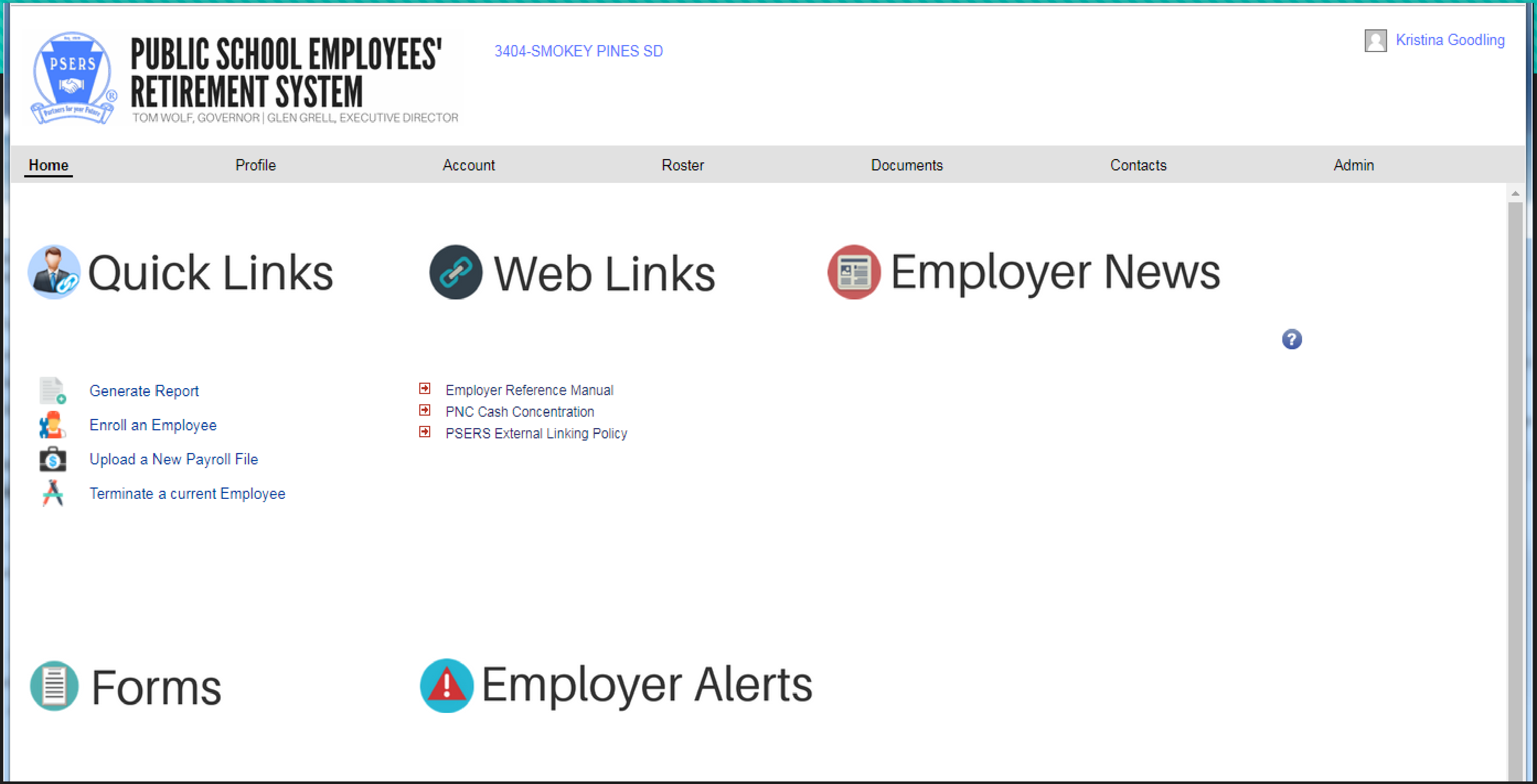
- User names and passwords will be converted if you have an **Administrator** account. We will speak more on this later.
- User accounts will need to be set up by your Administrator after ESS goes live.
- **New:** You will be required to change your password every 120 days when prompted by the system to ensure security.

Schools assigned to you

- The PSERS logo will appear at the top left, while your log in information will appear at the top right.
- If you only report for one school, you be will defaulted directly to your dashboard.
- If you report for multiple schools, you will see them listed for you to select which school you would like to view. (This applies to management companies or schools where the payroll contact serves multiple schools.)

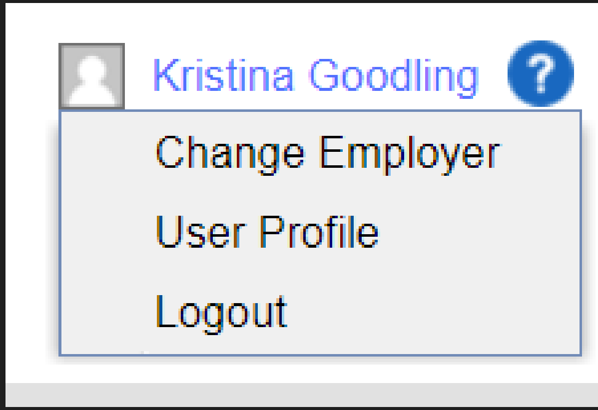


Your Dashboard

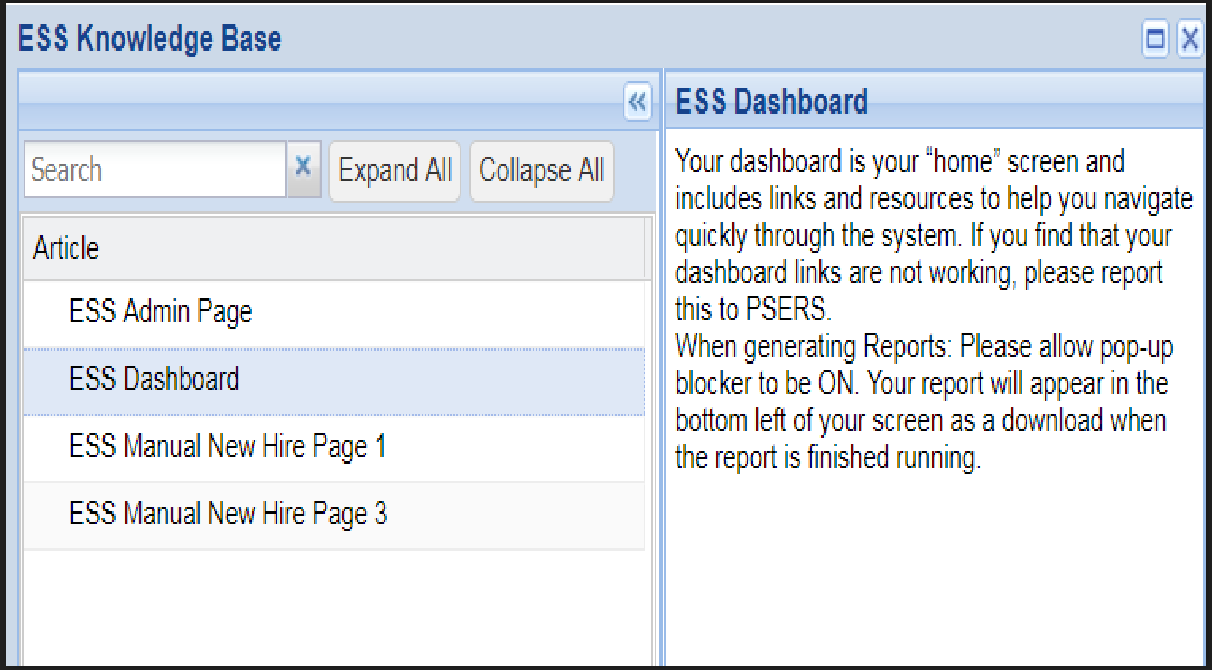


Information on Banner

- PSERS logo and your school name will appear on left side of the screen.
- On the right side of your screen will be your name (as the current logged in user) and the blue help text icon.
- Clicking on the silhouette will provide options for you to change employers, update your profile, and log out from the system.

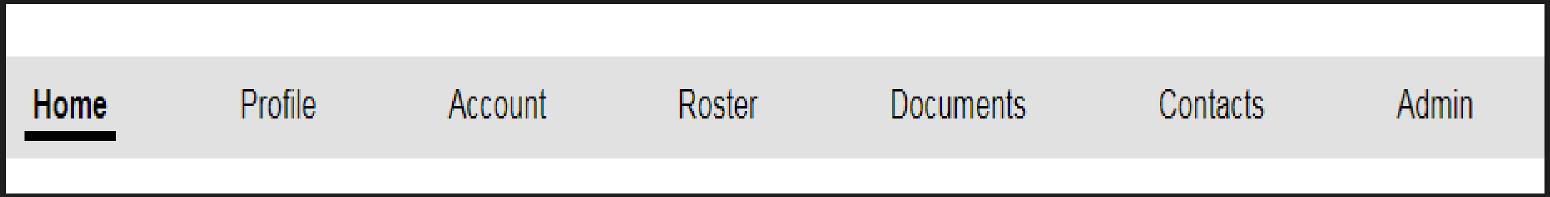


Help Text



- Clicking the blue question mark help text icon will allow you to find helpful information about how to use ESS.
- You can search for specific information, or access the Article tabs down the left column. The relevant information will appear on the right.
- Using help text may answer some of your questions directly without the need to reach out to PSERS in order to continue your work reporting.

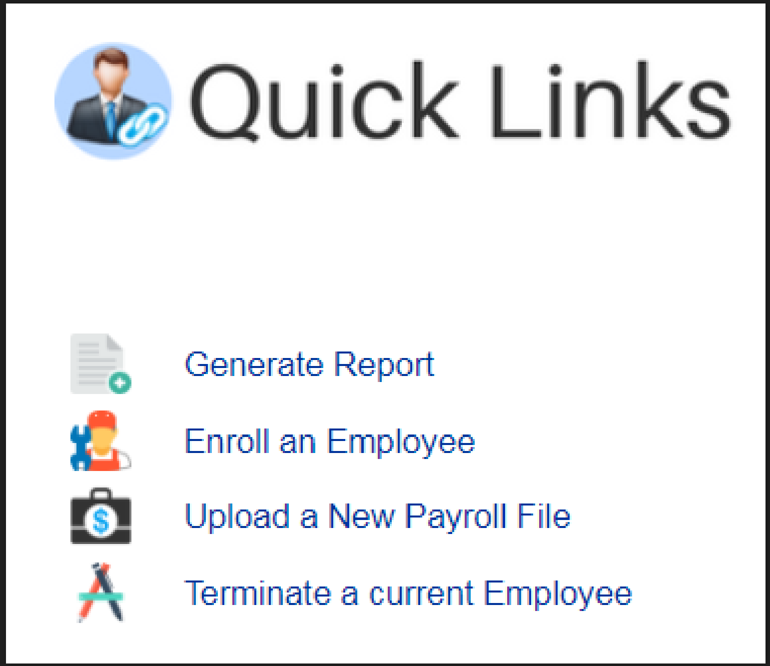
Dashboard Tabs



- ESS offers tabs across the top of your screen to easily move from one area to another.
- Your Home tab will bring you back to your dashboard options. This includes Quick Links, Web Links, Employer News, Forms and Employer Alerts.

Quick Links to your most used functions

- Generate Report will let you run four (4) types of reports.
- Enroll an Employee will take you to the Roster tab, specifically the Manual New Hire function.
- Upload a New Payroll File will take you to the Account tab.
- Terminate a Current Employee will take you to the Roster tab where you can create a new contract for your member.
- We'll touch on each of those sections in more detail later in this training.



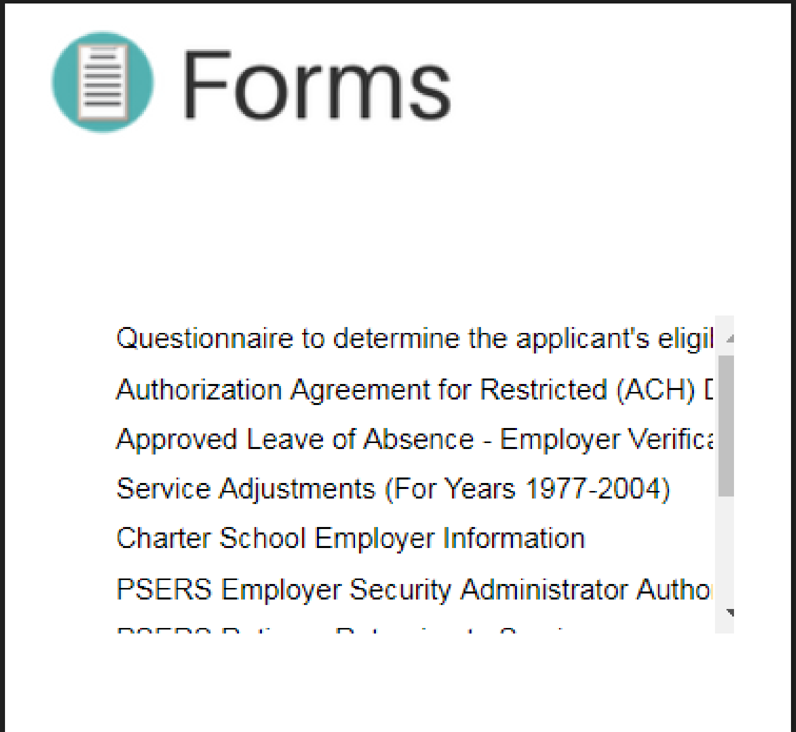
Web Links

- Web Links includes links to PSERS public website to access the Employer Reference Manual and to the PNC Cash Concentration website.
- PSERS external Linking policy can also be found here.

Employer News

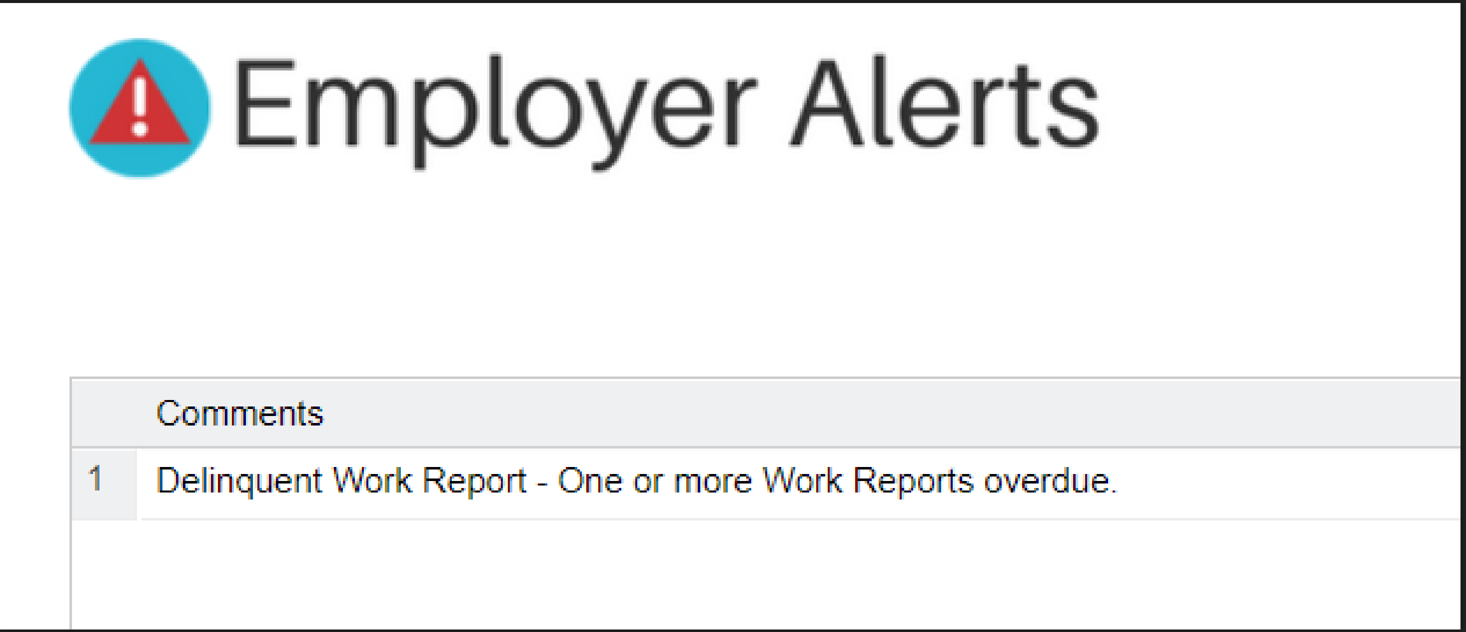
- Employer News will give PSERS an opportunity to communicate with you through your dashboard for important information.

PSERS Forms



- PSERS most used forms can be found here, listed by form name.
- These are the same forms that are currently listed under the Employer tab of the website. The forms will also continue to be available through the public website.

Employer Alerts



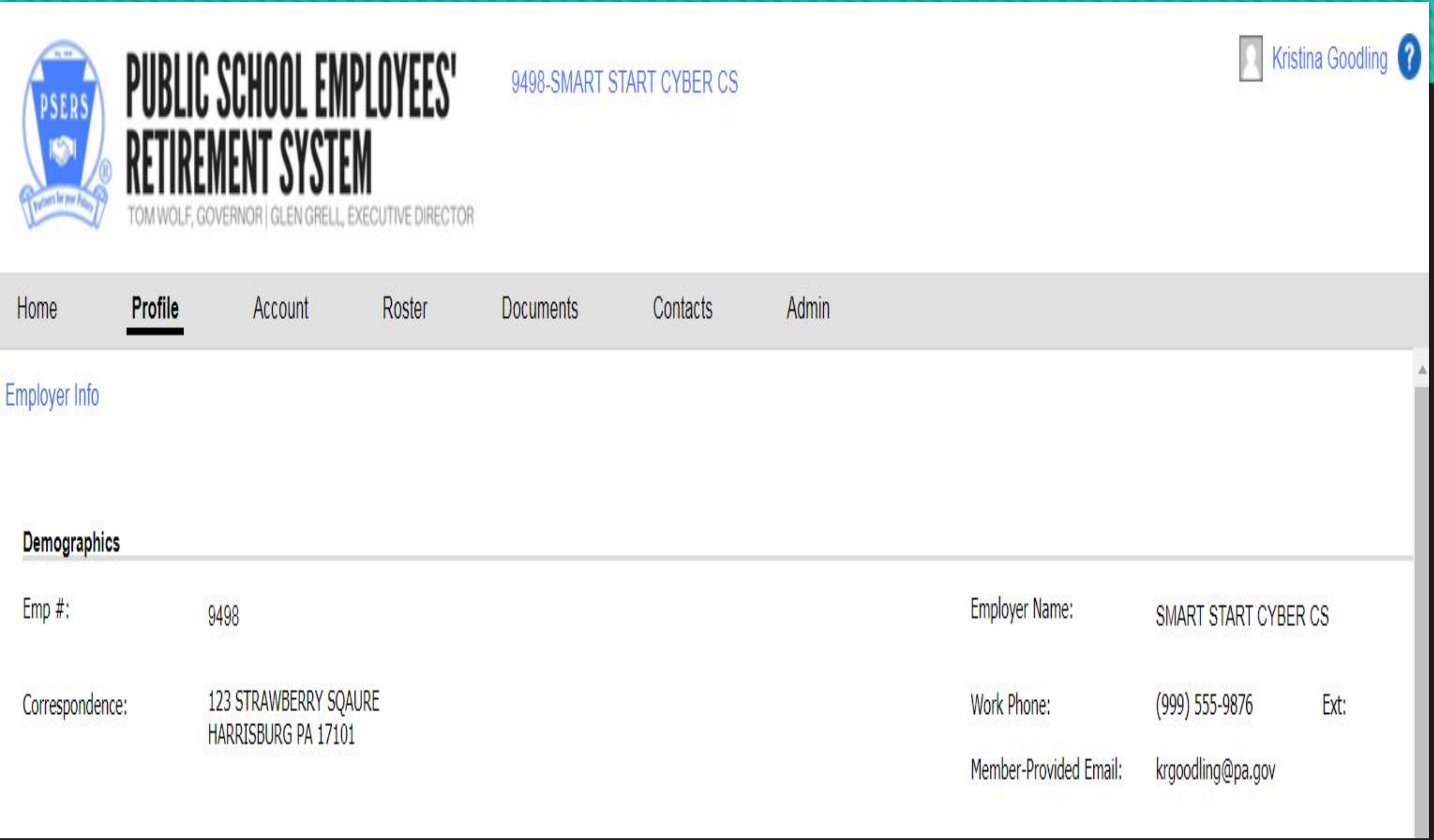
- Employer Alerts will display notices to you about your work reporting.
- This may notify you of delinquent work reports (as seen on the left) or that there are adjustments that you have not yet been approved for your school.

Profile Tab

Your main school address and contact information

Profile Tab

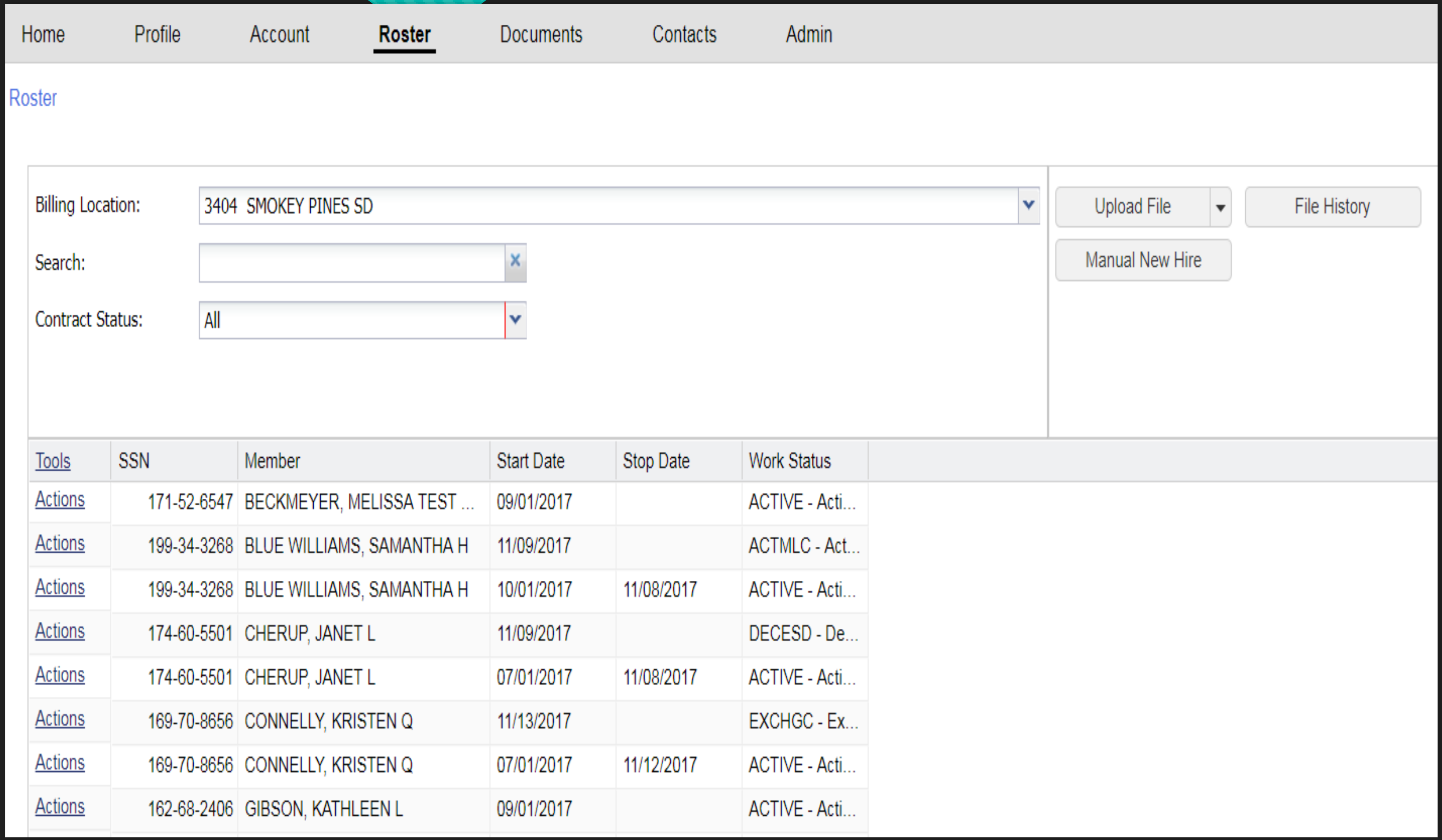
- Your Profile tab will display your school's address and general contact information as well as your PSERS reporting unit code (Employer #)
- This tab will be in a read-only format for you, so if your school relocates the administrative office you will need to notify PSERS in writing so this information can be updated.



Roster Tab

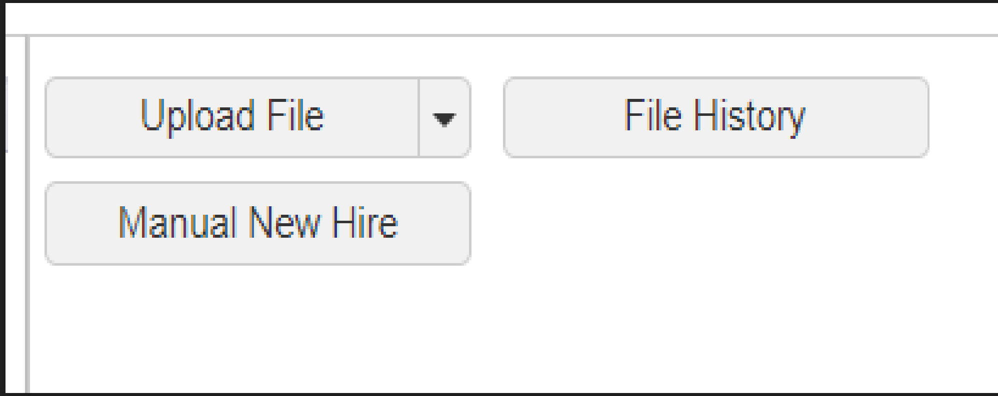
Your Roster Tab is the work area for **Member Demographic** and **Contract Record** related information for your employees.

Roster Tab



- Your “roster” contains all persons who have been employed with your school and reported to PSERS going back to 1973.
- Your Billing Location should auto-populate your school name.
- The Search box will allow you to search for a full or partial first or last name, or SSN.
- Member Demographic and Contract Record update actions will take place using the Roster tab.

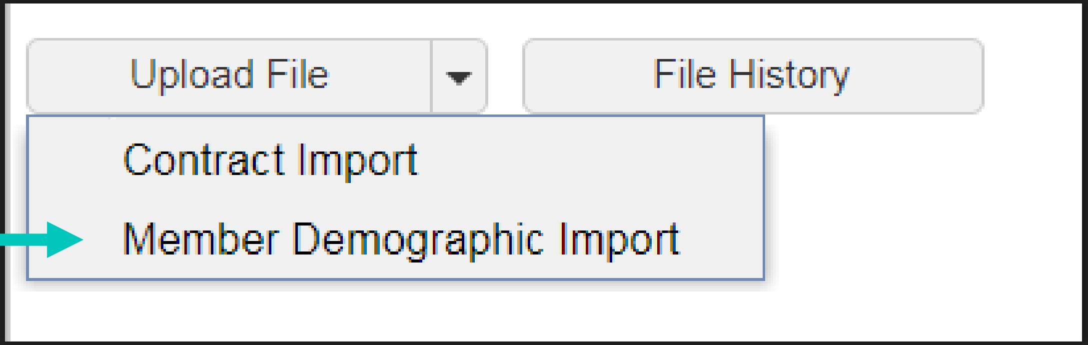
Roster Tab-Available Actions



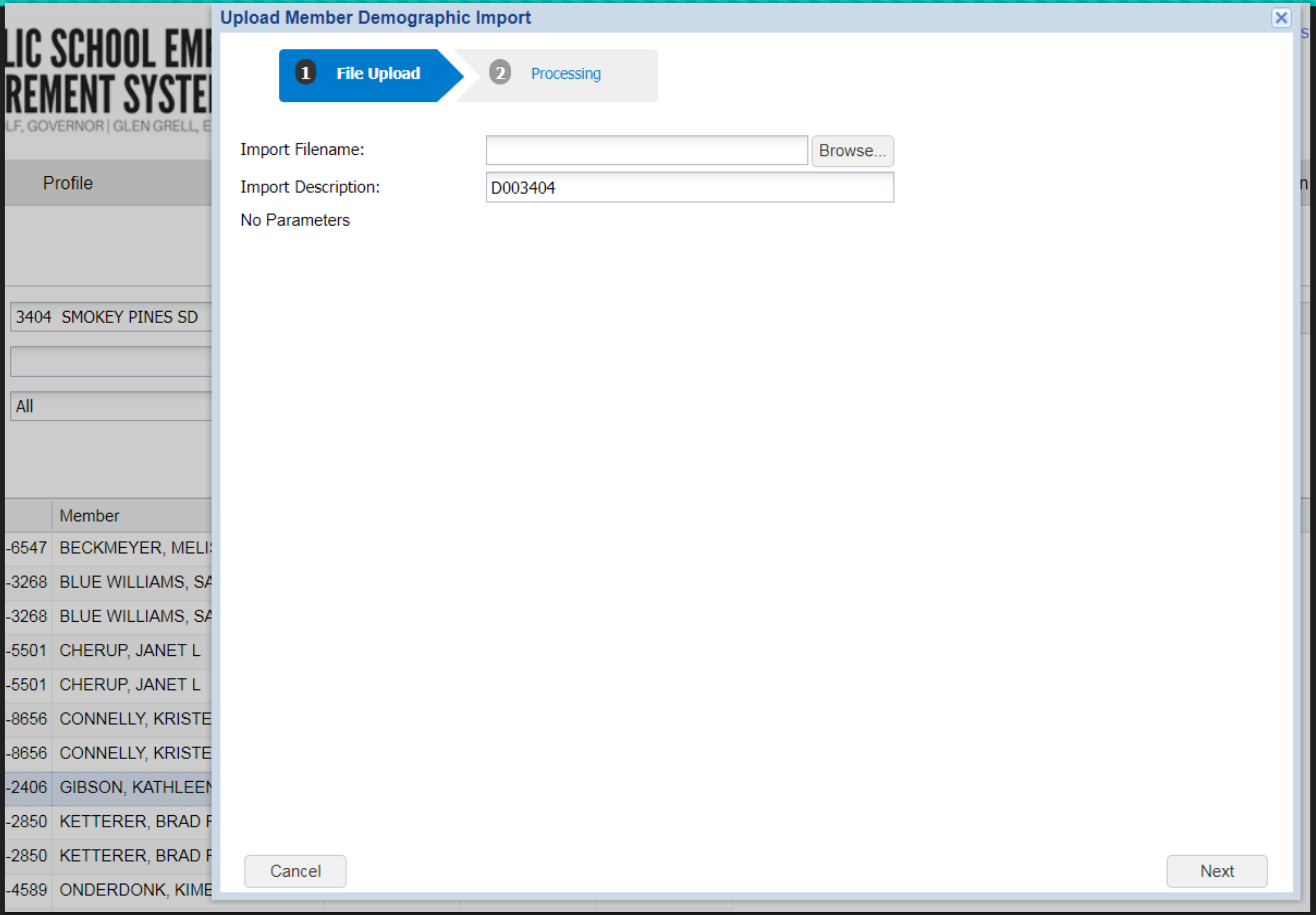
- The Upload File button arrow offers Contract Import or Member Demographic Import options. This button will walk you through the steps to import these types of files.
- The File History button serves as your work area and approved reports area all in one. Once your file has been imported into the system you will be able to see the status of your file and the number of rows imported. This screen will also show the number of invalid or exception rows to be corrected.
- **NEW:** The Manual New Hire button opens a 5-step wizard to enter a new employee's demographic record and the initial contract record all at once.

Importing a Member Demographic File

- Select the Upload File button. Use the down arrow on this button to select Member Demographic Import.



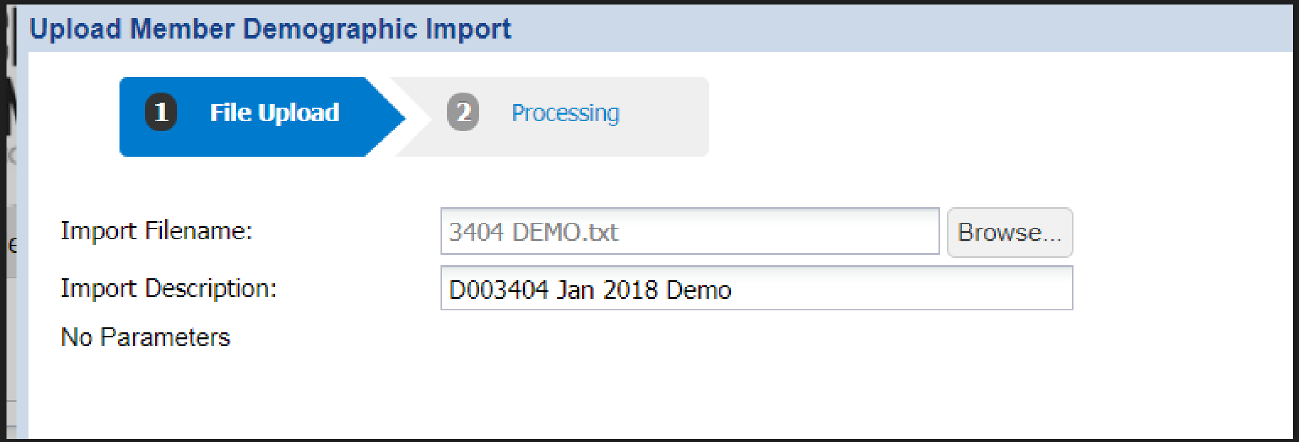
Importing a Member Demographic File



- You will browse your computer files to locate the file you would like to import.
- The Import Description will auto-populate by showing "D003404" which represents a Demographic file for reporting unit code 3404.
- You can change this description to be more specific to include the month, year, or reason for uploading this file.
- When you successfully locate your file, click Next at the bottom right of your screen to move into the Processing phase.

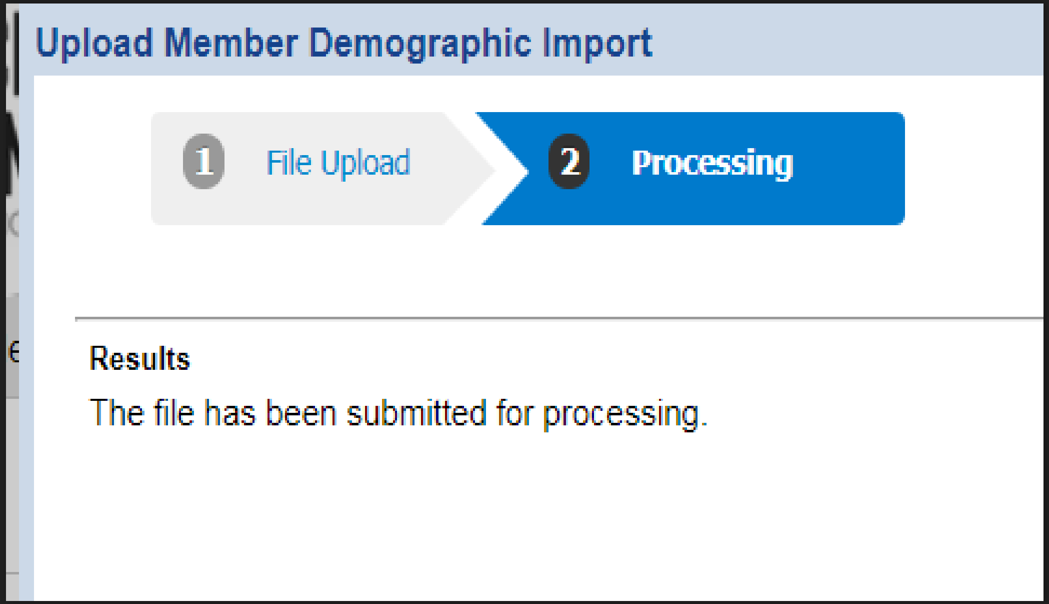
Selecting your file

- File selected will show in gray.
- Import Description updated to the entered description.
- Click the Next button in the bottom right corner. To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- A message stating "Processing file….Please wait" will display on your screen while processing.

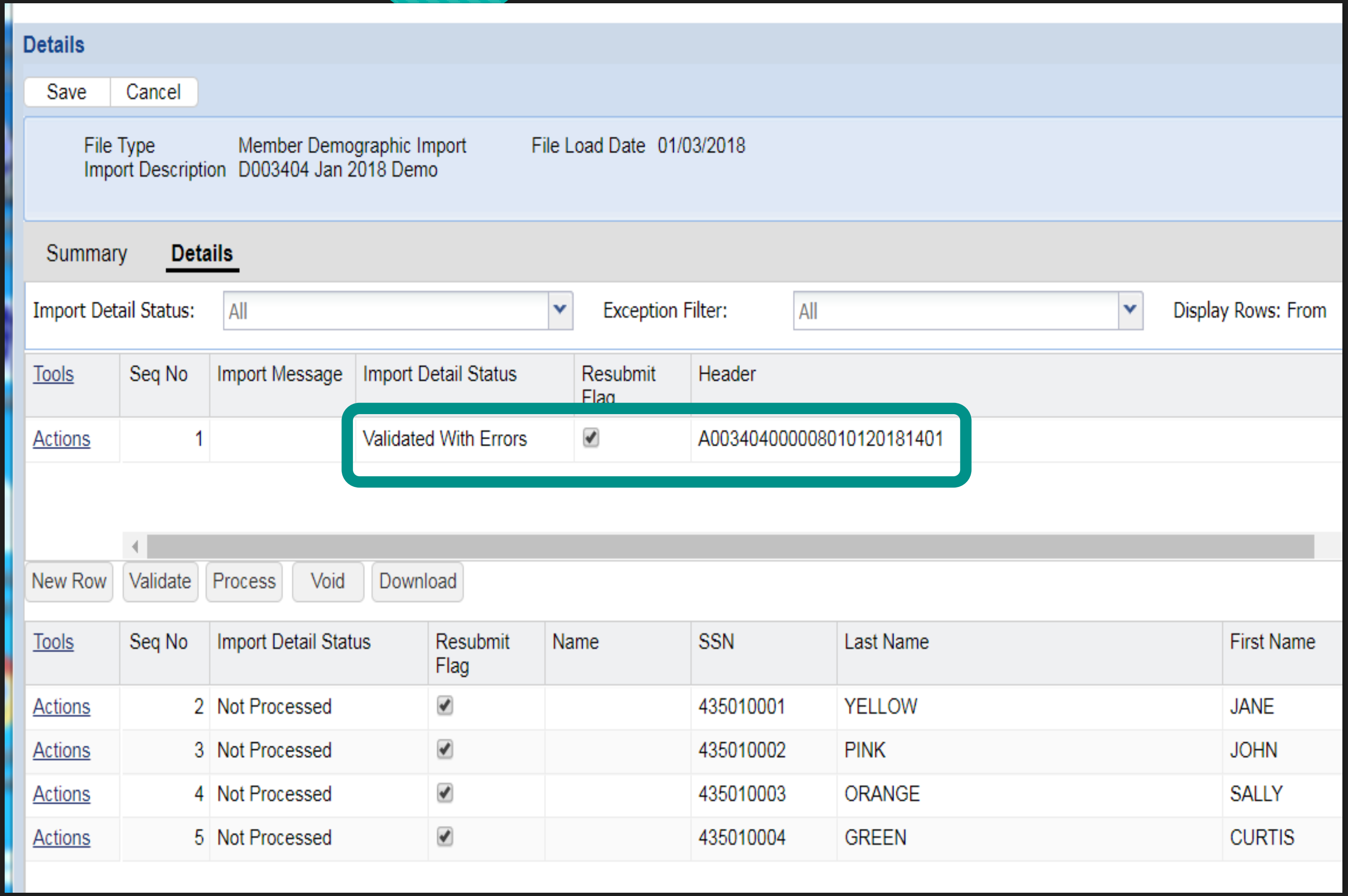


Processing

- After the “Processing file…please wait” message, the screen will show your file results.
- You can view the details of your file using the Details button in the bottom right corner.

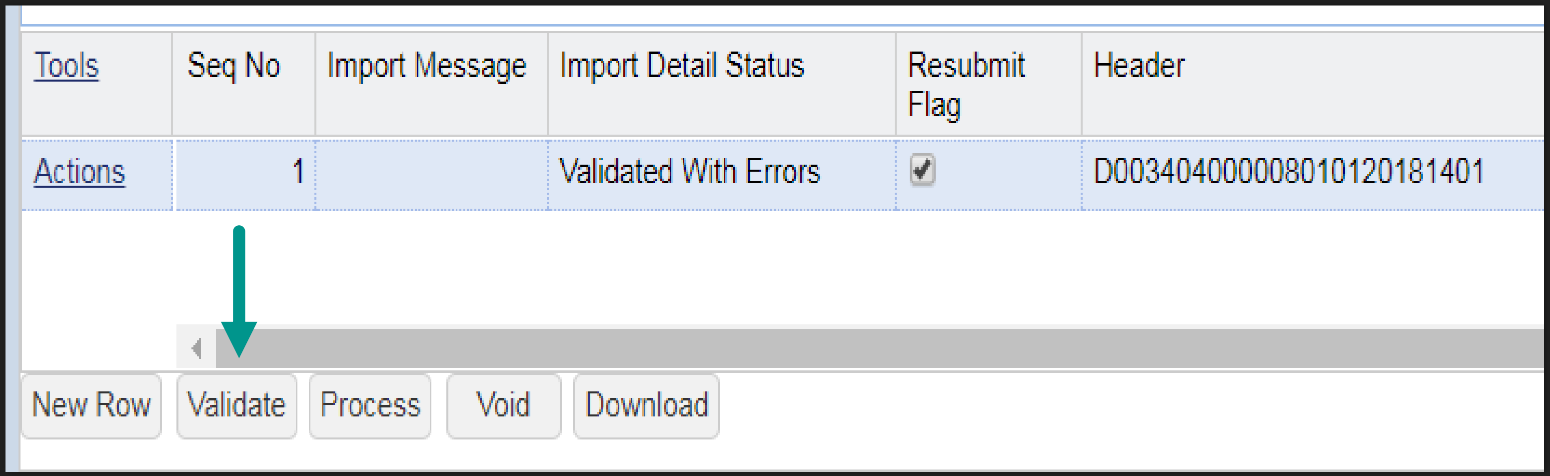


Processing a Member Demographic File



- ESS will automatically put you into Edit mode to make corrections to your file.
- **NEW:** Header row errors will need to be fixed by employers. In the example, this file was Validated with Errors. To continue, the header row must be corrected.
- In this example, the Demographic file header line should begin with "D" rather than A, and has caused the error.

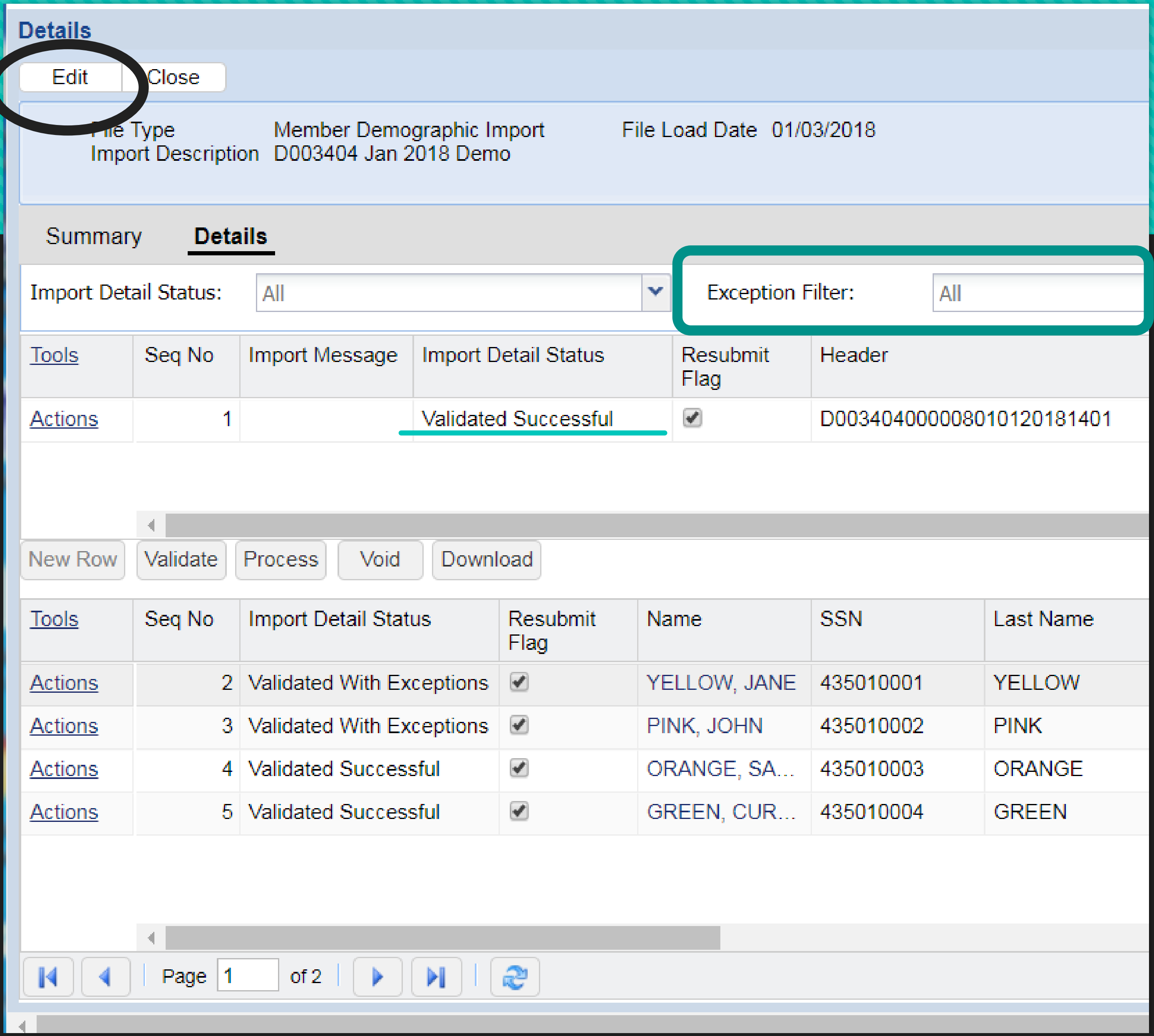
Fixing the Header Row



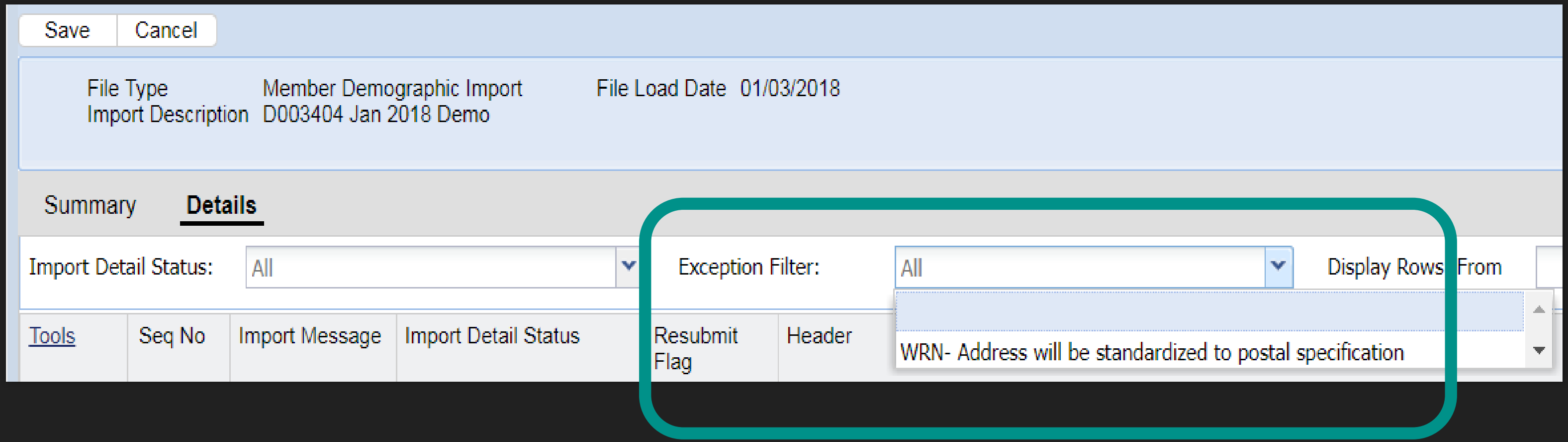
- Chapter 18 (File Formats) of the Employer Reference Manual explains the requirements for properly formatted files, including the header row details.
- By correcting the header row to start with "D", we are able to click the Validate button to see if the correct correction was made.
- **TIP:** If the text appears to be correct but an error still shows, it may be caused by extra spaces behind the text that need to be cleared out.

Validating Your File

- Once the header is corrected and validated, the Import Detail Status will change to Validated Successful.
- The rows on your previously unprocessed file will now show an Import Detail Status showing which rows are Successful, Validated with Exceptions, or Validated with Errors.
- The Exception Filter can be used to show similar errors. You will need to be in Edit mode to use the filter. The Edit button is at the top left of the screen.



Exception Filter



- When in edit mode, use the pull down arrow to see Exception/Invalid errors that need to be corrected.
- For the demographic file, there is only one exception (Warning) that the address will be standardized to postal specification.
- Click on the exception you would like to filter by.

Exceptions and Errors

Import Detail Status: All

Exception Filter: WRN- Address will be standardized to po

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated Successful	✔	D003404000008010120181401

New Row | Validate | Process | Void | Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	SSN	Last Name	First Name	Mi
Actions	2	Validated With Exceptions	✔	YELLOW, JANE	435010001	YELLOW	JANE	
Actions	3	Validated With Exceptions	✔	PINK, JOHN	435010002	PINK	JOHN	
Actions	8	Validated With Exceptions	✔	BLUE, DEB	435010007	BLUE	DEB	
Actions	9	Validated With Exceptions	✔	BLACK, LINDA	435010008	BLACK	LINDA	

Page 1 of 1

- All rows with the exception/invalid error chosen will display below. This example shows 4 rows.
- If there are many rows with this error, there will be additional pages listed in the bottom left of your screen.
- In the bottom right of your screen you may change the number of records visible per page. The default value for this page is 15 records.

Reviewing exceptions/error rows

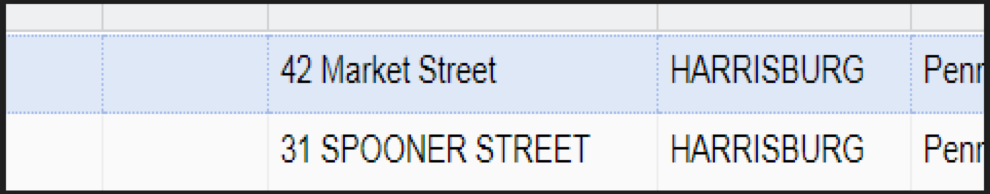
New Row | Validate | Process | Void | Download

Tools	Last Name	First Name	Mid...	Suffix	Sex	Birth Date	Care Of	Apartment	Street	City	State	Zip	Country
Actions	YELLOW	JANE			Female	10101980			42 MARKET STREET	HARRISBURG	Pennsylvania	17101	UNITED STAT...
Actions	PINK	JOHN			Male	09151972			31 SPOONER STREET	HARRISBURG	Pennsylvania	17101	UNITED STAT...
Actions	BLUE	DEB			Female	11121993			1 MAIN STREET	HARRISBURG	Pennsylvania	17101	UNITED STAT...
Actions	BLACK	LINDA			Female	10031973			2 NORTH STREET	HARRISBURG	Pennsylvania	17101	UNITED STAT...

- The address will be standardized by US Postal Service guidelines. In some cases, the system may prompt for the last four digits of the zip code also. Other errors may include incorrect birthdates, or perhaps information that ended up in an incorrect field that does not pass the system validations.
- From left to right, each row will contain all details of a member's demographic record that was submitted on the file. Not visible on this screen shot, the row also shows the phone numbers and email contact information that was entered on the demographic file.

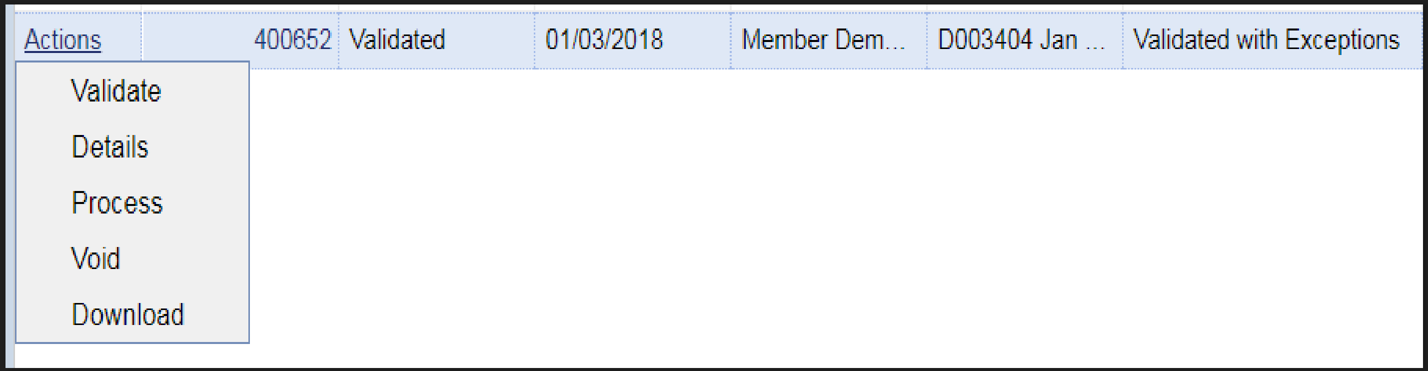
Editing the Record

- When in edit mode, you can click inside the incorrect field and enter changes directly into the row. "Market Street" was edited to show upper and lower case letters.
- When finished, click Save at the top left. You may save in between each change, or after all changes have been made.
- If you choose to save after each record, you will need to click the Edit button to make the next change.
- Click Validate for the system to review the file again. Only exceptions/errors not fixed should remain after the file is re-validated.

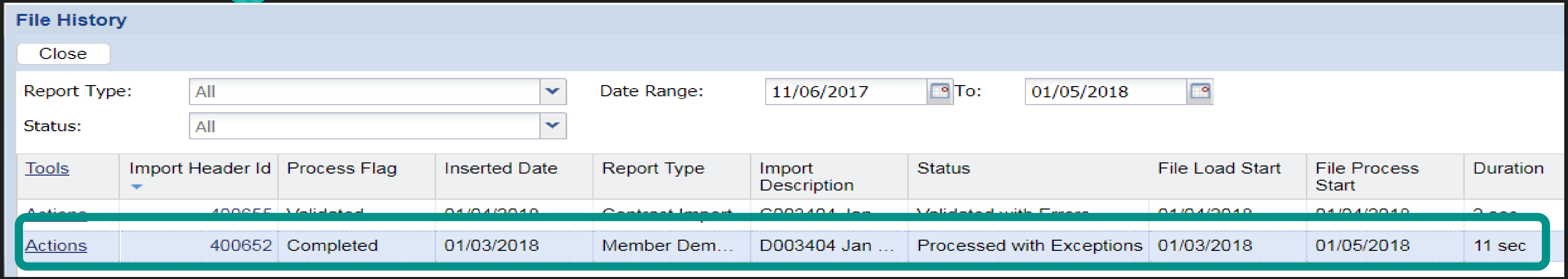


Processing the file

- Use the Close button at the top left when changes are complete for your file.
- This will default you to the File History screen.
- Using the Actions button at the beginning of the transaction row, select Process after your file has been Validated a final time.



Processing Completed



- When the Process action is clicked, ESS will begin to process the file. The Process Flag will go through a series of messages while this is happening: "Queued Processing," then "Processing," and finally "Completed".
- The Status of the Demographic file imported is now "Processed with Exceptions", due to the standardization exception from earlier.

Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By	Comments
8	0	0	8	0			KRGOODLING	
8	8	4	0	4			KRGOODLING	

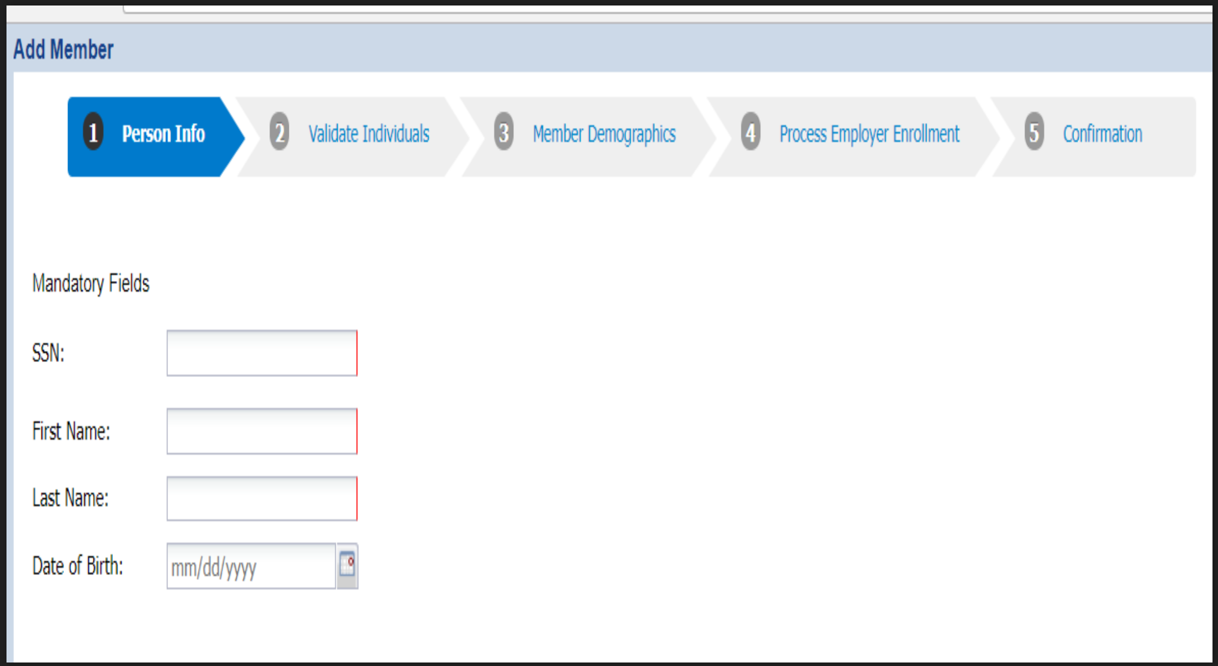
- The File History page serves as the work area and approved reports area.
- On the last slide the status of the demographic file was visible. Further to the right, details about the rows imported and processed as well as any valid, invalid or exception rows will be listed.
- The dark blue row shows that the demographic file was processed with 8 rows, 4 of which were valid, 4 of which were processed with an exception.
- Rows added to and deleted from the file will also be visible from this screen.

Manual New Hire Button

A **NEW** feature that allows manual entry of the **demographic record and contract record within one function** for newly hired employees.

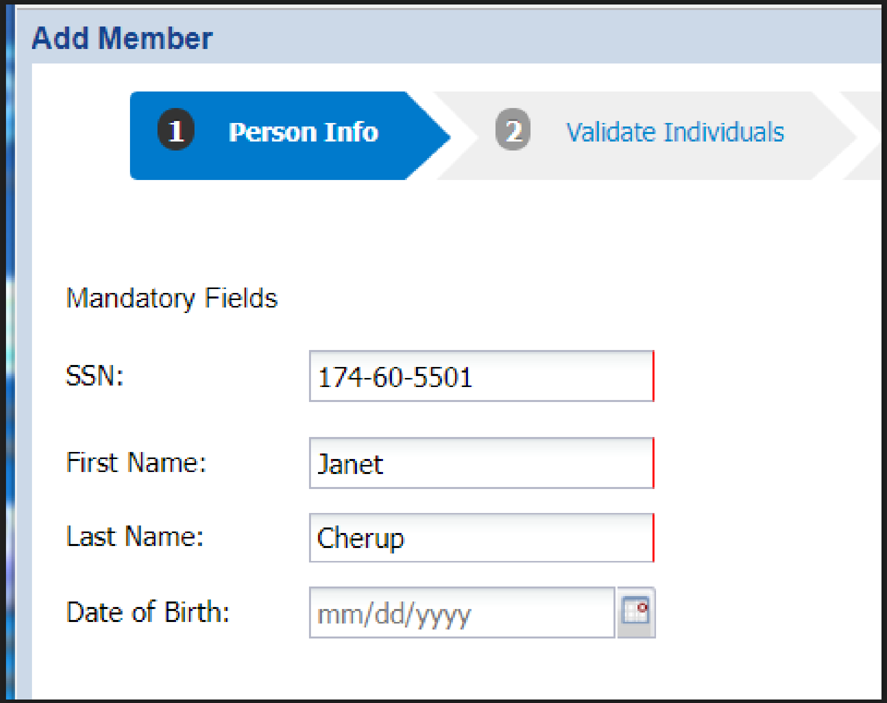
Manual New Hire Button

- If you manually enter your new hires rather than using file imports, you will use the Manual New Hire button.
- This 5-step feature should be used for new employees as it combines the demo and contract information in one process.
- For step one, mandatory information fields have a red bar down the right side. This part of the wizard looks to see if this person has been an employee for your school in the past.
- After mandatory information is entered, click the Search button (not in screen shot) at the bottom right of the screen.



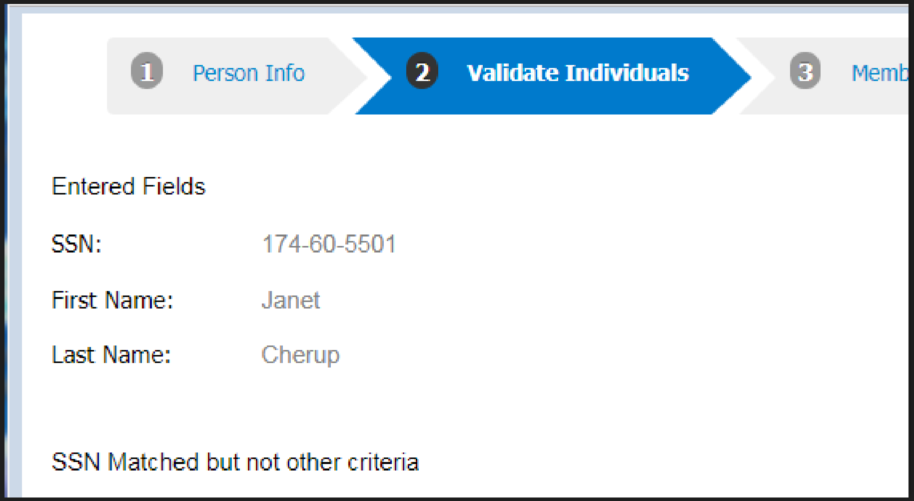
Step 1-Person Info

- SSN can be entered with or without dashes.
- First and last name should be entered, but Date of Birth is not required.
- To be found, this employee's information must be an exact match to the information already in the system.
- PSERS suggests using all CAPS when entering the first and last name when using the manual demo process.



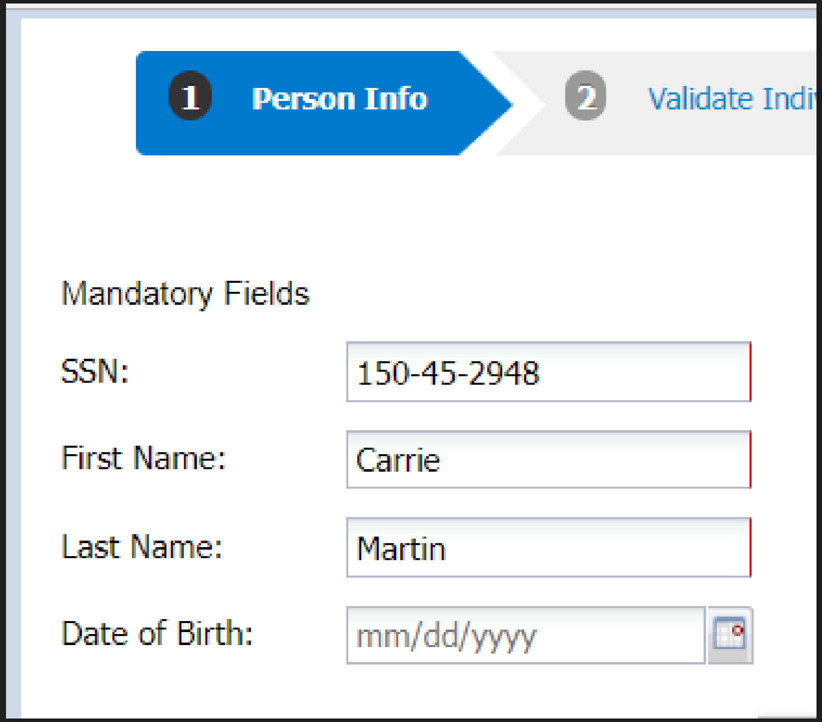
Step 2-Validate Individuals

- If the demo information entered is not an exact match, ESS will tell you.
- For this example, the SSN matches, but the name (first or last) may be spelled incorrectly.
- ESS will not let you continue with the information as is. Your options are to cancel the transaction or select the back button to fix your information. These buttons will be visible at the bottom of your screen.

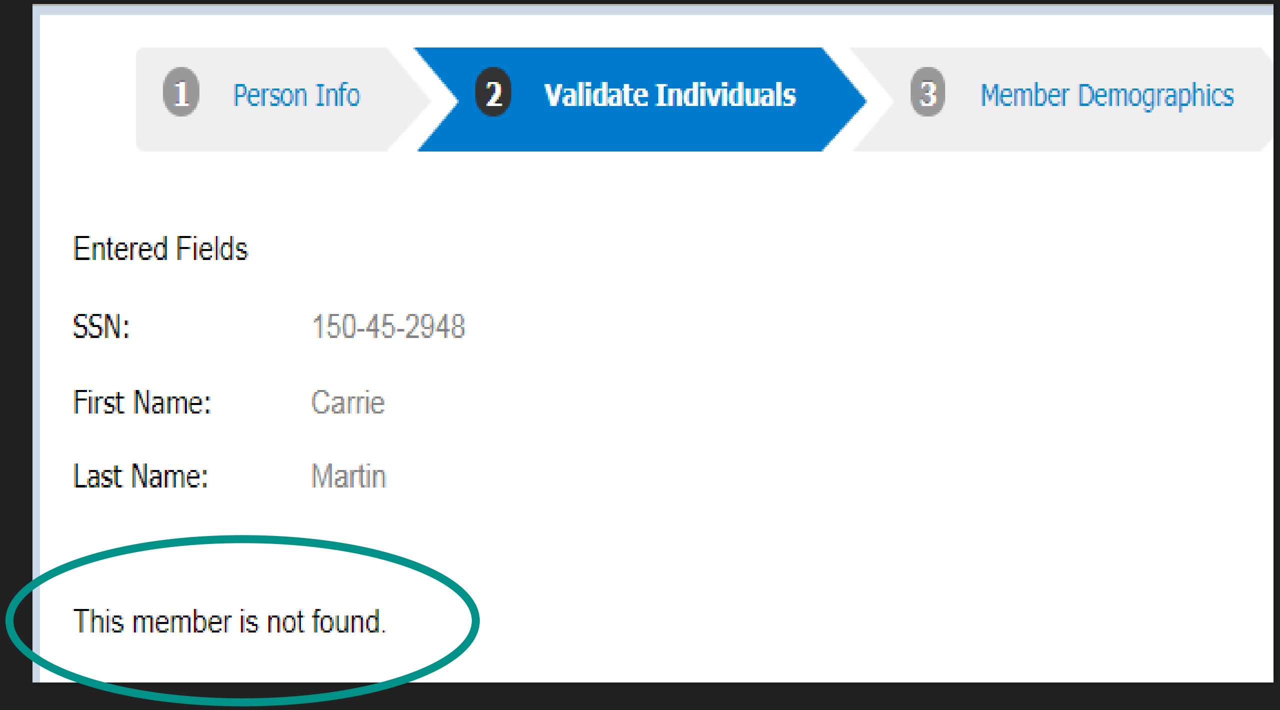


Back to Step 1-Person Info

- Re-enter demographic information and use the Search button at the bottom right of your screen.



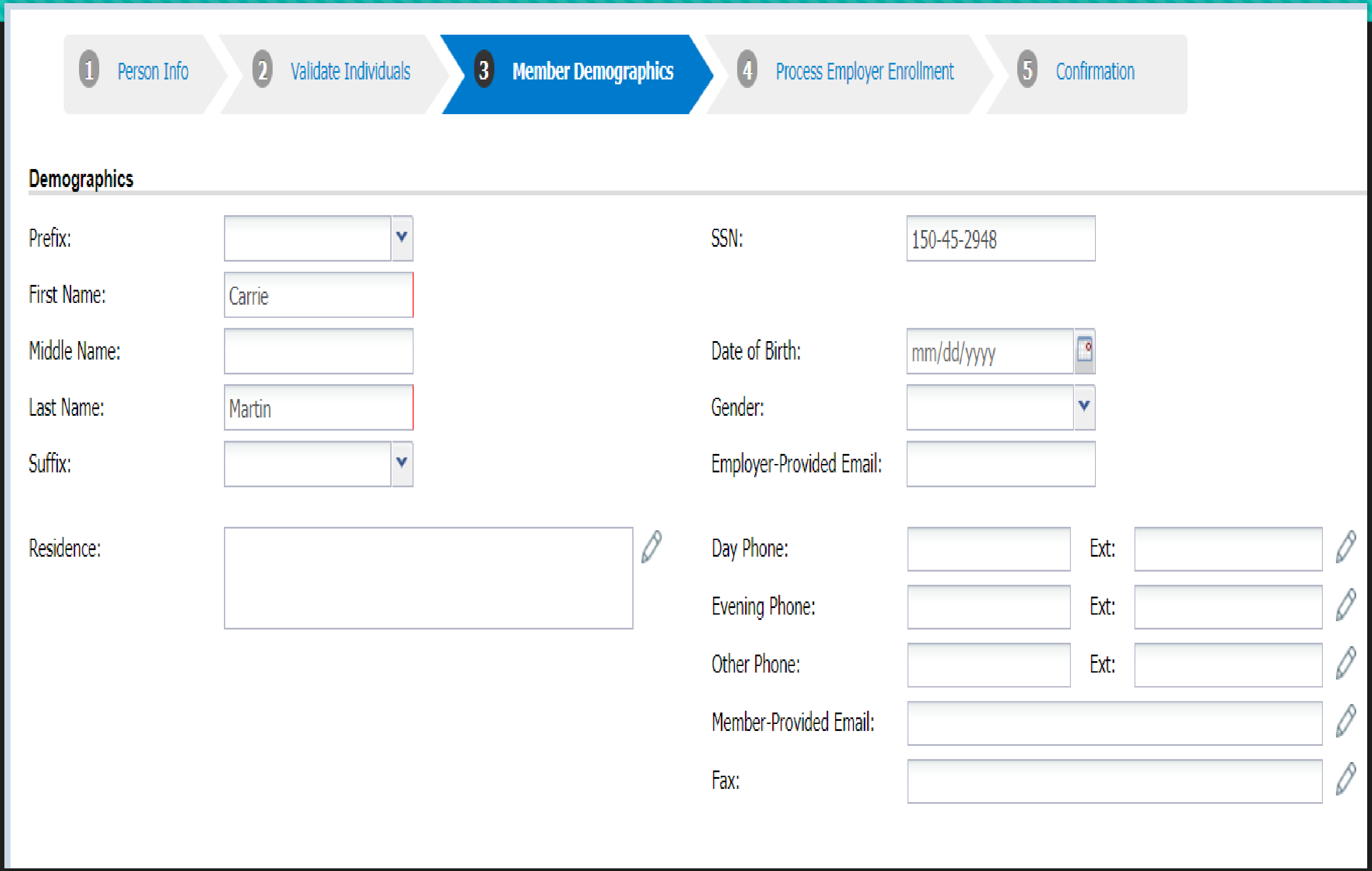
Step 2-Validate Individuals



- This time, our new employee did not match any existing member in ESS.
- At the bottom of your screen you will have buttons available to Cancel the transaction, go Back and re-enter information in Step 1(Person Info), or click the New Member button to proceed to Step 3 - Member Demographics.

Step 3-Member Demographics

- Step 3 prompts you to enter all demographic information about the member. This includes their name, Residence Address, Date of Birth, Gender, Employer-Provided Email, Phone and Fax Numbers.
- Mandatory fields show the red bar and are auto-populated from our prior steps, but it is preferable to capture all information possible at this time.



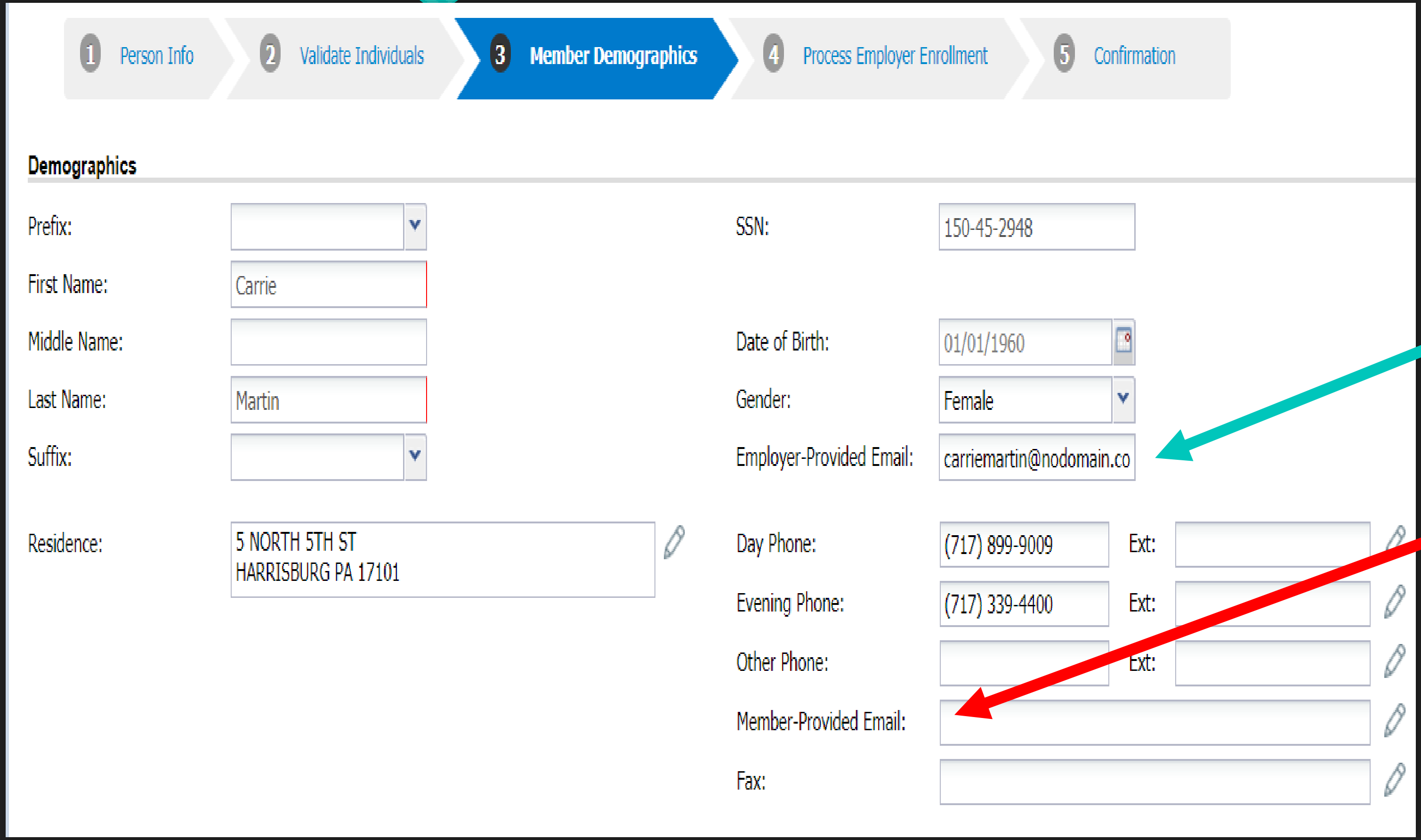
Adding the Address

- Click inside the Residence box to enter the address.
- Once open, ESS will auto-populate the county and the effective date (current date).
- Enter the zip code. The City and State will auto-populate based on the zip code you enter.

Completing the address

- You no longer need to spell out the last word of the address (Ex: Street, Avenue, Drive, etc)
- ESS is designed to shorten only the last word according to US Postal guidelines.
- After street address is entered, click the OK button at the top left of the New Residence Address Box.

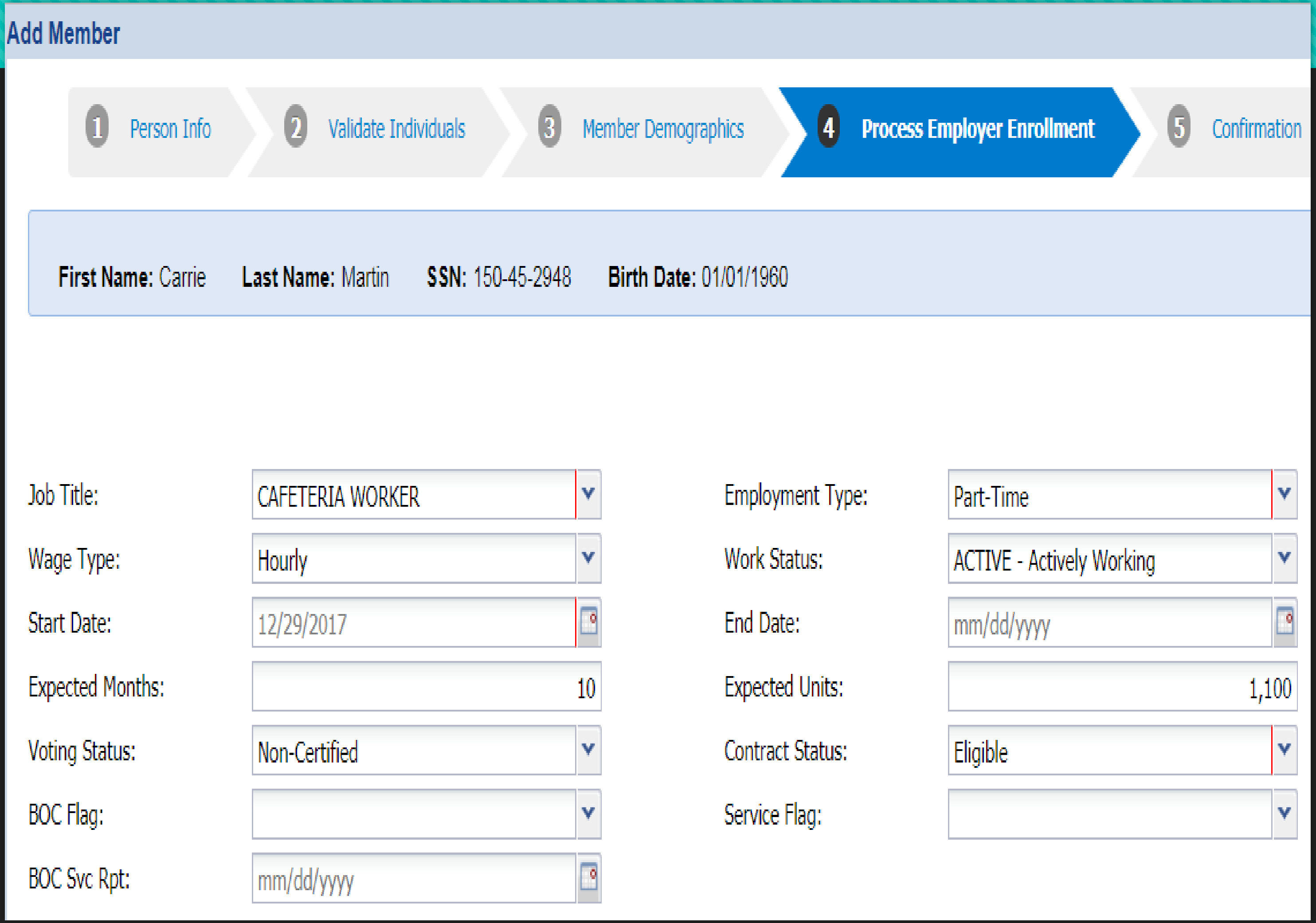
Finish Demographic Info



- Finish entering demographic info.
- Date of Birth will require 8 numbers (MM/DD/YYYY) but does not require slashes when entering.
- **Employer-provided email** is a field where you can enter an email address for your employee. This does not need to be their school email address.
- **Member-Provided Email** is <u>**not**</u> a field that can be saved by employers. This should be entered by the member through the Member Self-Service (MSS) system.
- Click Next at the bottom right of your screen to continue.

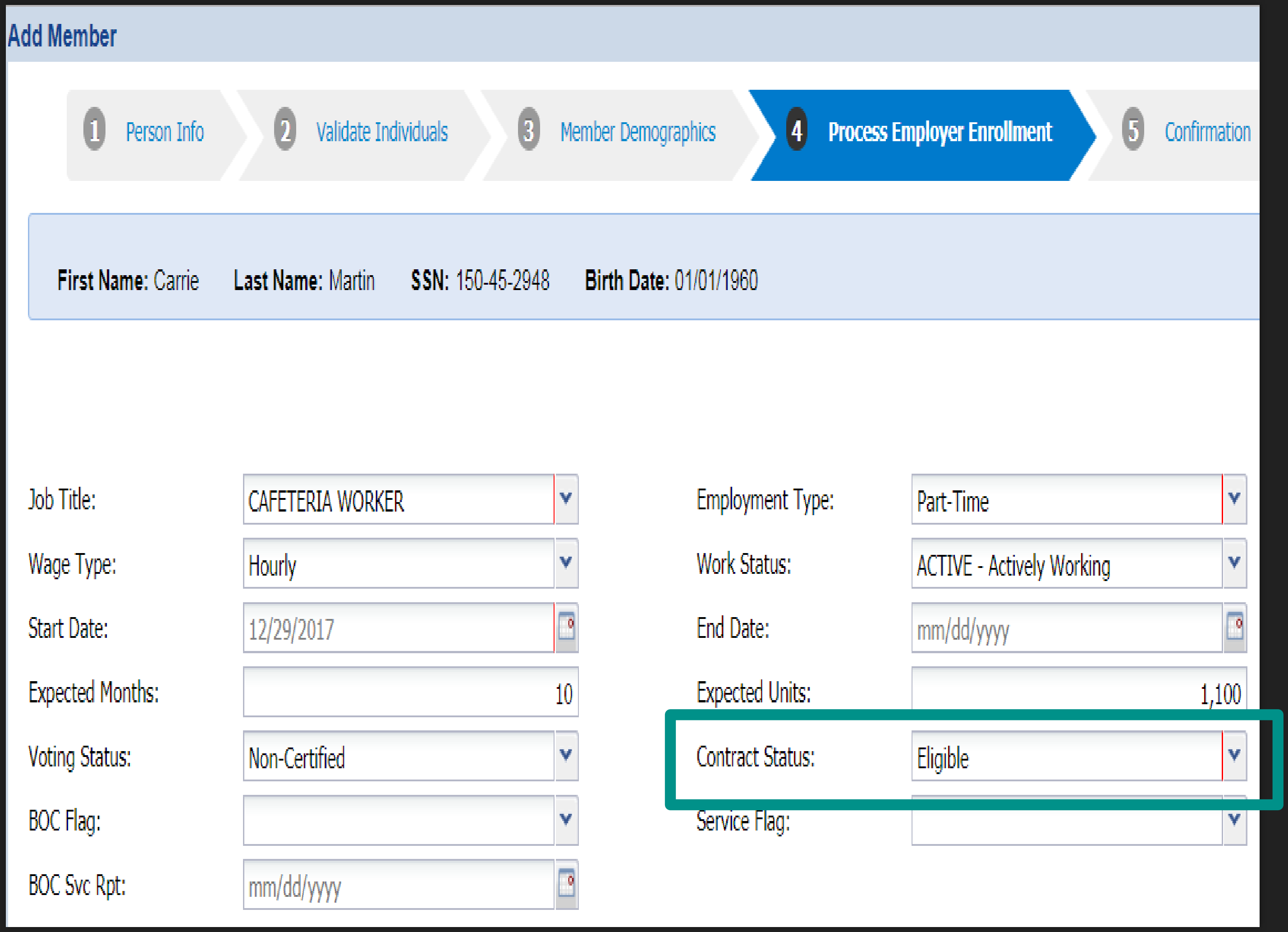
Step 4-Process Employer Enrollment

- Step 4 guides you through creating the employee's initial contract record.
- Job Titles are specific to titles your school has used for employees in the past. This list is organized alphabetically. Select a title from this list.
- Mandatory fields are marked with the red bar.
- Fields such as the End Date, BOC Flag, Service Flag, and BOC Svc Report date are not needed when creating a new ACTIVE contract.



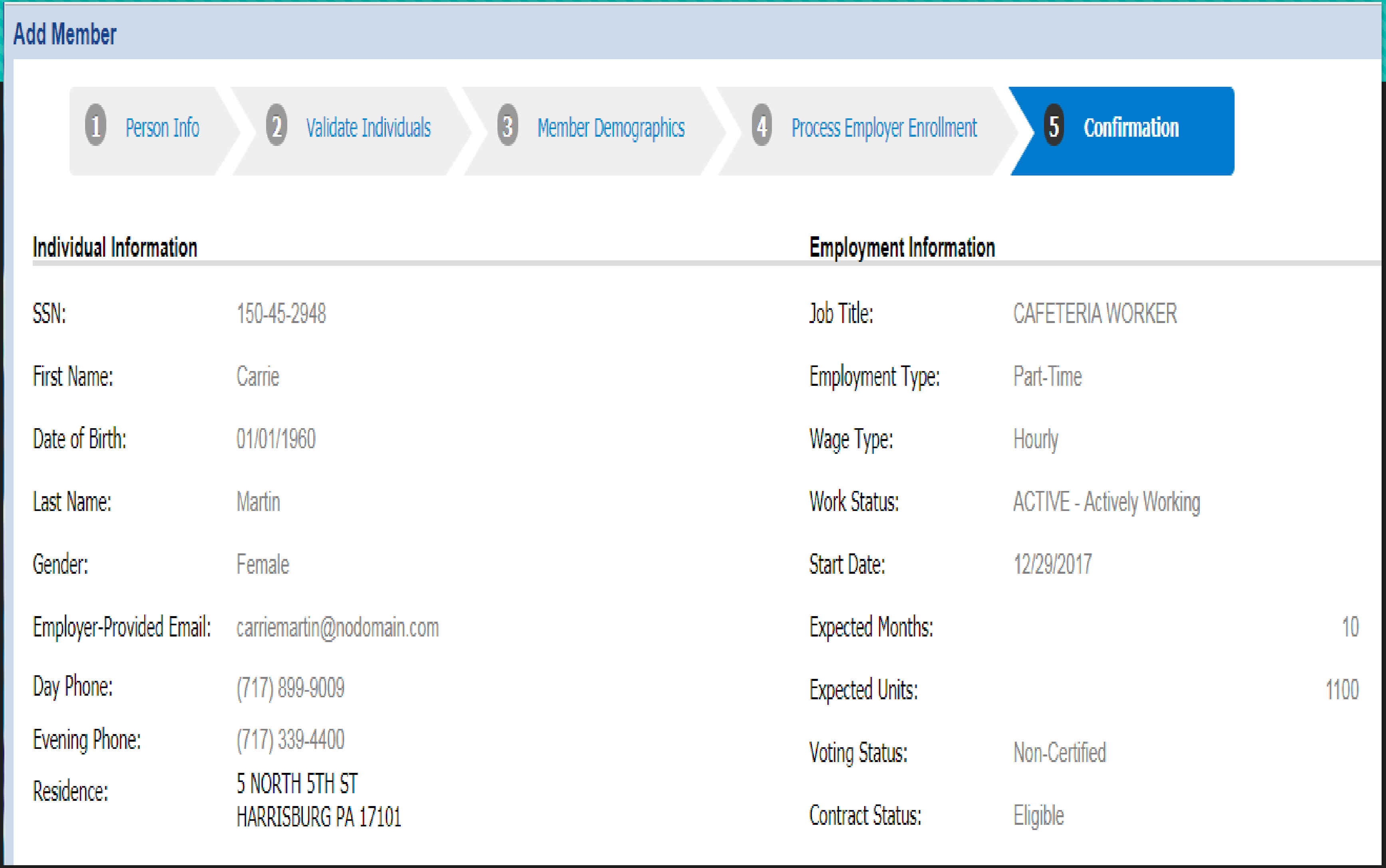
Step 4-Process Employer Enrollment cont.

- Carrie is a PT/Hourly Cafeteria worker. Her PT expected units are entered as 10 months/1100 hours. Her position does not require certification from the Department of Education, so her Voting Status is Non-Certified.
- **NEW:** Contract Status is a new field that needs to be entered by employers. The "Eligible" status should be selected unless an employee is being entered as ACTIVW-Waiver Request. A waiver would require the "Pending Waiver" contract status instead.
- Click the Next button at the bottom right of your screen to continue to the final step of the process.



Step 5: Confirmation

- Carefully review your employee's demographic and contract information for errors or typos before clicking the confirm button in the bottom right corner.
- Once confirmed, your employee can be reported on the next work history report.


Add Member

1 Person Info | 2 Validate Individuals | 3 Member Demographics | 4 Process Employer Enrollment | 5 Confirmation

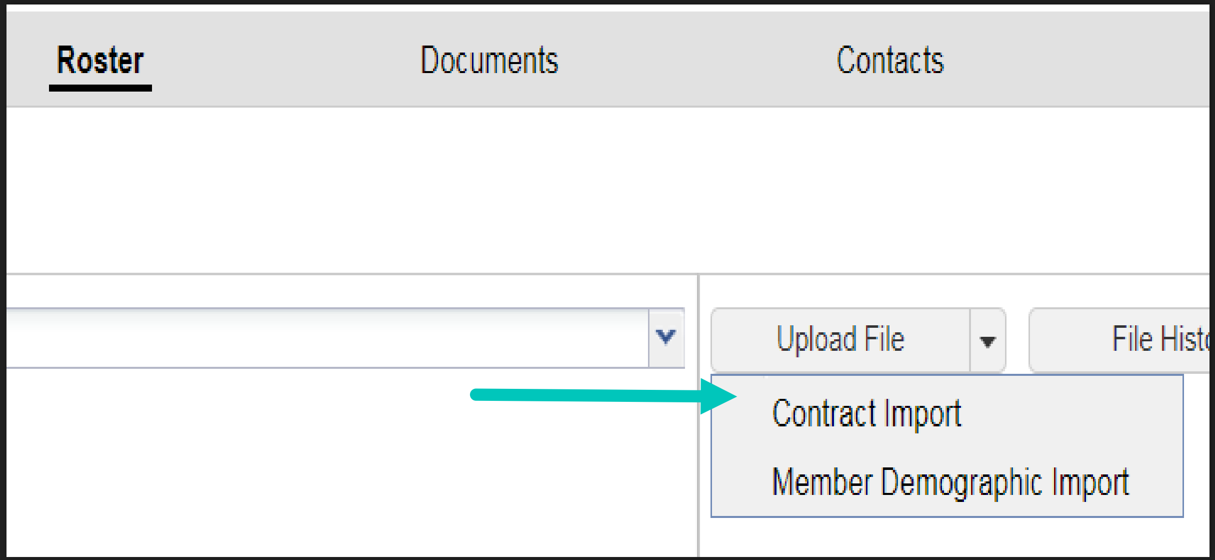
Individual Information		Employment Information	
SSN:	150-45-2948	Job Title:	CAFETERIA WORKER
First Name:	Carrie	Employment Type:	Part-Time
Date of Birth:	01/01/1960	Wage Type:	Hourly
Last Name:	Martin	Work Status:	ACTIVE - Actively Working
Gender:	Female	Start Date:	12/29/2017
Employer-Provided Email:	carriemartin@nodomain.com	Expected Months:	10
Day Phone:	(717) 899-9009	Expected Units:	1100
Evening Phone:	(717) 339-4400	Voting Status:	Non-Certified
Residence:	5 NORTH 5TH ST HARRISBURG PA 17101	Contract Status:	Eligible

After confirmation….

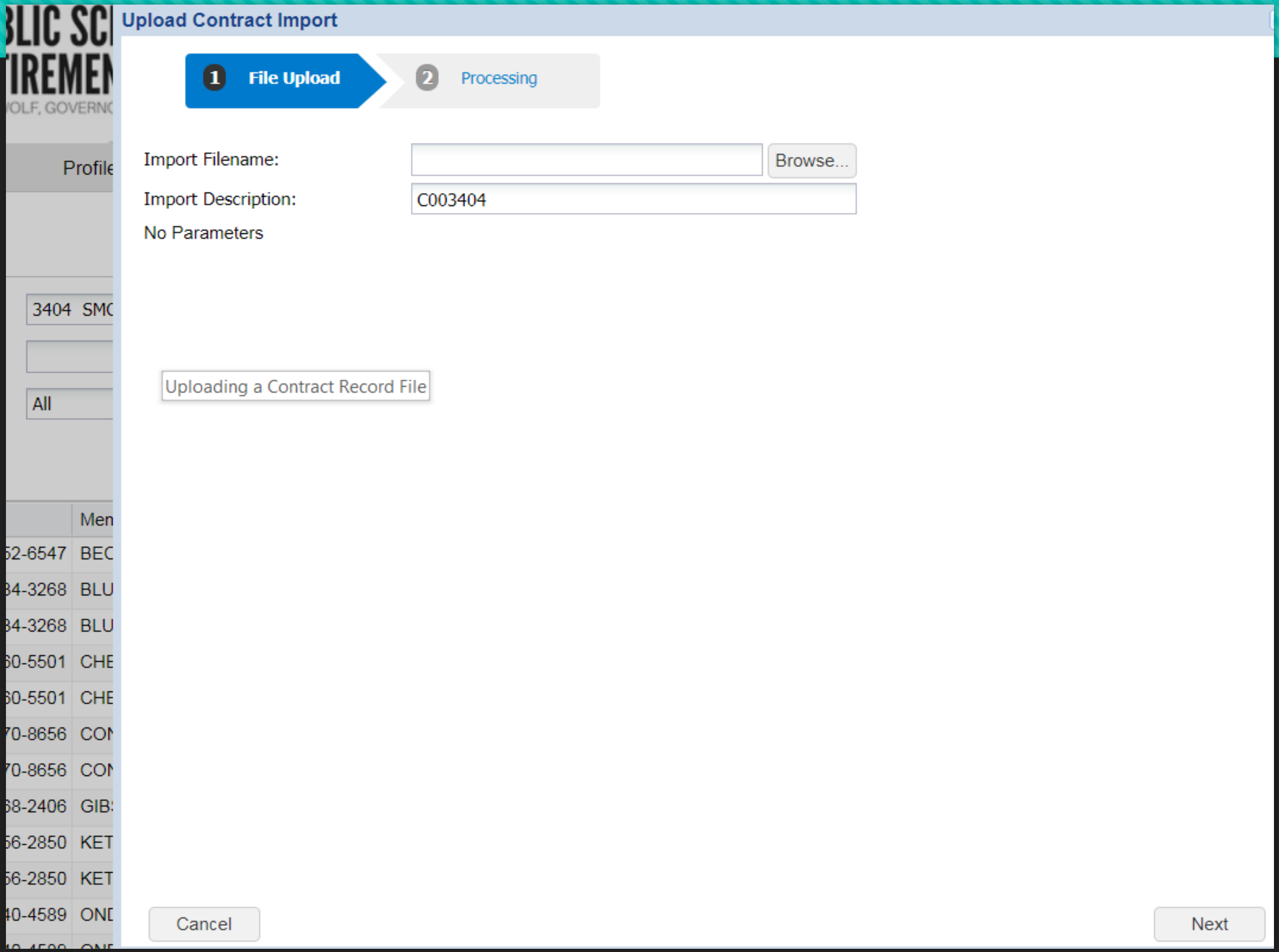
- After the Confirm button is clicked, ESS will show a message stating “Enrolling” while it processes your request.
- If any changes need to be made, you may use the Change button in the top left corner.
- Use the Back button on the blue banner to return to the main Roster page.

Uploading a Contract Record File

- From Roster tab, use the Upload File button and select the pull down arrow Contract Import option.



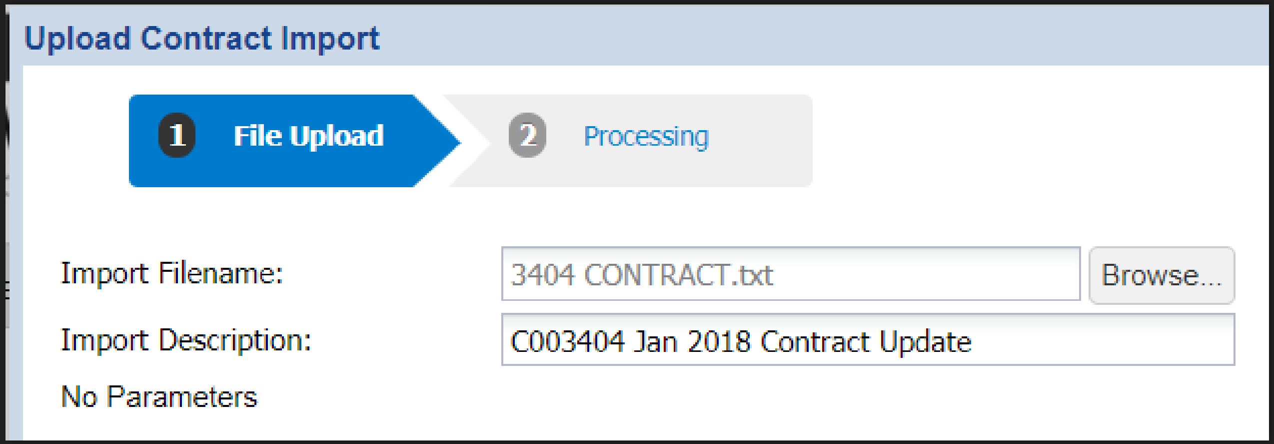
Importing a Contract Record File



- You will browse your computer files to locate the file you would like to import.
- The Import Description will auto-populate by showing “C003404” which represents a Contract Record file for reporting unit code 3404.
- You can change this description to be more specific to include the month, year, or reason for uploading this file.
- When you successfully locate your file, click Next at the bottom right of your screen to move into the Processing phase.

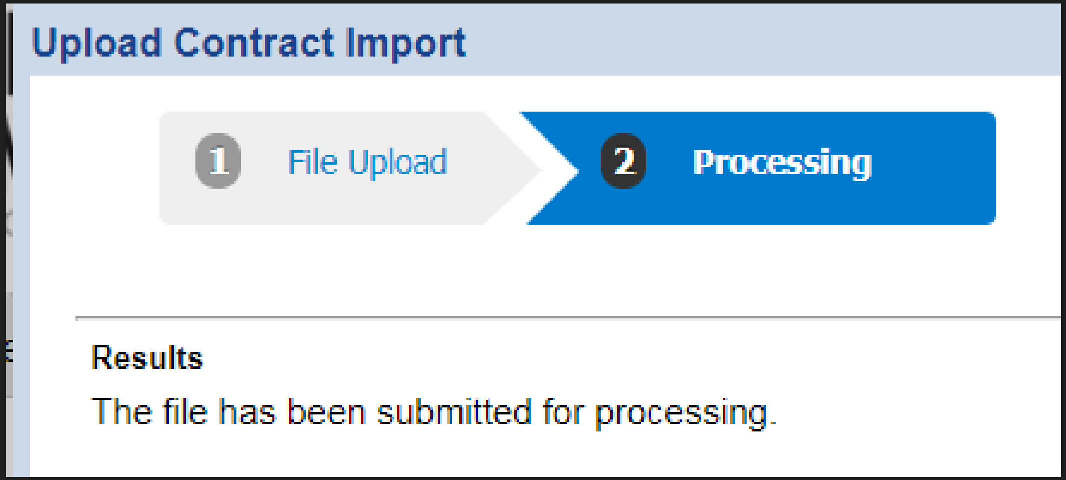
Selecting Your File

- File selected will show in gray.
- Import Description updated to my preference.
- To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- To proceed, click the Next button in the bottom right corner. A message stating “Processing file….Please wait” will display on your screen while processing.



Processing

- After the "Processing file…please wait" message, the screen will show your file results.
- You can view the details of your file using the Details button in the bottom right corner, which we used for the Demographic File.
- If you click the Close button in the bottom left, you can also use the File History button on the Roster page to view your file details.



File History button

File History

Close

Report Type: All

Date Range: 11/05/2017 To: 01/04/2018

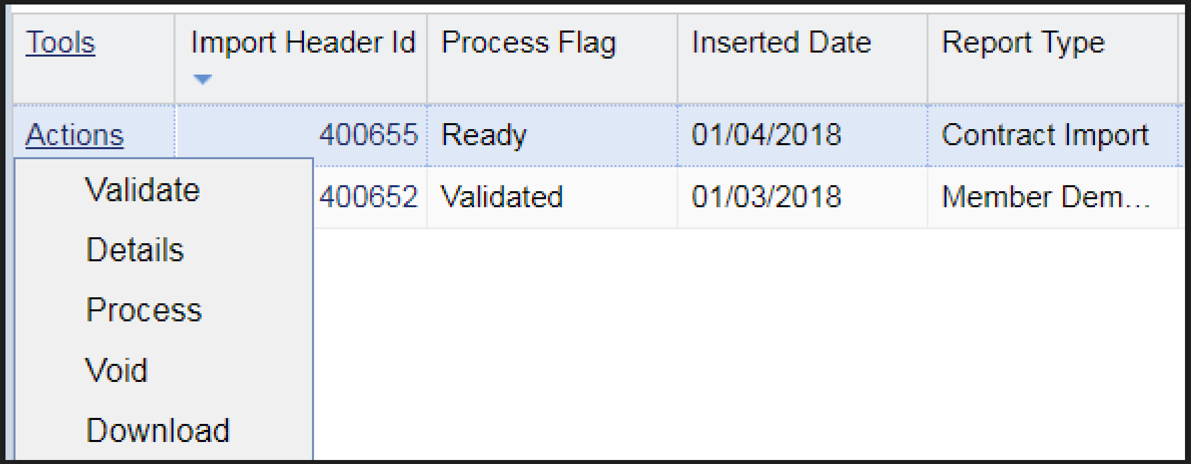
Status: All

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

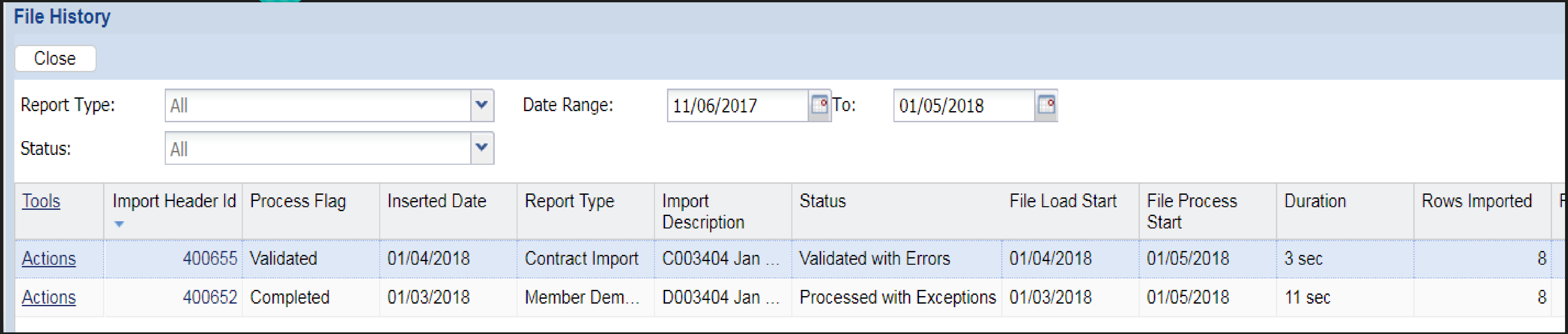
- The File History button serves as your work area and approved reports area. You can sort by Report Type, Date Range, or report Status.
- You can see the Demographic file that was validated earlier and the Contract Import that was just processed.
- To get to the Details of our Contract Import, you will use the Action button at the beginning of that row.

File History Action Button

- Click the Actions button for the Contract Import File.
- From the Actions button, you can Validate the file, view the Details where you can view/correct errors, Process the file, Void the file, or Download the file.
- First, we need to Validate the file.
- As the validation occurs, the Process Flag will read "Queued Validation".
- After the file is Validated, the status will change and the duration will populate.



Contract Import Validated



File History

Close

Report Type: All

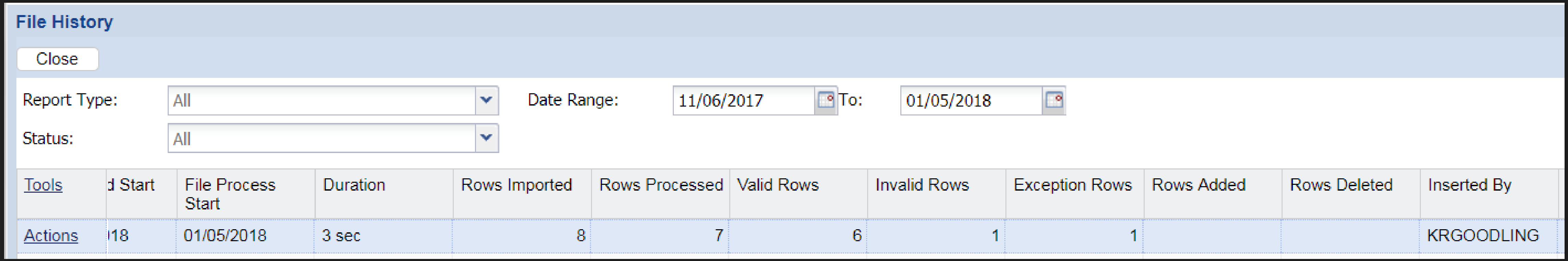
Status: All

Date Range: 11/06/2017 To: 01/05/2018

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported
Actions	400655	Validated	01/04/2018	Contract Import	C003404 Jan ...	Validated with Errors	01/04/2018	01/05/2018	3 sec	8
Actions	400652	Completed	01/03/2018	Member Dem...	D003404 Jan ...	Processed with Exceptions	01/03/2018	01/05/2018	11 sec	8

- The Contract Import file shows a Process Flag of Validated and a Status of "Validated with Errors" meaning there are rows that need to be corrected before processing the file.

Work Area for Contract Import



File History

Close

Report Type: All

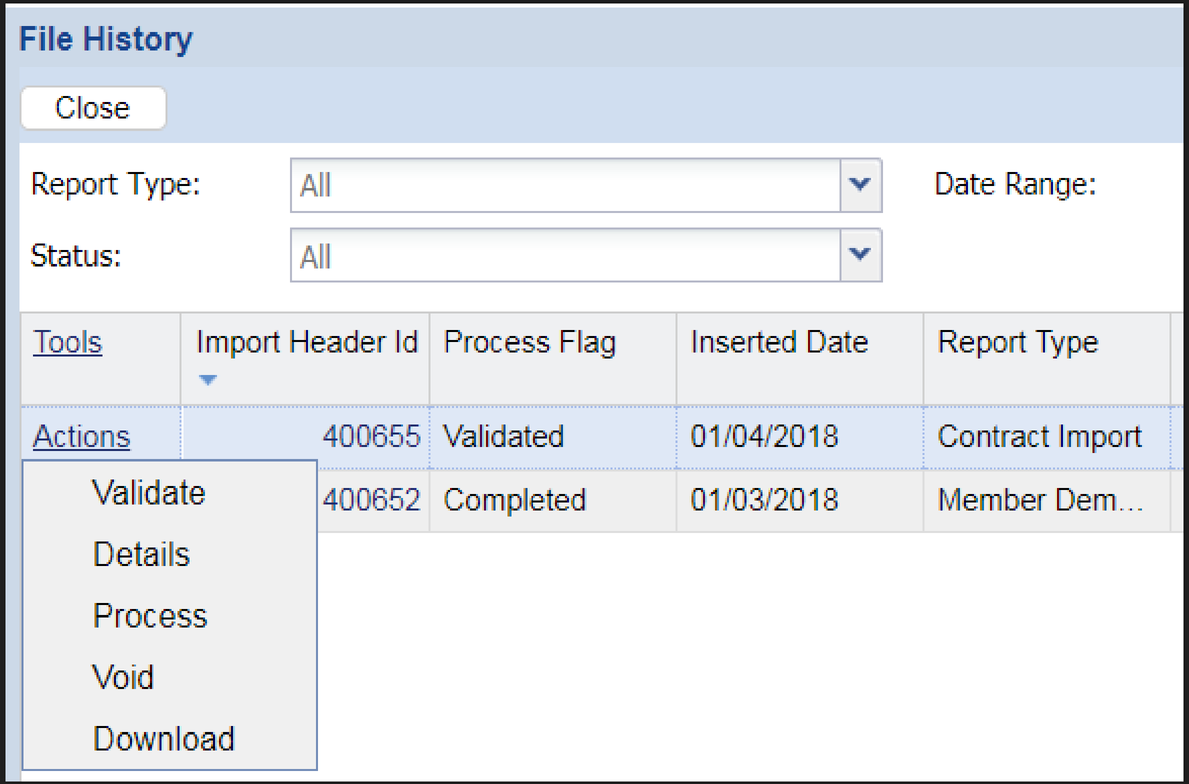
Date Range: 11/06/2017 To: 01/05/2018

Status: All

Tools	d Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By
Actions	18	01/05/2018	3 sec	8	7	6	1	1			KRGOODLING

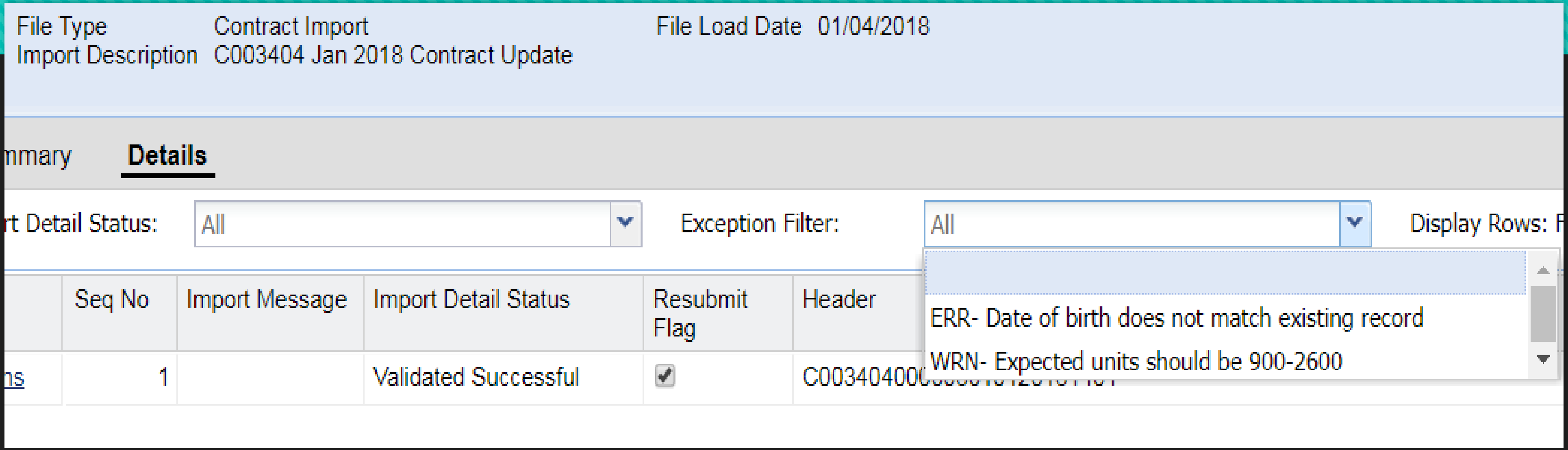
- The Contract Import imported 8 rows but only 6 rows are Valid. The file history screen shows that there is 1 Invalid row and 1 Exception row that should be corrected before the file is processed.
- To view the details of the file, use the Actions button at the start of the row.

Contract Import Details



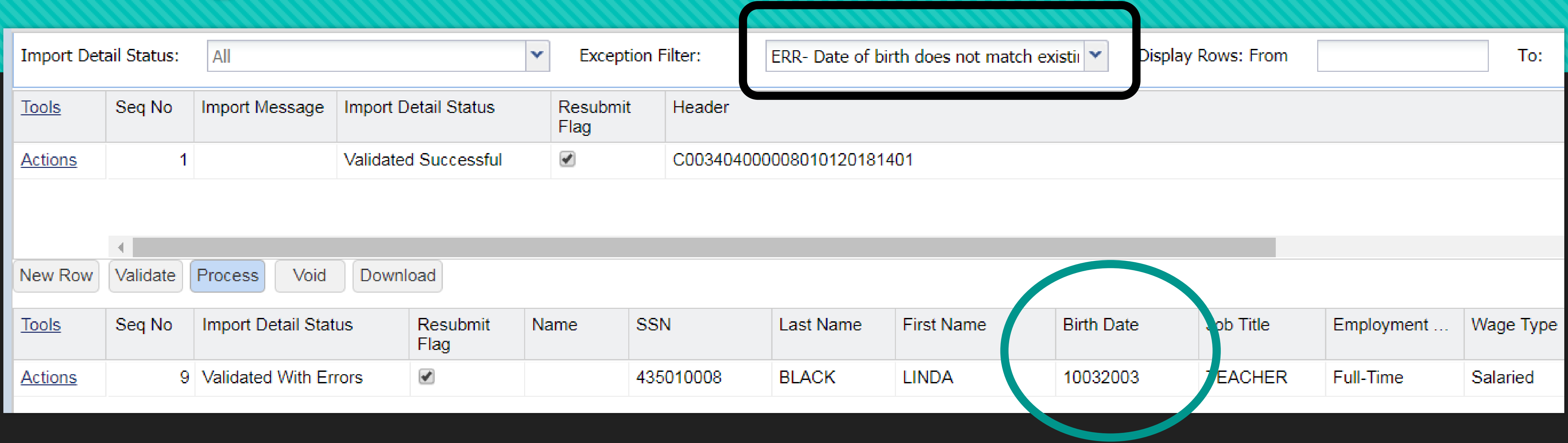
- Click Details to view the transaction rows and to use the exception filter to correct errors for the Contract Import file.

Exception Filter



- Use the Exception Filter arrow to show exceptions for the contract import file.
- There are two listed; an "ERROR-Date of birth does not match existing record" and a "WARNING-Expected units should be 900-2600."
- Invalid records will display as an ERROR (ERR).
- Exception records will display as a WARNING (WRN).
- If there were a longer list, you would use the scroll bar on the right side of the drop down menu to view all invalid/exception errors.

Fixing Error



- The ESS system validations found that there was an error with the Birth Date for Linda Black.
- If the incorrect Birth Date was a typographical error, please correct within the transaction row.
- This member's Birth Date should be corrected to show 10/03/1973 instead. While in edit mode, click inside the Birth Date field to correct the year to show 1973. Then click the Save button at the top left. Click the Edit button to move to the next correction.

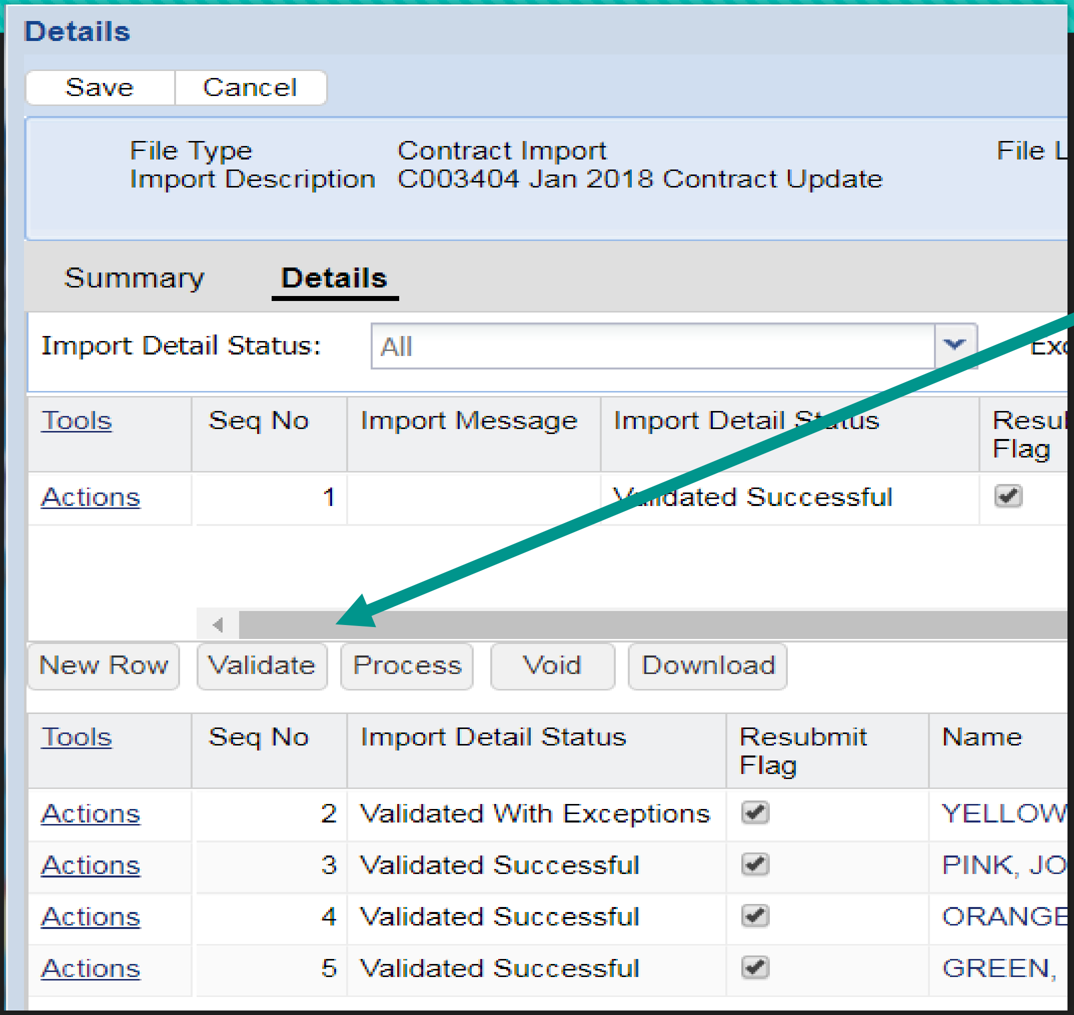
Correcting Expected Units

New Row | Validate | Process | Void | Download

Tools		Last Name	First Name	Birth Date	Job Title	Employment ...	Wage Type	Work Status	Start Date	End Date	Expected Months	Expected Units
Actions		YELLOW	JANE	10101980	TEACHER	Full-Time	Hourly	ACTIVE - Acti...	01012018		12	180

- Jane Yellow was found as an exception due to questionable expected units. As a Full-Time Hourly employee, her expected units should be between 900 and 2600 hours.
- Instead, the contract record imported shows she is expected to work 12 months for 180 days.
- By clicking inside the Expected Units field, you can change the number of hours she is expected to work to show 2080 hours.

After corrections, Validate file again

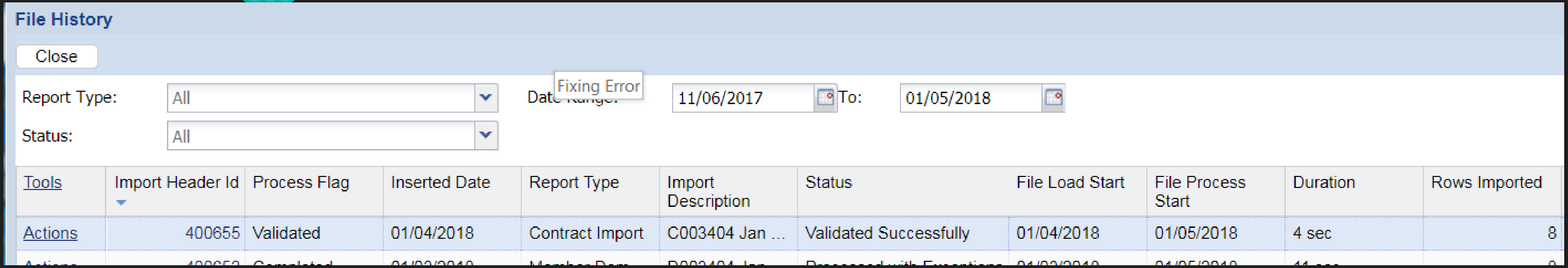


- Click the Validate button located on the left side of your screen about halfway done the page.

OR

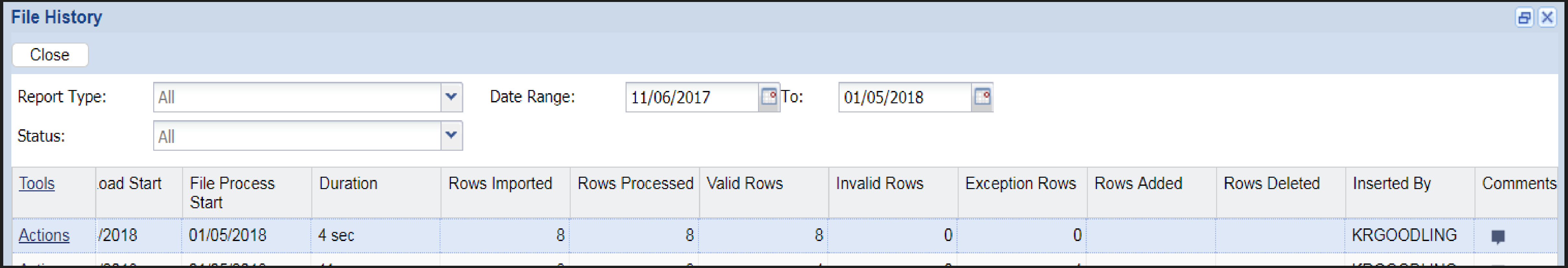
- Close the Details page at the top left after corrections have been made. This will return you to the File History page when you can select the Actions button, and Validate from there.

Validated Successfully



- From the File History screen you can see that the Process Flag now shows the Contract Import file as Validated and the Status displays as "Validated Successfully" meaning that the exceptions and invalids were successfully corrected.

Validated Successfully-Row Count


File History

Close

Report Type: All

Date Range: 11/06/2017 To: 01/05/2018

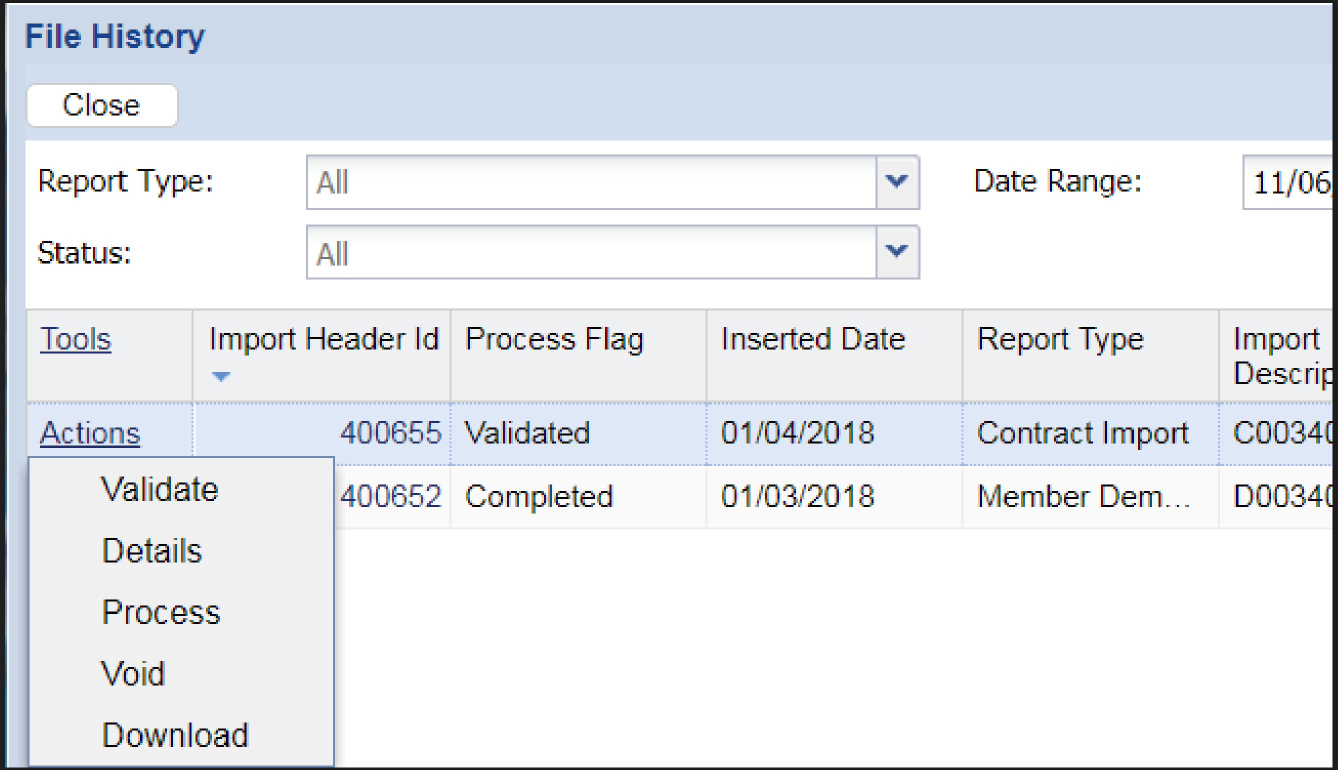
Status: All

Tools	oad Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By	Comments
Actions	/2018	01/05/2018	4 sec	8	8	8	0	0			KRGOODLING	

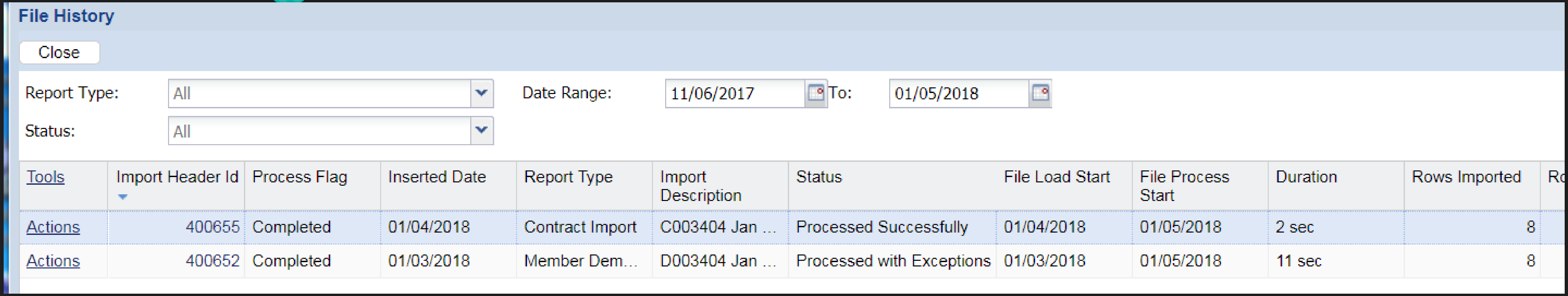
- Scrolling to the right of your screen, the dark blue row represents our Contract Import line that was just Validated Successfully.
- The Contract Import has imported 8 rows, processed 8 rows, and now shows 8 Valid rows, with no Invalid or Exception Rows.

Processing the Contract Import

- Scroll back to the left and click the Actions button at the start of the Contract Import row.
- Select Process.



File Processed Successfully



File History

Close

Report Type: All

Status: All

Date Range: 11/06/2017 To: 01/05/2018

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Ro
Actions	400655	Completed	01/04/2018	Contract Import	C003404 Jan ...	Processed Successfully	01/04/2018	01/05/2018	2 sec	8	
Actions	400652	Completed	01/03/2018	Member Dem...	D003404 Jan ...	Processed with Exceptions	01/03/2018	01/05/2018	11 sec	8	

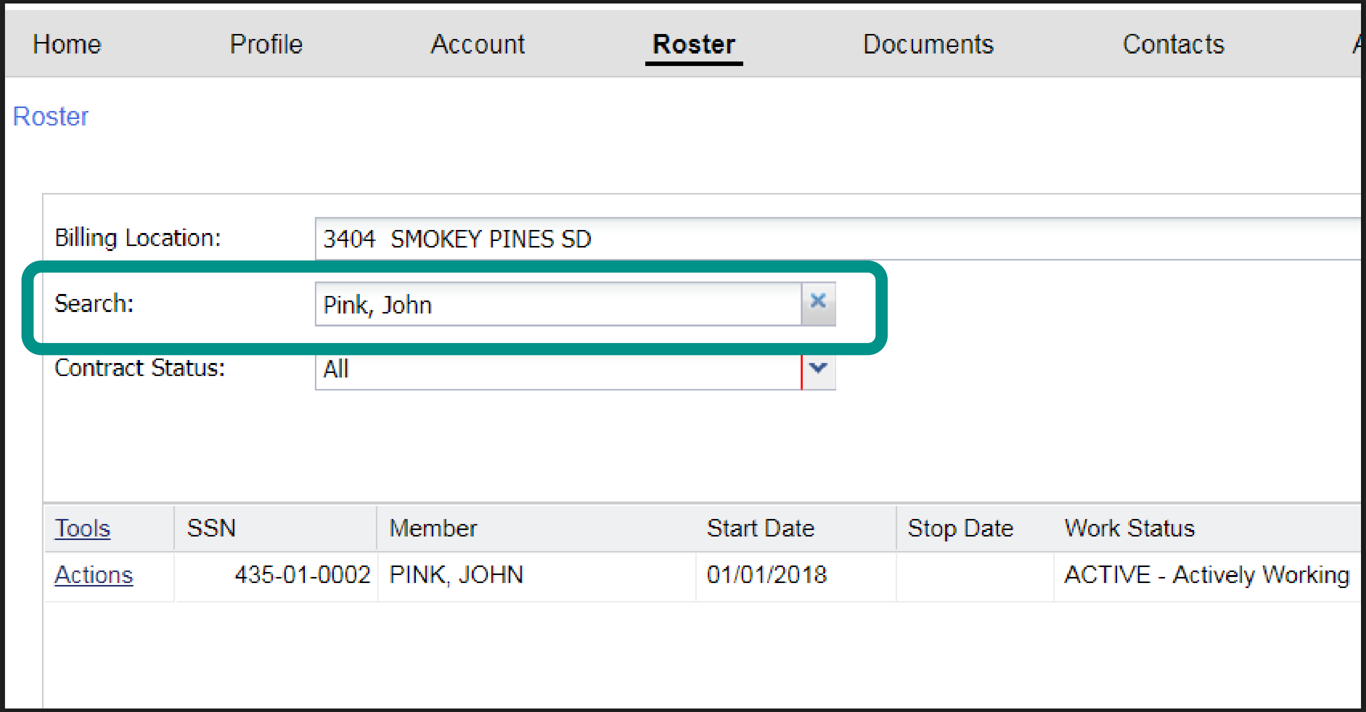
- Once processed, the Process Flag with show as Completed and the Status will show as Processed Successfully for the Contract Import File for January.
- Click the Close button at the top left of the screen to return to the Roster page.

Roster Tab: Searching and Sorting your Roster

Your guide to finding current and past employees that have worked for your school.

Search Box feature

- To search for an employee, enter the first and/or last name, or social security number in the Search box.
- Member John Pink was newly added to the roster. Entering “Pink, John” in the search box will bring up any employees with this name.
- To search with a full name, the last name must be entered first, followed by a comma, then the first name.



Searching a Partial Name

Billing Location: 3404 SMOKEY PINES SD

Search: Blue

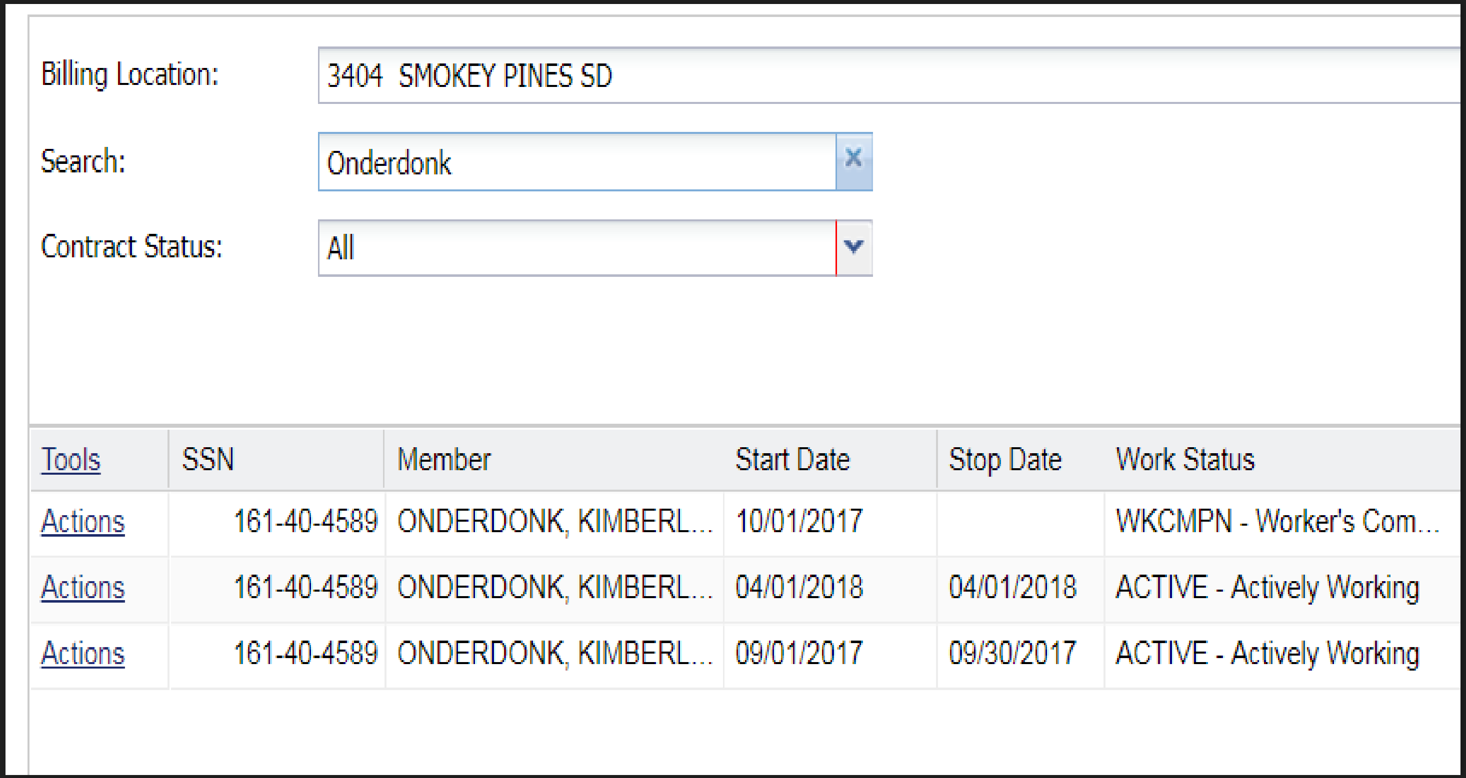
Contract Status: All

Tools	SSN	Member	Start Date	Stop Date	Work Status
Actions	199-34-3268	BLUE WILLIAMS, SAMA...	11/09/2017		ACTMLC - Activated Militar...
Actions	199-34-3268	BLUE WILLIAMS, SAMA...	10/01/2017	11/08/2017	ACTIVE - Actively Working
Actions	215-42-5142	BLUE, BILL BOB	10/01/2017		ACTIVE - Actively Working
Actions	435-01-0007	BLUE, DEB	01/01/2018		ACTIVE - Actively Working
Actions	178-52-2220	BLUE, WANDA	09/01/2017		ACTIVE - Actively Working

- If only "Blue" is entered in the Search Box, any employee with BLUE within their name will be found in the search.
- This search found four members.

Members with Multiple Contracts

- Any contracts from your school associated with the employee you are searching for will be found in your search.
- **Open contract records will not have a stop date.** When a new contract is created, the previous open contract should close without a gap in dates.



Billing Location: 3404 SMOKEY PINES SD

Search: Onderdonk

Contract Status: All

Tools	SSN	Member	Start Date	Stop Date	Work Status
Actions	161-40-4589	ONDERDONK, KIMBERL...	10/01/2017		WKCMPN - Worker's Com...
Actions	161-40-4589	ONDERDONK, KIMBERL...	04/01/2018	04/01/2018	ACTIVE - Actively Working
Actions	161-40-4589	ONDERDONK, KIMBERL...	09/01/2017	09/30/2017	ACTIVE - Actively Working

Partial SSN search

- Searches can be done for partial information also. For example, "435" will find any members whose SSN begin with those three digits.

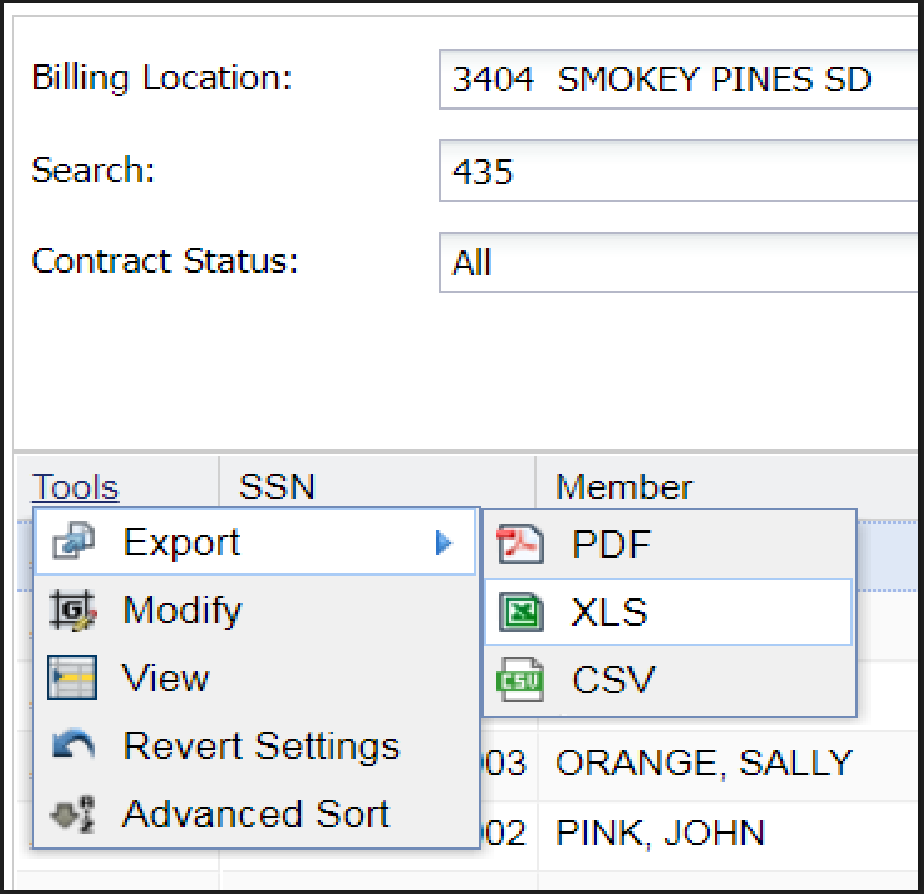
Billing Location: 3404 SMOKEY PINES SD

Search: 435

Contract Status: All

Tools	SSN	Member	Start Date	Stop Date	Work Status
Actions	435-01-0008	BLACK, LINDA	01/01/2018		ACTIVE - Actively Working
Actions	435-01-0007	BLUE, DEB	01/01/2018		ACTIVE - Actively Working
Actions	435-01-0004	GREEN, CURTIS	01/01/2018		ACTIVE - Actively Working
Actions	435-01-0003	ORANGE, SALLY	01/01/2018		ACTIVE - Actively Working
Actions	435-01-0002	PINK, JOHN	01/01/2018		ACTIVE - Actively Working
Actions	435-01-0005	PURPLE, FRANK	01/01/2018		ACTIVE - Actively Working
Actions	435-01-0006	RED, BARBARA	01/01/2018		ACTIVE - Actively Working
Actions	435-01-0001	YELLOW, JANE	01/01/2018		ACTIVE - Actively Working

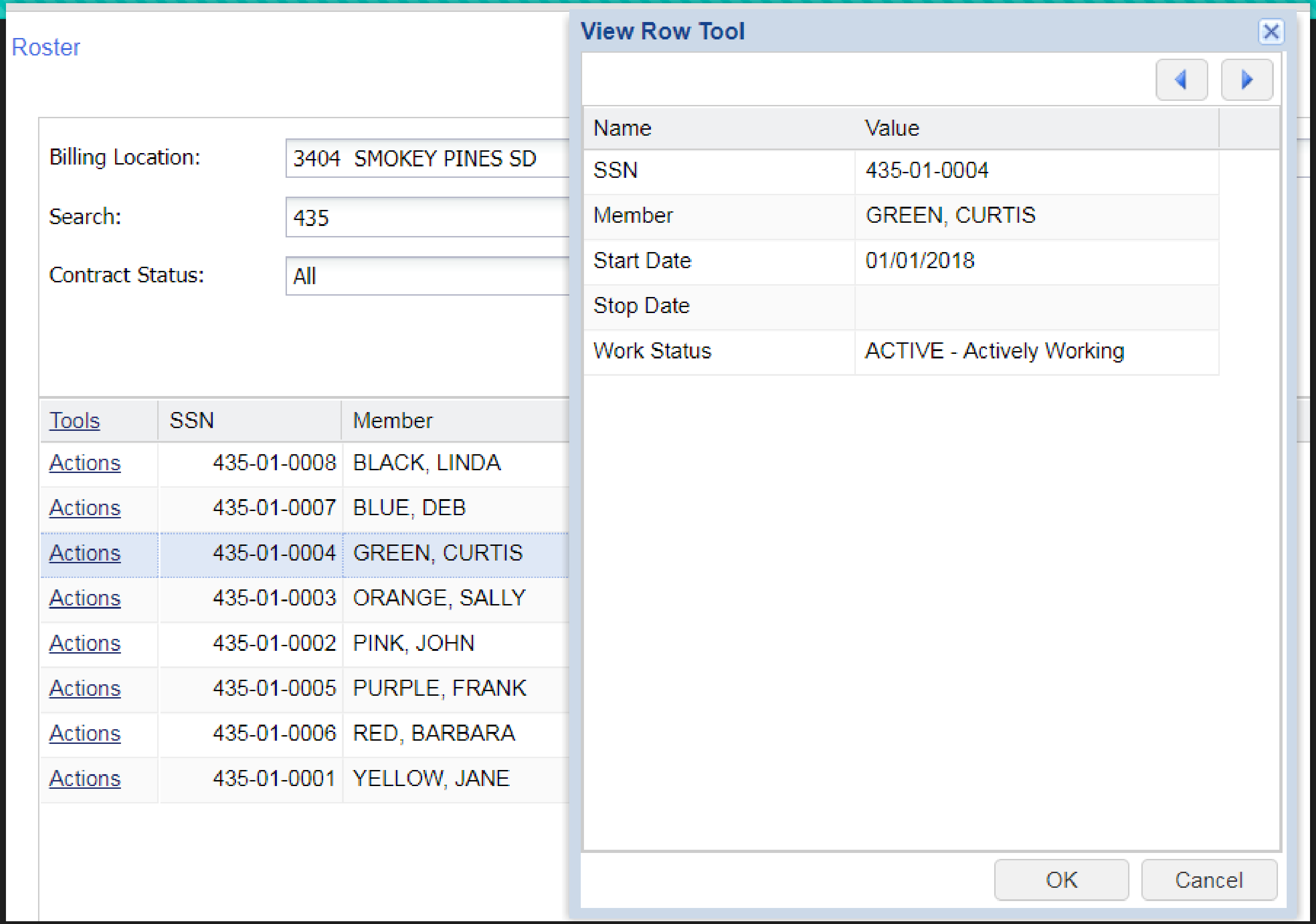
Tools Button on Roster Tab



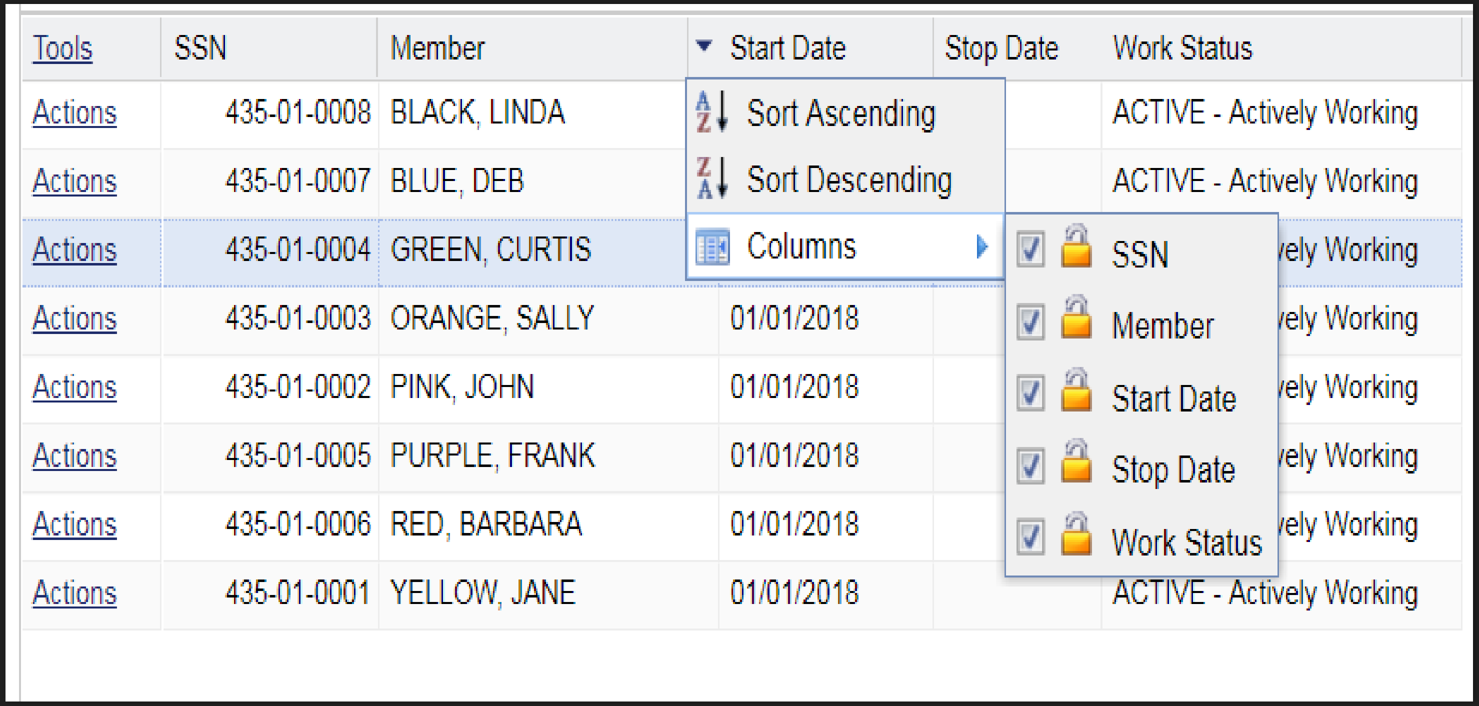
- Using the Tools button on your Roster tab you can **Export** your Roster. When the blue arrow is clicked, you can select a PDF, XLS or SCV file containing your roster details.
- **Modify** does not have employer functionally currently.
- **View** allows you to see roster contract information in a different format.
- At the right of each column header is a pull down arrow giving options for how the roster can be sorted. **Revert Settings** will bring this screen back to the standard format.
- **Advanced Sort** gives you the option to reorganize the order of your columns.

View Row Tool

- When View is selected, the View Row Tool will appear. This starts with the person at the top of your roster and allows you to use the left/right arrows to read through member contracts.
- The Roster will highlight the record being viewed in blue behind the View Row Tool screen. Example: Curtis Green
- The OK or Cancel buttons at the bottom of that screen will close this function.



Column sorting

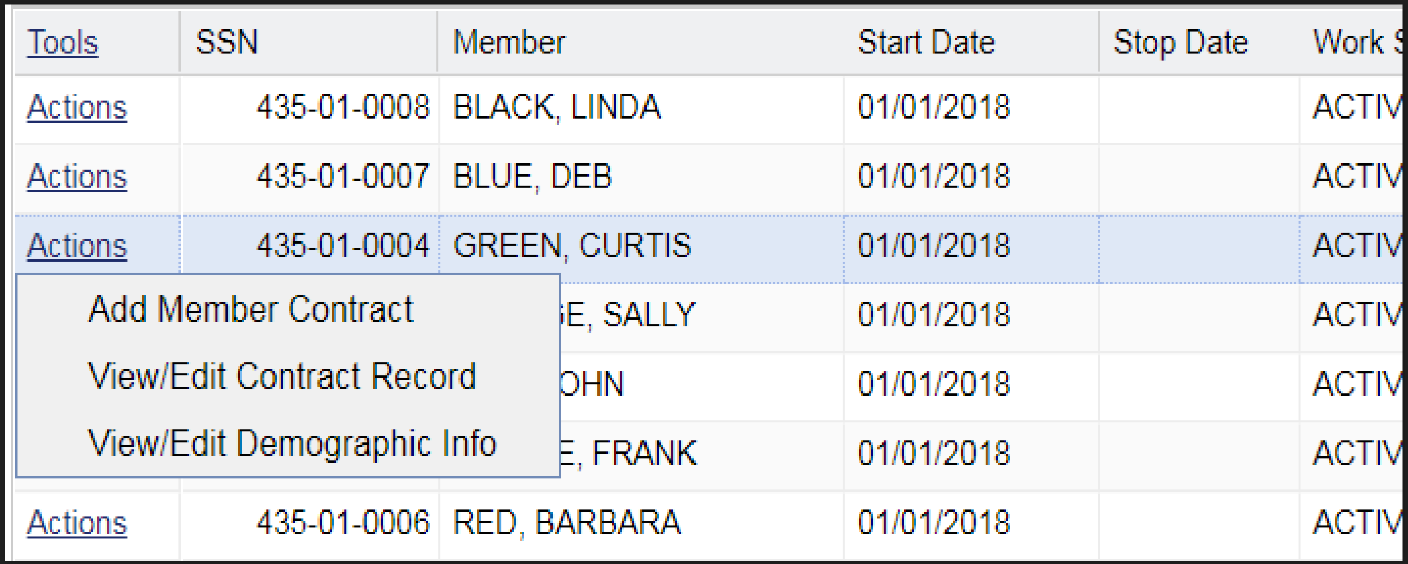


- Each column can be sorted Alphabetically Ascending or Descending and columns can be turned on or off per preference using the checkboxes.
- Example-Member Column. The down arrow shows your options for sorting.
- If you sort and realize you would like to go back to the standard format, Revert Settings is available using the Tools button at the left of the column headers.

Roster Tab: Manually updating Contract Records and Demographic Information

The **Actions** button provides options for updating member records manually.

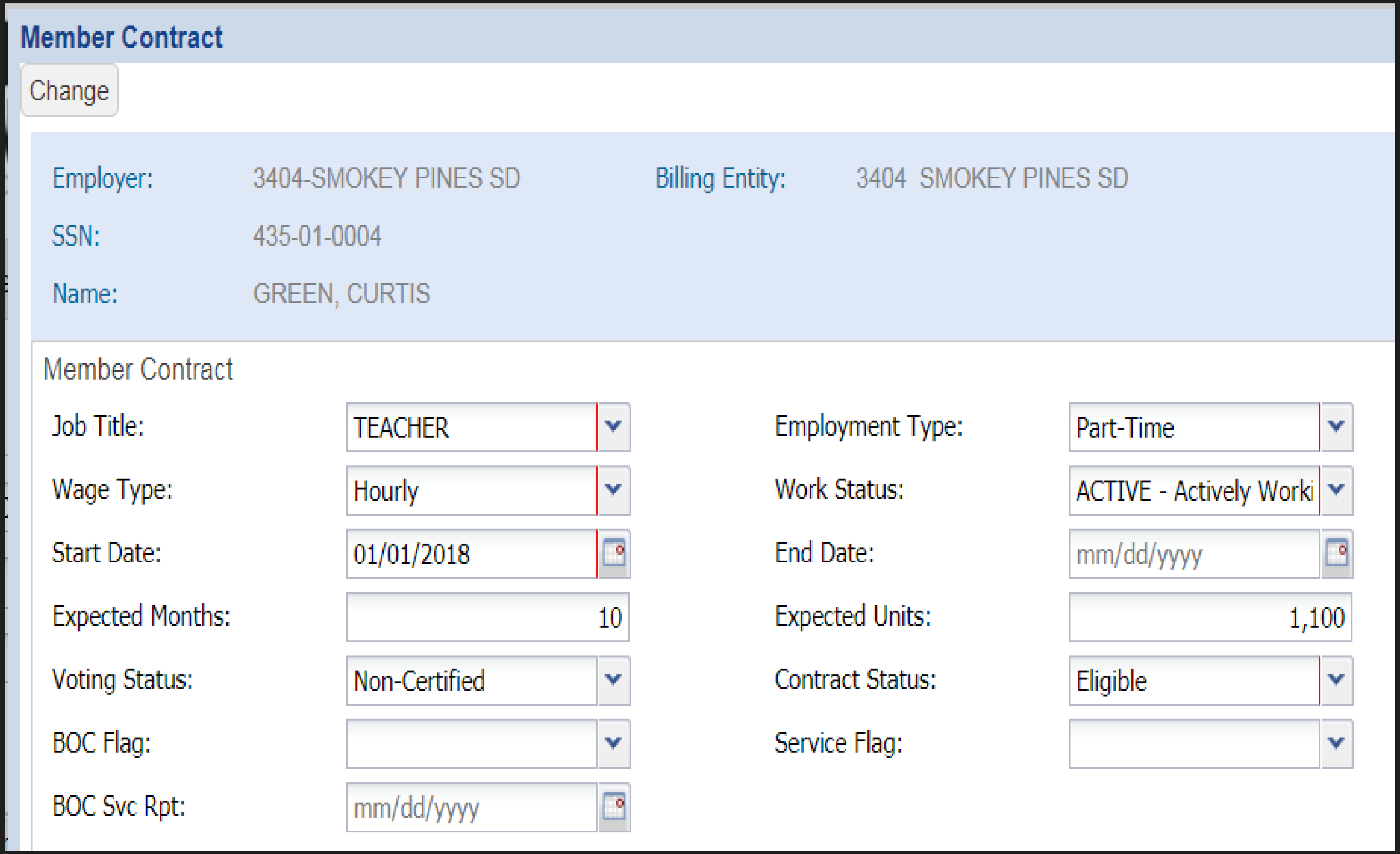
Roster Actions button



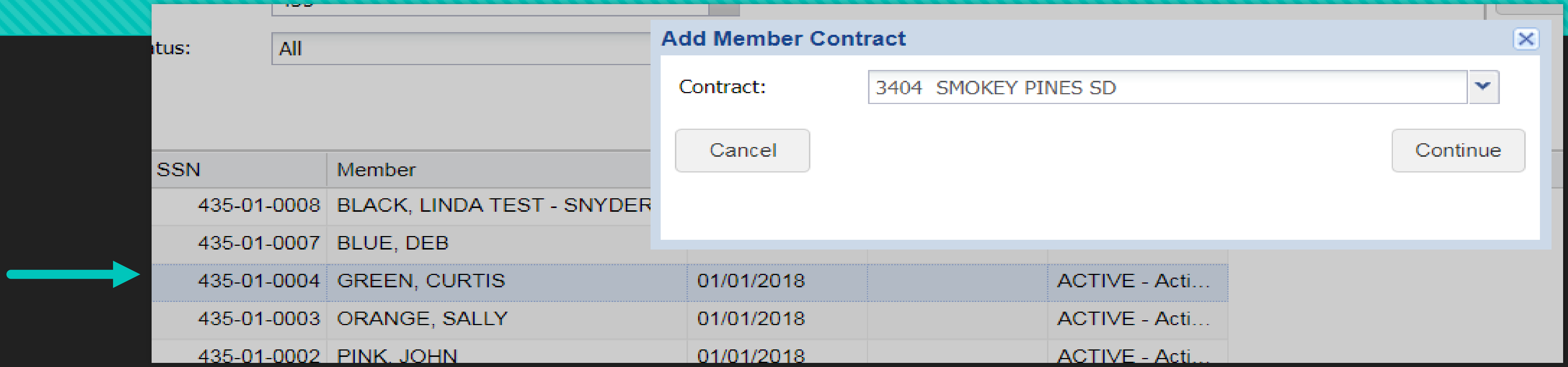
- Roster Actions include:
  - Adding a member contract manually for an existing employee
  - View/Edit Contract Record
  - View/Edit Demographic Info

View/Edit Member Contract

- You may want to view a member's contract to be sure of wage type and expected units before creating a new member contract.
- The Change button in the top left will allow you to make edits to the current contract record. When completed, click the OK button in the bottom right corner.



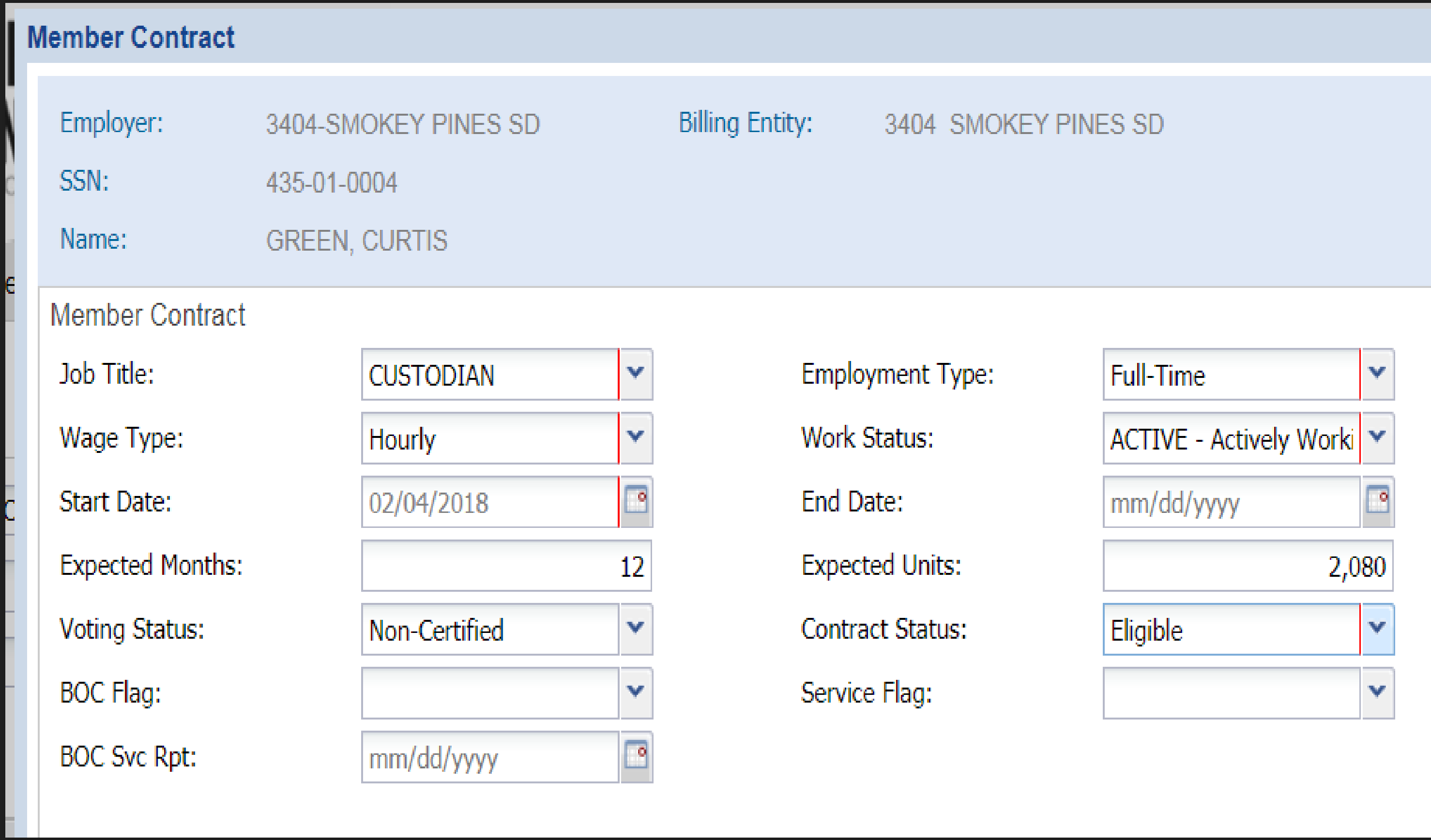
Add new Member Contract



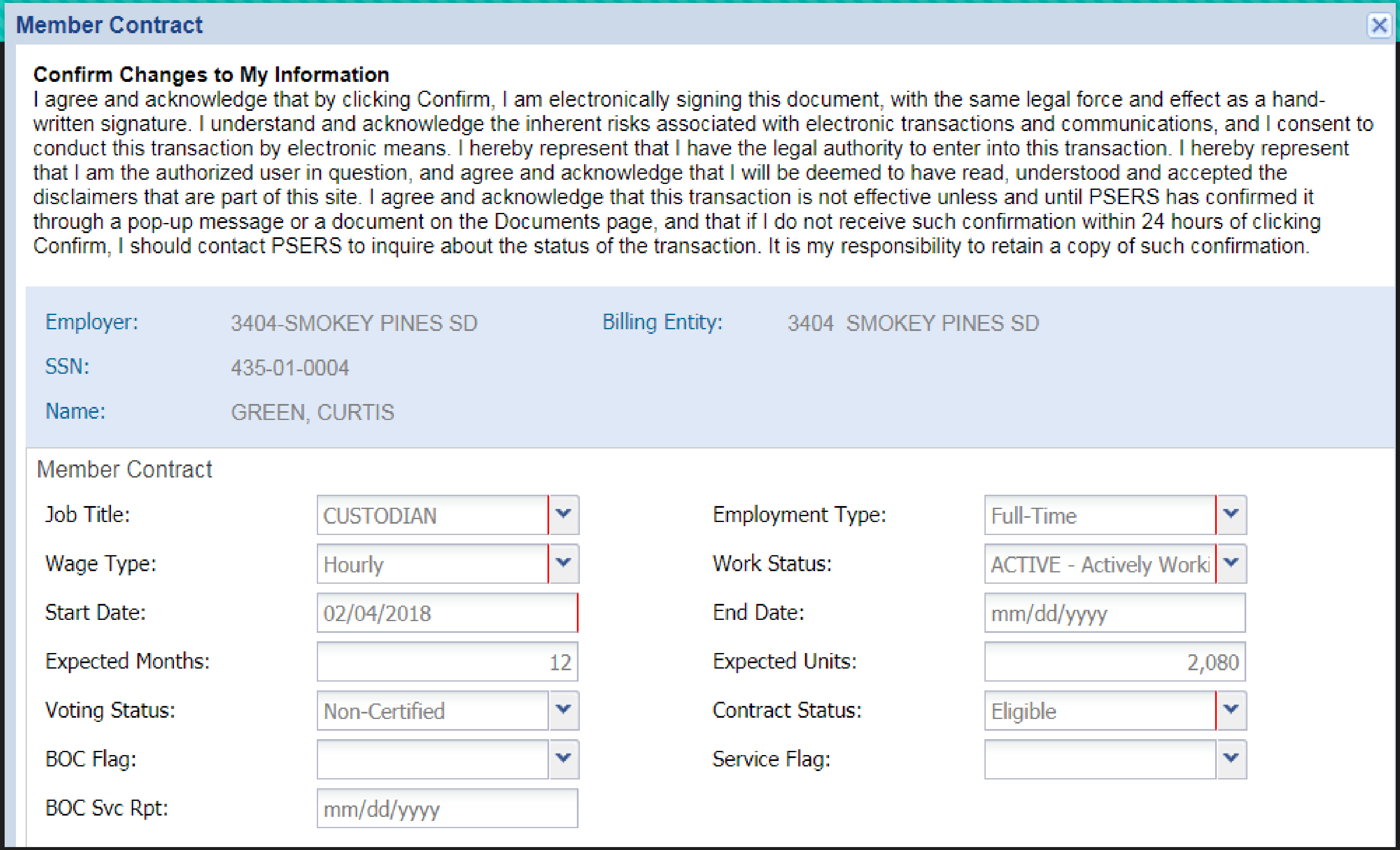
- The Add Member Contract function will allow you to create new contracts manually for your members.
- When you click the Add Member Contract option, a dialogue box will appear populating your school name. Click Continue.
- In the background, you will see that the transaction row for Green, Curtis is highlighted as the member you are generating a new contract for.

View/Edit Contract Record

- The member contract screen populates the name of the school and the member's name and SSN in the blue banner.
- Using the tab button will allow you to move from field to field or you may use your mouse to navigate.
- You will not need to enter an end date when creating a new record.
- Contract status will be Eligible for most contracts.
- A Termination record is the only contract that requires BOC Flag, Service Flag and BOC Service Report date.
- Click Save when completed.



New Contract Confirmation



Member Contract

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.

Employer:	3404-SMOKEY PINES SD	Billing Entity:	3404 SMOKEY PINES SD
SSN:	435-01-0004		
Name:	GREEN, CURTIS		

Member Contract

Job Title:	CUSTODIAN	Employment Type:	Full-Time
Wage Type:	Hourly	Work Status:	ACTIVE - Actively Worki
Start Date:	02/04/2018	End Date:	mm/dd/yyyy
Expected Months:	12	Expected Units:	2,080
Voting Status:	Non-Certified	Contract Status:	Eligible
BOC Flag:		Service Flag:	
BOC Svc Rpt:	mm/dd/yyyy		

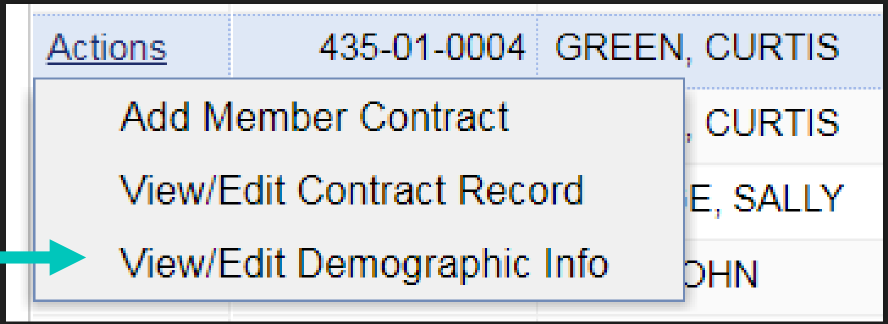
- Review new contract information entered. If all details appear correctly, click the Confirm button at the bottom right.
- If there is a detail you would like to change, click the Back button at the bottom of the page.
- Or, if you realize this contract was created in error you may click Cancel in the bottom left to cancel the new contract.

Contract Check

Actions	435-01-0004	GREEN, CURTIS	02/04/2018		ACTIVE - Acti...
Actions	435-01-0004	GREEN, CURTIS	01/01/2018	02/03/2018	ACTIVE - Acti...
Actions	435-01-0003	ORANGE, SALLY	01/01/2018		ACTIVE - Acti...
Actions	435-01-0002	PINK, JOHN	01/01/2018		ACTIVE - Acti...

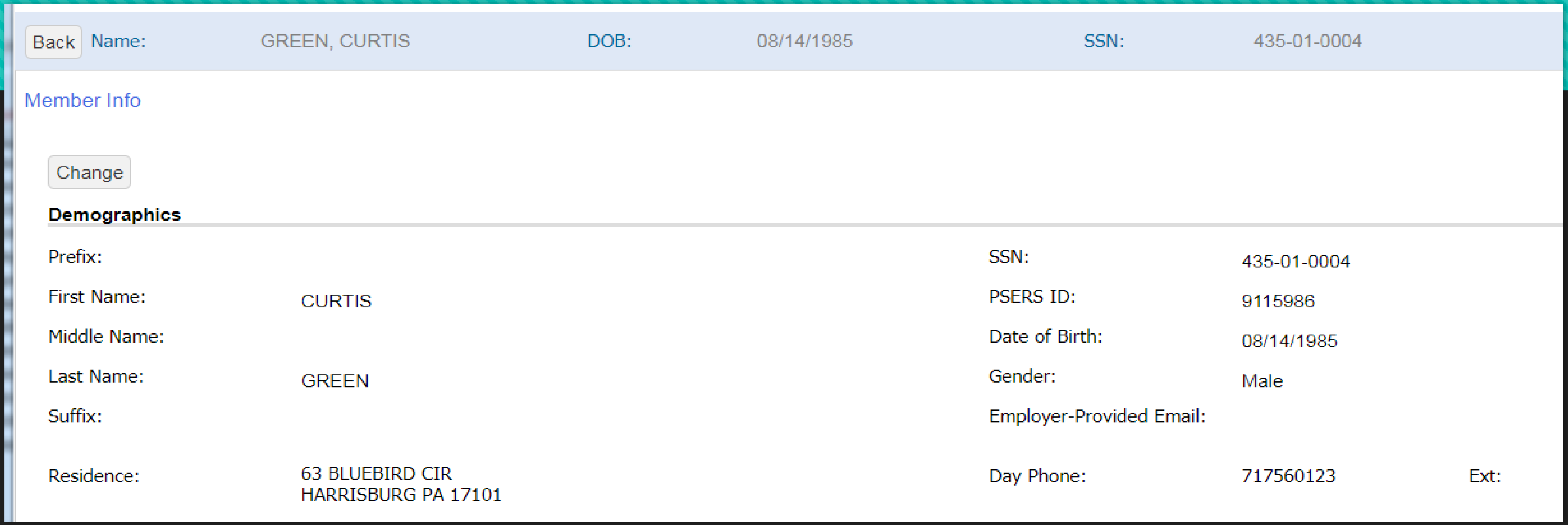
- After clicking Confirm, a new row will appear for that member in your roster tab.
- The previous contract will also be end dated. In our example, Green's new contract started 2/4/2018 so the hourly teacher contract is end dated as of 2/3/2018.

View/Edit Demographic Info



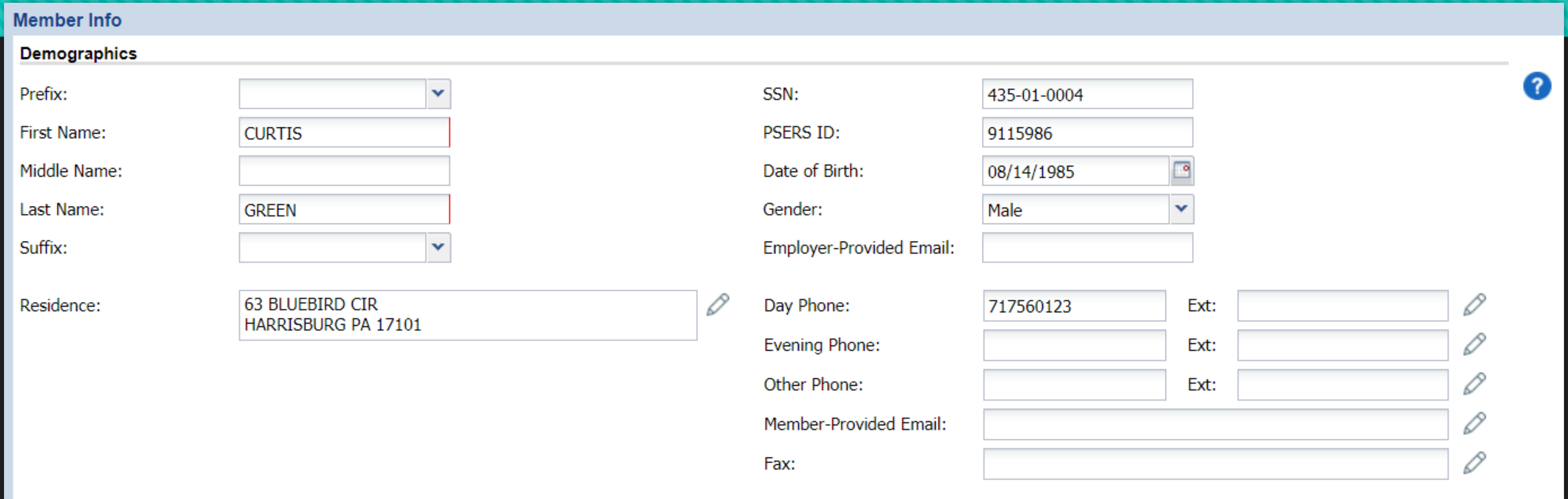
- Back to the Actions button, Click View/Edit Demographic Info to make a change to a member's demographic information.

Updating Member Demographic Info



- If you only want to view the member's demographic information and not make changes, review, then use the Back button in the top left corner to return to the Roster tab.
- If changes are needed to update information, click the Change button above the word Demographics.
- **Remember, SSN and DOB changes must be made by PSERS**. If this information is incorrect, please submit a **Demographic Information Change Request Form** from the form list on your Dashboard.

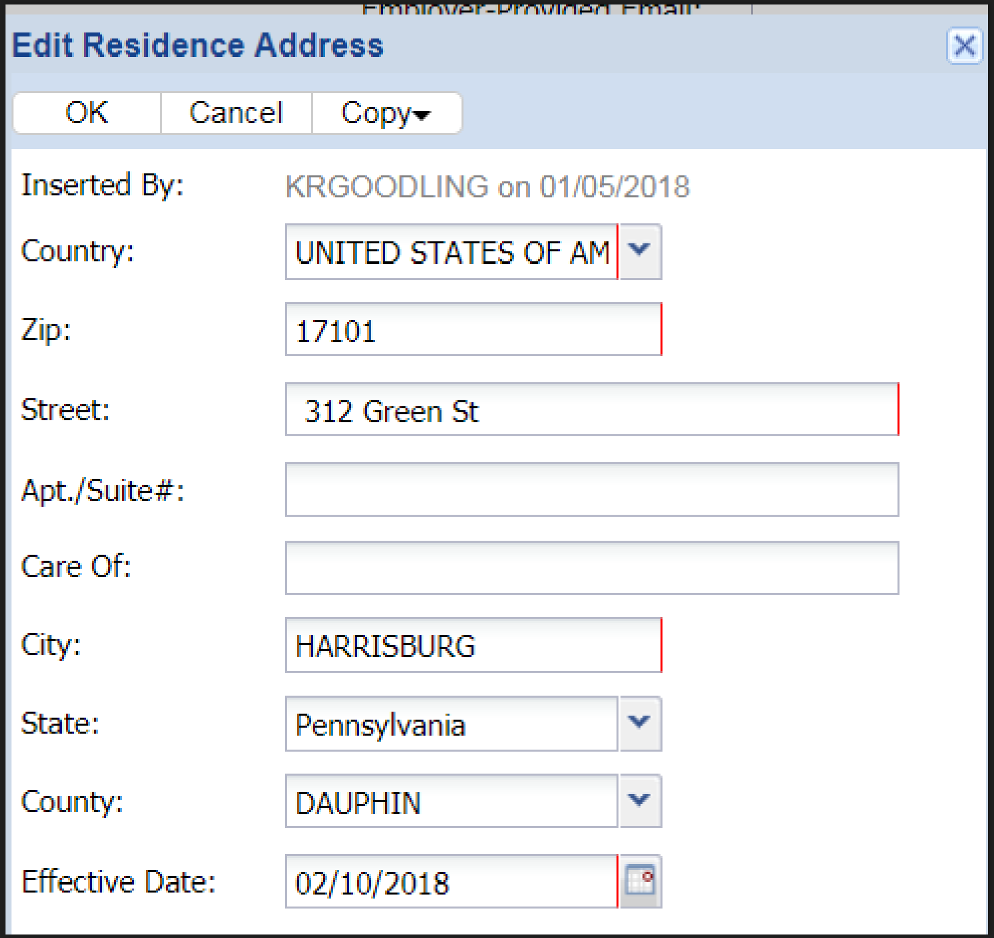
Member Info Screen



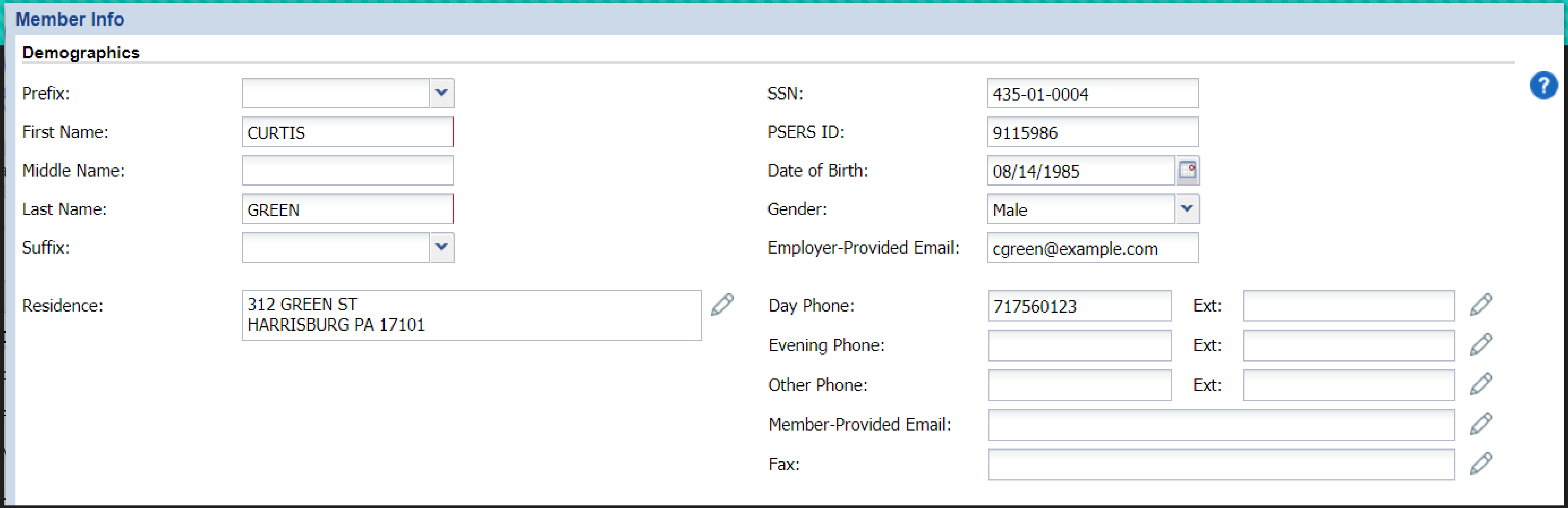
- Email is a great way to contact people. Please enter an Employer-Provided Email address for your employees if they have a school email address.
- To update the member's address, click the pencil beside the Residence Address field. Click the Edit Address option. OR, click inside the address box.

Updating an address

- The last change made to the address will appear at the top of the address box.
- When the zip code is entered, the correct city and state will populate.
- The Effective Date of the address change will populate with the current date.
- Click OK when your changes are completed.

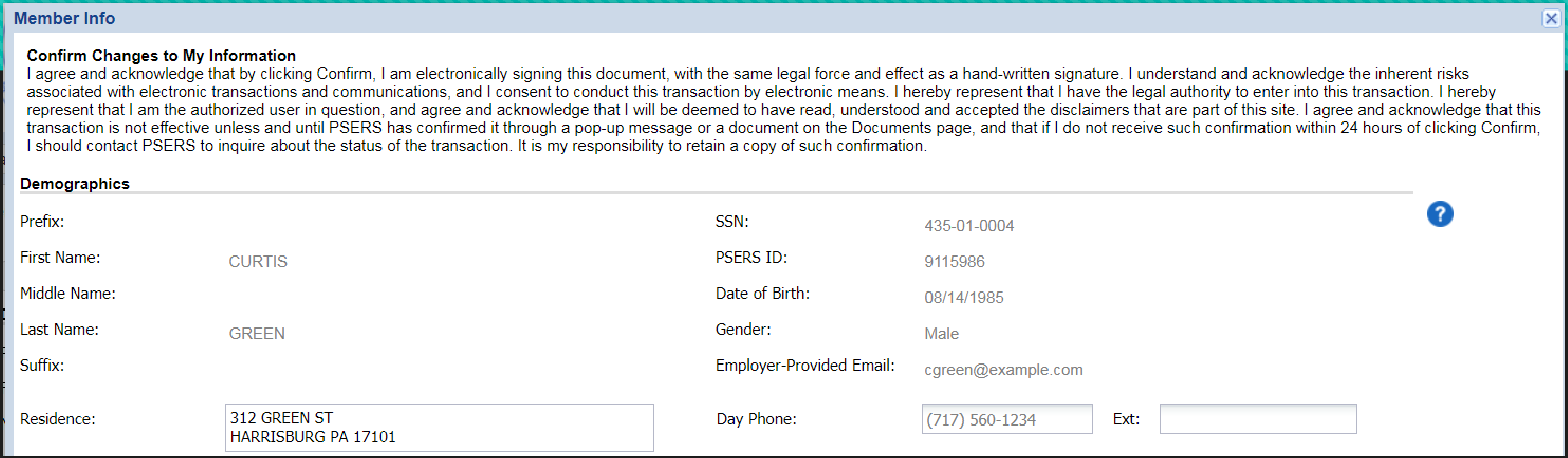


Completing demographic changes



- The member’s address and employer-provided email have been updated. Click Next in the bottom left to continue.

Confirmation Screen



Member Info

Confirm Changes to My Information

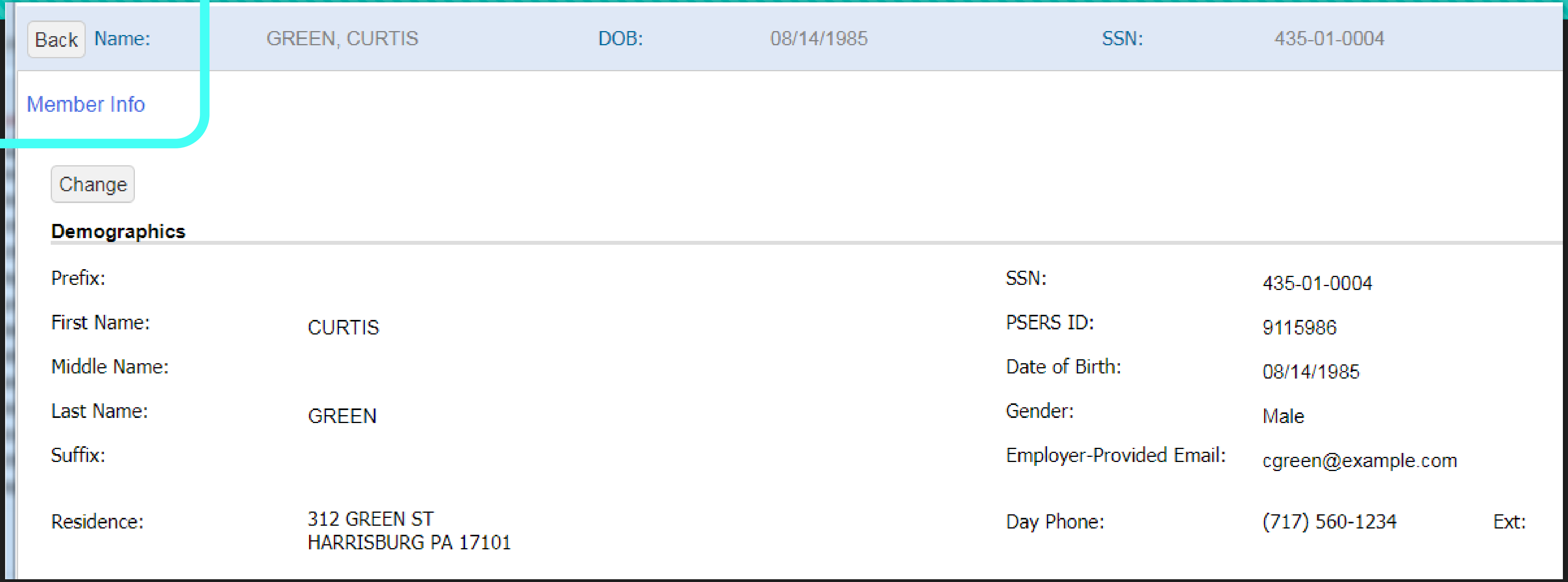
I agree and acknowledge that by clicking Confirm, I am electronically signing this document, with the same legal force and effect as a hand-written signature. I understand and acknowledge the inherent risks associated with electronic transactions and communications, and I consent to conduct this transaction 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.

Demographics

Prefix:		SSN:	435-01-0004
First Name:	CURTIS	PSERS ID:	9115986
Middle Name:		Date of Birth:	08/14/1985
Last Name:	GREEN	Gender:	Male
Suffix:		Employer-Provided Email:	cgreen@example.com
Residence:	312 GREEN ST HARRISBURG PA 17101	Day Phone:	(717) 560-1234 Ext:

- ESS will ask you to confirm your changes one final time. If you agree, Click Confirm in the bottom right.
- Click Back if you need to make a correction.
- Click Cancel in the bottom left if you wish to cancel the demographic change entirely.

Member Info

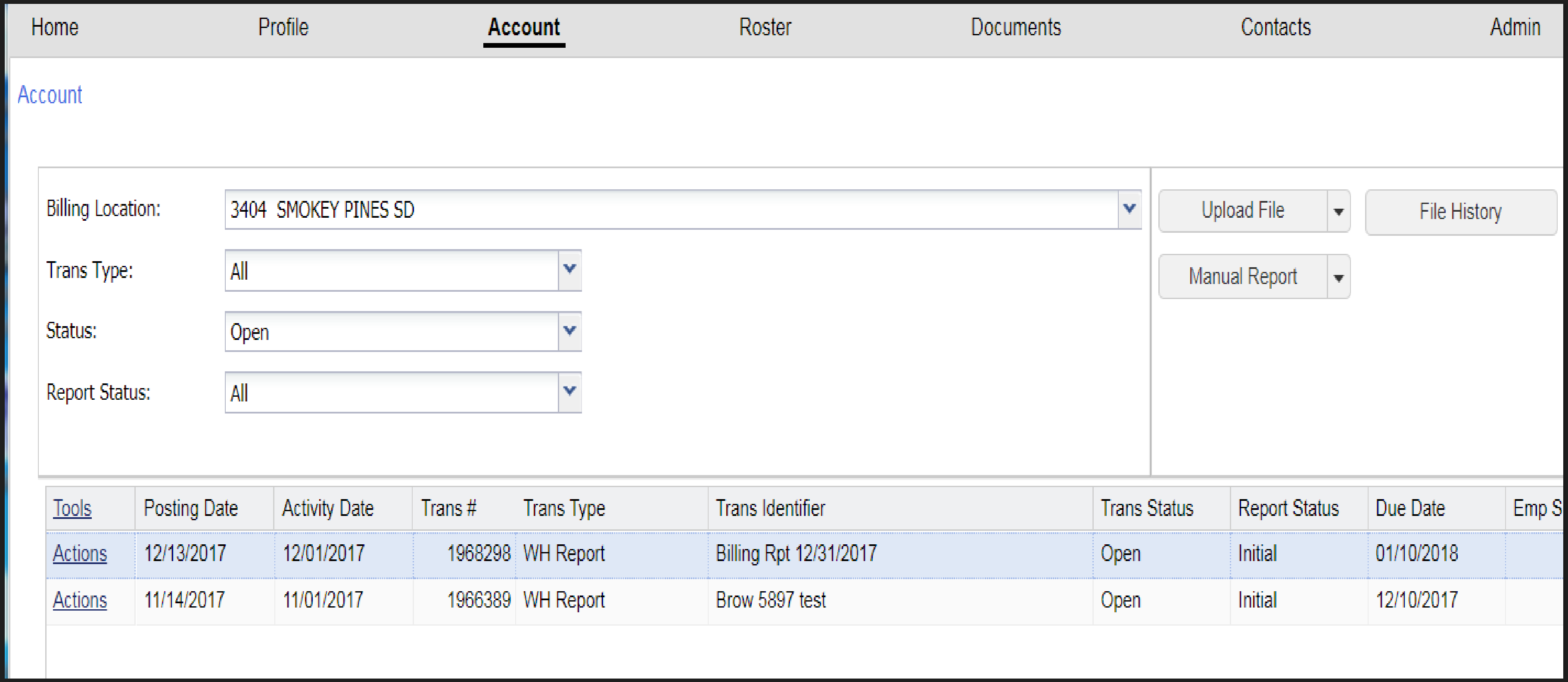


- After confirming your member demographic info update, you will be returned to the Member Info screen. Click the Back button in the top left to return to the Roster tab page.

Account Tab

Your Account Tab is the work area for **Work History Reporting** and **Work History Adjustment** related information for your employees.

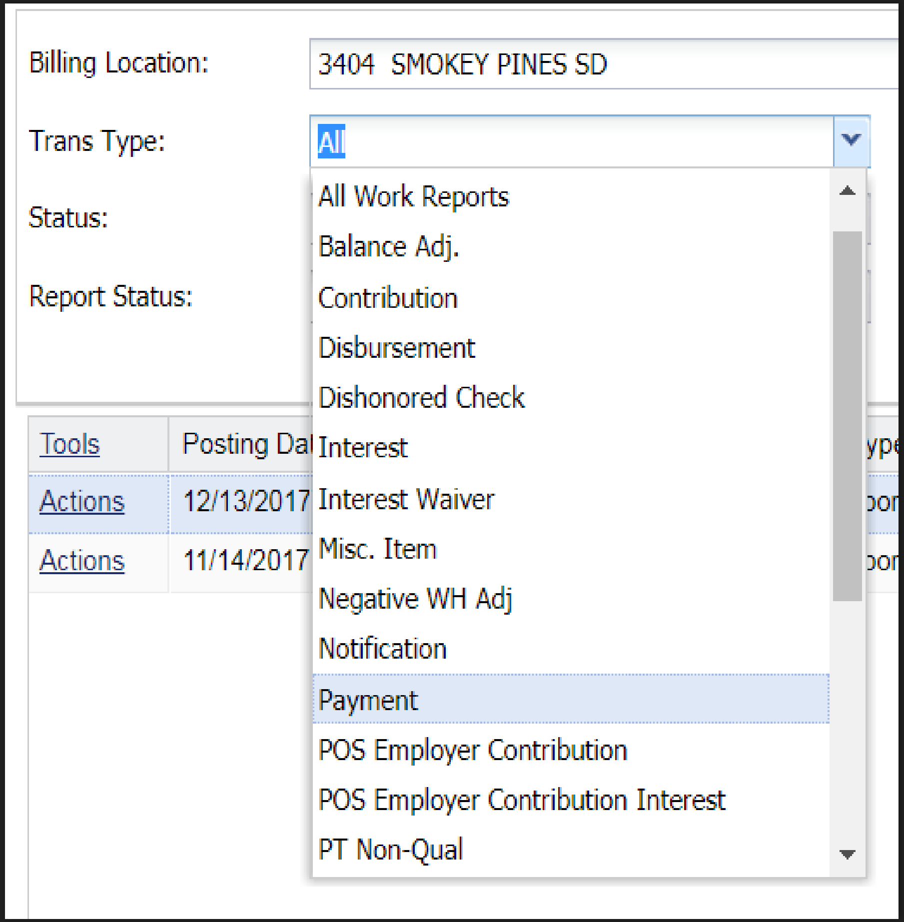
Account Tab Screen



- Your Account tab will display transactions made to a school's account. This includes billings reports (work history reports), adjustments made by both the school and PSERS, and payments made to the school's account.

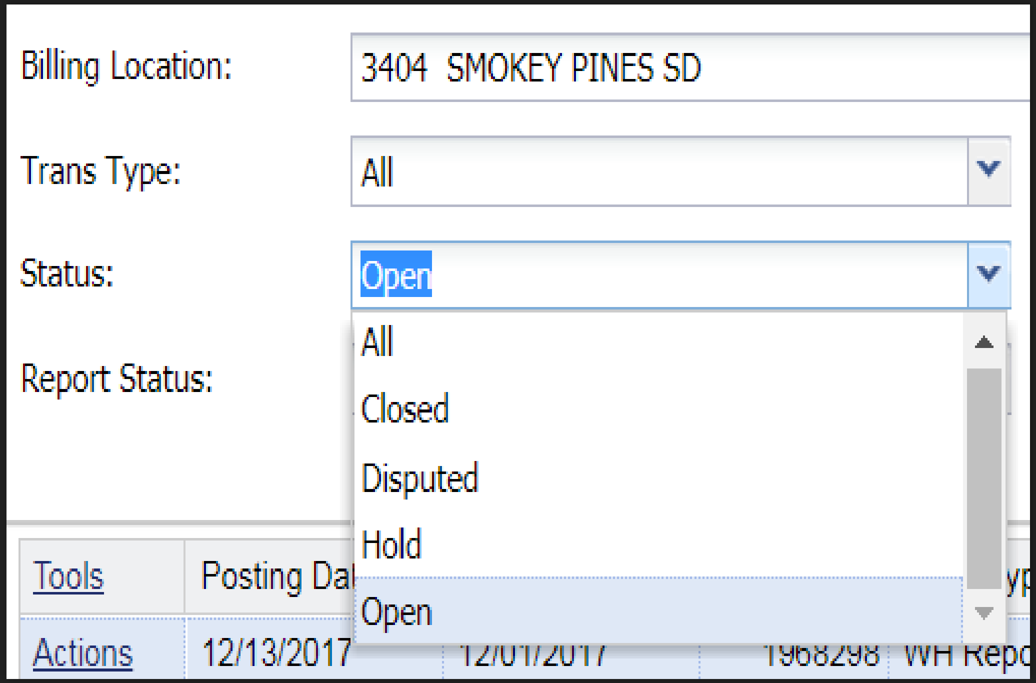
Filtering the Account Tab by Trans Type

- The Account tab can be filtered using a long list of descriptors. A sample of this list is pictured to the right. Use the scroll bar on the right side of the search box to view the remaining options on the list.
- Employers may commonly filter by:
  - All Work Reports
  - Payment
  - WH Adjustment
  - WH Report
- The additional items listed are filters that may be used for PSERS staff to research different types of accounting issues.
- Employers will see adjustments made by the district and PSERS staff in their Account tab.

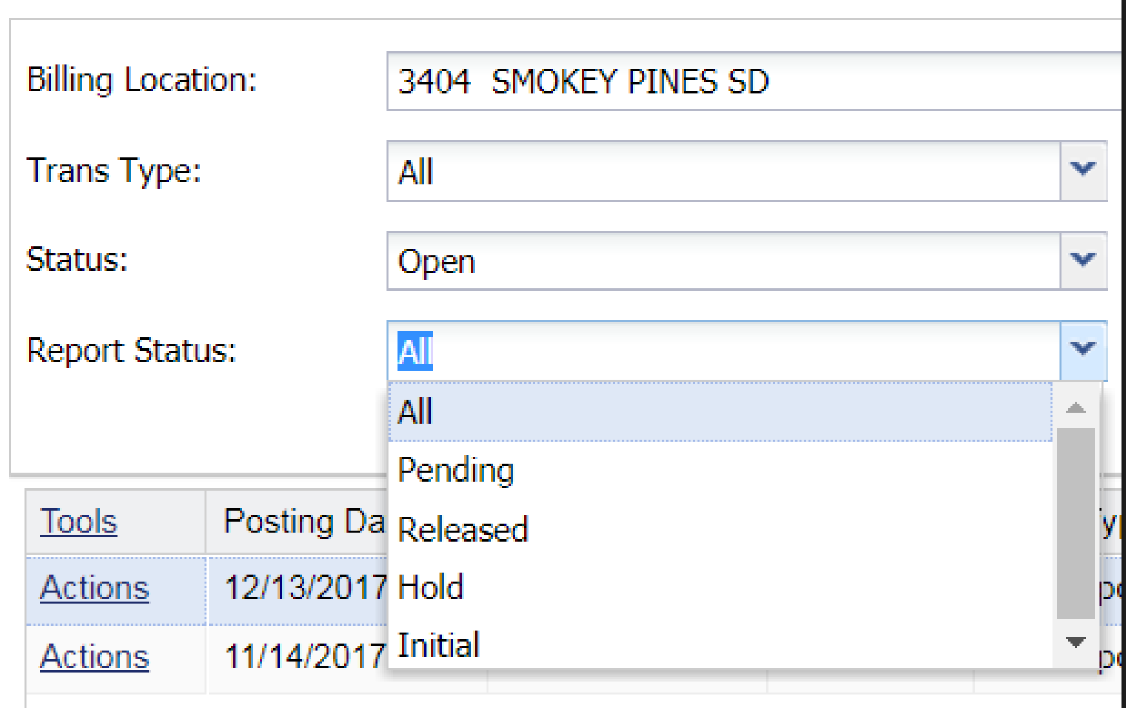


Filter by Status

- The default value will show “Open” on your Account Tab in the Status Menu.
- You are able to filter by Open, Closed, or Hold transactions.
- An example of a Hold Transaction is an adjustment using the Court Award identifier.



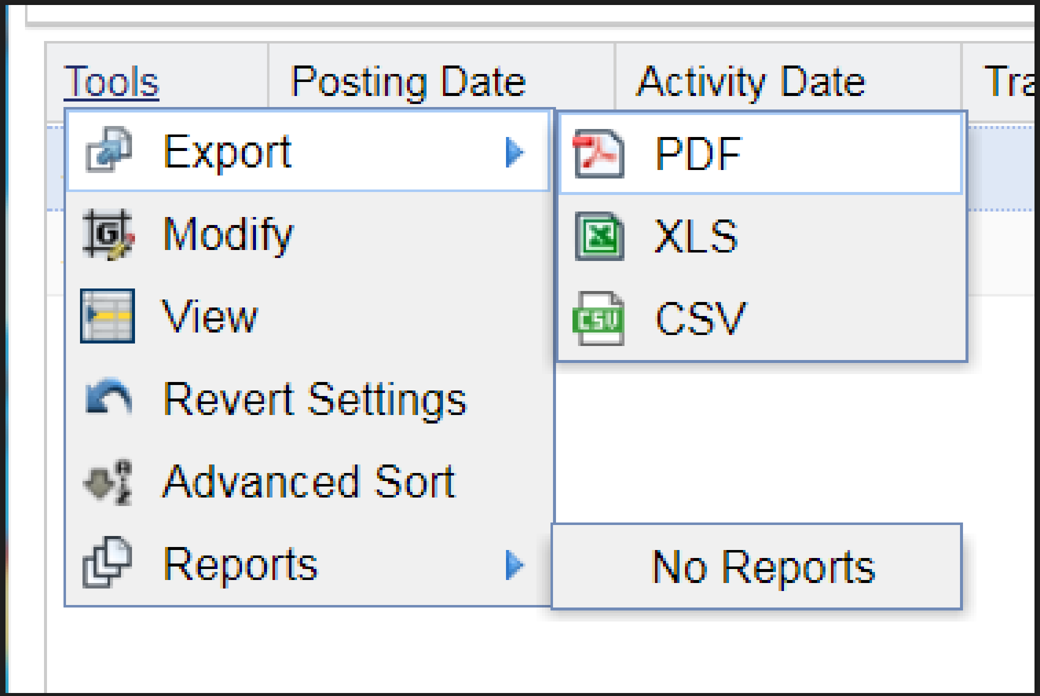
Filtering by Report Status



- Report Status is defaulted to All. The Report Status could assist in filtering to find which reports are still in an initial status rather than released.

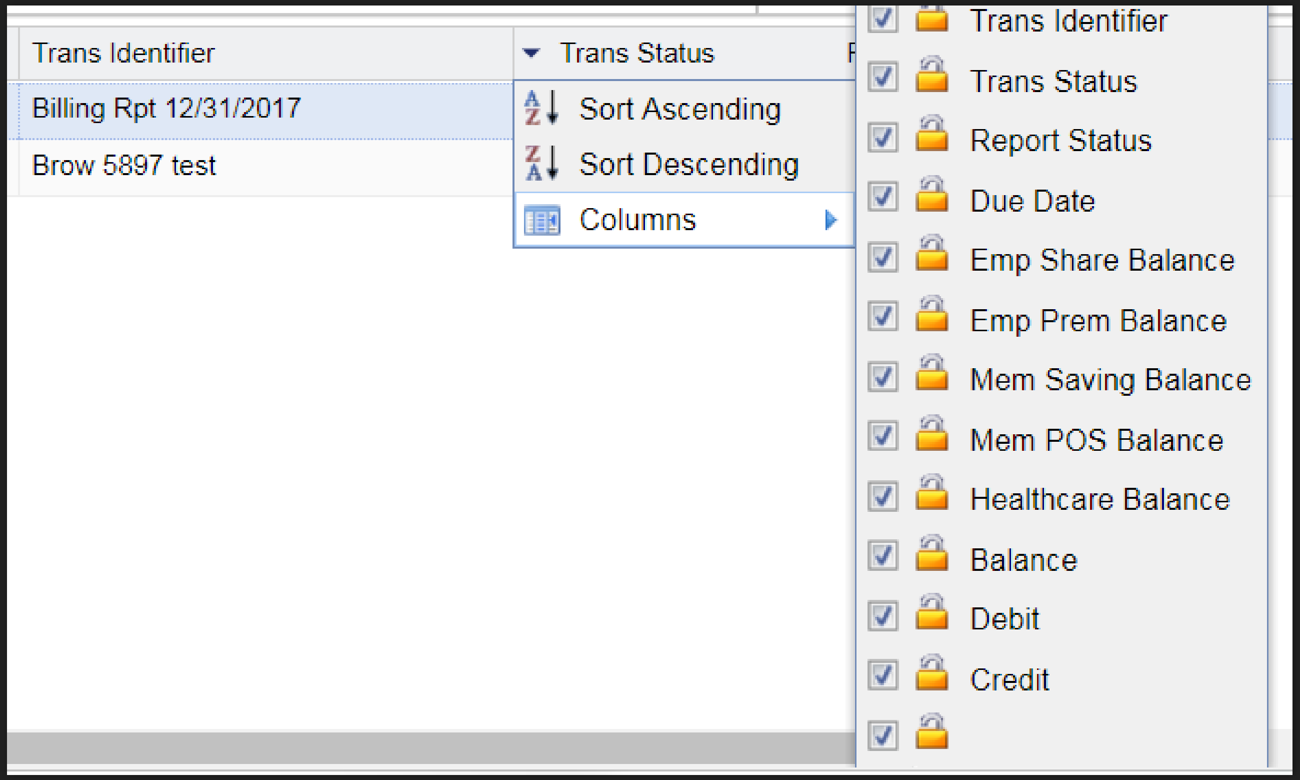
Sorting using the Tools button

- Similar to the Tools button on the Roster tab, the Account tab details can be Exported also.
- New to the Tools button is a Reports button at the bottom; however, there are no reports available. The blue arrow leads to “No Reports” when selected.



Sorting Account Tab Columns

- The columns may also be sorted to your preference using the Sort Ascending/Descending options.
- Columns may be shrunk closer together to condense what is visible on your screen or they can be stretched out to read full identifiers. To do this, hover to the right of the arrow for the column you would like to move until you get the icon with expansion arrows.



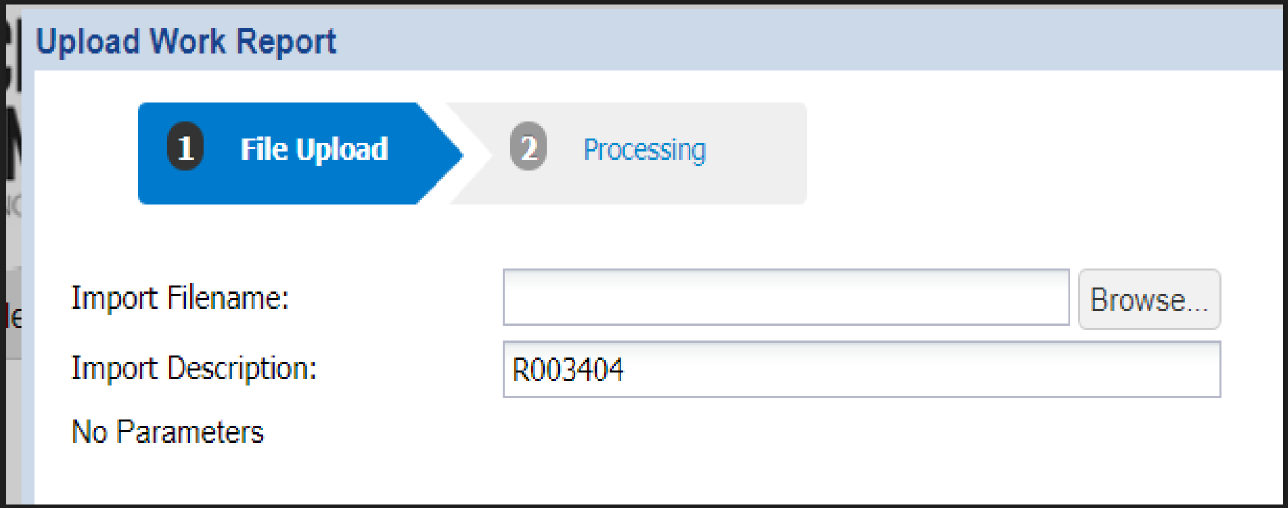
Account Tab-Available Actions

- Upload File button arrow offers Adjustment or Work Report options. This button will walk you through the steps to import these types of files.
- The File History button will serve as your work area and approved reports area all in one. Once your file has been imported into the system you will be able to see the status of your file and the number of rows imported. This screen will also show the number of invalid or exception rows to be corrected.
- The Manual Report button arrow offers manual work report or adjustment options

Importing a Work History Report

- A reminder: There are **NO CHANGES** to the format of the Work Report in ESS.
- Click the Upload File button. Select Work Report.

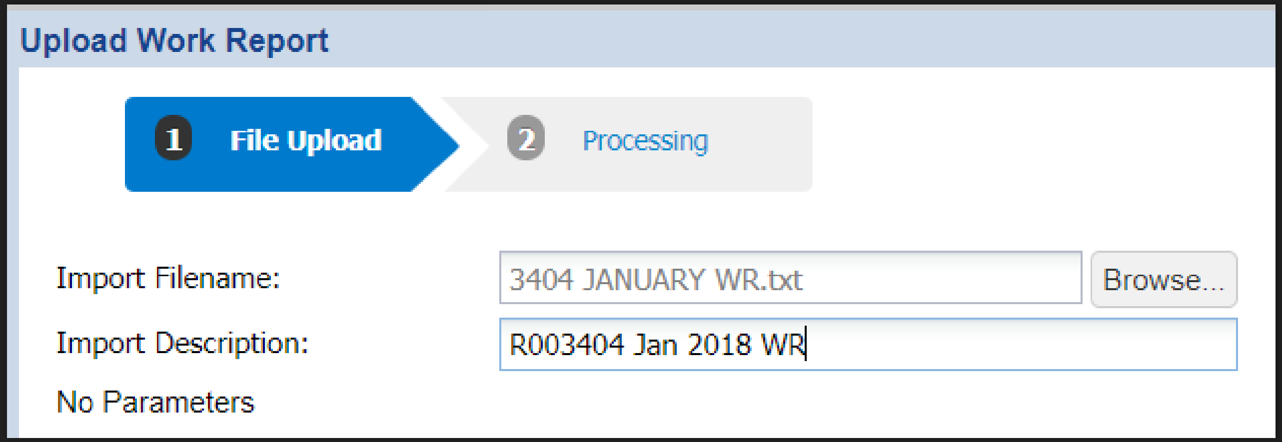
Importing a Work History Report File



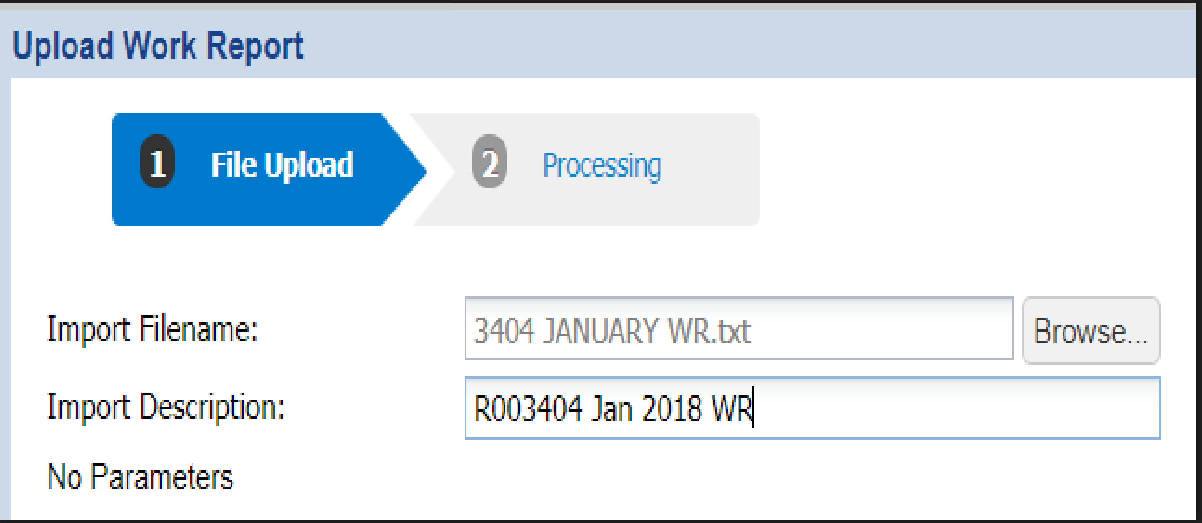
- You will browse your computer files to locate the file you would like to import.
- The Import Description will auto-populate by showing "R003404" which represents a Work Report file for reporting unit code 3404.
- You can change this identifier to be more specific to include the month, year, or reason for uploading this file.
- When you successfully locate your file, click Next at the bottom right of your screen to move into the Processing phase.

Selecting Your File

- File selected will show in gray.
- Import Description updated to my preference.
- Click the Next button in the bottom right corner. To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- A message stating "Processing file….Please wait" will display on your screen while processing.



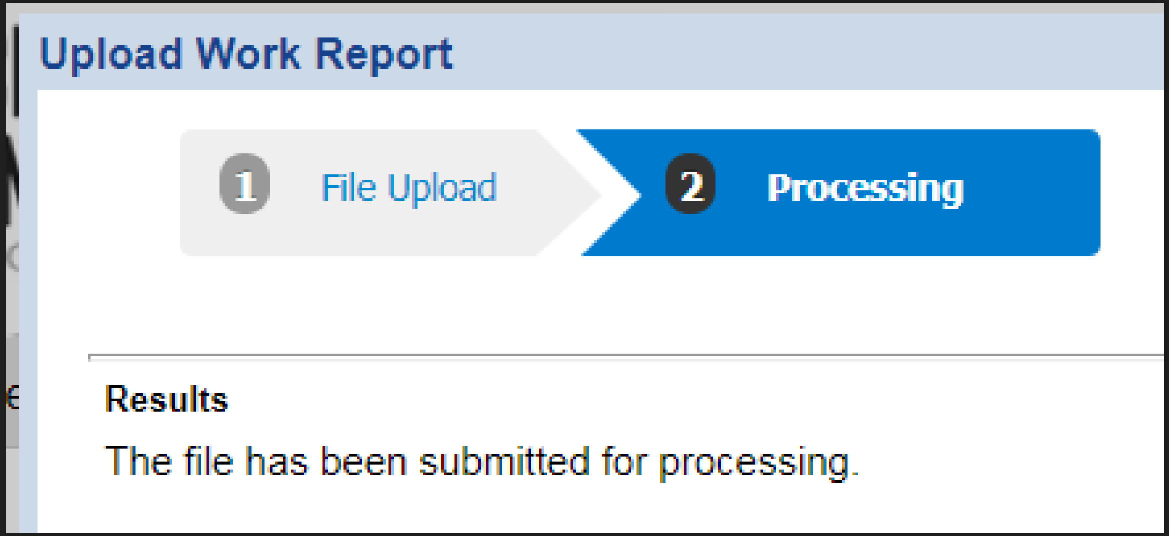
Select File



- File selected will show in gray.
- Import Description updated to the previously entered description.
- Click the Next button in the bottom right corner. To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- A message stating "Processing file….Please wait" will display on your screen while processing.

Processing the Work Report File

- After the "Processing file…please wait" message, the screen will show your file results.
- You can view the details of your file using the Details button in the bottom right corner.



File History

File History

Close

Report Type: All

Date Range: 11/09/2017 To: 01/08/2018

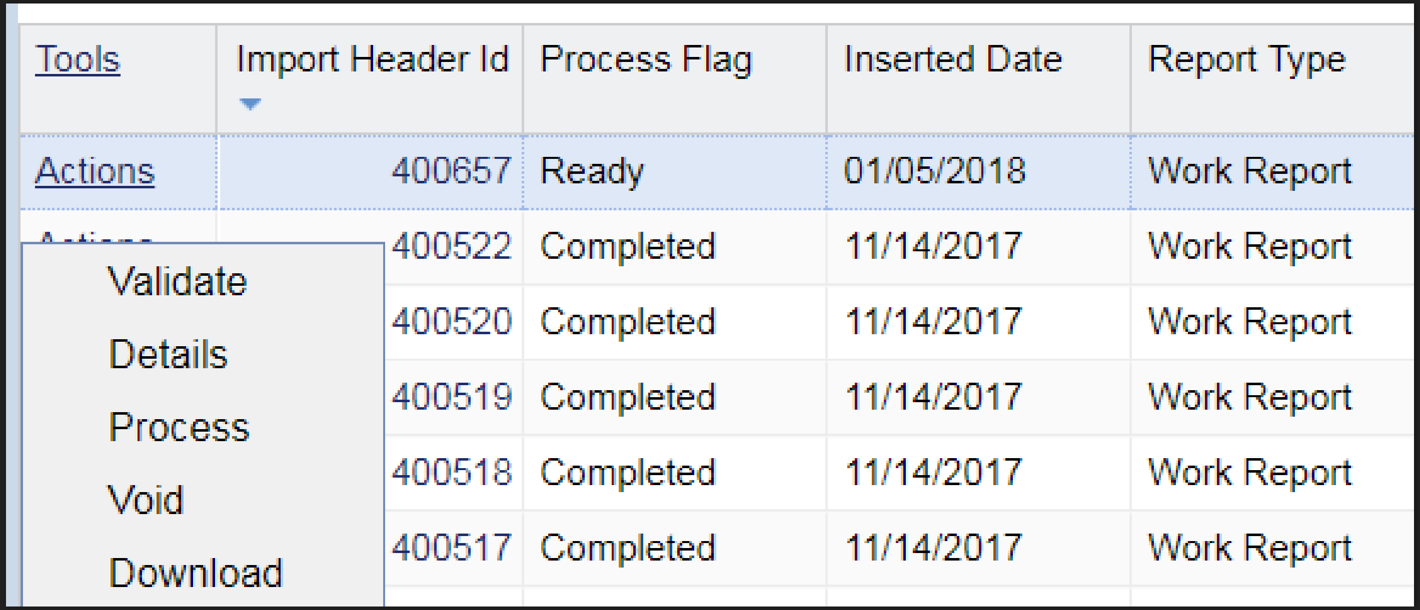
Status: All

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported
Actions	400657	Ready	01/05/2018	Work Report	R003404 Jan ...	Validated with Errors	01/05/2018			8

- If you select the Close button, ESS will direct you to the File History page.
- The Jan 2018 WR has been imported into the system, but has not yet been Validated. The Process Flag still reads as "Ready" while the file Status is displaying "Validated with Errors" and 8 rows of data have been imported.
- **TIP:** You do not need to continue processing a file all at once. Once imported, you may come back to Validate, Correct, or Process the file. You can find any files imported using the File History button.

Validating the file

- Click the Actions button at the beginning of your Work Report Row.
- Select the Validate option.



Validating the file

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported
Actions	400657	Validated	01/05/2018	Work Report	R003404 Jan ...	Validated with Errors	01/05/2018	01/08/2018	5 sec	8

- As the validation occurs, the Process Flag will read "Queued Validation".
- After the file is Validated, the status will update and the duration will populate.

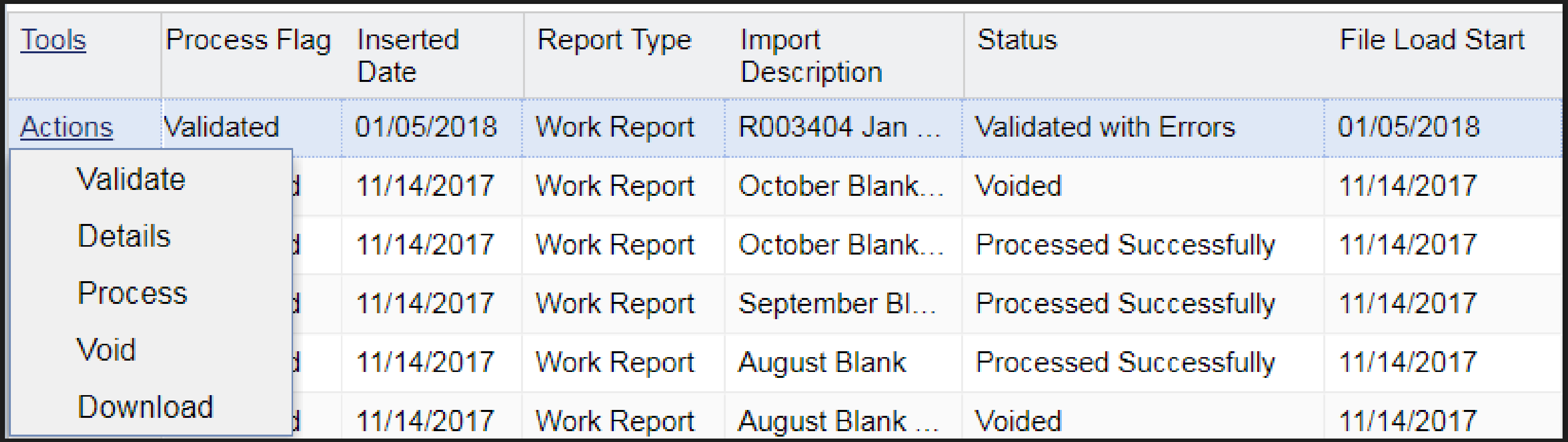
Row Details of Work History Report File

Tools	l Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By
Actions	18	01/08/2018	5 sec	8	6	6	2	0			KRGOODLING

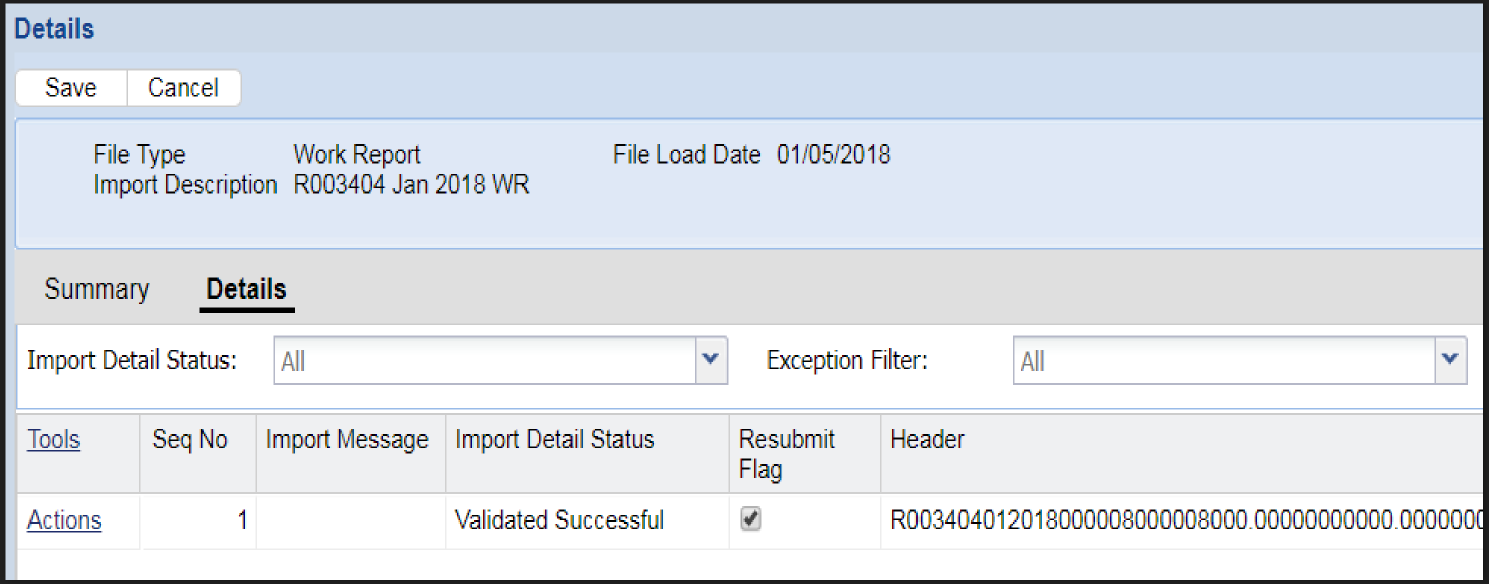
- If you continue to scroll to the right, the imported row details of your file will be visible. There are 8 imported rows, but only 6 rows are Valid. There are two (2) Invalid Rows that will need to be corrected prior to processing the work history report file.
- Using the Actions button at the start of the row, select Details.

View Details of Work History Report File

- Click Details to view the transaction rows and to use the exception filter to correct errors for the Work History Report file.

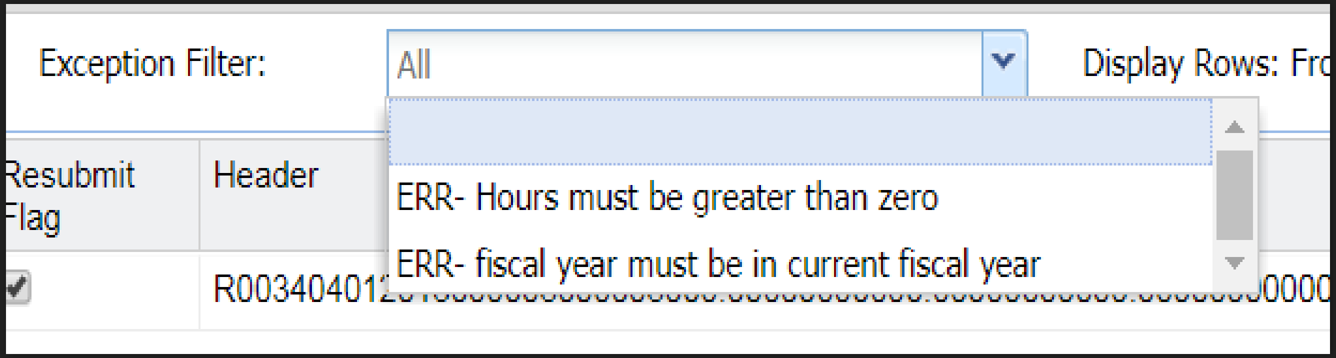


Locating the Exception Filter



- Clicking Details takes you to the Details screen and puts you into Edit mode, enabling you to make changes to your file.
- From the File History screen, you know there are two rows that are invalid. Using the Exception Filter at the top center of the screen, use the pull down area to view these errors. **You must be in edit mode to use the Exception Filter.**

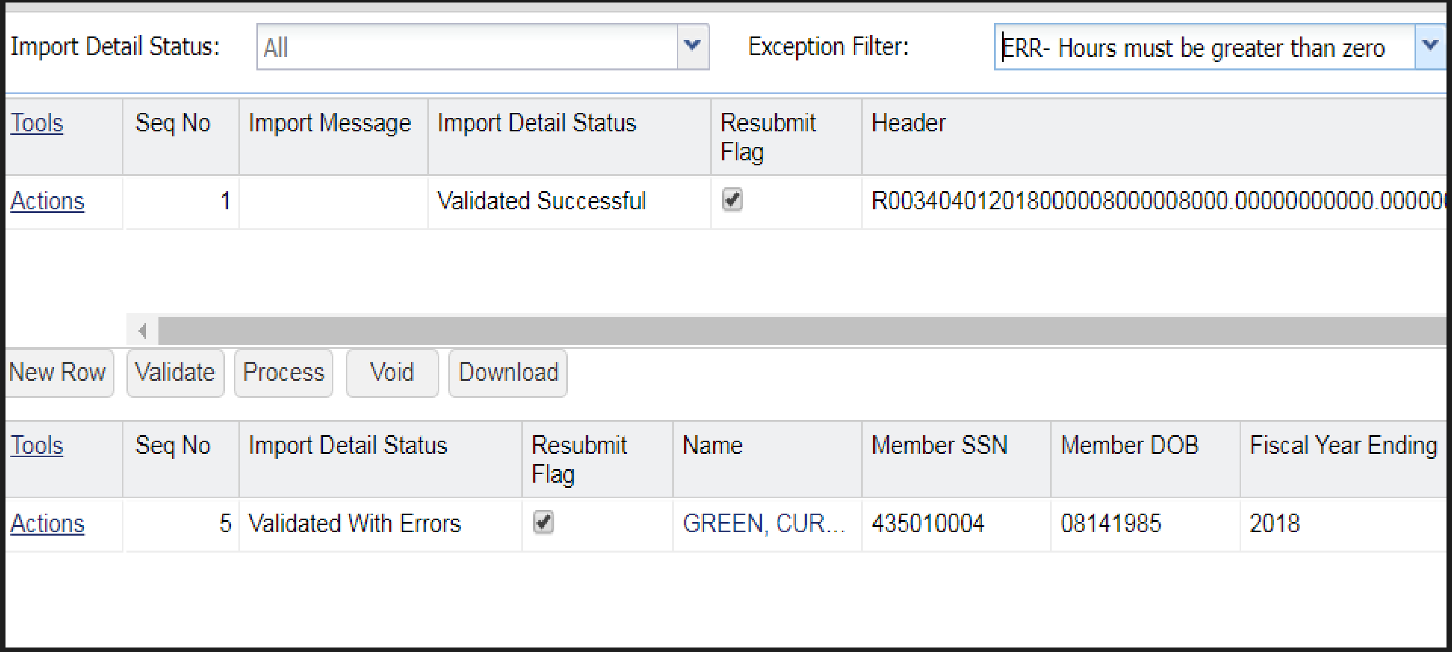
Errors found on Work History Report File



- Two errors (ERR) were found through validating the work history report. These errors have caused the two invalid rows that were visible on the file history tab.
- Select the error you would like to correct.

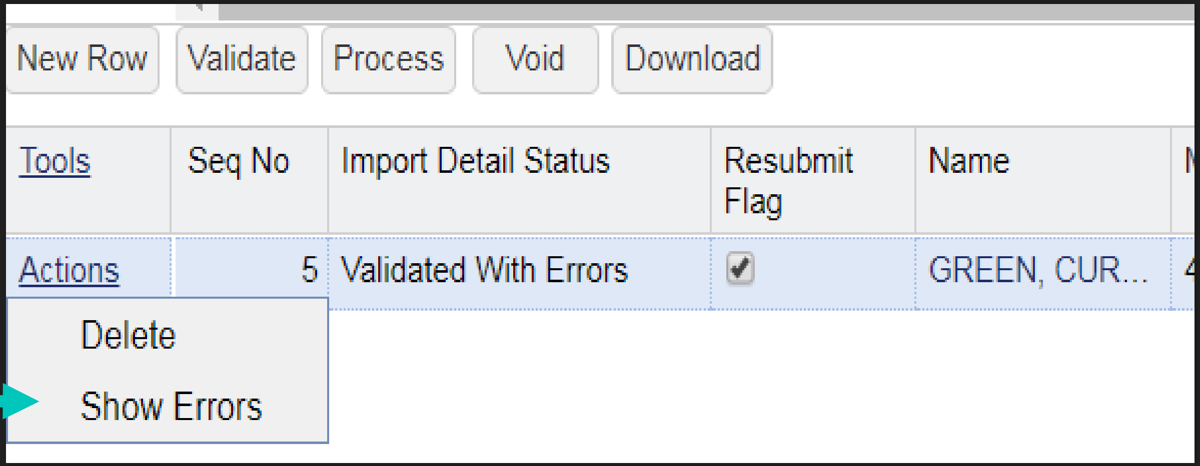
Error-Hours must be greater than zero

- Click the error you would like to fix first. This will bring all members with that error into the middle of the screen.
- ERR-Hours must be greater than zero was the error selected. One member, Curtis Green is displaying this error.

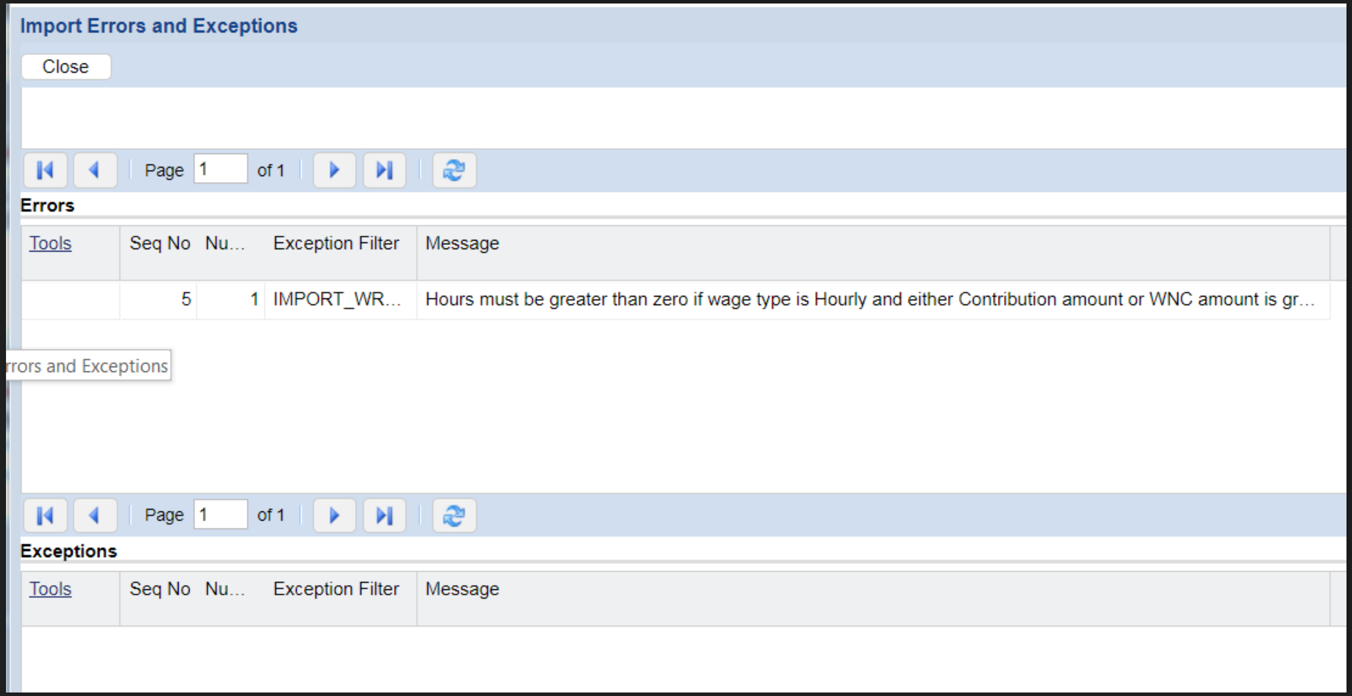


Show Errors function

- Curtis Green display the ERR-Hours must be greater than zero error, but are there other errors with this row?
- Click the Actions button at the start of the row and select Show Errors.



Import Errors and Exceptions



- The Show Errors function takes you to the Import Errors and Exceptions page. This page is broken into separate areas for Messages, Errors, and Exceptions that can all be viewed for that particular record.
- There are no other errors or exceptions to be fixed for this record. (Messages would appear at the top of the screen above Errors.)
- After reviewing, click the Close button at the top left.

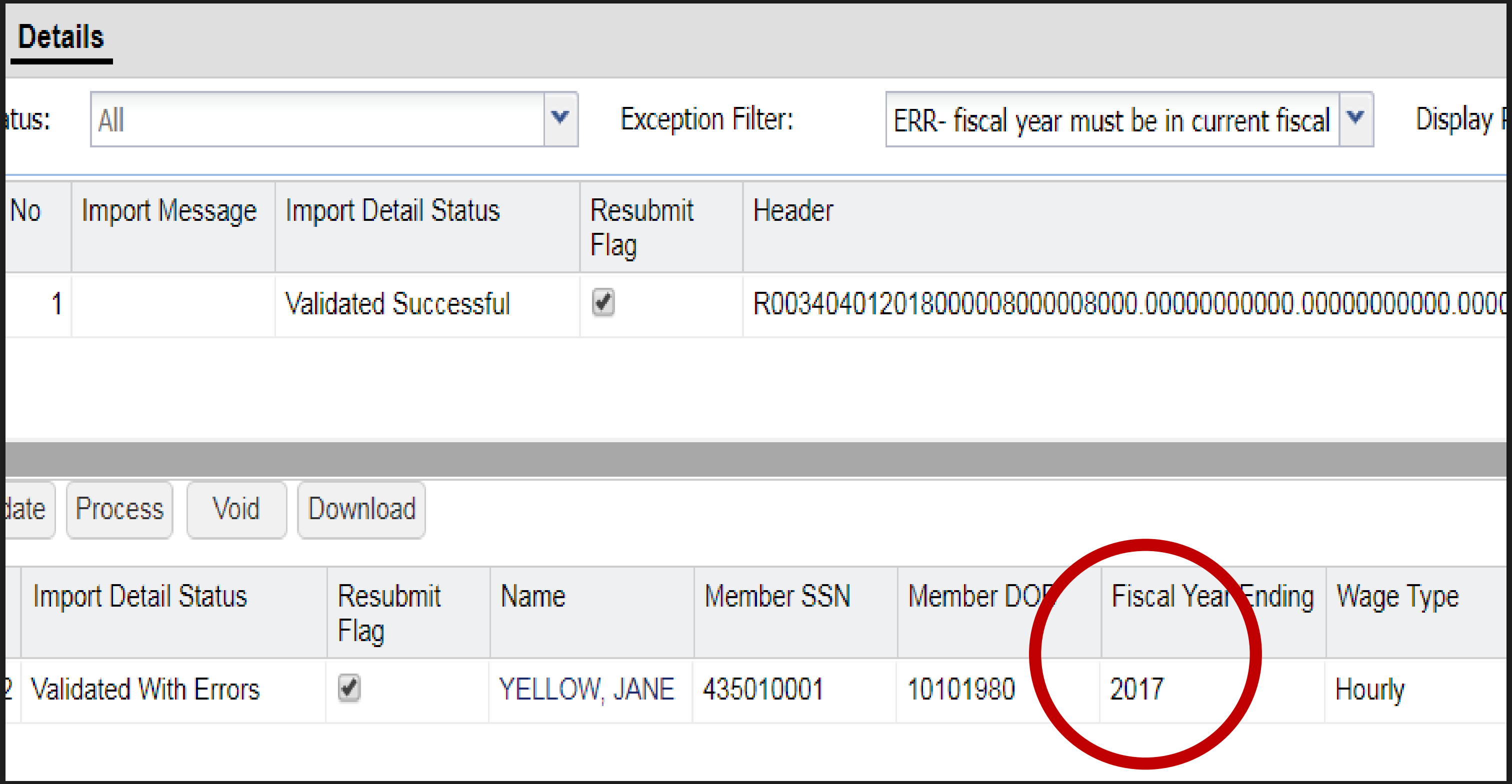
Correcting error for no hours reported

Tools	Name	Member SSN	Member D...	Fiscal Ye...	Wage Type	Work Status	BASE	URCC	OT	SUP	CONTRIB	Hours	Days
Actions	GREEN, CUR...	435010004	08141985	2018	Hourly	ACTIVE - Ac...	001000.00	000000.00	000000.00	000000.00	000075.00	0000	000.00

- Curtis Green was reported with $1,000.00 base salary but zero (0) hours to support his earnings. To fix this, select edit from the top left (if not already in edit mode) and click inside the box under the Hours column.
- For this example, 100 hours of service will be entered ($10/hour position). Then click Save in the top left.

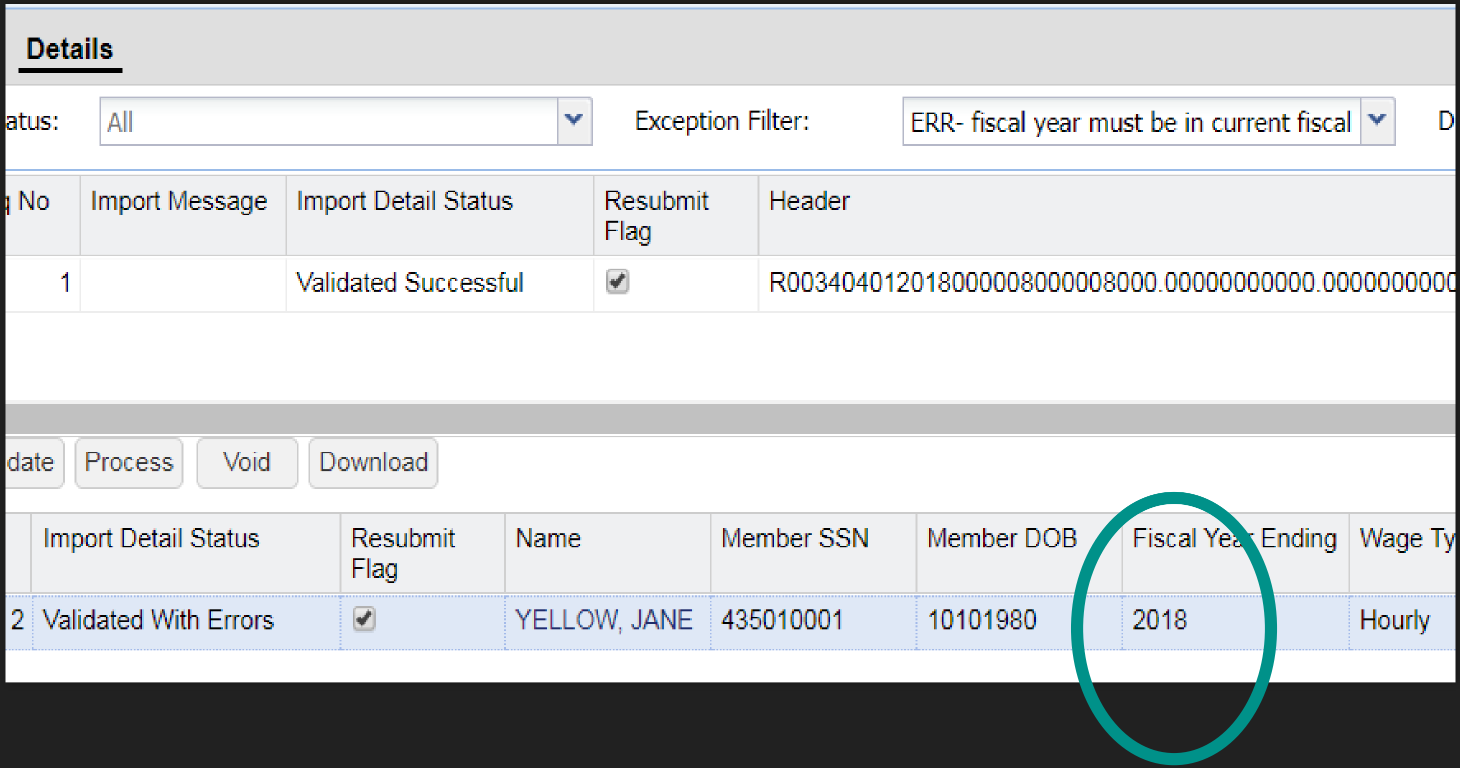
Return to Exception Filter

- We fixed the first error that was listed in our exception filter, but there was also another error: ERR-fiscal year must be in current fiscal year.
- One record, Jane Yellow, appeared below showing 2017 as the fiscal year on the work history report. Since this is a January report, the year must show as 2018.

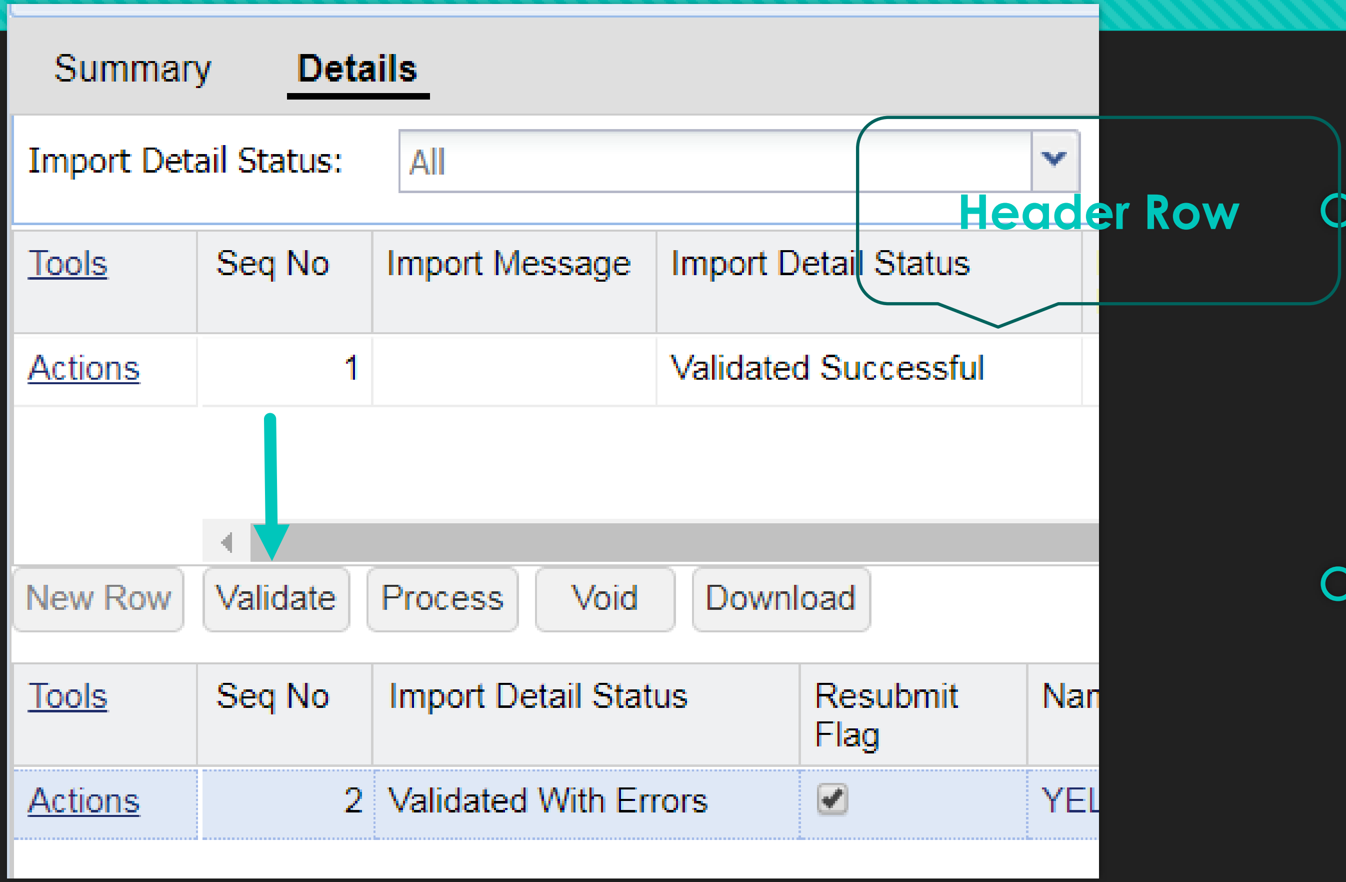


Error-Correct fiscal year

- Click inside the field under the Fiscal Year Ending column. Correct the year to show 2018.
- The Fiscal Year may be either the previous or current year in July, August or September reporting to accommodate balance of contract (BOC) reporting. All other months must be in the current fiscal year.
- Click Save to save changes.

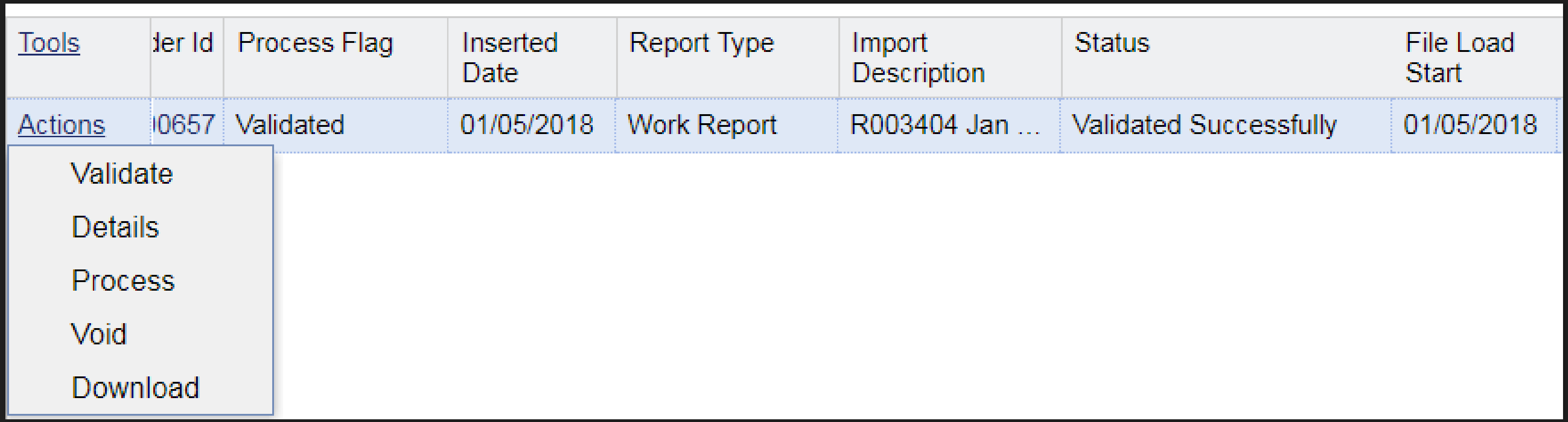


Validate work history report



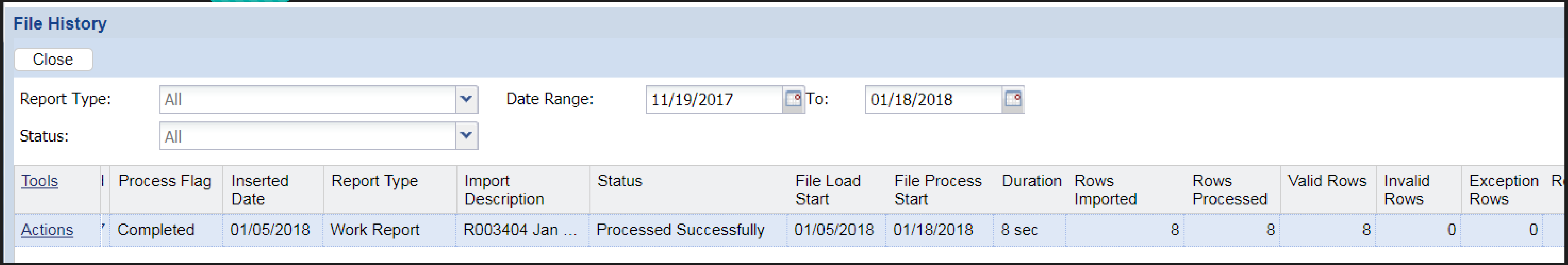
- When all corrections have been made, select the Validate button to re-validate your report. The Validate button is about halfway down the screen on the left below the Header Row.
- OR, you can close this screen and use the File History screen and Validate the file using the Actions button.

Validated Successfully



- All corrections have been made and the File has been Validated Successfully. Further to the right are the row counts that show that 8 rows were imported, and 8 rows are valid. Since there are no invalid or exception rows, the file can be processed.
- Click the Actions button and select the Process option to Process the account.

Processing the Work Report File



- The file has been Processed Successfully, processing 8 rows of data.
- Click the Close button at the top left to return to the Account Tab.

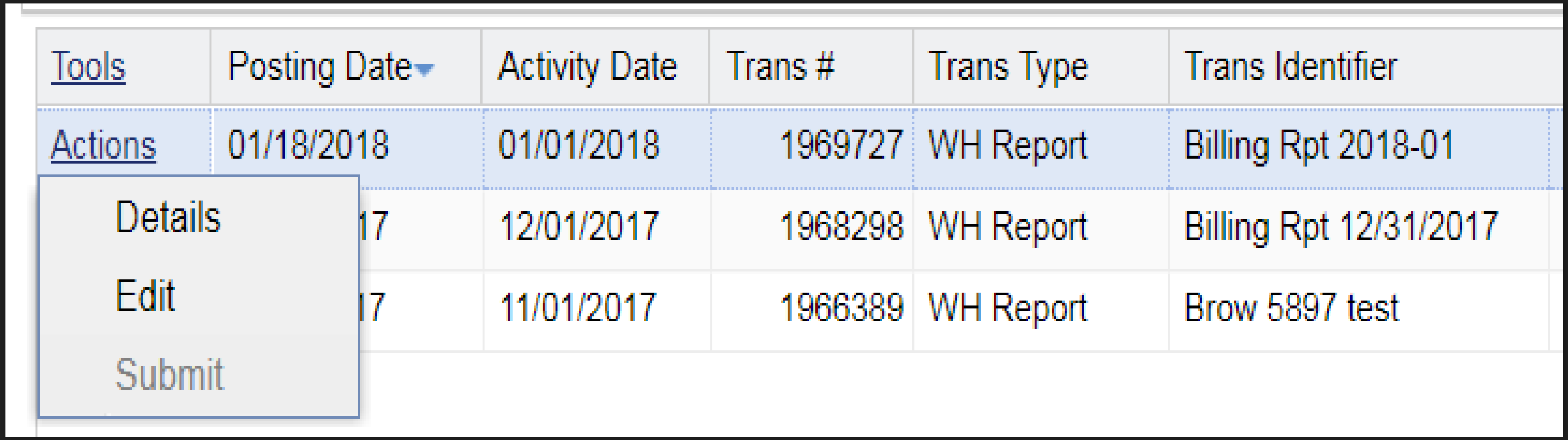
Refresh your Browser to see transaction

Tools	Posting Date	Activity Date	Trans #	Trans Type	Trans Identifier	Trans Status	Report Status	Due Date	Emp Share Bal...	E
Actions	01/18/2018	01/01/2018	1969727	WH Report	Billing Rpt 2018-01	Open	Pending	03/02/2018	$2,539.20	
Actions	12/13/2017	12/01/2017	1968298	WH Report	Billing Rpt 12/31/2017	Open	Initial	01/10/2018	$317.40	
Actions	11/14/2017	11/01/2017	1966389	WH Report	Brow 5897 test	Open	Initial	12/10/2017	$0.00	

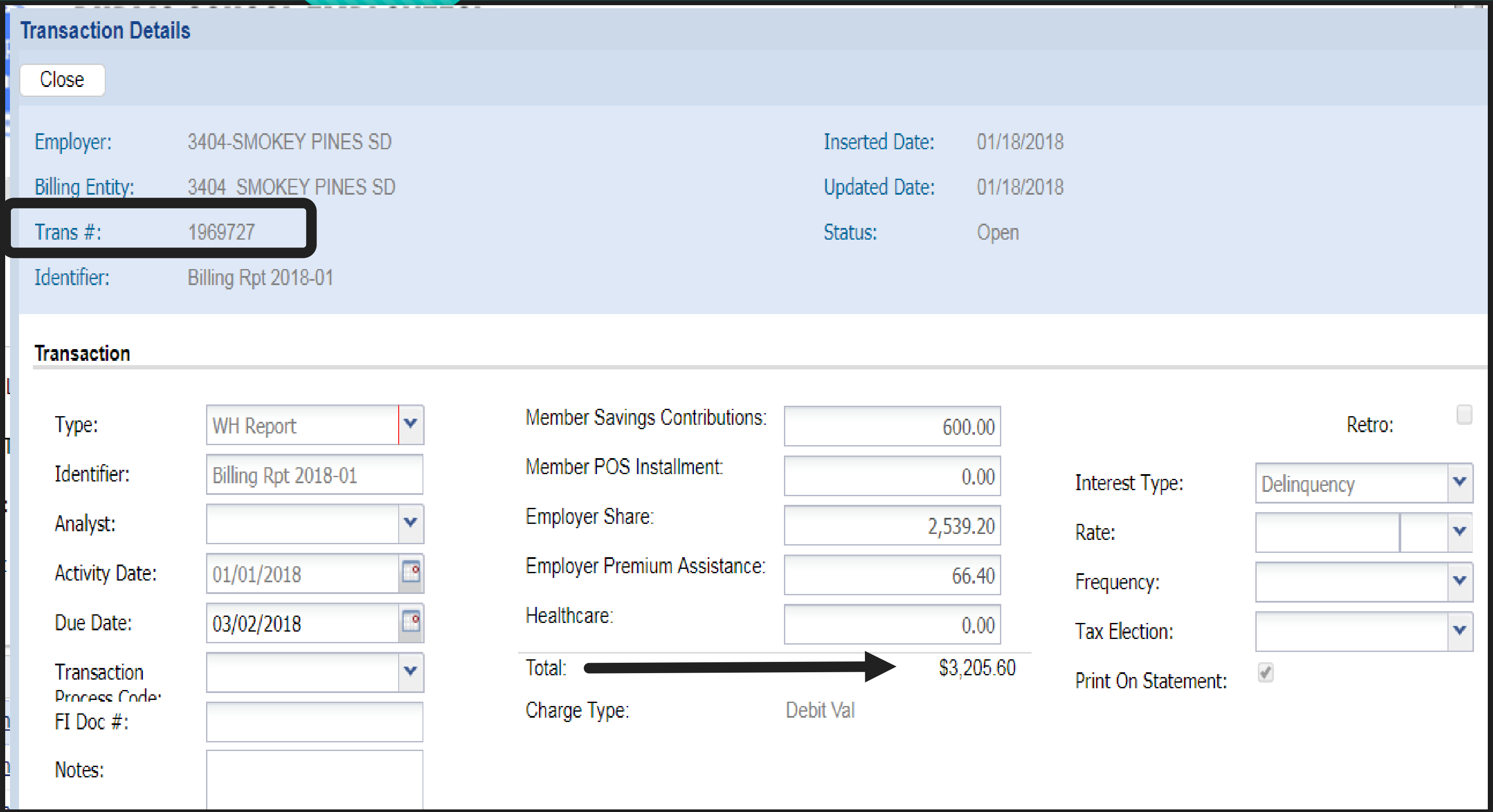
- Your new work report file has been processed successfully, but there is one more step needed before it is truly approved in ESS. If your file transaction is not visible in your Account Tab activity, use the browser refresh icon or log out/log in so the new data can be pulled into the system.
- After refreshing your browser, this work report should be the most current transaction at the top of your page. **The Report Status is showing Pending.**

WH Report Actions

- The Jan 2018 Work History report has been processed.
- The Actions button will offer options to see Details or Edit the January 2018 work history report.



Selecting Details option


Transaction Details

Close

Employer: 3404-SMOKEY PINES SD

Billing Entity: 3404 SMOKEY PINES SD

Trans #: 1969727

Identifier: Billing Rpt 2018-01

Inserted Date: 01/18/2018

Updated Date: 01/18/2018

Status: Open

Transaction

Type: WH Report

Identifier: Billing Rpt 2018-01

Analyst:

Activity Date: 01/01/2018

Due Date: 03/02/2018

Transaction Process Code:

FI Doc #:

Notes:

Member Savings Contributions: 600.00

Member POS Installment: 0.00

Employer Share: 2,539.20

Employer Premium Assistance: 66.40

Healthcare: 0.00

Total: $3,205.60

Charge Type: Debit Val

Retro:

Interest Type: Delinquency

Rate:

Frequency:

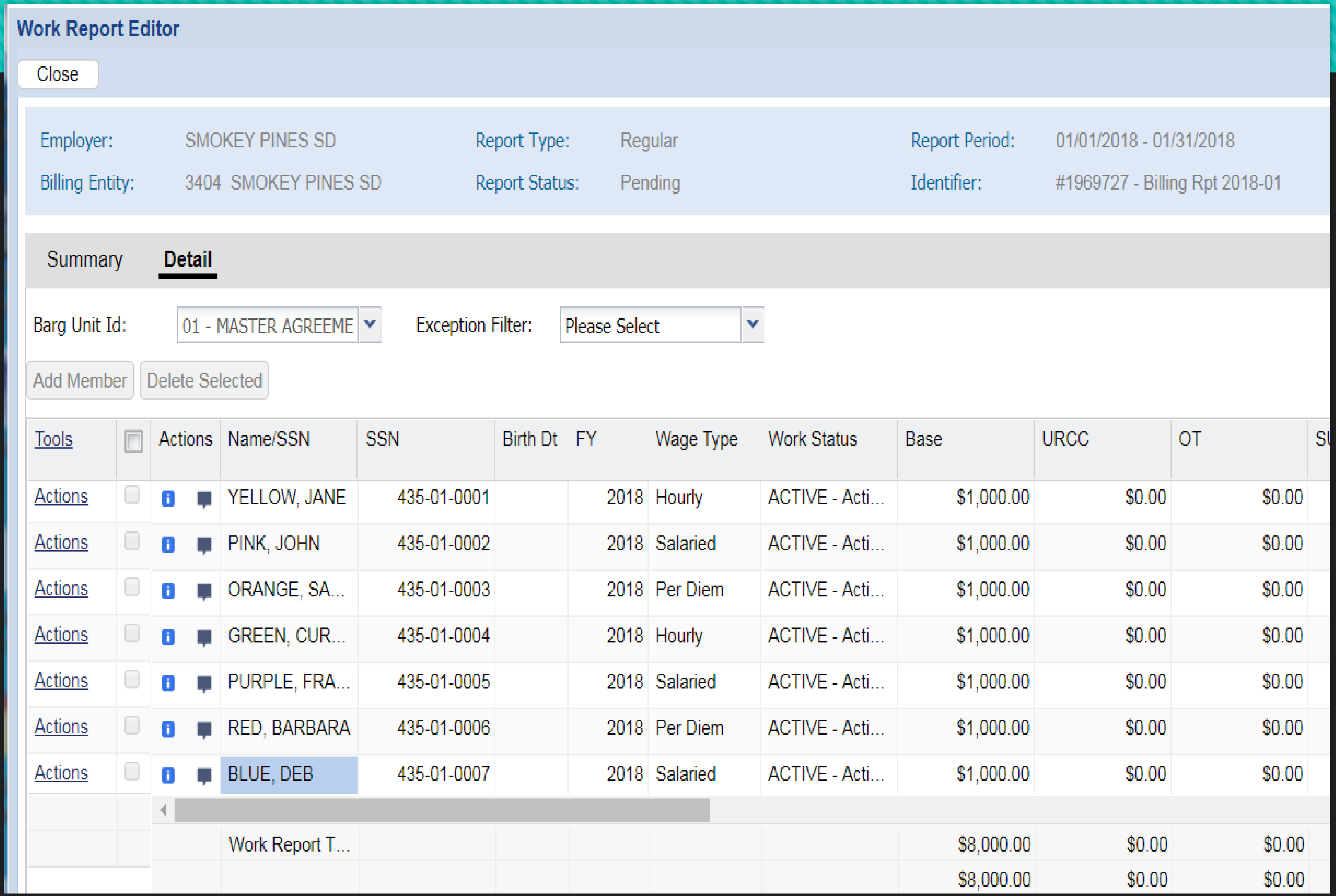
Tax Election:

Print On Statement:

- Transaction Details will show the amounts the school will be billed in each category according to the information reported on the work history report.
- The transaction # can be found at the top of this screen.
- A total of the charges is provided at the bottom of the column.

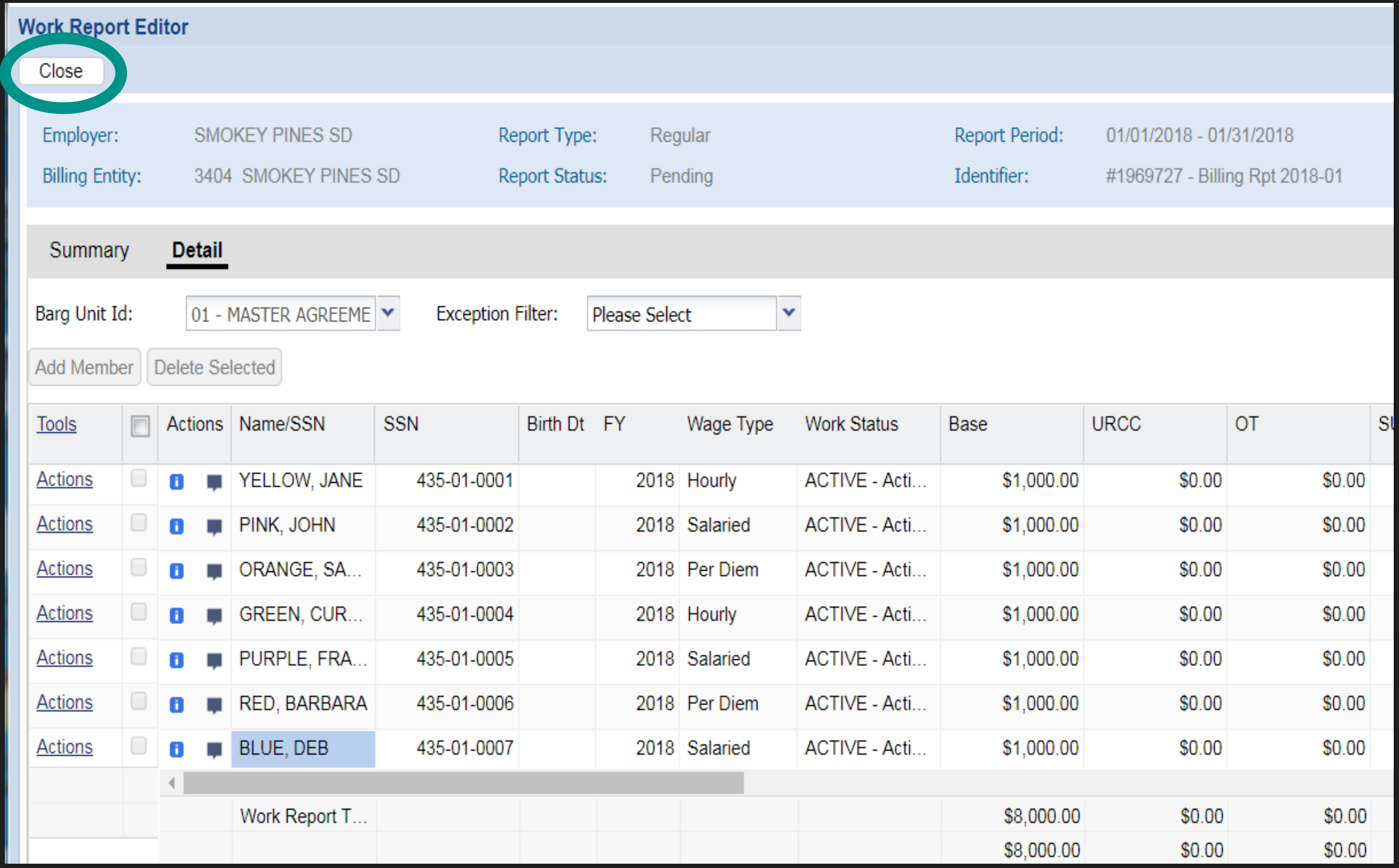
Selecting Edit Option

- The Work Report Editor allows you to view the members on your approved work report.
- The term "edit" is misleading because there are no changes that can be made after the report is submitted.
- WH Report can be filtered using the exception filter if you approved your report with errors/exceptions.
- The columns for all work report fields appear as you scroll to the right.



Return to Accounts Tab

- Use the Close button at the top left to return to the Accounts tab when done viewing your work history report.

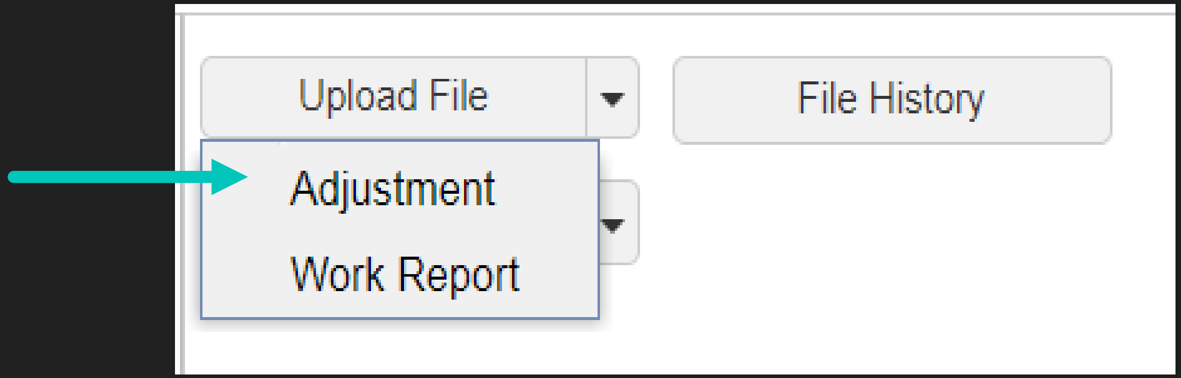


Adjustment Report Uploads

Importing your adjustment file

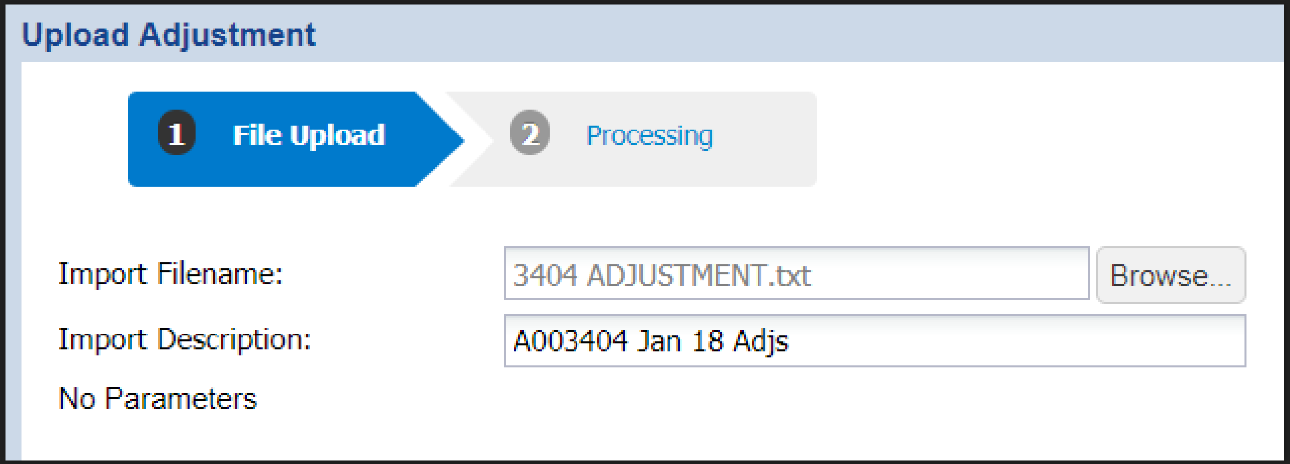
Importing an Adjustment File

- A reminder: There are **NO CHANGES** to the format of the Adjustment Template for ESS.
- Click the Upload File button. Select Adjustment.



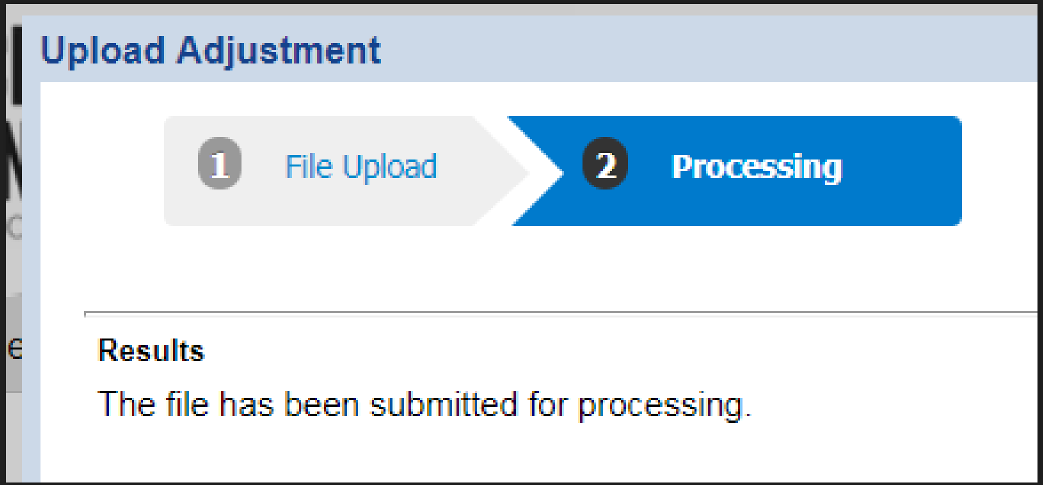
Select your File

- File selected will show in gray.
- Import Description updated to my preference.
- Click the Next button in the bottom right corner. To cancel the transaction, click the Cancel button in the bottom left. This will return you to the main Roster tab page.
- A message stating "Processing file….Please wait" will display on your screen while processing.



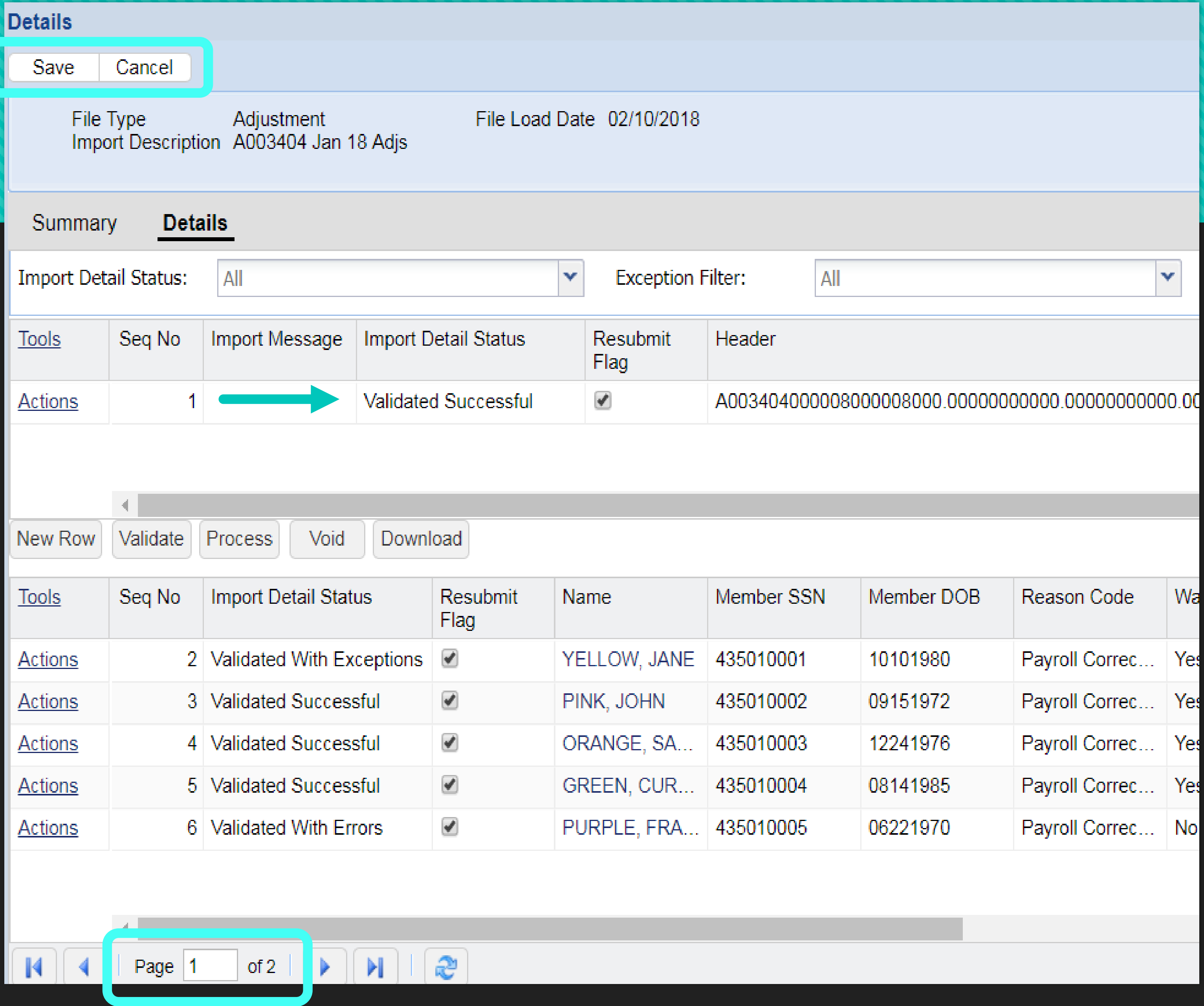
Processing the Adjustment File

- After the "Processing file…please wait" message, the screen will show your file results.
- You can view the details of your file using the Details button in the bottom right corner.

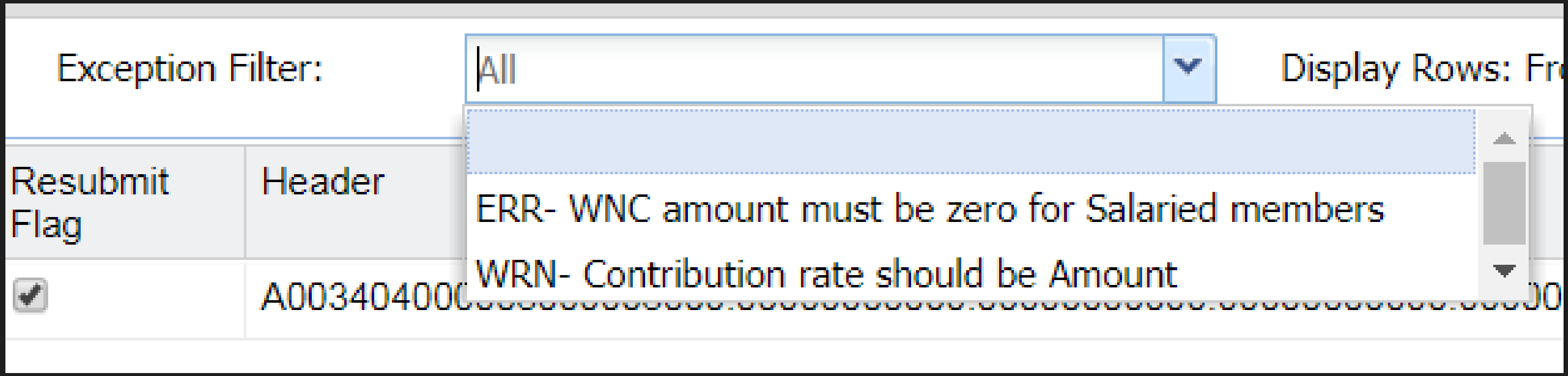


Details Page

- Clicking the Details button will take you to the Details page and automatically put you in Edit mode.
- The Adjustment file was Validated Successfully.
- There are two pages of data but already exceptions and errors are visible.



Exception Filter



- Use the arrow in the Exception Filter box to view Exceptions and Errors on your Adjustment File.
- There is one error message (ERR) and one exception message (WRN warning)

ERR-WNC amount error

Summary **Details**

Import Detail Status: All

Exception Filter: ERR- WNC amount must be zero for Sala

Display Rows: From

To:

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated Successful	☑	A003404000008000008000.0000000000.0000000000.0000000000.0000000000.0000000000.0000000000.0000000000.0001012

New Row | Validate | Process | Void | Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Reason Code	Wage Indicator	Contrib Withheld	Fiscal Year…	Wage Type	Work Status
Actions	6	Validated With Errors	☑	PURPLE, FRANK	435010005	06221970	Payroll Correc…	No	No	2018	Salaried	ACTIVE - Acti…

- There is an error in Frank Purple's adjustment row. As a salaried member, he should not be reported with WNC because he is qualified from day 1 of service.
- The Adjustment reason code was entered as Payroll Correction, but there were no contributions withheld.

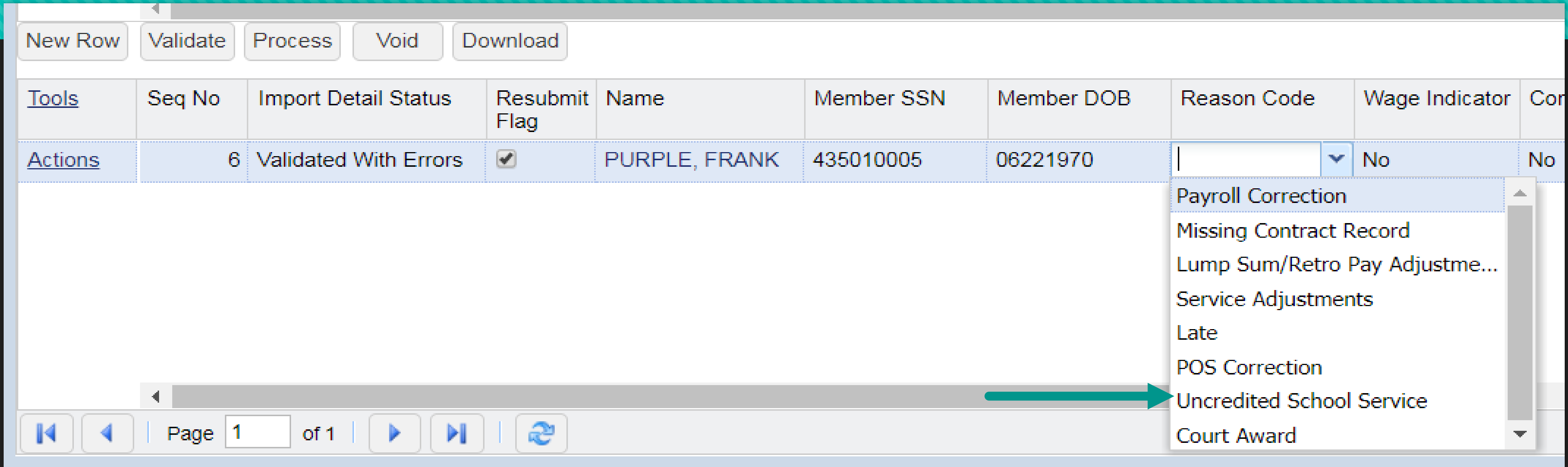
ERR-WNC amount cont.

New Row | Validate | Process | Void | Download

Tools	Wage Type	Work Status	BASE	URCC	OT	SUP	CONTRIB	Hours	Days	WNC	POS	EX
Actions	Salaried	ACTIVE - Acti...	0000000.00	0000000.00	0000000.00	0000000.00	0000000.00	00000	0000.00	0001000.00	0000000.00	000

- Use the gray scroll bar at the bottom of your screen to scroll to the right so you can see that member Frank Purple has $1,000 reported in the WNC column.
- There is also no service reported with these wages. Click inside the Days box to add service days if needed.
- **NEW:** Leading zeroes are not needed when making corrections, just enter the corrected value and apply/save your changes.

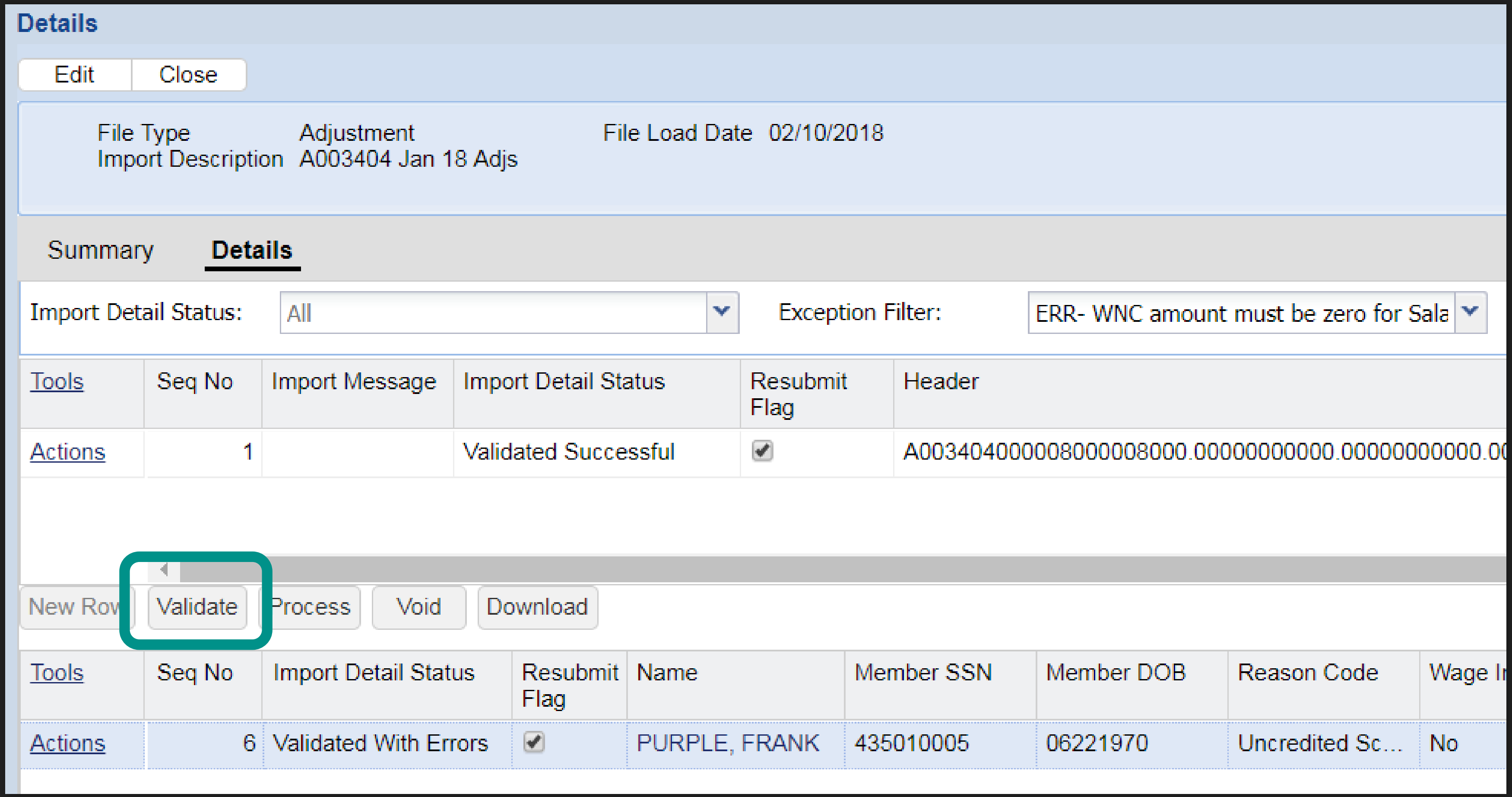
Reason Code options



- When you click inside the Reason Code field, an arrow will populate at the end of the box. Click the arrow for Reason Code options. Rather than Payroll Correction, Purple's WNC should be reported as Uncredited School Service. Select the desired code.
- You may save after each row is corrected, or you may wait until all corrections are made and then click save.

Validate file

- After corrections are made you may wish to validate the file again to be sure your corrections are valid.
- Save changes first, then click the Validate button.
- You can also validate from the Actions button in the File History screen.
- Clicking the Close button will take you back to the File History screen.



File History Screen

File History

Close

Report Type: All

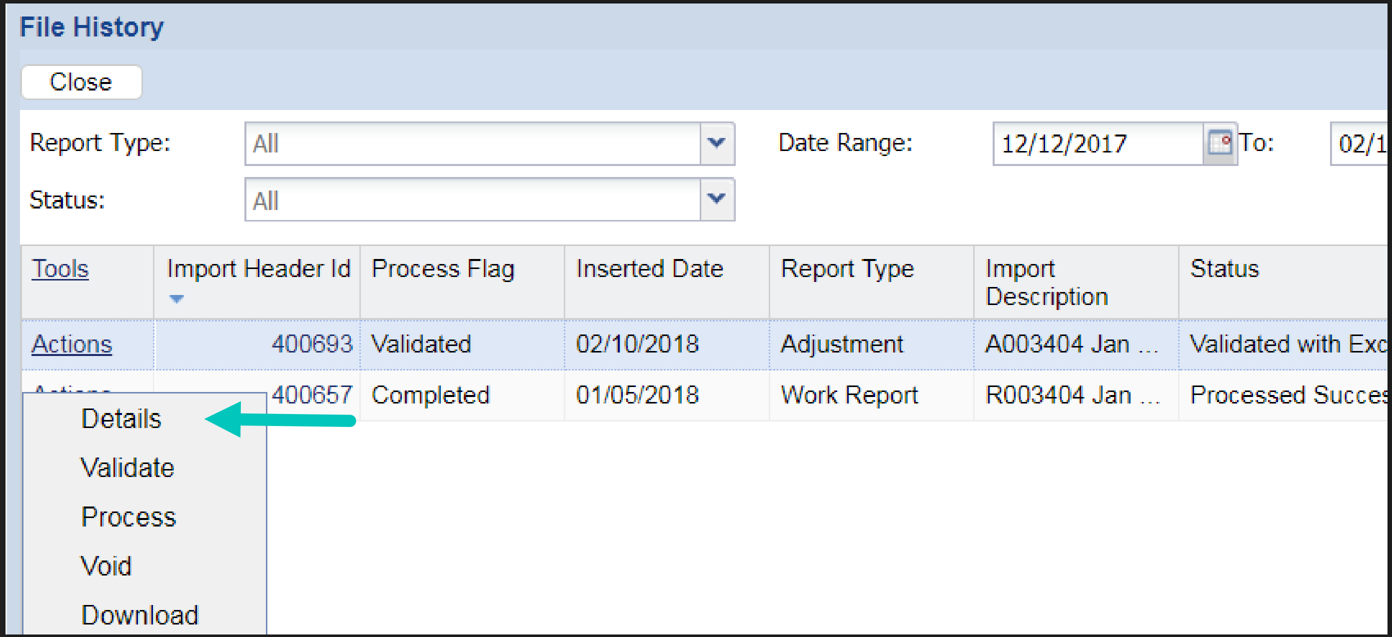
Date Range: 12/12/2017 To: 02/10/2018

Status: All

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Ro
Actions	400693	Validated	02/10/2018	Adjustment	A003404 Jan ...	Validated with Exceptions	02/10/2018	02/10/2018	5 sec	8	
Actions	400657	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Successfully	01/05/2018	01/18/2018	8 sec	8	

- The blue row is the adjustment file. The file has been validated and imported with 8 rows, but the status still shows Validated with Exceptions. Our error was corrected, but there was an exception listed in the exception filter that still needs to be reviewed.

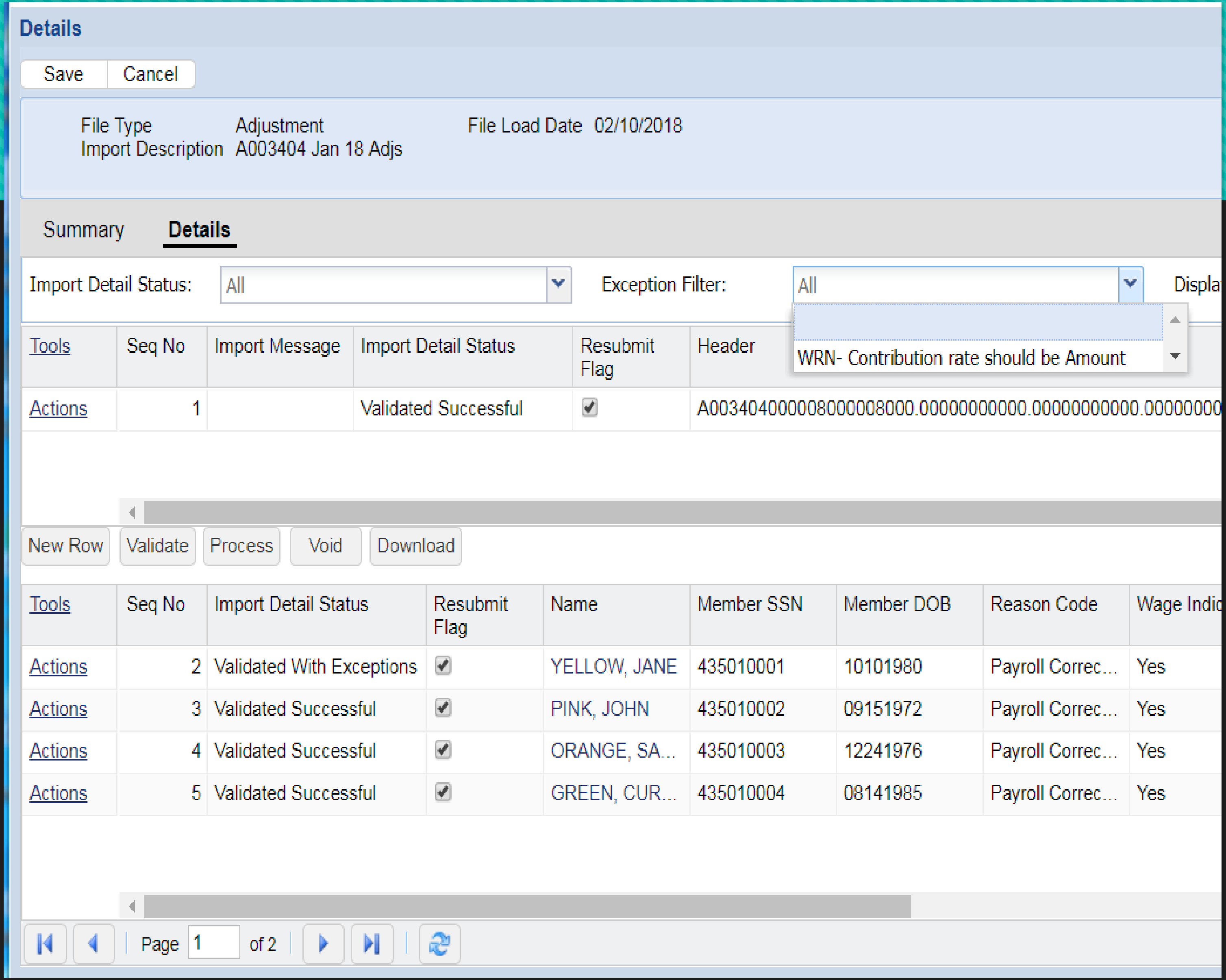
Actions button



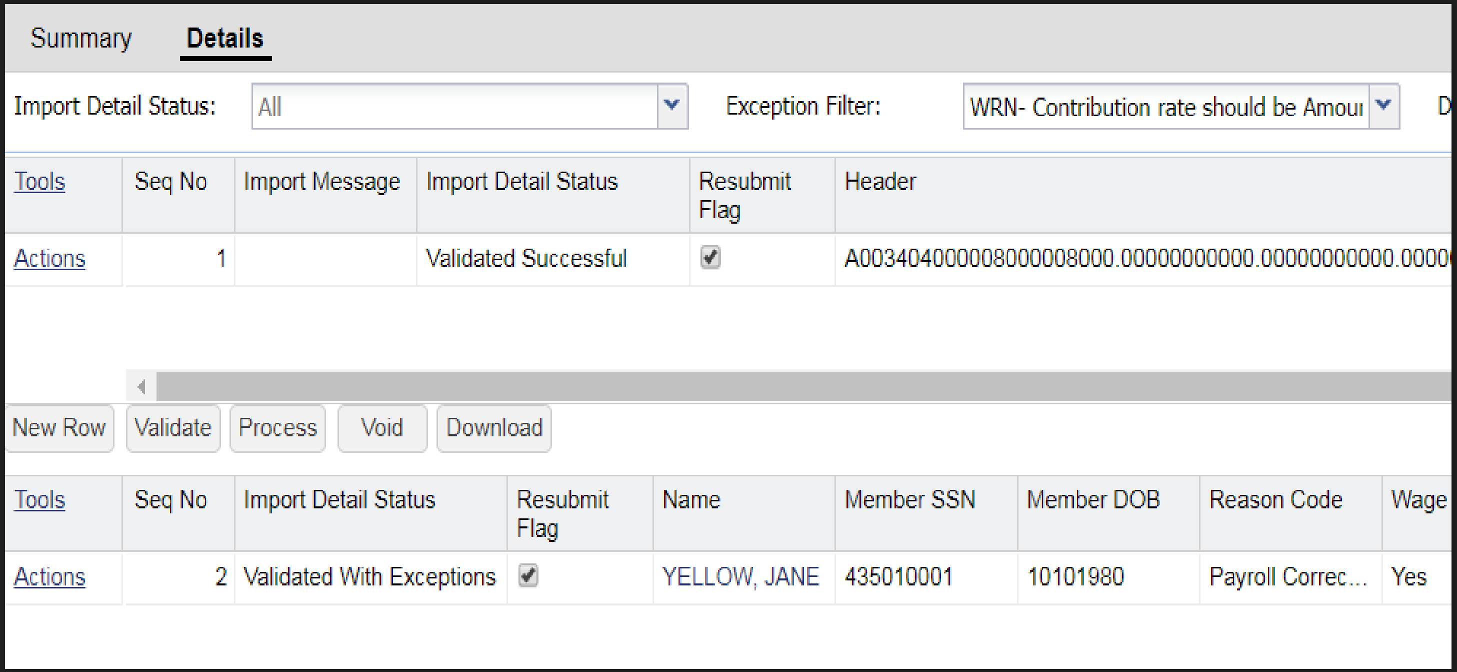
- Click the Actions button at the start of the row. Select Details to return to Details page.

Exception Filter

- Select WRN-Contribution rate should be Amount in the Exception Filter.
- All records on the adjustment file with this exception will populate below.



WRN-Contribution rate exception



Summary **Details**

Import Detail Status: All Exception Filter: WRN- Contribution rate should be Amou D

Tools	Seq No	Import Message	Import Detail Status	Resubmit Flag	Header
Actions	1		Validated Successful	☑	A003404000008000008000.0000000000.0000000000.0000

New Row | Validate | Process | Void | Download

Tools	Seq No	Import Detail Status	Resubmit Flag	Name	Member SSN	Member DOB	Reason Code	Wage
Actions	2	Validated With Exceptions	☑	YELLOW, JANE	435010001	10101980	Payroll Correc...	Yes

- Only one record, Jane Yellow, was found with this exception.

WRN-Contribution rate cont.

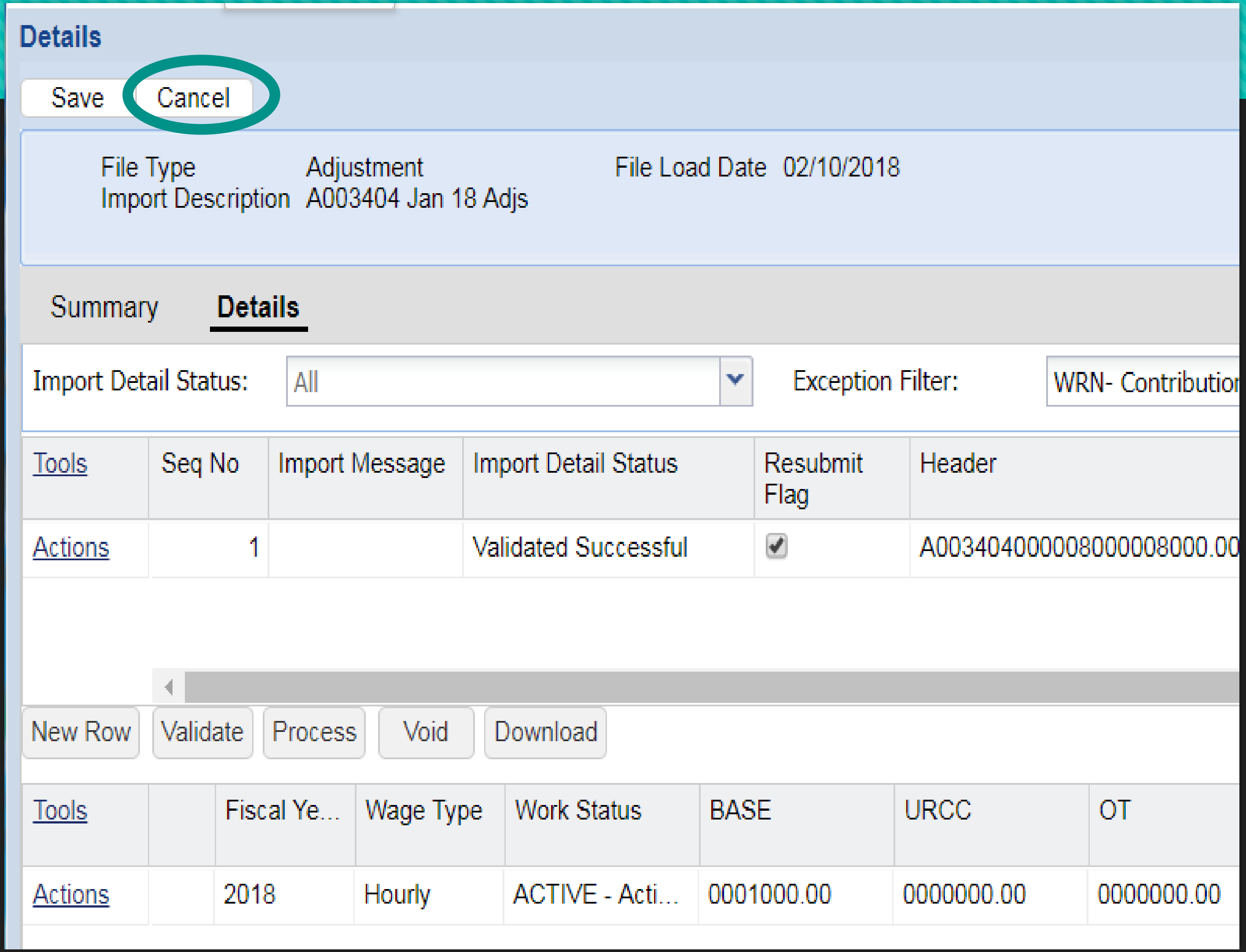
New Row | Validate | Process | Void | Download

Tools		Fiscal Ye...	Wage Type	Work Status	BASE	URCC	OT	SUP	CONTRIB	Hours	Days	WNC
Actions		2018	Hourly	ACTIVE - Acti...	0001000.00	0000000.00	0000000.00	0000000.00	0000065.00	00160	0000.00	0000000

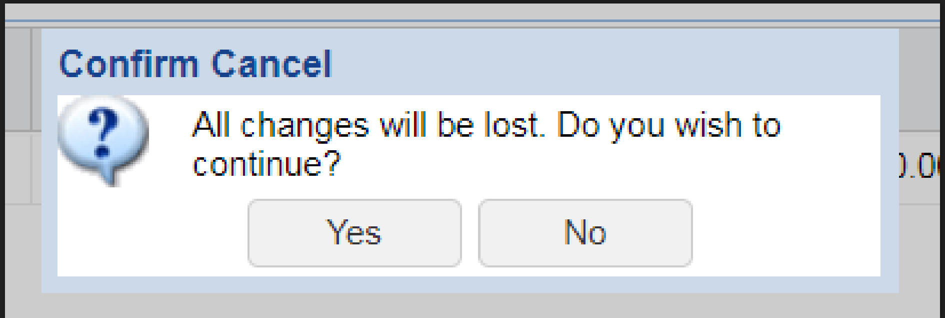
- After scrolling to the right, the base wages show $1,000 but the CONTRIB field only shows $65.00. The contributions would be correct for someone who is a TD 6.5% member but ESS is telling us this is not correct.

Close Details page

- The contribution rate should be verified before corrections are made to the transaction row.
- The contribution rate and membership class is available using your **approved WH Reports** on the Account Tab.
- Click the Cancel button on the Details screen. If you have made other changes but have not saved, Save first, then Close the Details page.

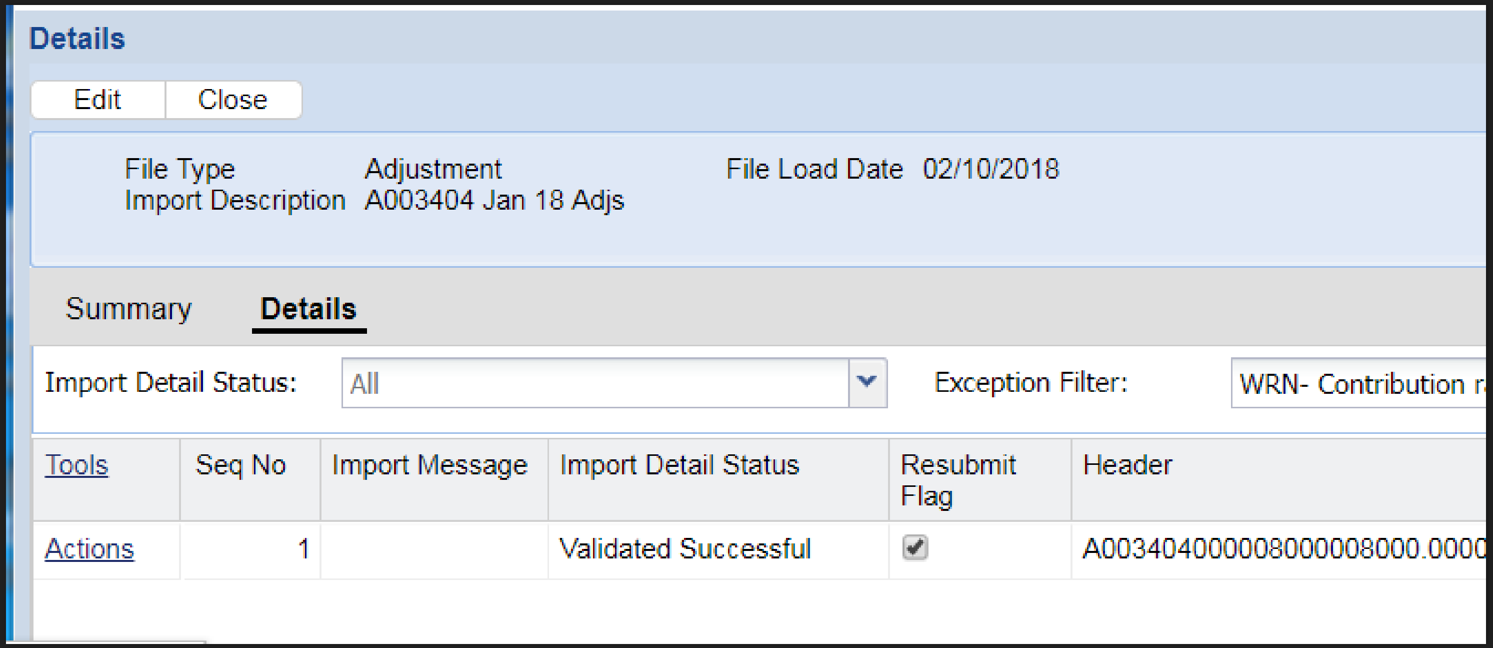


Confirm Cancel



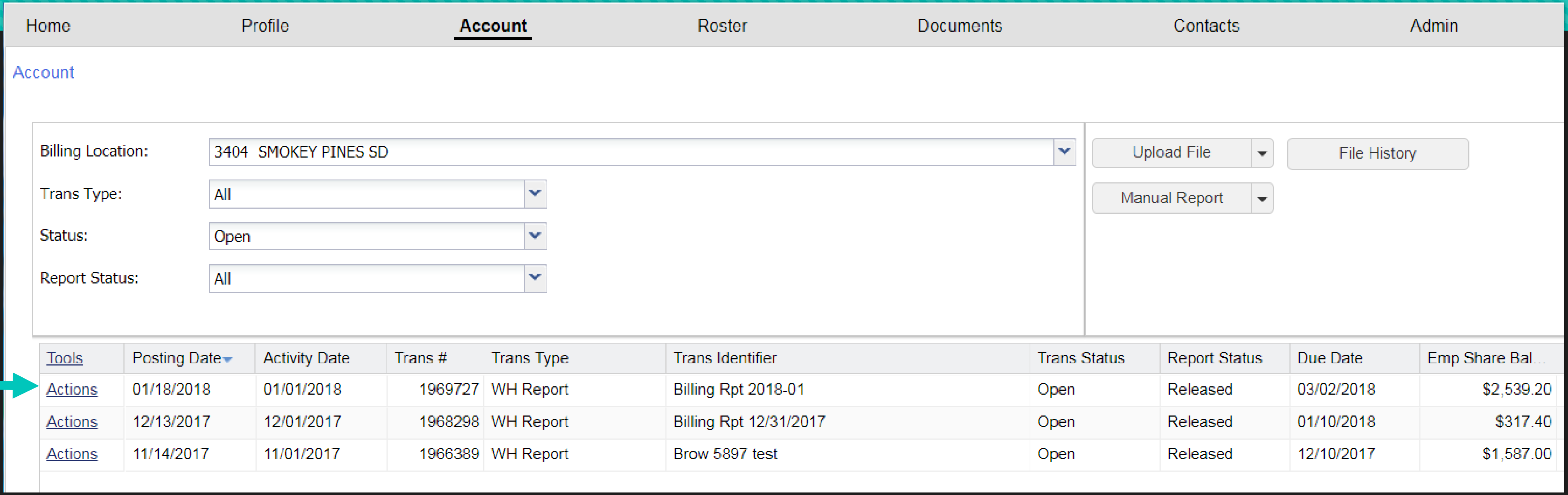
- When using the Cancel button, ESS will provide you a chance to rethink your decision.
- Please be sure to save any other corrections made before leaving the details page.

Close button



- To leave details page, click Close. This will return you to the File History page. Click Close to leave the File History page. This will take you back to the Account Tab.

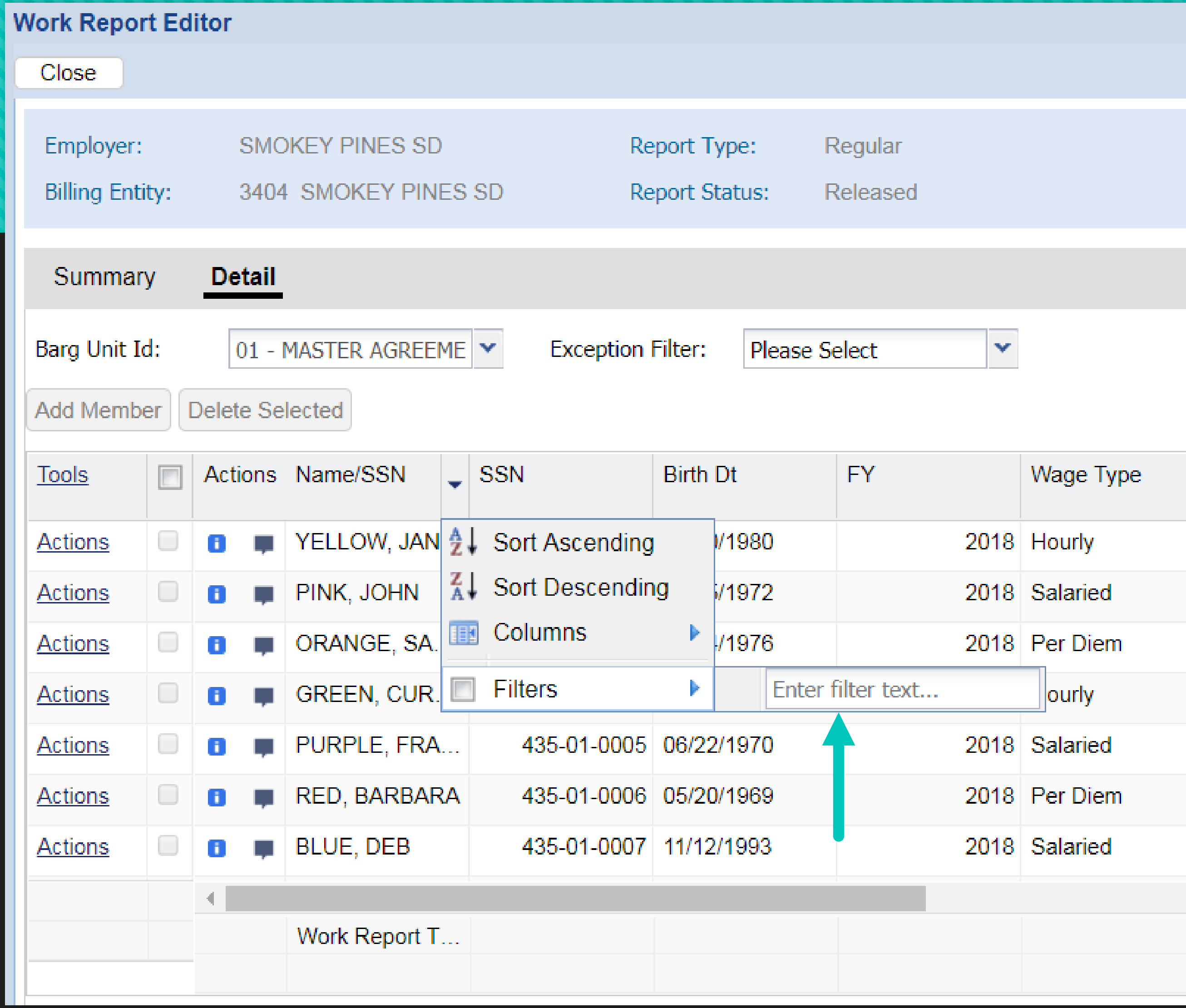
Account Tab to WH Report Details



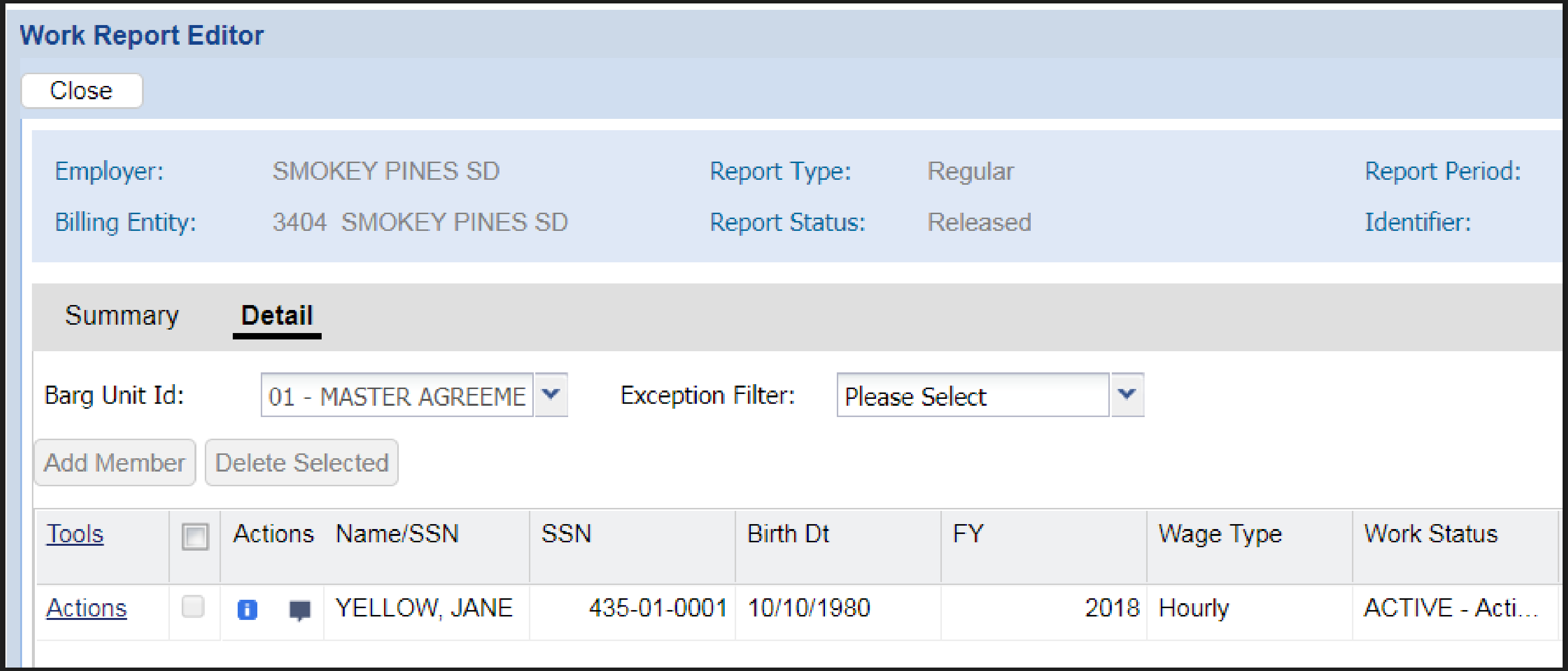
- Use the Actions button on the row for the most recent WH Report. Select **Edit** from the options listed.

Work Report Editor

- The Edit button takes you to the Work Report Editor screen.
- Jane Yellow is the first person listed on this work history report but if she wasn't you would use the Name/SSN drop down arrow on the right side of that field, go to Filters, and enter her name or SSN to find her within the work history report.

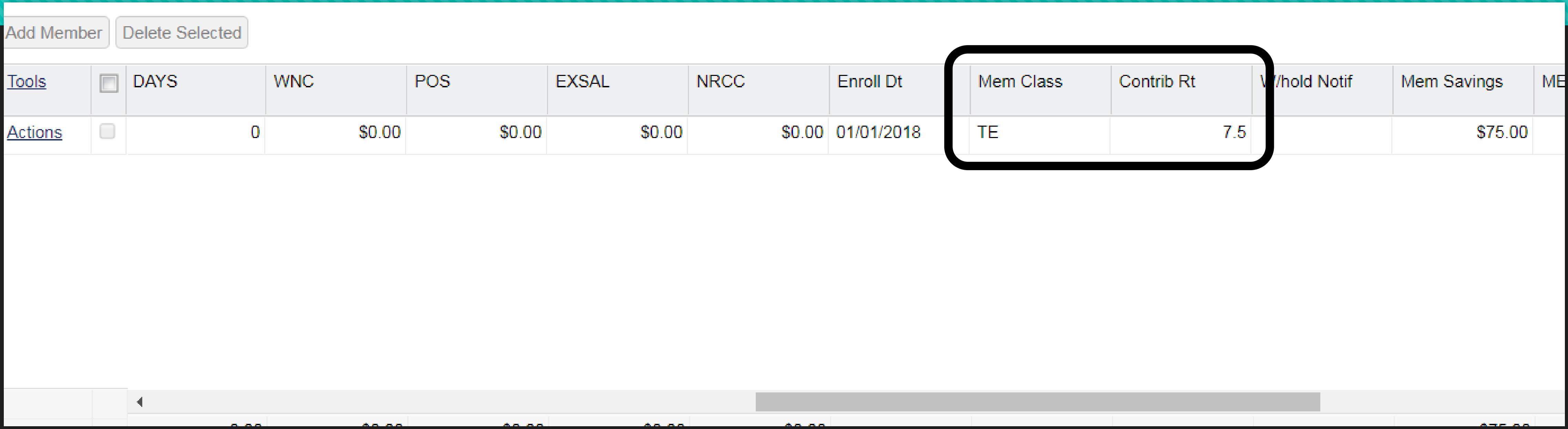


Member found



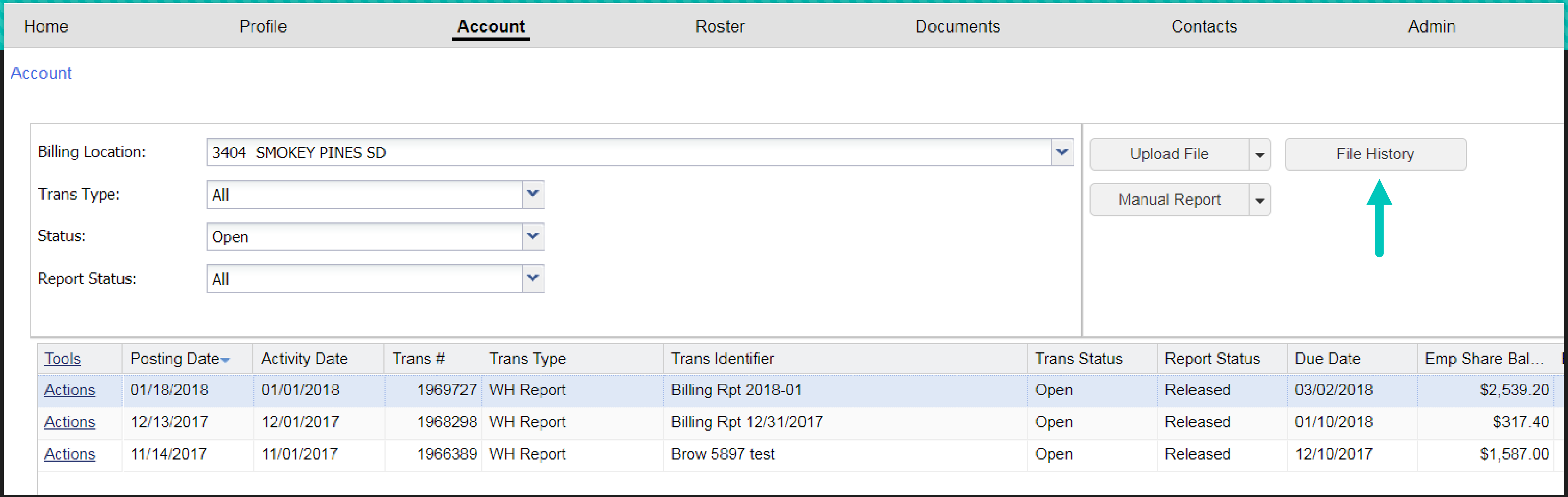
- When you have found the record you are looking for, use the gray scroll bar at the bottom of the screen to view the rest of her transaction row.

Finding the Contribution Rate and Class



- Use the scroll bar at the bottom of the page to scroll to the right. The contribution rate and class are both listed on your approved work history reports.
- Jane Yellow is part of membership class TE with a 7.5% contribution rate. For $1,000 wages, $75 in contributions should be withheld.
- Use the Close bottom at the top of the screen to return to the Accounts tab.

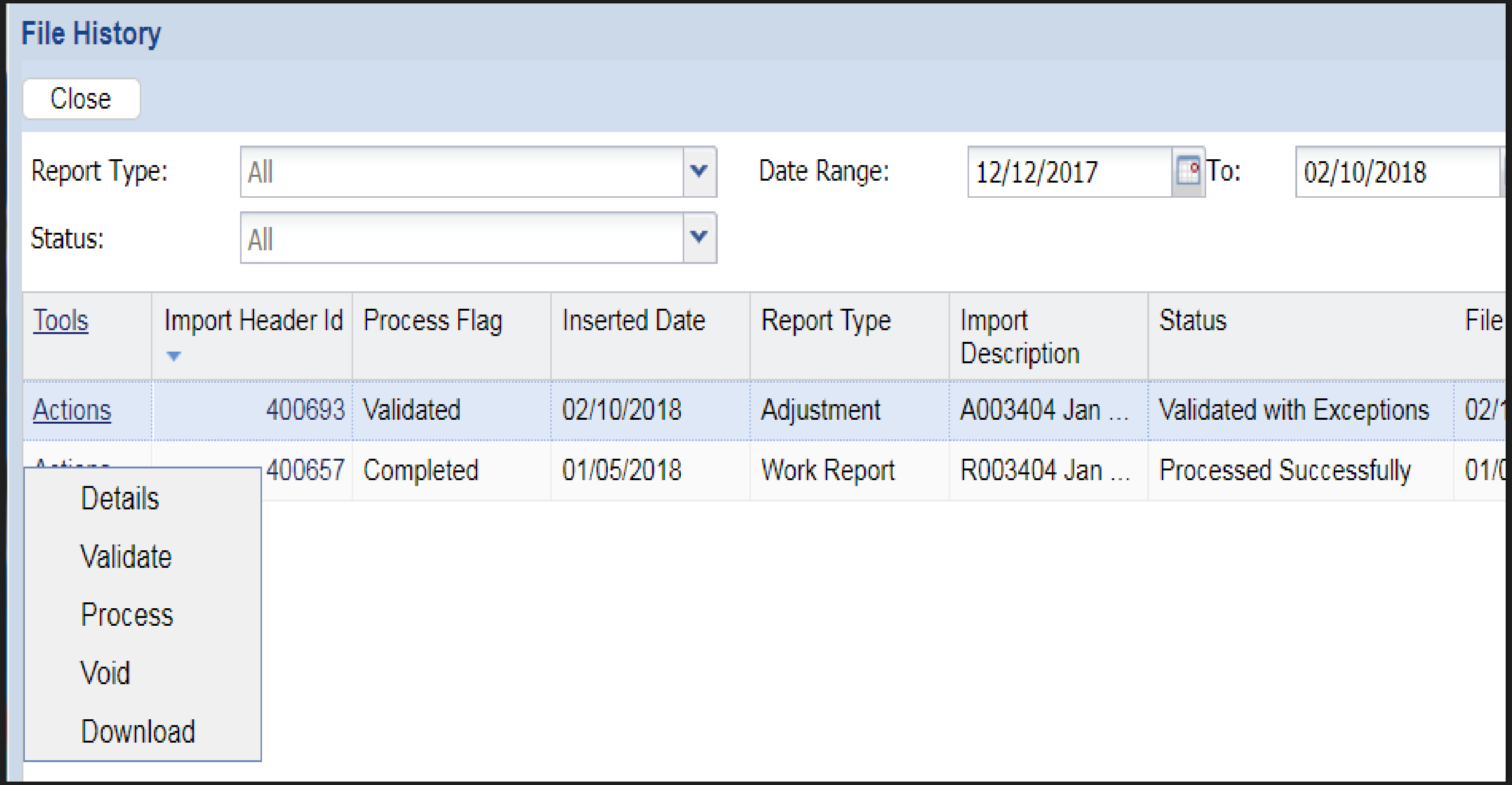
Accounts tab to File History button



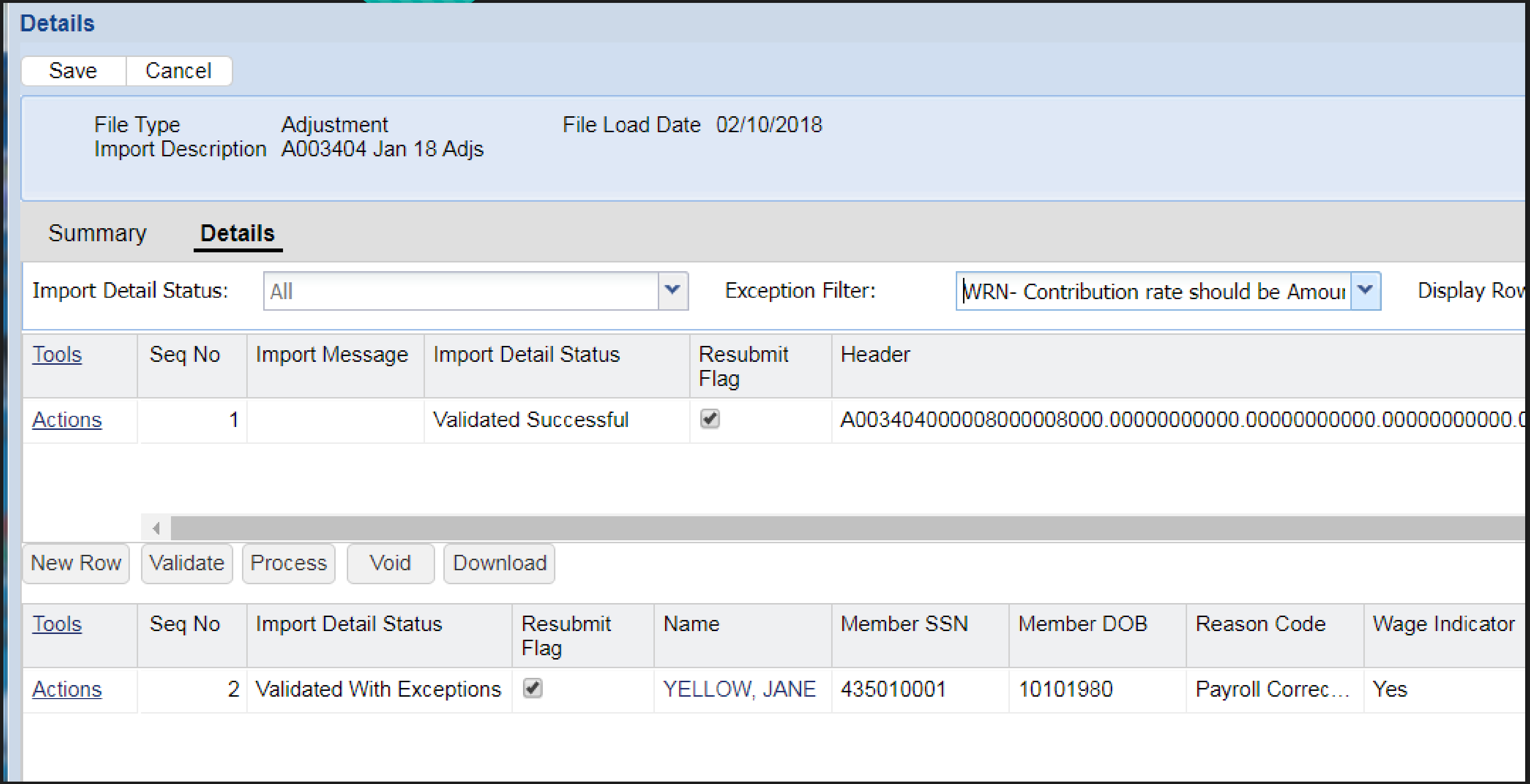
- To return to adjustment file to continue correcting Jane Yellow’s contributions, click the File History button.

Adjustment Details

- Click Actions button on Adjustment file row and select Details to return to Details page.



Use Exception Filter to locate member



- Use the Exception Filter to find the member you need to correct.
- Using the gray scroll bar, scroll right to make the correction in the CONTRIB field.

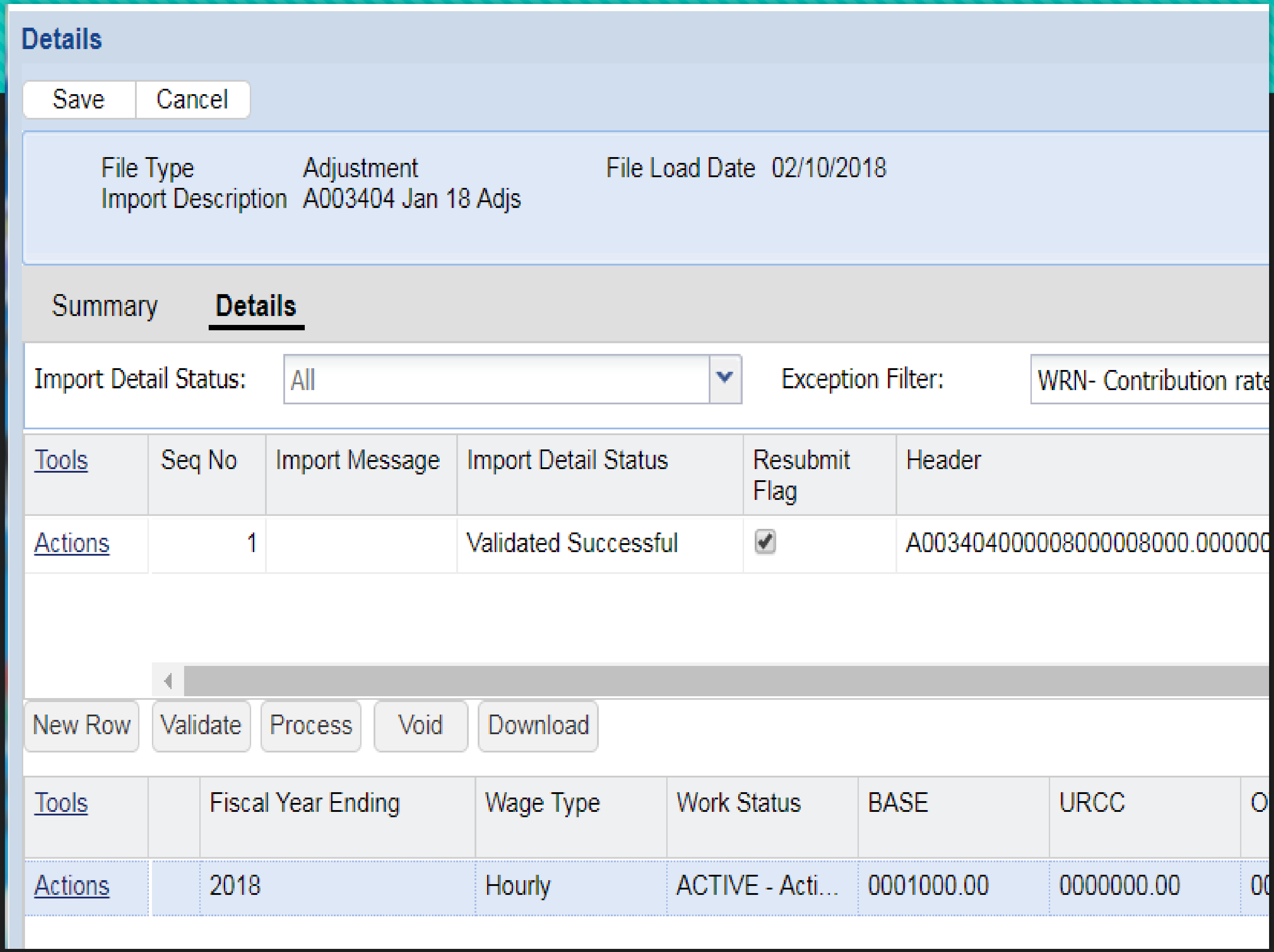
Make correction in CONTRIB field

Tools		Fiscal Year Ending	Wage Type	Work Status	BASE	URCC	OT	SUP	CONTRIB	Hours	Days
Actions		2018	Hourly	ACTIVE - Acti...	0001000.00	0000000.00	0000000.00	0000000.00	75.00	00160	0000.00

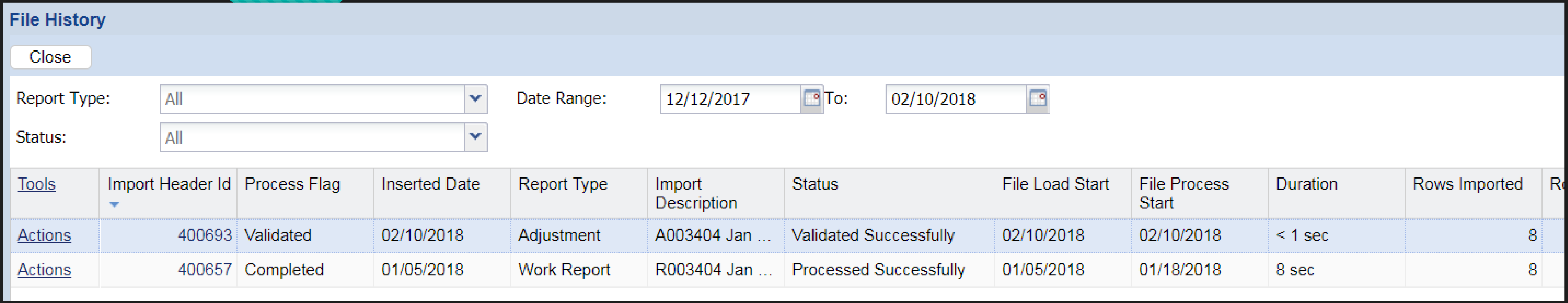
- Click inside CONTRIB field box and enter the corrected amount of contributions. Instead of $65.00, her adjustment transaction row now shows $75.00.

Save, then Validate file

- Click Save to save your corrections.
- Because this is our last exception and/or error to fix, the file is also ready to be validated again.
- Click Validate after you have saved your work.



Validated Successfully



File History

Close

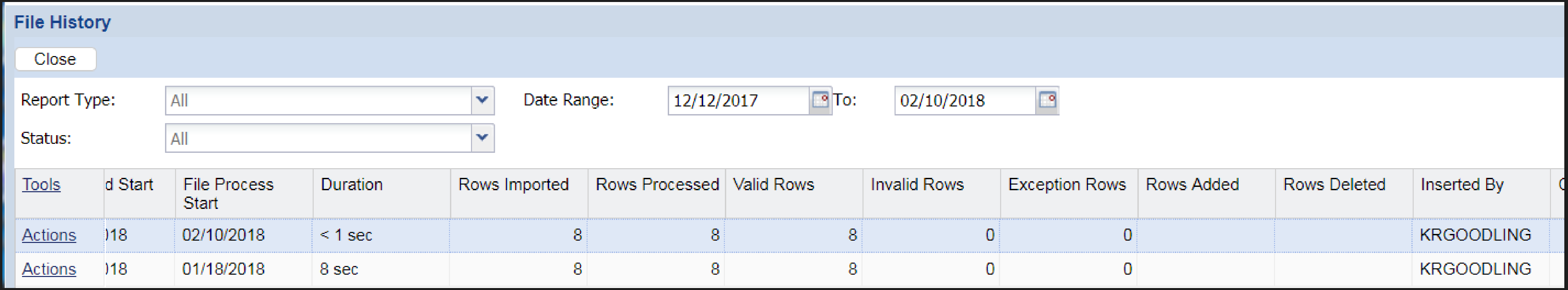
Report Type: All | Date Range: 12/12/2017 To: 02/10/2018

Status: All

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported
Actions	400693	Validated	02/10/2018	Adjustment	A003404 Jan ...	Validated Successfully	02/10/2018	02/10/2018	< 1 sec	8
Actions	400657	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Successfully	01/05/2018	01/18/2018	8 sec	8

- Use the Close button to return to the File History screen.
- The Adjustment file has been Validated Successfully with 8 rows. There should no longer be any rows with errors or exceptions. To check, scroll to the right to see the rest of the row details.

Adjustment file details



File History

Close

Report Type: All

Date Range: 12/12/2017 To: 02/10/2018

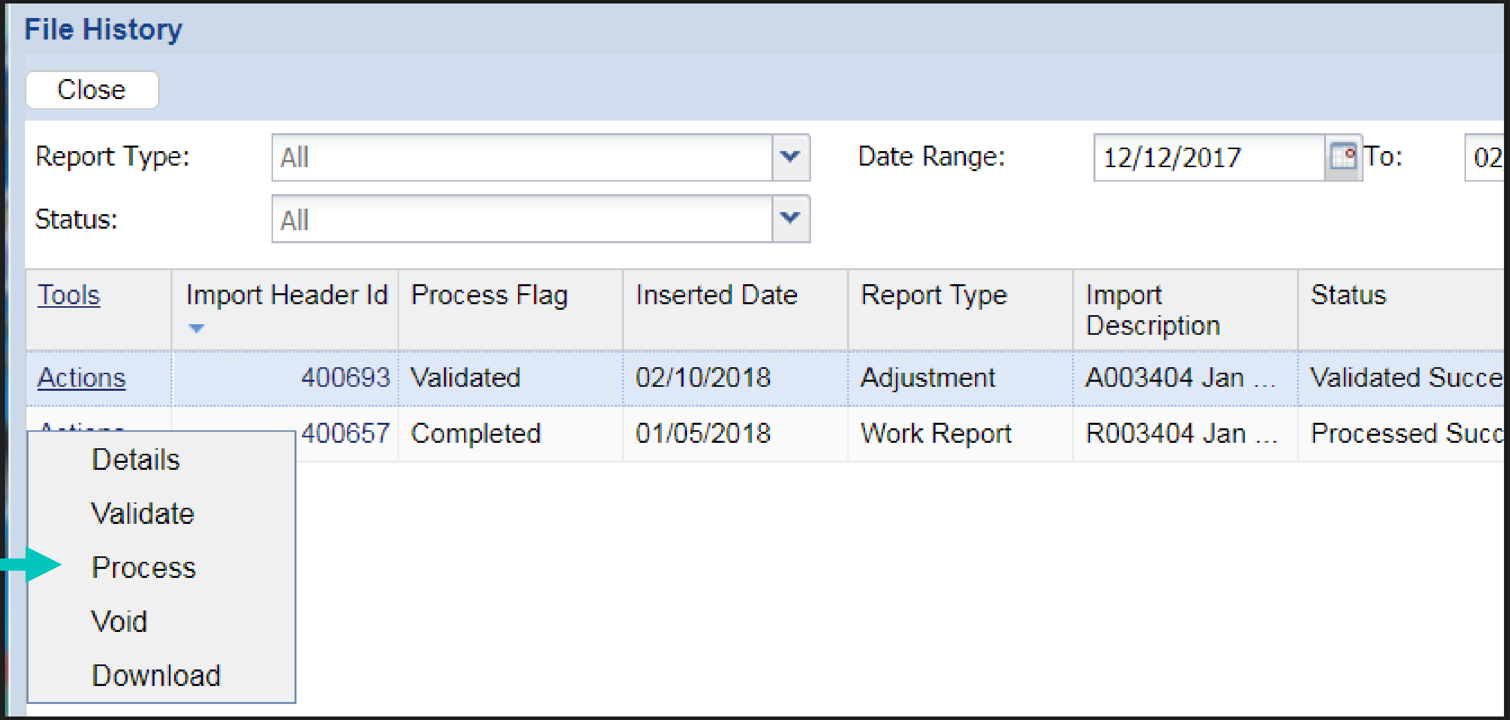
Status: All

Tools	d Start	File Process Start	Duration	Rows Imported	Rows Processed	Valid Rows	Invalid Rows	Exception Rows	Rows Added	Rows Deleted	Inserted By
Actions	)18	02/10/2018	< 1 sec	8	8	8	0	0			KRGOODLING
Actions	)18	01/18/2018	8 sec	8	8	8	0	0			KRGOODLING

- The blue row is the adjustment file. The file successfully imported 8 rows and there are no errors or exceptions remaining.

Process the file

- After scrolling back to the left, click the Actions button and select the Process option to process the adjustment file.



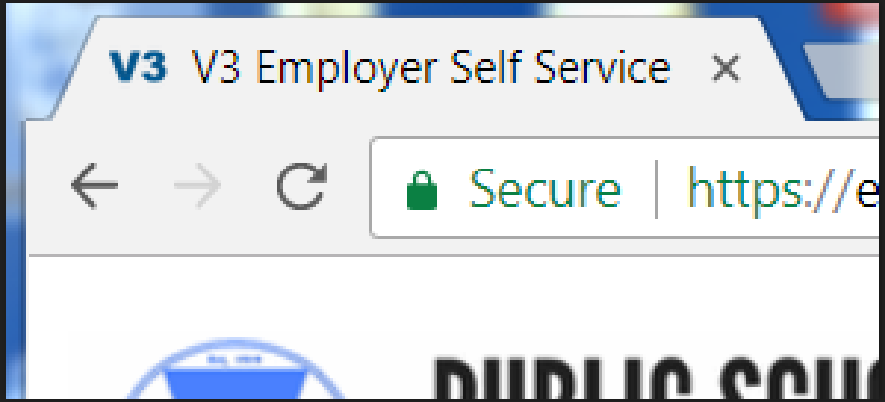
Processed Successfully

Tools	Import Header Id	Process Flag	Inserted Date	Report Type	Import Description	Status	File Load Start	File Process Start	Duration	Rows Imported	Rows
Actions	400693	Completed	02/10/2018	Adjustment	A003404 Jan ...	Processed Successfully	02/10/2018	02/10/2018	10 sec	8	
Actions	400657	Completed	01/05/2018	Work Report	R003404 Jan ...	Processed Successfully	01/05/2018	01/18/2018	8 sec	8	

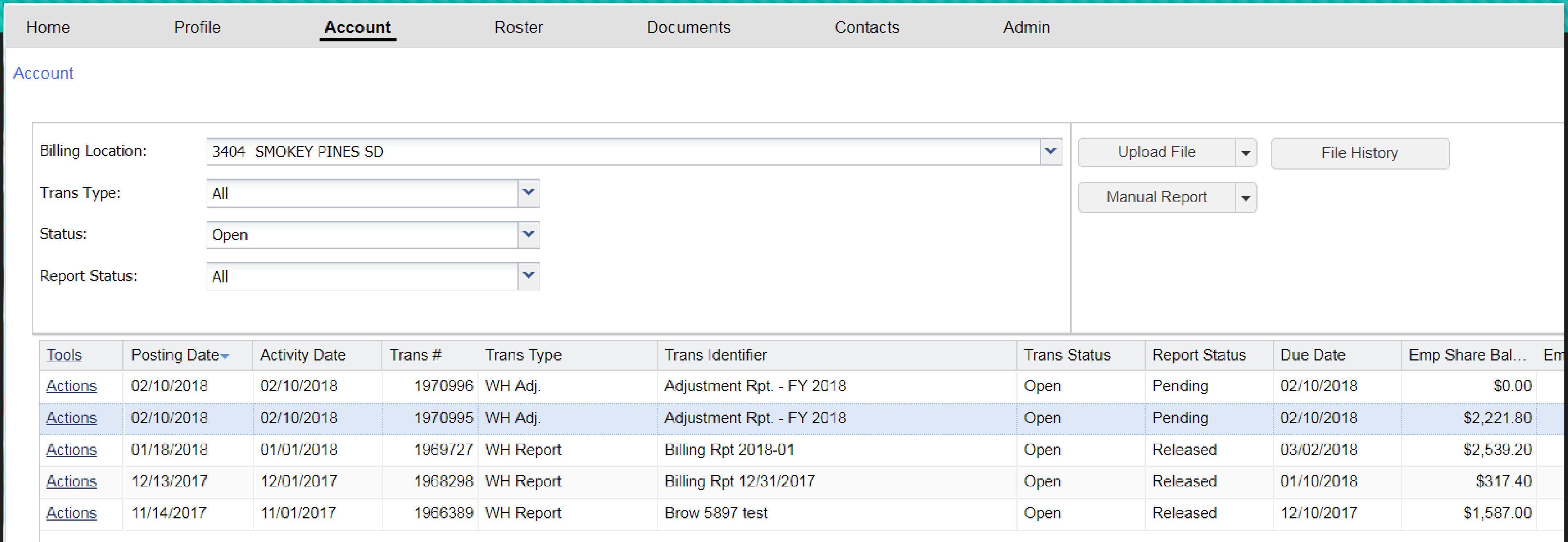
- The Adjustment file has been successfully processed.
- Click Close in the top left corner to return to the Accounts Tab.

Refresh the Browser

- Files that were processed should appear in your Account tab right away but you may need to refresh your browser to pull these new transactions in so you can view them.



Transaction in Account Tab



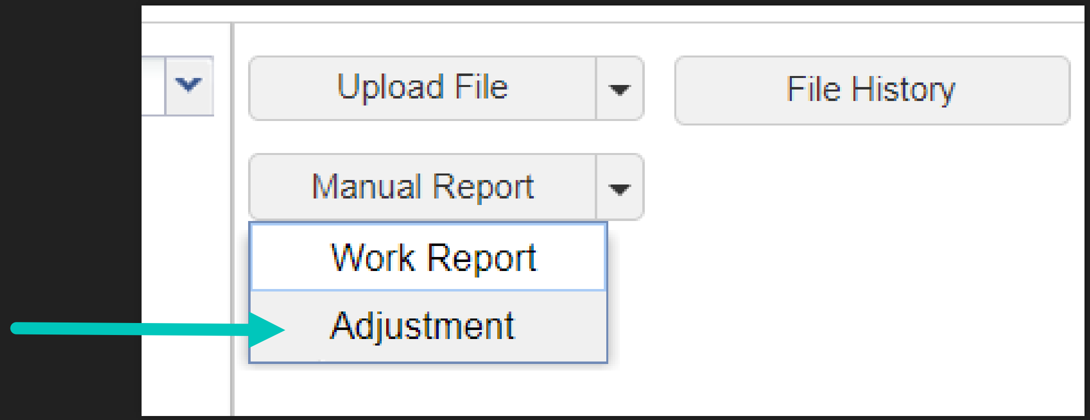
- The Report Status shows Pending for the Adjustment Report that was just processed.

Manual Adjustments

Your guide to correcting accounts individually.

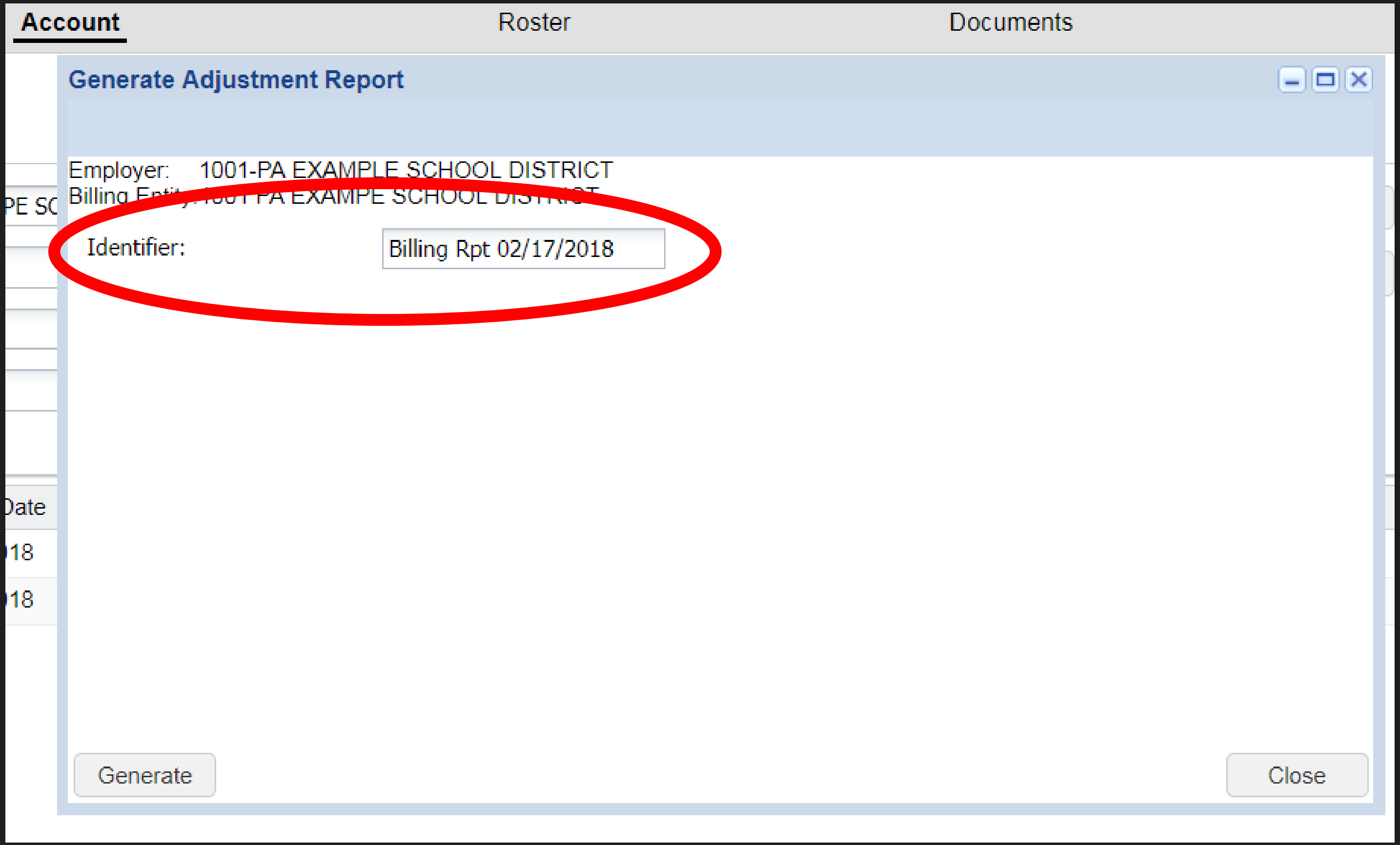
Account Tab

- To do a manual adjustment, you will use the Manual Report button drop down arrow to select Adjustment.



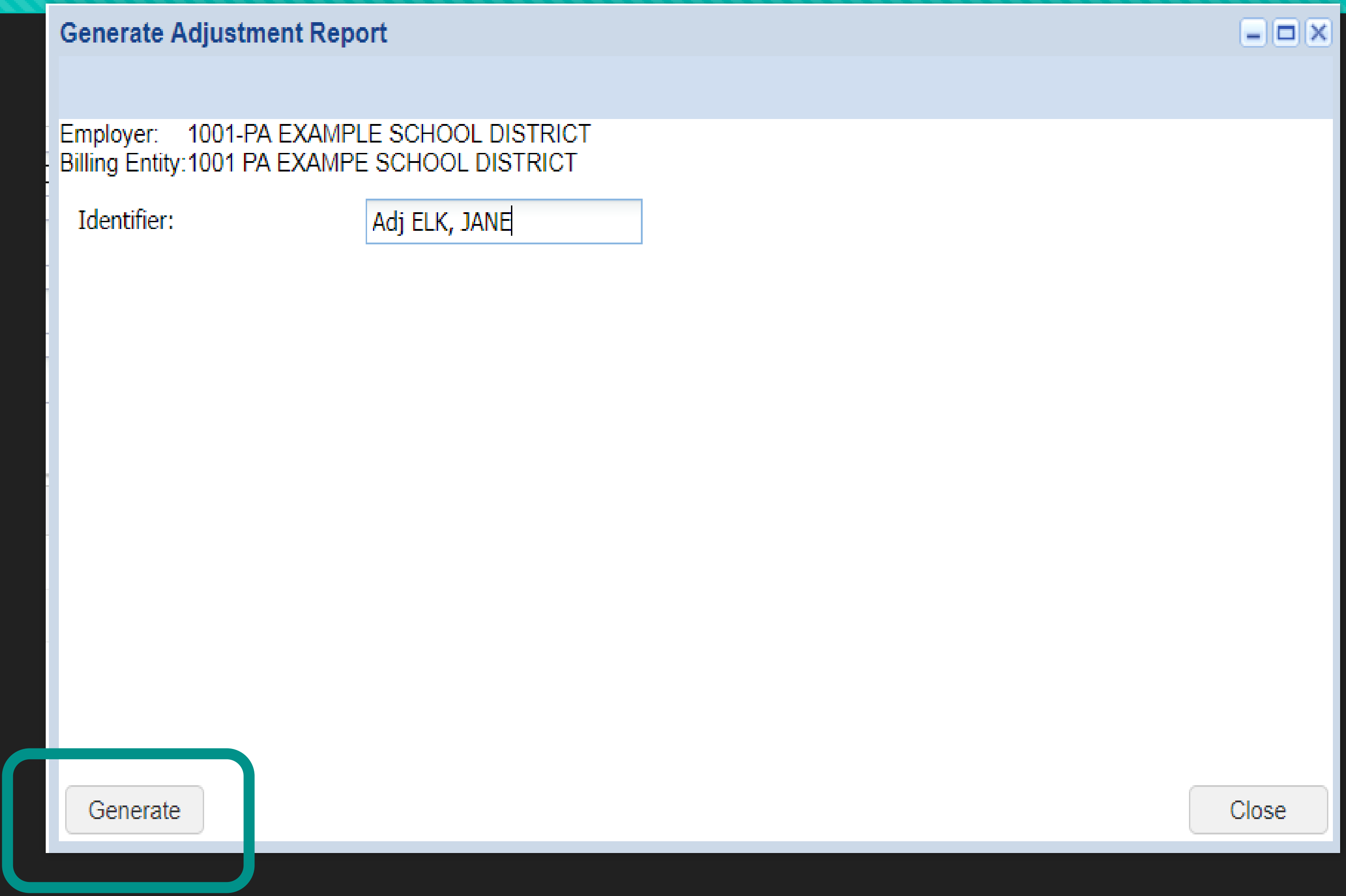
Important: Rename Identifier

- The Generate Adjustment Report screen will have your Employer name at the top, just above the Identifier.
- **TIP:** The system populates the Identifier, but lists this as a Billing Report. **You must rename this Identifier to something you can identify as a manual adjustment** instead or this may cause confusion when you are reviewing your Employer Statement of Account.

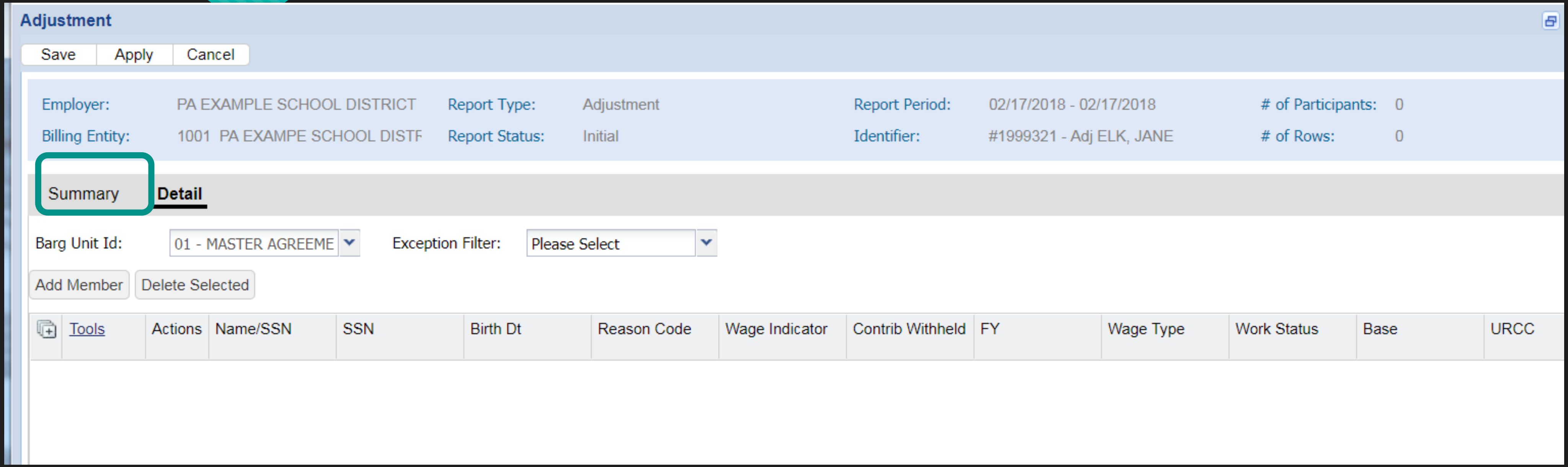


Generate the Adjustment

- After your Identifier is renamed, click the Generate button.
- Please note, this button is on the left, rather than the right like most screens.



Adjustment screen



- You are in edit mode when you begin a manual adjustment.
- Click the Add Member button to create an adjustment row.

New adjustment line created

Add Member | Delete Selected

	Tools	Actions	Name/SSN	SSN	Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS
	Actions											$0.00	$0.00	$0.00	$0.00	$0.00	

- Clicking the Add Member button will create an adjustment row.
- Each row created will have an Actions button on the far left.
- The adjustment line fields are set up in the same order as the work report.
- Double click inside the Name/SSN box to enter the member's name or SSN.

Name/SSN field

Add Member | Delete Selected

	Tools	Actions	Name/SSN	SSN	Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS
	Actions		ELK, JANE	435-01-0041	10/10/1980							$0.00	$0.00	$0.00	$0.00	$0.00	

- The SSN and Birth Date will populate based on the name or SSN entered in the Name/SSN field.
- Please carefully review these details to make sure you are adjusting the correct member before moving on.

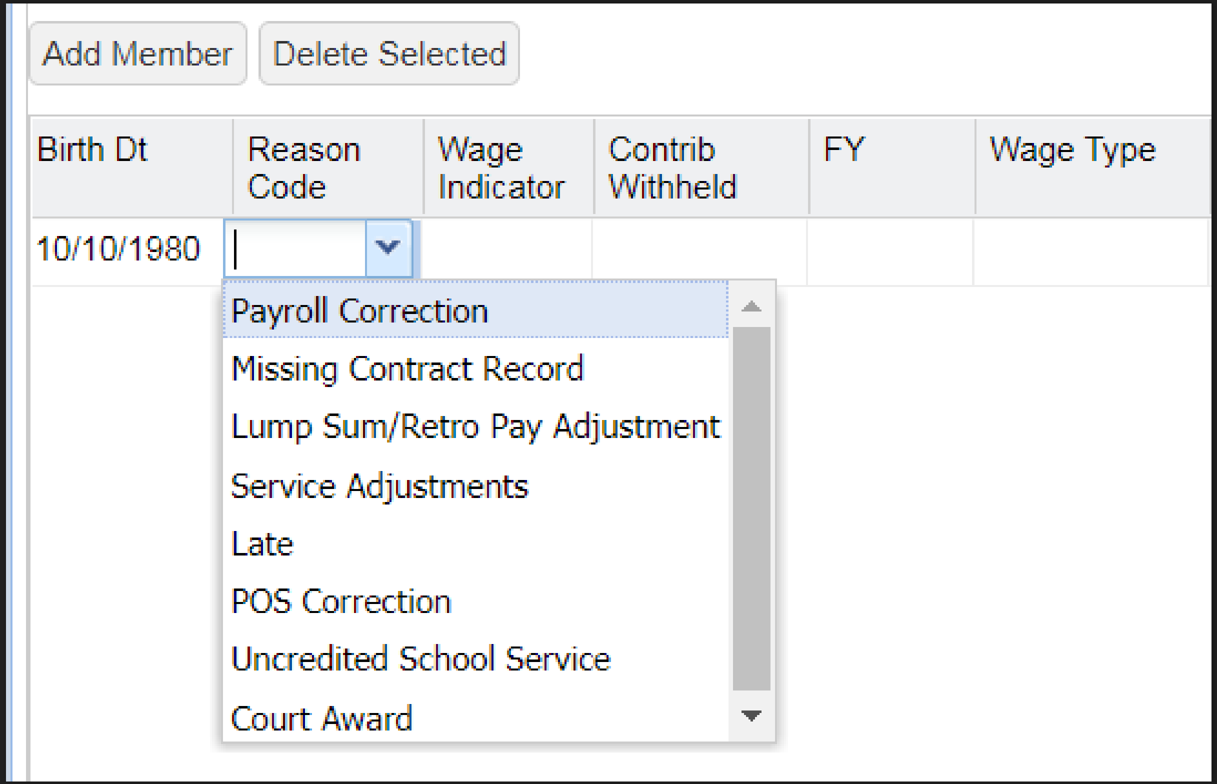
Available fields

Add Member Delete Selected

Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS	DAYS	WNC	POS	EXSAL	NRCC
10/10/1980							$0.00	$0.00	$0.00	$0.00	$0.00			$0.00	$0.00	$0.00	$0.00

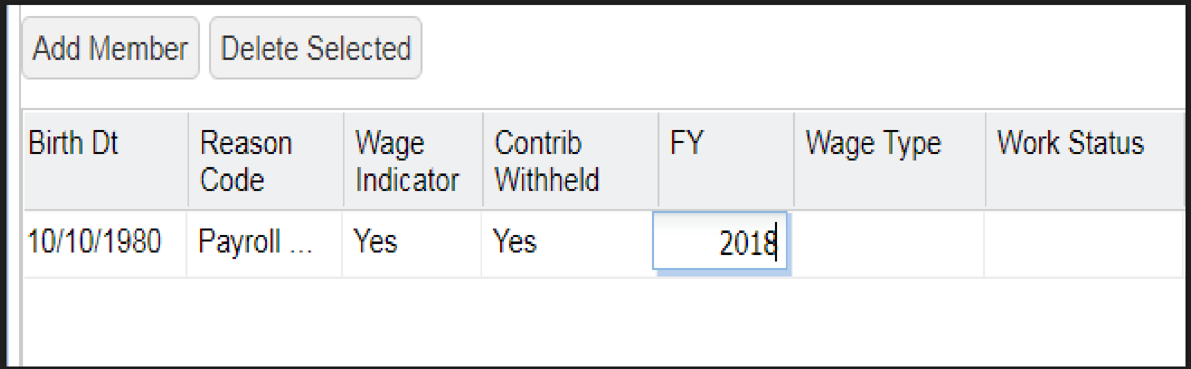
- The fields listed on the adjustment row are in the same order as the work history report.
- **The first six fields that appear blank after the birth date are all mandatory fields.**
- The monetary and service fields only need to be entered if your adjustment requires those values.

Reason Codes



- Many fields have a pull down menu on the right side of the field to make a selection. After selecting the appropriate reason code, continue moving through the fields.

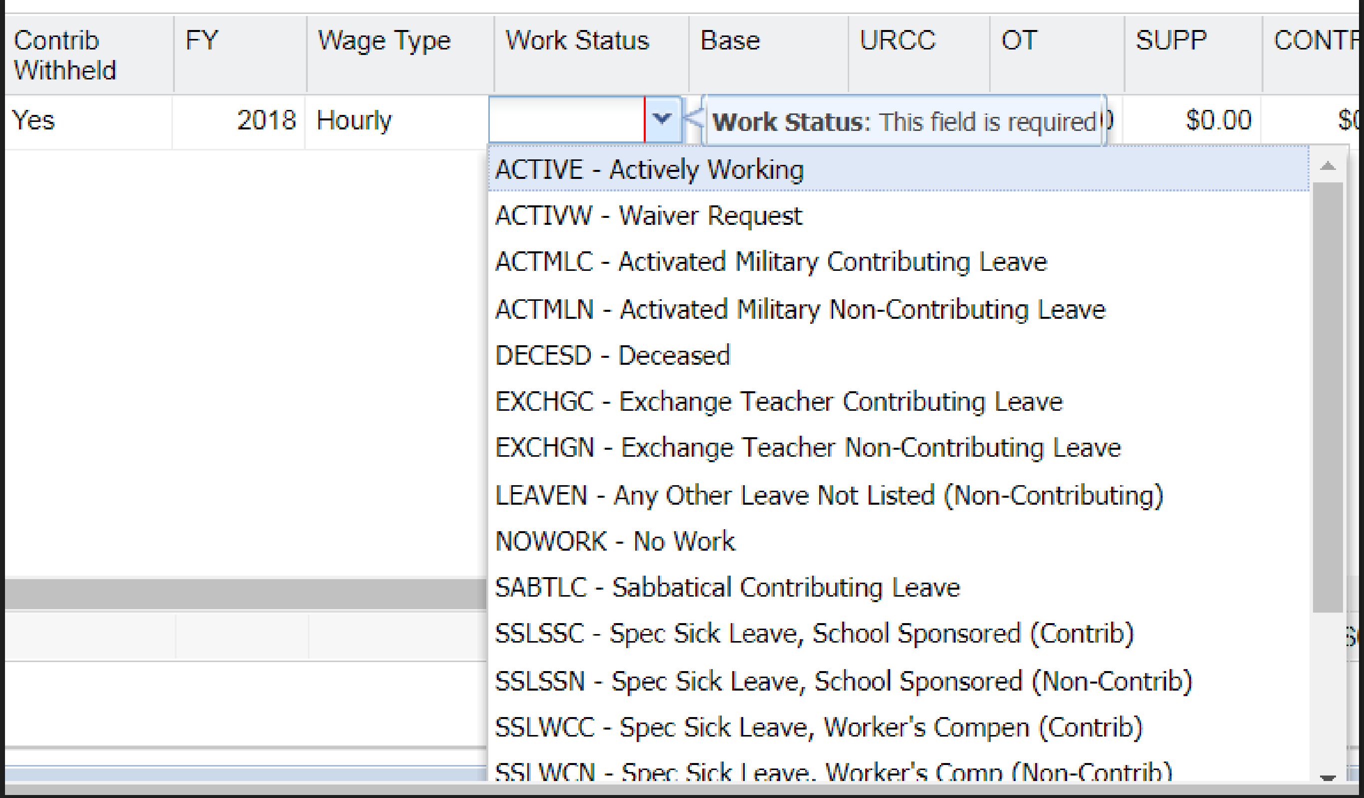
Wage Indicator and Contributions Withheld



- For most accounts the Wage Indicator should display as Yes. This means that you paid this member during the fiscal year you are correcting.
- The Contributions Withheld field is asking if you withheld contributions for the money you are adjusting. This may be a yes or no.
- The FY field does not have a pull down menu. Enter the fiscal year for the year the money was earned, not the year the money was paid.

Wage Type and Work Status

- The Wage Type and Work Status both have pull down menus where you can select options. There are required fields.
- Jane Elk is an Hourly wage type who is Actively Working (ACTIVE).
- Remember, the **Wage Type** and **Work Status must match an open contract record** for the member you are adjusting.



Enter adjustment details

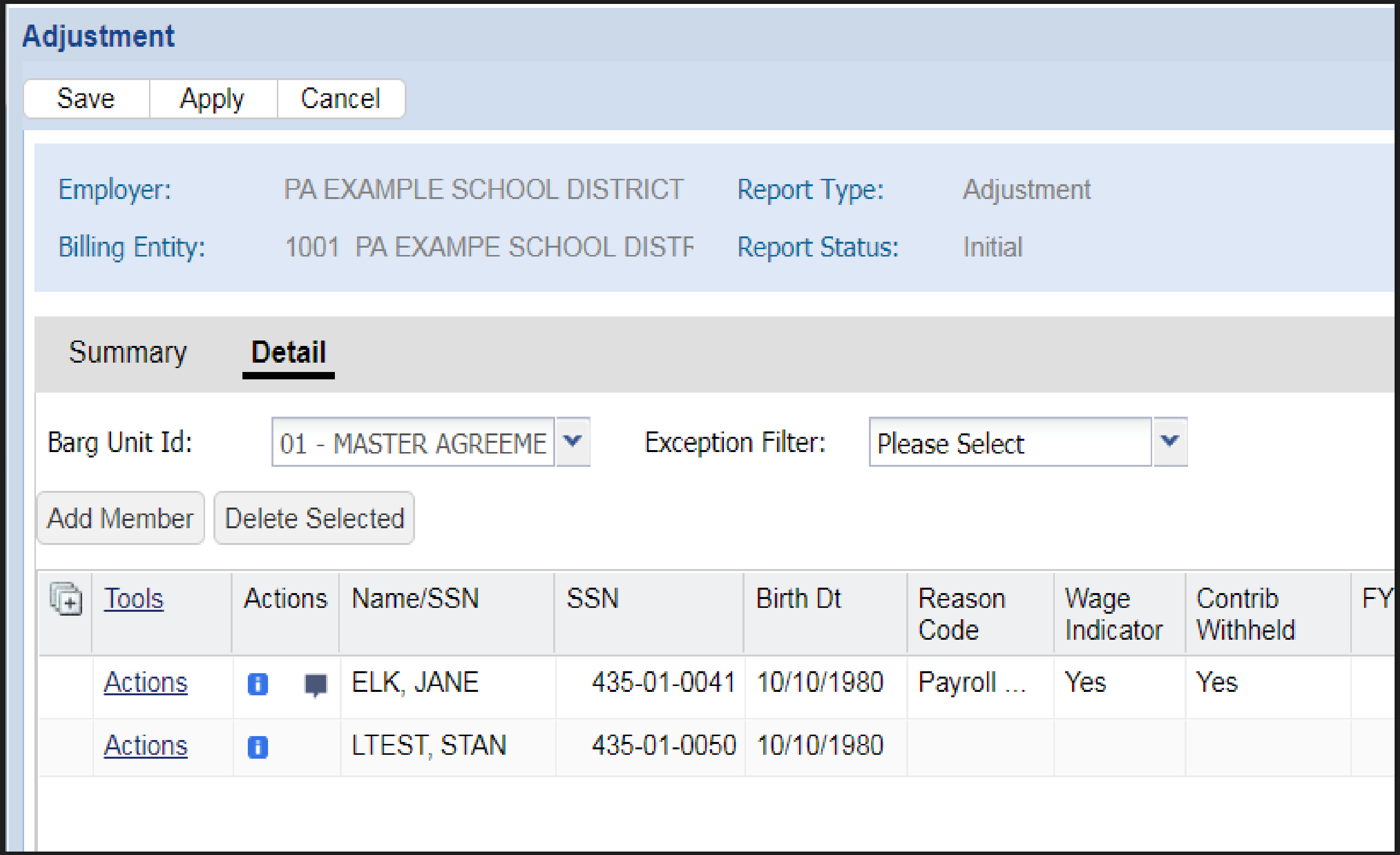
Add Member | Delete Selected

Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS	DAYS	WNC	POS	EXSAL	NRCC
10/10/1980	Payroll ...	Yes	Yes	2018	Hourly	ACTIVE - A...	$500.00	$0.00	$0.00	$0.00	$37.50	25		$0.00	$0.00	$0.00	$0.00

- After all mandatory fields are entered, begin entering the required values for your member adjustment.
- This adjustment shows $500.00 added to base, $37.50 contributions withheld, and 25 hours to support the service rendered for the wages entered.
- The remaining fields can stay at $0.00 or blank.

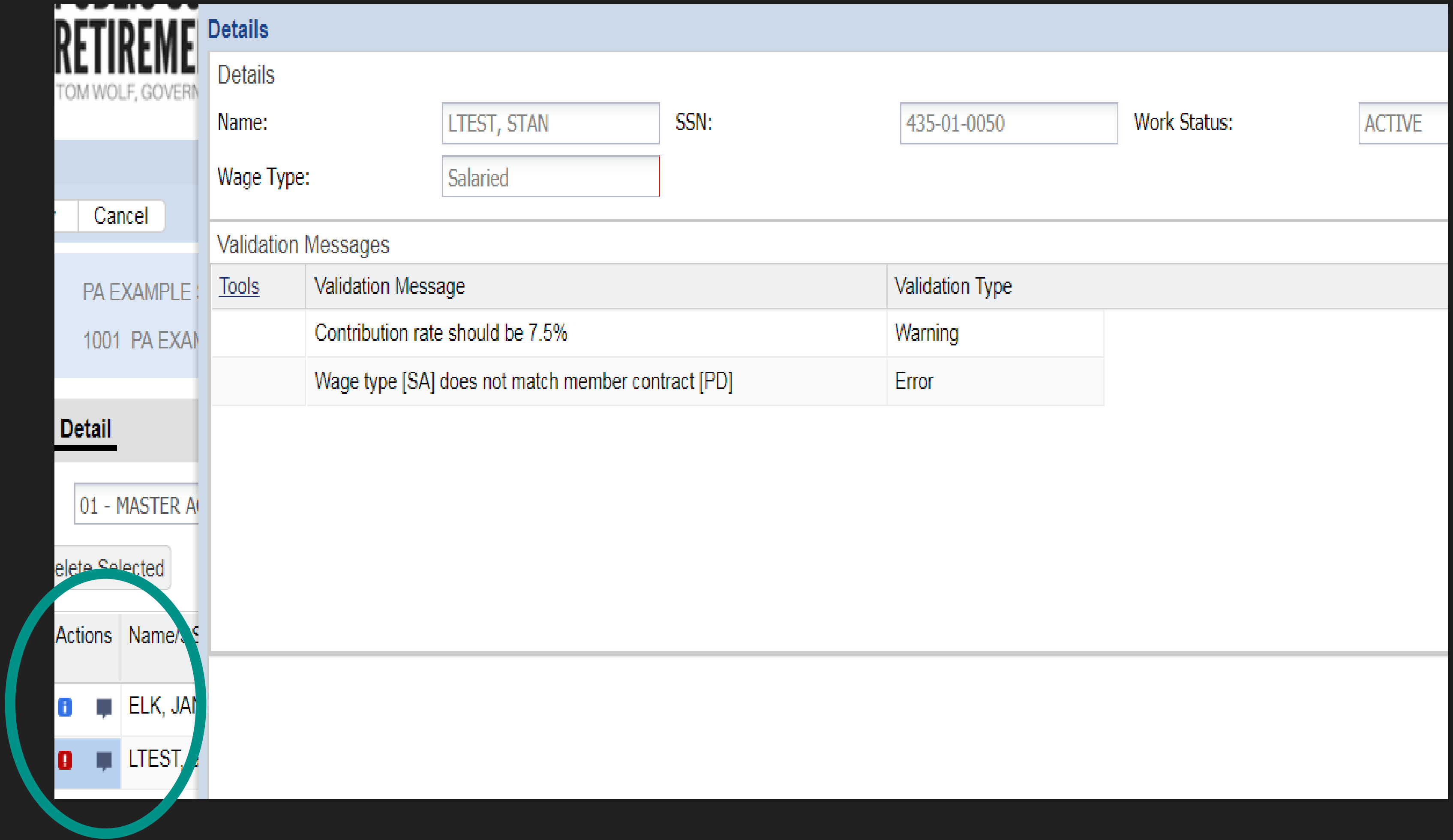
Adding a new adjustment row

- Slide back to the left and click Apply at the top left.
- To continue adding members, click Add Member to create a new adjustment row.
- When you are finished with your manual adjustments, click Save.



Actions field

- The blue indicator in front of the member's name means the adjustment passes all validations. Clicking on this indiator provides the details of the adjustment.
- If the adjustment does not pass validations, this will show as yellow or red to communicate that there is an exception or error in the adjustment row.
- The Details screen will tell you which Validations the adjustment did not pass.



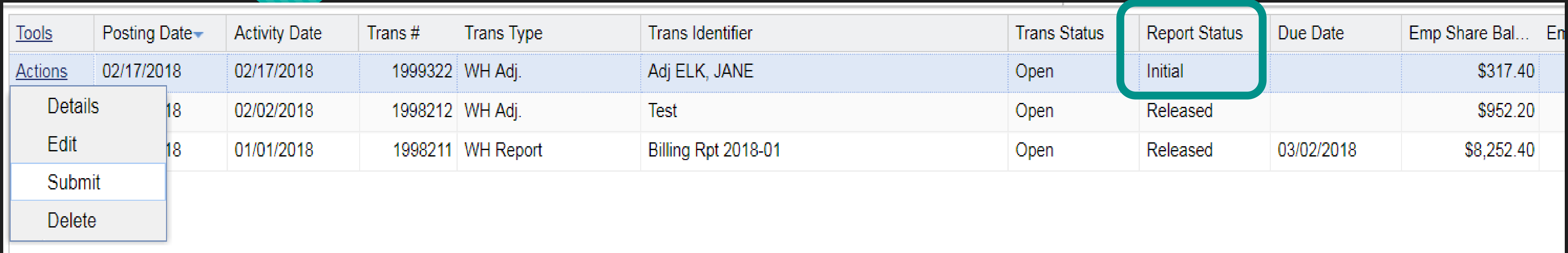
Fixing an Error or Exception

Add Member | Delete Selected

	Tools	Actions	Name/SSN	SSN	Birth Dt	Reason Code	Wage Indicator	Contrib Withheld	FY	Wage Type	Work Status	Base	URCC	OT	SUPP	CONTR	HRS
	Actions		ELK, JANE	435-01-0041	10/10/1980	Payroll ...	Yes	Yes	2018	Hourly	ACTIVE - A...	$500.00	$0.00	$0.00	$0.00	$37.50	
	Actions		LTEST, STAN	435-01-0050	10/10/1980	Payroll ...	Yes	Yes	2018	Per Diem	ACTIVE - A...	$500.00	$0.00	$0.00	$0.00	$36.50	

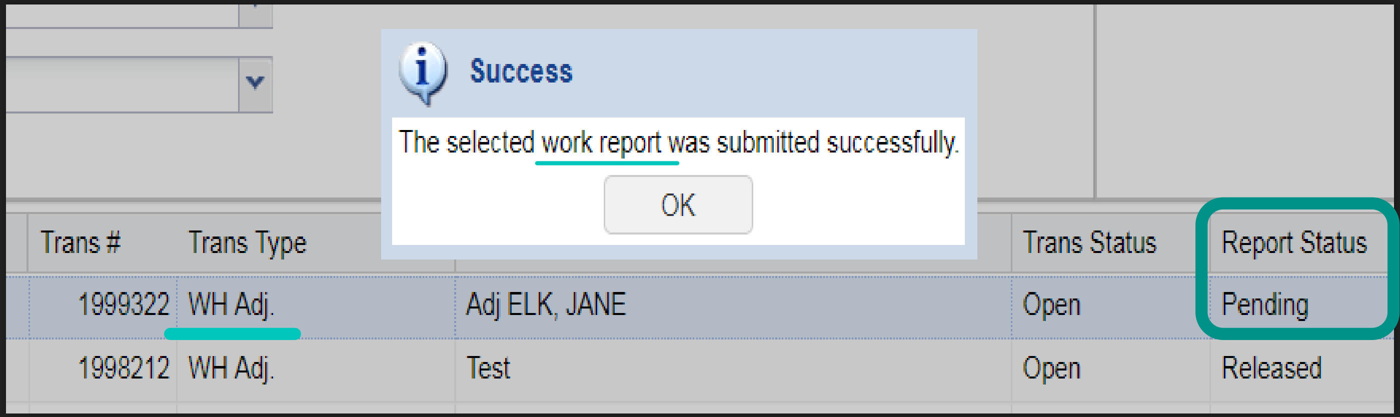
- Double click inside the field that needs to be corrected. Click Apply to apply changes.
- LTEST, Stan is a Per Diem member, not Salaried, and this correction has been made.
- The Yellow indicator stills show because the contributions are incorrect.
- Also in the Actions section is a Comment box. You may enter a comment to explain why the adjustment was necessary.
- When your adjustment corrections are complete, Click Save in the top left of the screen.

Approving your adjustment



- Clicking Save returns you to the Account tab. Your new adjustment displays as the most recent transaction.
- Similar to the work history report, you may click Details or Edit to view the adjustment details or make changes.
- The Report Status displays as Initial. Click the Actions button for the **Submit** option to approve this adjustment.

Success message



- You will receive a Success message when your adjustment is submitted successfully. The message may be misleading because it states "work report". This transaction is still coded as "WH Adj" or work history adjustment.
- Click the OK button to move onto your next transaction.
- The Report Status has changed to Pending and will updated to Released when the system runs the release batch next.

Welcome to the Employer Self-Service (ESS) Training Session!

- When prompted, please dial in to hear the presentation.
- Please mute your phone to be sure that others cannot hear you during the presentation.
- A 5 minute intermission will be provided about 1 hour into the session.
- Questions may be asked using the Q & A feature and will be answered by ESC staff.
- After training sessions are completed we will post information to the PSERS website:
  - FAQ Resource using the questions you've asked.
  - A clean recording of this webinar presentation.
  - A PowerPoint resource that may address some of your questions as you learn to use ESS after go-live
- Our go-live date is set for the last week of March 2018. More information will be provided as we get closer to that date.
- Thank you for attending this training! We will begin shortly.

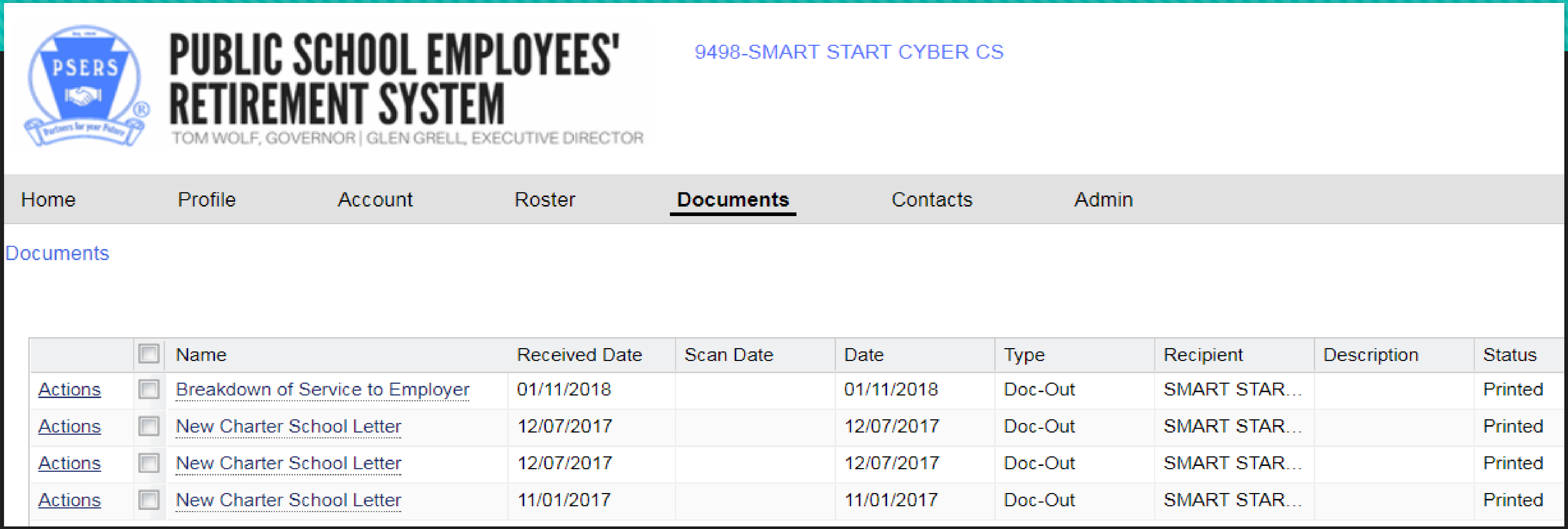
Documents Tab

Correspondence, Letters, Reports, Statement of Amount Due (SOAD), and the Employer Statement of Account can all be found here.

New Feature: Paperless Delivery

- All employers are part of **Paperless Delivery**, meaning that PSERS documents will be electronically sent via email rather than coming to your office on paper. Contact Roles must be kept up to date so documents can be electronically delivered. We will discuss contact updates in more detail soon.
- When a new document is available, the contact person who is designated to receive that type of document will receive an email to alert them that there is a new document waiting for them.
- Older documents will be converted into the new system, but they may not be available to review as an Excel file.
- Documents like the Statement of Account Due (SOAD) can be printed and mailed to PSERS with your lump POS payment check.

Documents Tab

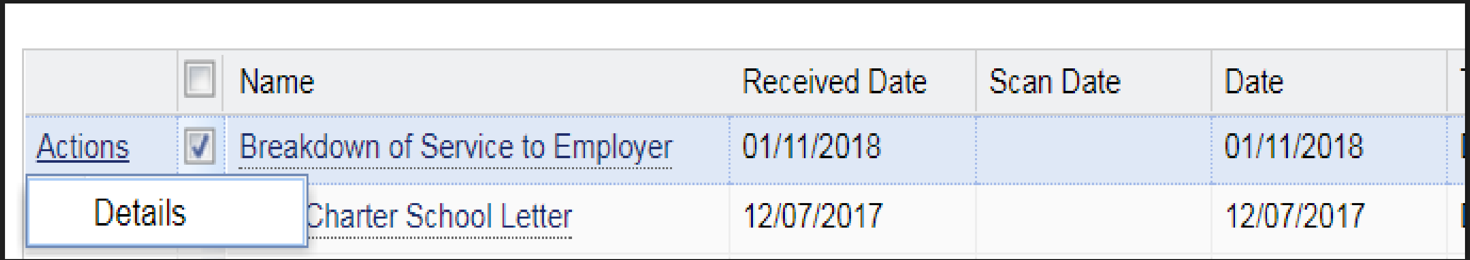


		Name	Received Date	Scan Date	Date	Type	Recipient	Description	Status
Actions		Breakdown of Service to Employer	01/11/2018		01/11/2018	Doc-Out	SMART STAR...		Printed
Actions		New Charter School Letter	12/07/2017		12/07/2017	Doc-Out	SMART STAR...		Printed
Actions		New Charter School Letter	12/07/2017		12/07/2017	Doc-Out	SMART STAR...		Printed
Actions		New Charter School Letter	11/01/2017		11/01/2017	Doc-Out	SMART STAR...		Printed

- Your Documents Tab is where PSERS letters, informational correspondence, Statements of Account Due (SOADs), the Employer Statement of Account, and some Reports can be found.

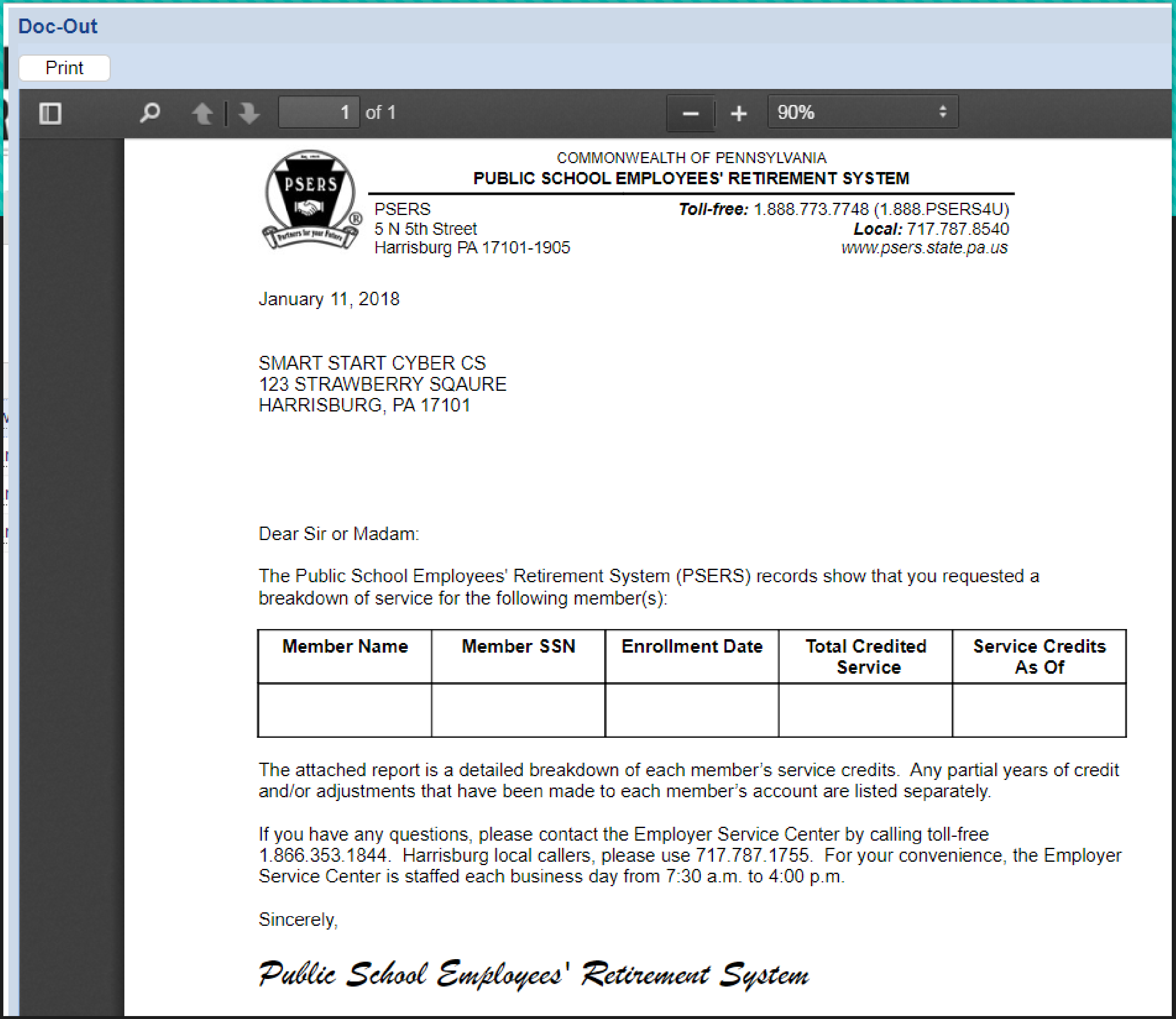
Documents Tab Actions

- The Actions button at the beginning of each row will show available options when viewing the document. For most documents, Details will be the only action available. This allows you to view the correspondence that was sent to you electronically.



Details Action

- Click the Details button.
- This opens the Breakdown of Service documents that was sent from PSERS to you. The document should look just as it does in the paper version.
- You can Print the document using the Print button in the top left corner.



COMMONWEALTH OF PENNSYLVANIA
PUBLIC SCHOOL EMPLOYEES' RETIREMENT SYSTEM

PSERS
5 N 5th Street
Harrisburg PA 17101-1905

Toll-free: 1.888.773.7748 (1.888.PSERS4U)
Local: 717.787.8540
www.psers.state.pa.us

January 11, 2018

SMART START CYBER CS
123 STRAWBERRY SQAURE
HARRISBURG, PA 17101

Dear Sir or Madam:

The Public School Employees' Retirement System (PSERS) records show that you requested a breakdown of service for the following member(s):

Member Name	Member SSN	Enrollment Date	Total Credited Service	Service Credits As Of

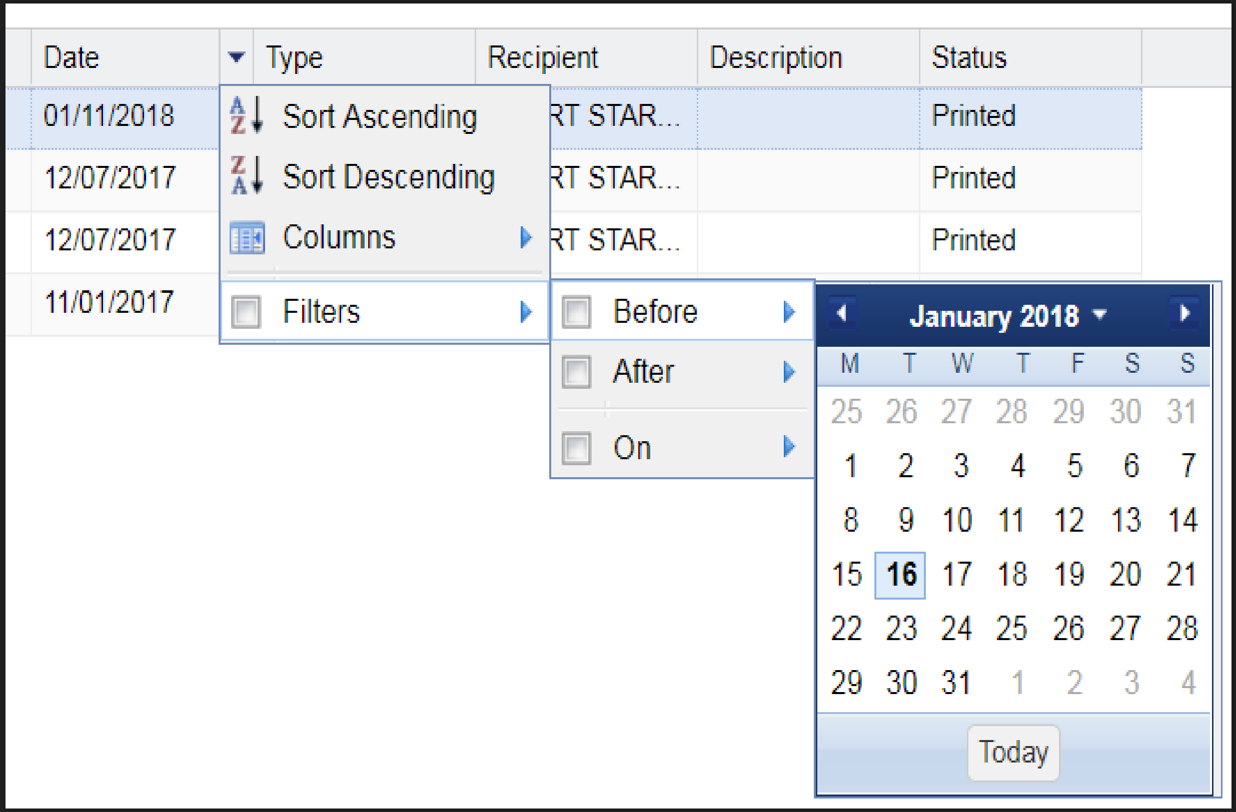
The attached report is a detailed breakdown of each member's service credits. Any partial years of credit and/or adjustments that have been made to each member's account are listed separately.

If you have any questions, please contact the Employer Service Center by calling toll-free 1.866.353.1844. Harrisburg local callers, please use 717.787.1755. For your convenience, the Employer Service Center is staffed each business day from 7:30 a.m. to 4:00 p.m.

Sincerely,

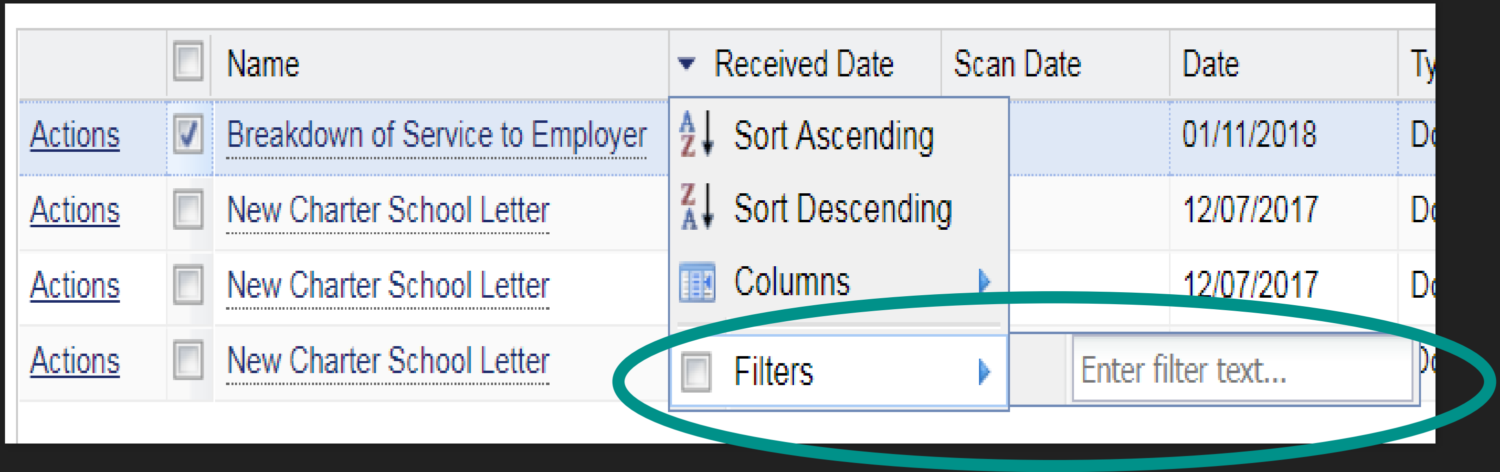
Public School Employees' Retirement System

Sorting your Documents Tab



- Similar to the other tabs, the identifiers in the header row of the Documents tab have the ability to be sorted according to your preference.
- To do this, hover above the right side of the identifier. This populates a pull down menu that displays your viewing or sorting options.
- For example, the Date column can be sorted from most or least recently received documents. The filter can be set further to find items before, after, or on a particular date.

Sorting by particular document type



- The Name column can be sorted alphabetically. Or, a filter option can be used to locate a particular type of document by entering text in the filter box.
- The word "New" entered in the filter text box would bring up on documents that displayed "New" in their title.

Employer Statement of Account (SOA)

Newly formatted, your Employer SOA information can now be found in two documents.

Employer SOA Documents

Home | Profile | Account | Roster | **Documents**

Documents

		Name	Received Date	Scan Date	Date	Type	Recipient	Description	Status
Actions	☐	Employer Statement of Accounts	02/01/2018		02/01/2018	Doc-Out	SMOKEY PIN...		Printed
Actions	☑	Employer SOA Detail Report	02/01/2018		02/01/2018	Doc-Out	SMOKEY PIN...		Printed
Actions	☐	Employer Contract Record - Fol...	01/06/2018		01/06/2018	Doc-Out	SMOKEY PIN...		Printed
Actions	☐	Employer Contract Record - Fol...	12/07/2017		12/07/2017	Doc-Out	SMOKEY PIN...		Printed

- Your Employer Statement of Account is available on the 1st of every month. This statement has been reformatted and broken down into two different documents.
- Employer Statement of Accounts is a Summary of beginning and end of month balances.
- Employer SOA Detail Report will provide the details on the transactions that occurred since your last statement.

Employer Statement of Accounts

Commonwealth of Pennsylvania – Public School Employees' Retirement System

5 N 5th Street
Harrisburg PA 17101-1905
Toll-free: 1.888.773.7748
Fax: 717.772.3860
www.psers.state.pa.us

Employer Statement of Accounts
January 2018 Statement

Mail Center

SMOKEY PINES SD
111 FIREPIT LN
BEVERLY HILLS, CA 90210

Billing Statement

Employer Code: 3404
Monthly Activity

Period: 01/01/2018 to 01/31/2018

Current Date: 02/01/2018

POST DATE	TRANS #	TRANS TYPE	PAYMENT TYPE	TRANS IDENTIFIER	TRANSACTION AMOUNT	MEMBER CONTRIBUTIONS	MEMBER POS	EMPLOYER CONTRIBUTIONS	EMPLOYER POS
01/01/2018				**Beginning Balance**	**2,241.70**	**287.50**	**0.00**	**1,954.20**	
01/18/2018	1969727	WH Report		Billing Rpt 2018-01	3,205.60	600.00	0.00	2,605.60	
01/31/2018		**Ending Balance**			**5,447.30**	**887.50**	**0.00**	**4,559.80**	

As a reminder, payments for member contributions are due no later than 10 days after the close of the month for which deductions were withheld. Payments for employer contributions are due quarterly and no later than 5 business days after the Retirement Subsidy reimbursement is paid by the Commonwealth. Payments are due for Employer Purchase of Service no later than 90 days from the Statement of Amount Due generation date.

If payments are not remitted by the established due dates, delinquent amounts may be deducted from your Retirement Reimbursement Subsidy and/or your Basic Education Subsidy.

- This one page document provides the beginning and ending balances for the specified time period.

Employer SOA Detail Report

DETAILED Billing Statement

Employer Code: [redacted] **Period:** 01/01/2018 to 01/31/2018 **Current Date:** 02/01/2018

POST DATE	TRANS #	TRANS TYPE	PAYMENT TYPE	TRANS IDENTIFIER	APPLIED TO	TRANSACTION AMOUNT	MEMBER CONTRIBUTIONS	MEMBER POS	EMPLOYER CONTRIBUTIONS	EMPLOYER POS
07/27/2016	1578349	SCP Employer Contribution		Lump POS: SSN [redacted]-7716: POS 555031		69.03	0.00	0.00		69.03
08/08/2017	1719269	WH Report		Billing Rpt 2017-07		496,551.82	93,732.58	198.72	402,620.52	
09/08/2017	1728324	WH Report		Billing Rpt 2017-08		493,746.18	93,023.89	198.72	400,523.57	
10/02/2017	1737615	SCP Employer Contribution		Lump POS: SSN [redacted]-7654: POS 581439		526.23	0.00	0.00		526.23
10/06/2017	1739413	WH Report		Billing Rpt 2017-09		974,277.50	183,919.19	563.26	789,795.05	
11/14/2017	1966386	WH Report		Billing Rpt 2017-10		958,696.58	180,910.68	563.26	777,222.64	
11/14/2017	1966387	WH Adj.		Z COOPER SERVICE ADJ 10/31/17		200.35	37.50	0.00	162.85	
12/19/2017	1968879	WH Report		Billing Rpt 2017-11		400.70	75.00	0.00	325.70	
01/31/2018		**Ending Balance**				**2,924,468.39**	**551,698.84**	**1,523.96**	**2,370,650.33**	**595.26**

Employer SOA Detail Report

- The Detail Report will display the Posting Date of the Transaction, the Trans #, the Type of Transaction, and the Transaction Identifier.
- Each row breaks out Member Contributions, Employer Contributions, and POS money from left to right within the same transaction row.
- For payments made, all transaction numbers where money was applied will be listed.
- **NEW: Due dates are not listed on the Detail Report.** Due dates should be mentally calculated based on the posting date of the transaction. Employers will still make payments for employer contributions quarterly. Payments for due for Employer Purchase of Service payments no later than 90 days after the generation of the Statement of Account.

The fine print…

POST DATE	TRANS #	TRANS TYPE	PAYMENT TYPE	TRANS IDENTIFIER	APPLIED TO	TRANSACTION AMOUNT	MEMBER CONTRIBUTIONS	MEMBER POS	EMPLOYER CONTRIBUTIONS	EMPLOYER POS

As of this statement date, the following monthly work reports are considered delinquent and should be submitted immediately:
OCTOBER 2017
NOVEMBER 2017
DECEMBER 2017

As a reminder, payments for member contributions are due no later than 10 days after the close of the month for which deductions were withheld. Payments for employer contributions are due quarterly and no later than 5 business days after the Retirement Subsidy reimbursement is paid by the Commonwealth. Payments are due for Employer Purchase of Service no later than 90 days from the Statement of Amount Due generation date.

If payments are not remitted by the established due dates, delinquent amounts may be deducted from your Retirement Reimbursement Subsidy and/or your Basic Education Subsidy.

- Delinquent work reports as of the statement generation date will be listed at the end of your SOA.
- Reminders of when payments are due for member and employer contributions, and purchase of service payments are also listed here, as well as consequences for not submitting timely payments to PSERS.

Contacts Tab

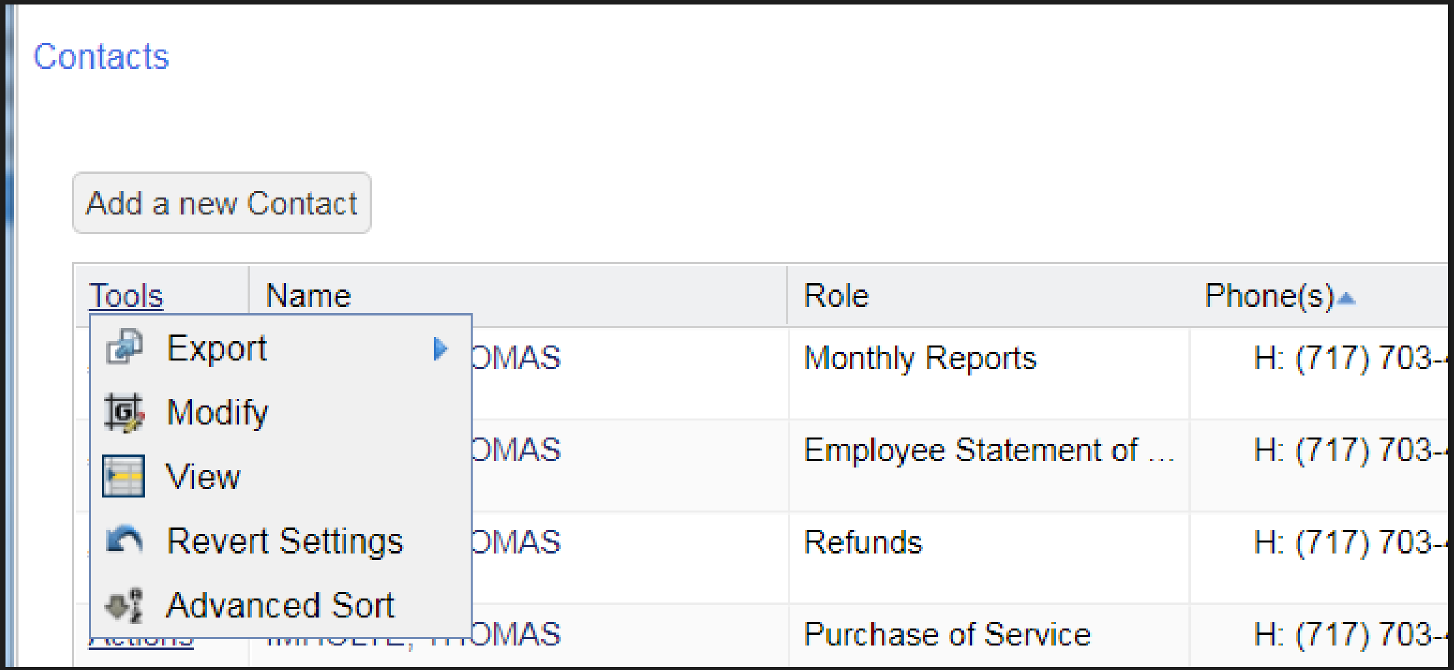
Job Roles and email addresses should be kept up to date by employers in the contact section.

Contact Roles

- The Name, Role, Phone #, Fax #, Email, Address, Start and Stop Dates are fields that should be filled out for each staff person who is responsible for a particular role.
- PSERS requests that someone **always** be assigned to the role of:
  - Monthly Reports
  - Business Manager
  - Superintendent
- **Each role can only be assigned once** although an individual can hold more than one role.
- **Email addresses must be kept current.** An invalid email address will result in the inability to transmit a document to your Documents Tab using the Paperless Delivery method.
- All employers are automatically enrolled in Paperless Delivery.

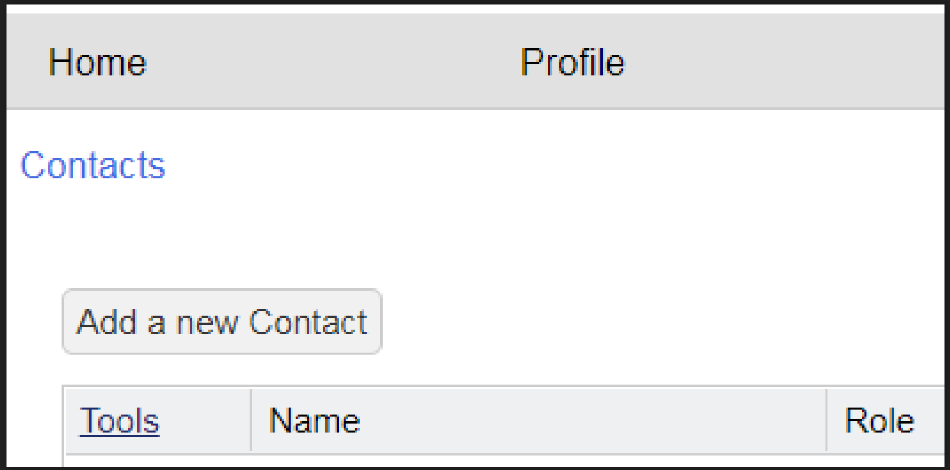
Sorting the Contacts Tab

- Similar to the other tabs, the Tools button at the top left of your contacts area will offer options to Export, View, or initiate an Advanced Sort of your contacts.
- If you choose to sort or filter any specific columns, the Revert Settings option will bring your Contacts Tab back to the default setting.
- Contact roles have a start and stop date. **When updating roles, you must end date the role for the current holder before creating a new contact for that role.**



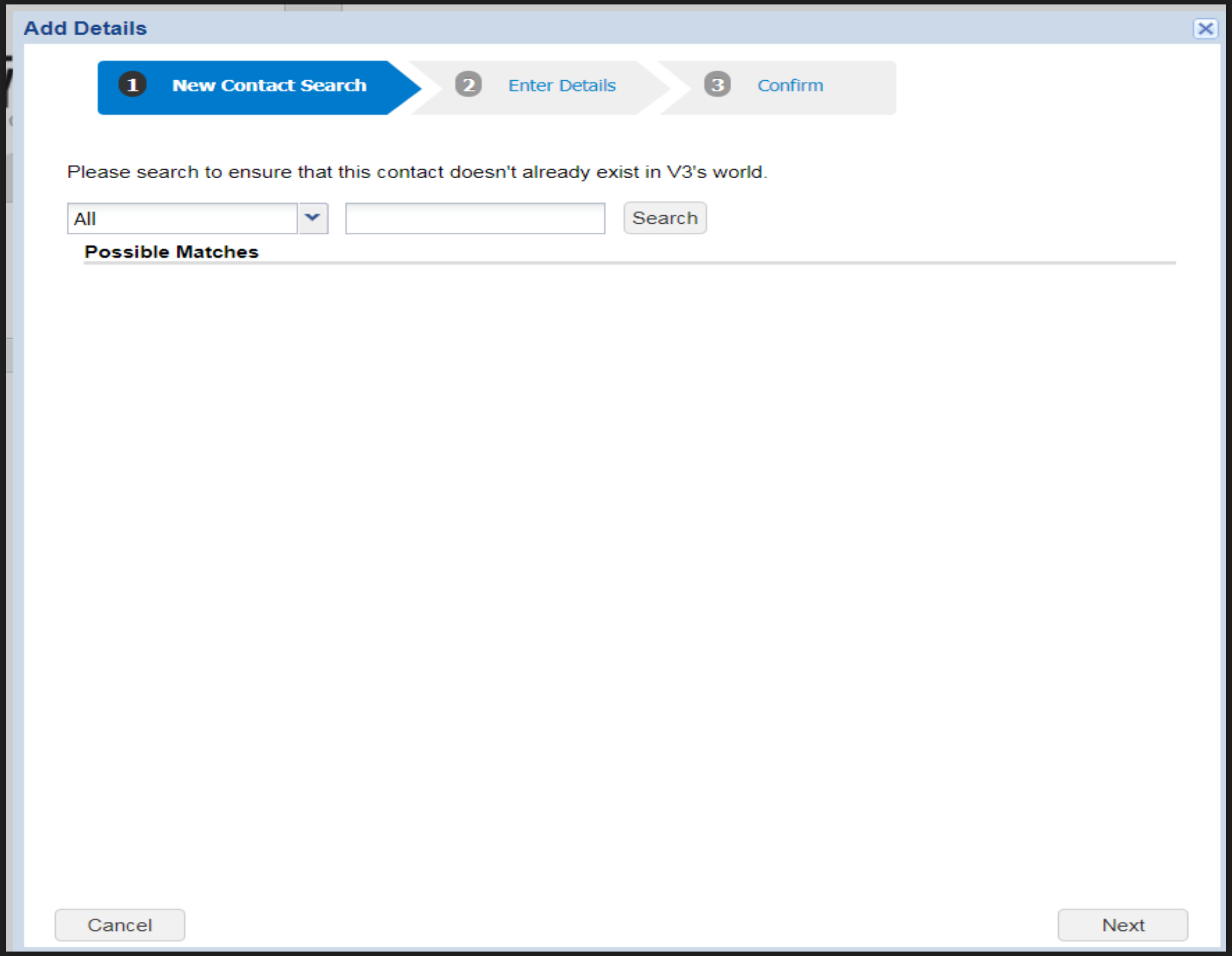
Adding a new Contact

- Click the Add a new Contact button in the top left.



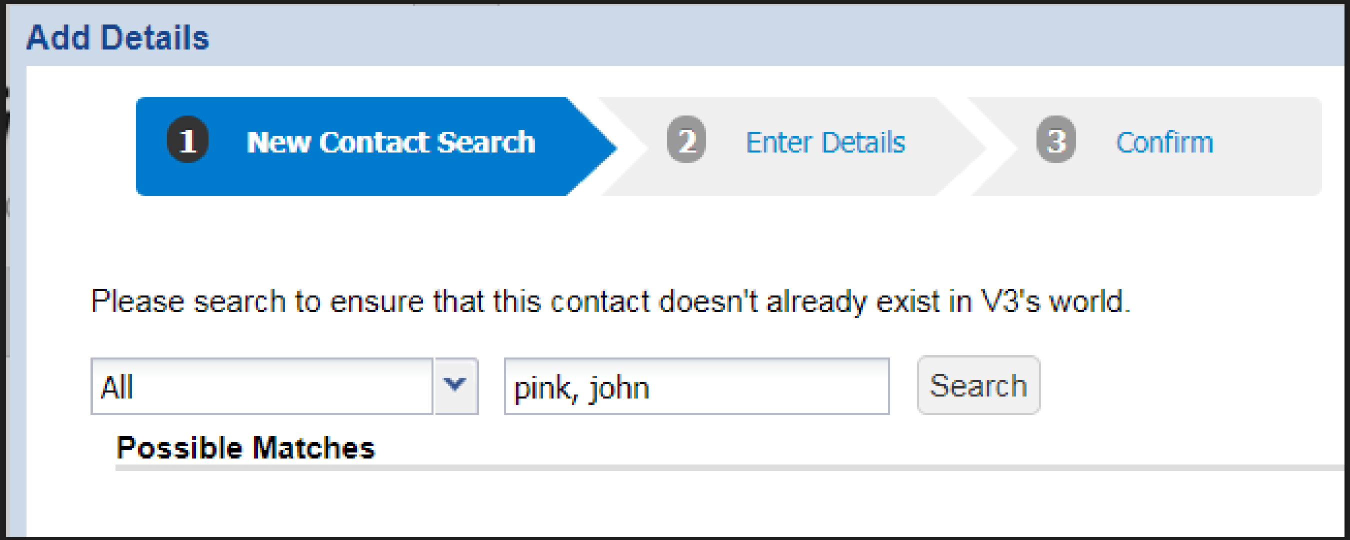
Add Details Screen

- The Add Details screen will appear when you click the Add a new Contact button.
- Step 1 is New Contact Search. The system is searching for possible matches for existing contact information.



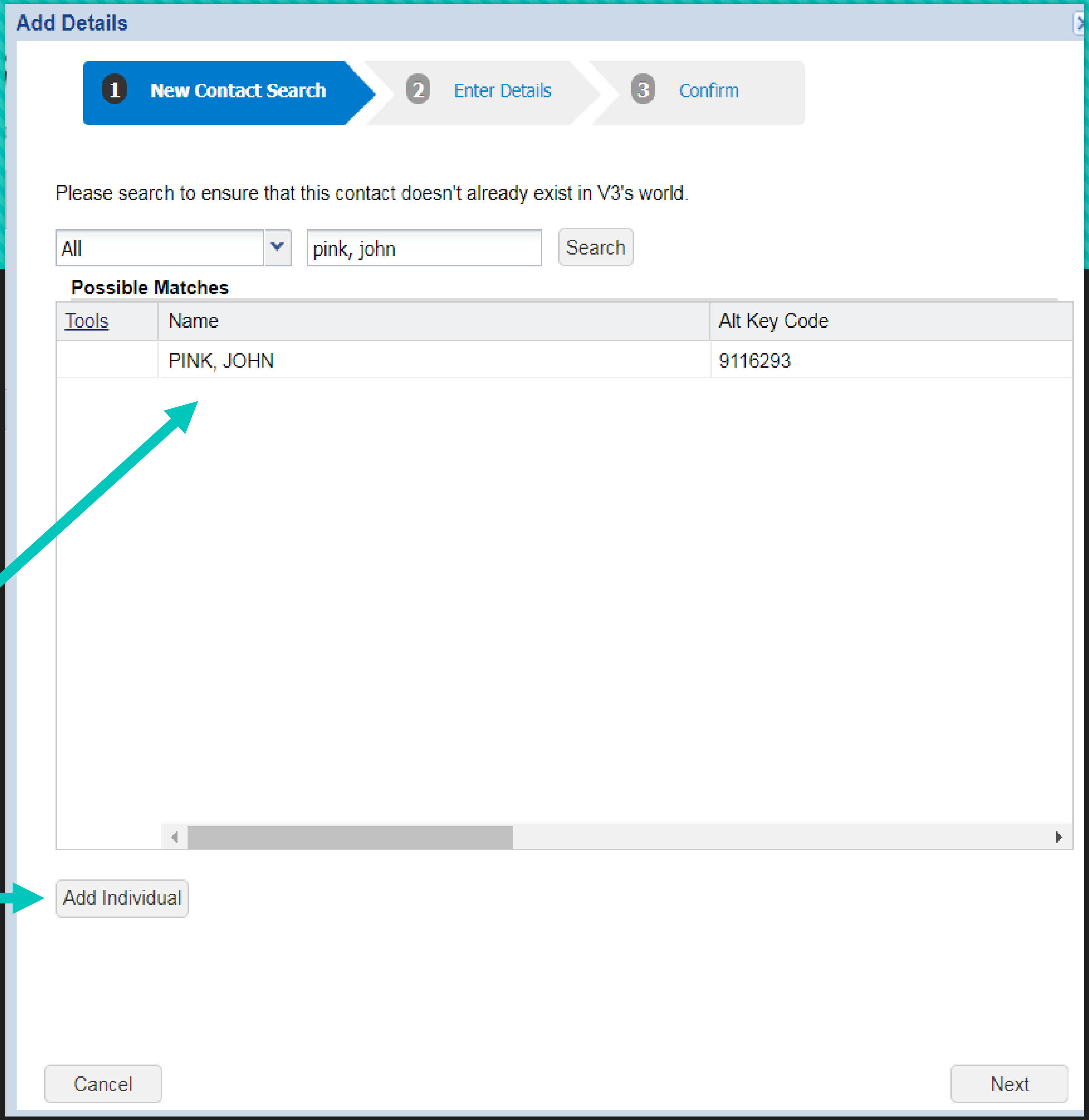
Step 1: New Contact Search

- Enter your contact's name in the search box and click Next at the bottom right.



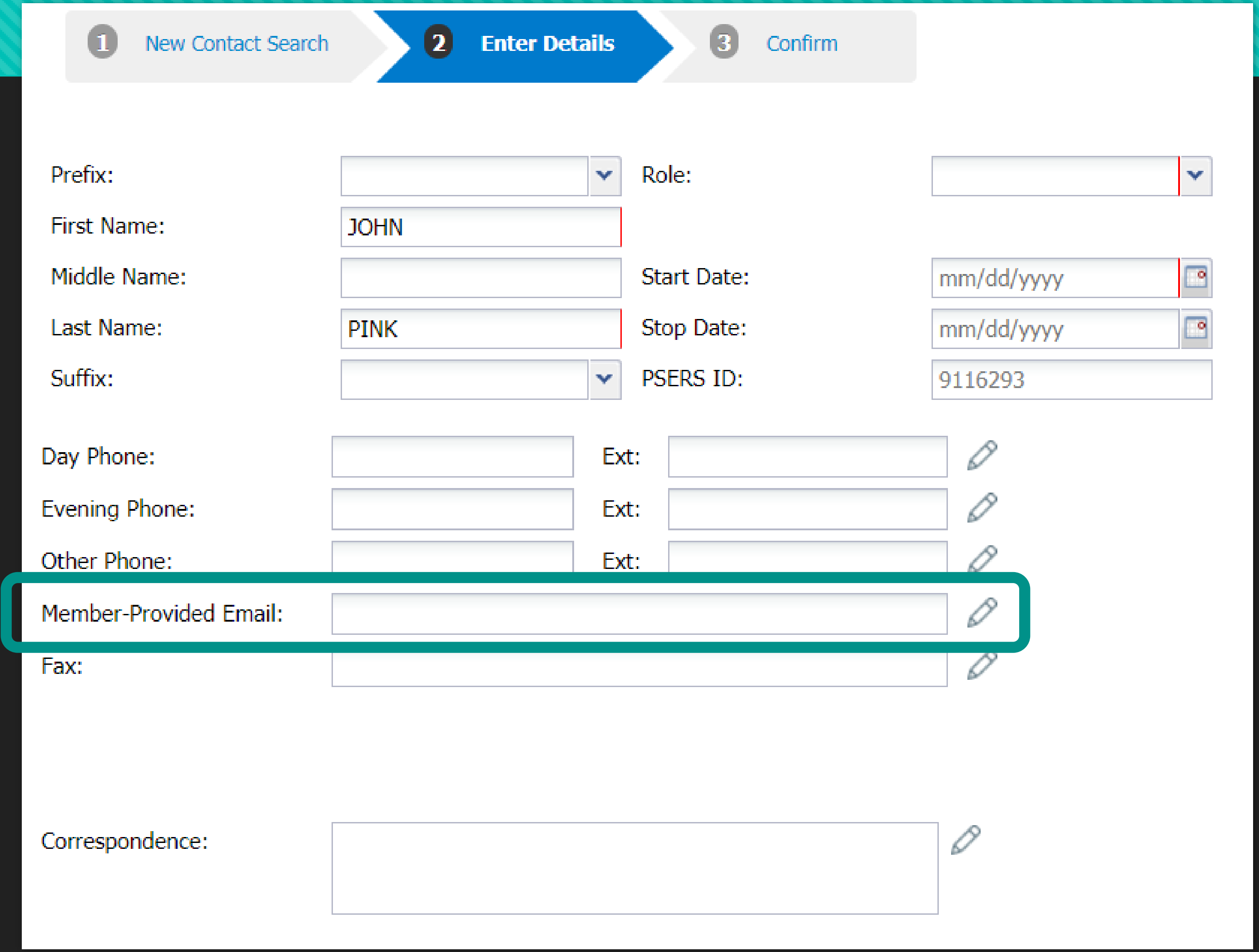
Contact search

- Because John Pink is already a user in the system, his name was found as a match in the system.
- Select the all caps match that was found by the system and click Next.
- If the name of the person searched was not found, select Add Individual.



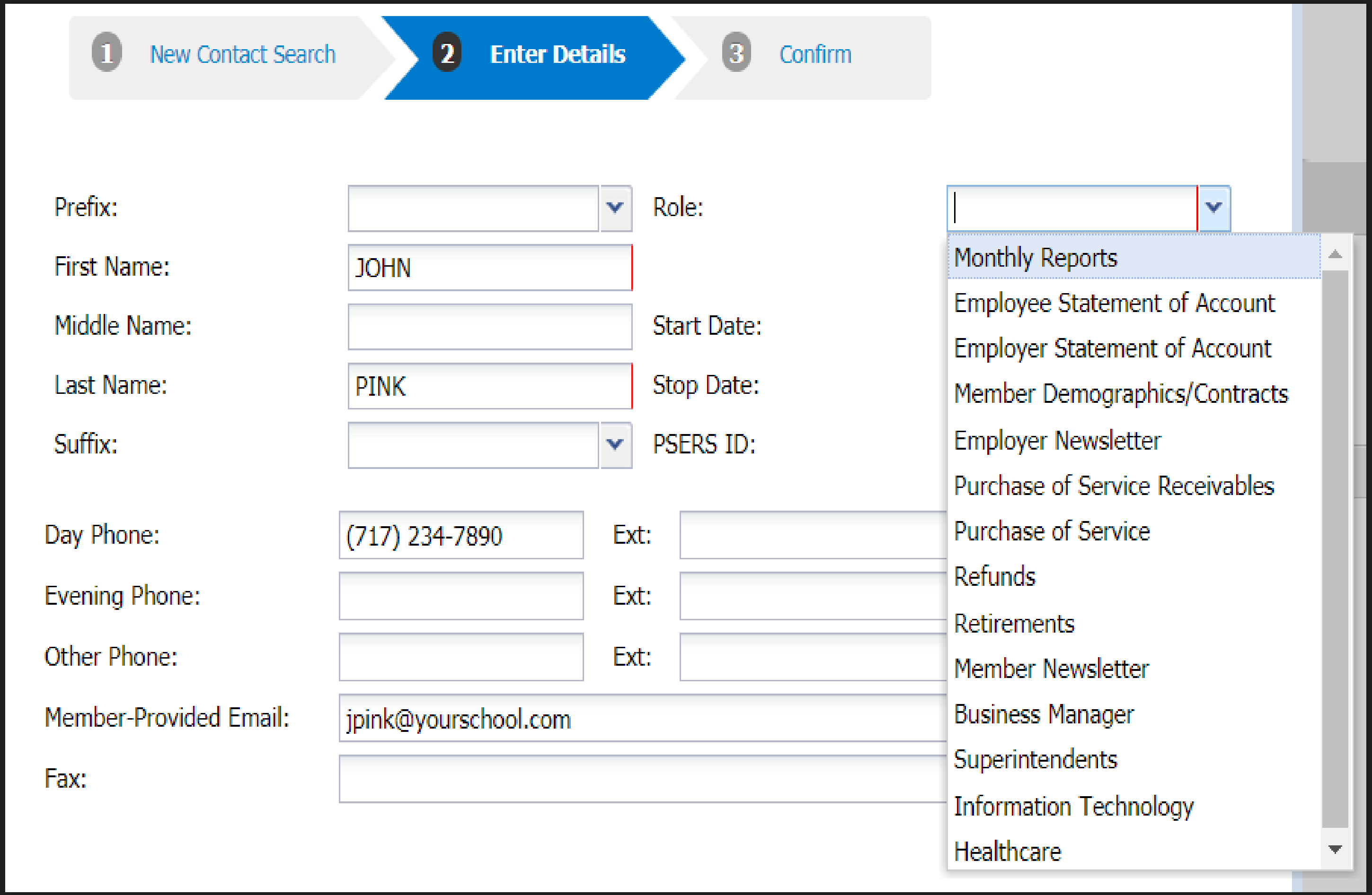
Step 2: Enter Details

- The contact's name and PSERS ID is populated by ESS.
- The contact's Role, start date, phone number, email address and Correspondence address should also be completed.
- The field titled "Member-provided email" is misleading. The contact person's **school email address** should be filled in this field. **This is necessary to receive electronic documents and other PSERS communication.**



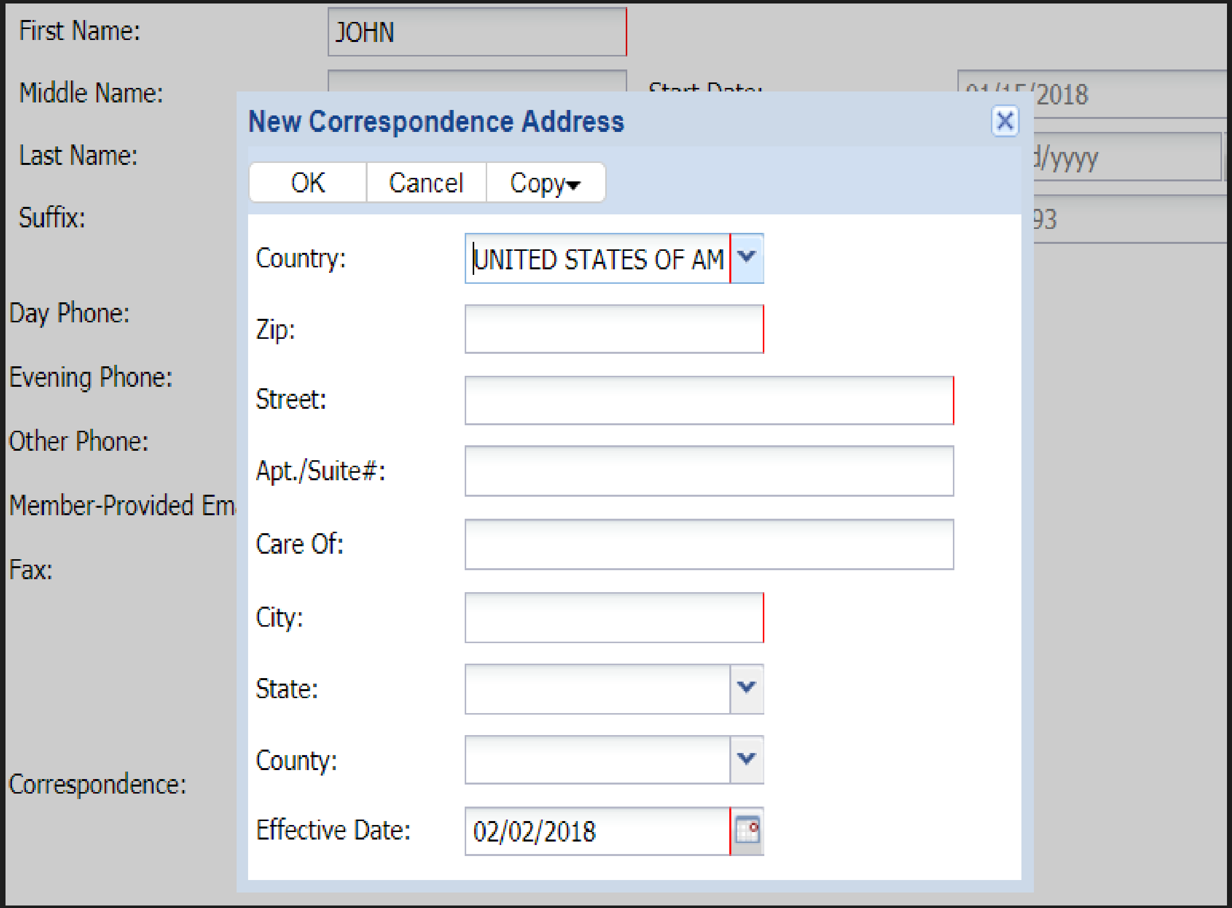
Selecting a Role

- The Role is a mandatory field. Each role may only be assigned once, although more than one role can be assigned to a person.
- The pull down menu should be used to view roles.
- There should always be a current person assigned to the roles of Monthly Reports, Business Manager, and Superintendents.
- If the role you selected is already held by another person, you will receive an error message telling you that it is unavailable.

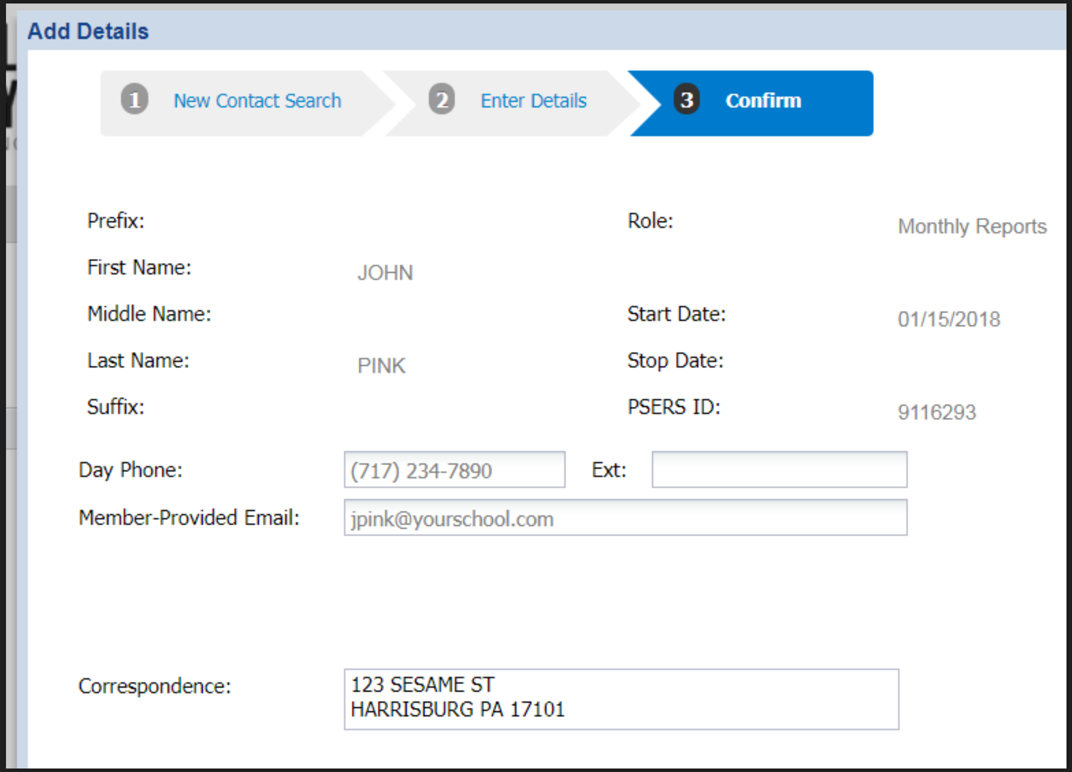


Start Date and Address

- The Start date should be entered as the date the contact took over the role you are assigning.
- The Correspondence Address should be the address your school receives mail. This may not be the same address as the physical location of your business office.
- Entering the zip code will populate the city and state. The effective date will automatically use the current date but is editable.
- Click the OK button when address is completed.



Step 3: Confirm



Add Details

1 New Contact Search | 2 Enter Details | 3 **Confirm**

Prefix:		Role:	Monthly Reports
First Name:	JOHN		
Middle Name:		Start Date:	01/15/2018
Last Name:	PINK	Stop Date:	
Suffix:		PSERS ID:	9116293

Day Phone: (717) 234-7890 Ext:

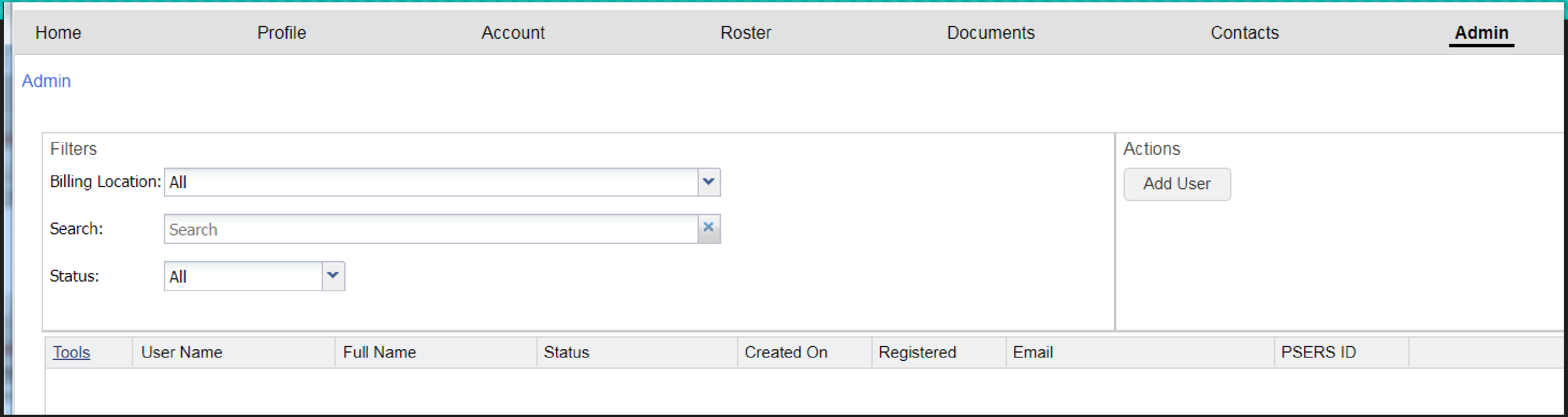
Member-Provided Email: jpink@yourschool.com

Correspondence: 123 SESAME ST
HARRISBURG PA 17101

Admin Tab

Only persons with an Administrator account will see this tab.

Admin Tab



- The Admin tab displays persons who have ESS access either with an Admin account or a User account.
- Your school name will populate in the Billing Location field.
- You can search for a particular person or a specific status (All, Active, Inactive, Locked)

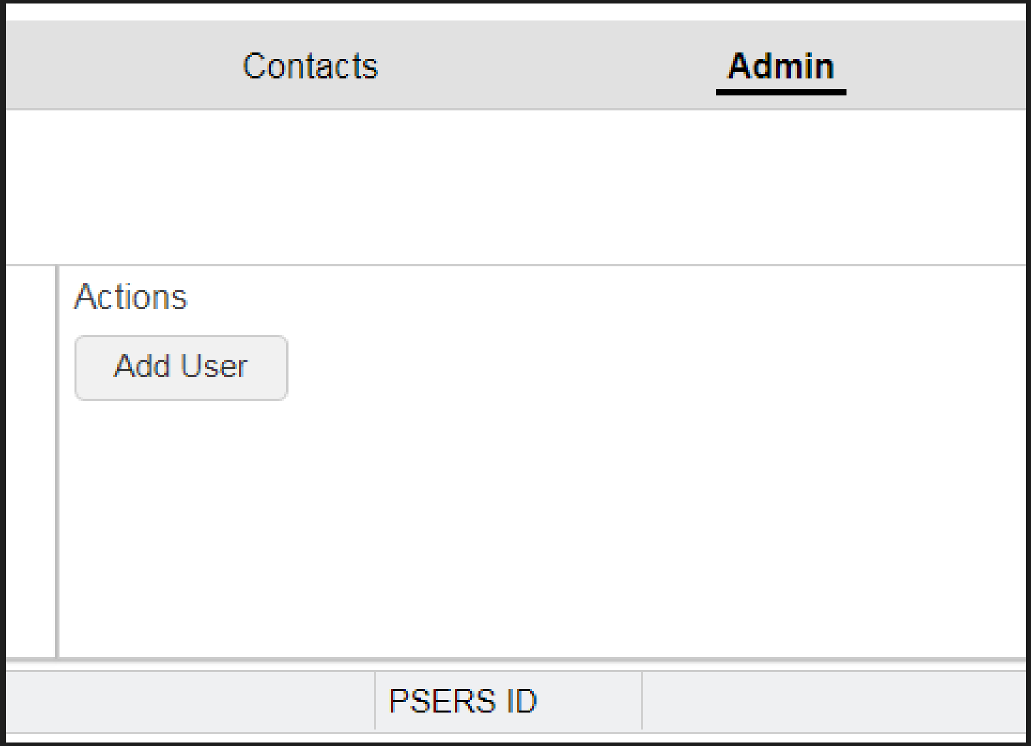
Converting to Browser: Admins only!

- Persons with Admin accounts will have their username and passwords converted to the new ESS Browser system.
- You must know your password; this information will be requested the first time you sign into ESS.
- After your username and password are entered, the system will prompt you to change your password.
- After your school's admin has successfully registered, they can start creating User Accounts.
- PSERS encourages the Admin(s) at your school to **register as soon as possible** after ESS goes live so your school can begin reporting and learning the new system. This will be the last week of March 2018.

After Go-Live Admin account info

- New employees who require an ESS Administrator account should submit a PSERS Employer Security Administrator Authorization (PSRS-1270) form.
- Please be sure to check the box indicating "Create Employer Security Administrator" and sign the form when requesting access.
- If someone with an Admin account leaves your school and will not need access any longer, please submit the same form and check the box to indicate "Delete Employer Security Administrator".
- This form is available on your ESS Dashboard under the Forms section, is located on the public website under the Employer tab, or can be requested from your ESC representative.
- When completed, please fax form to the number listed on the form so it can be processed quickly.

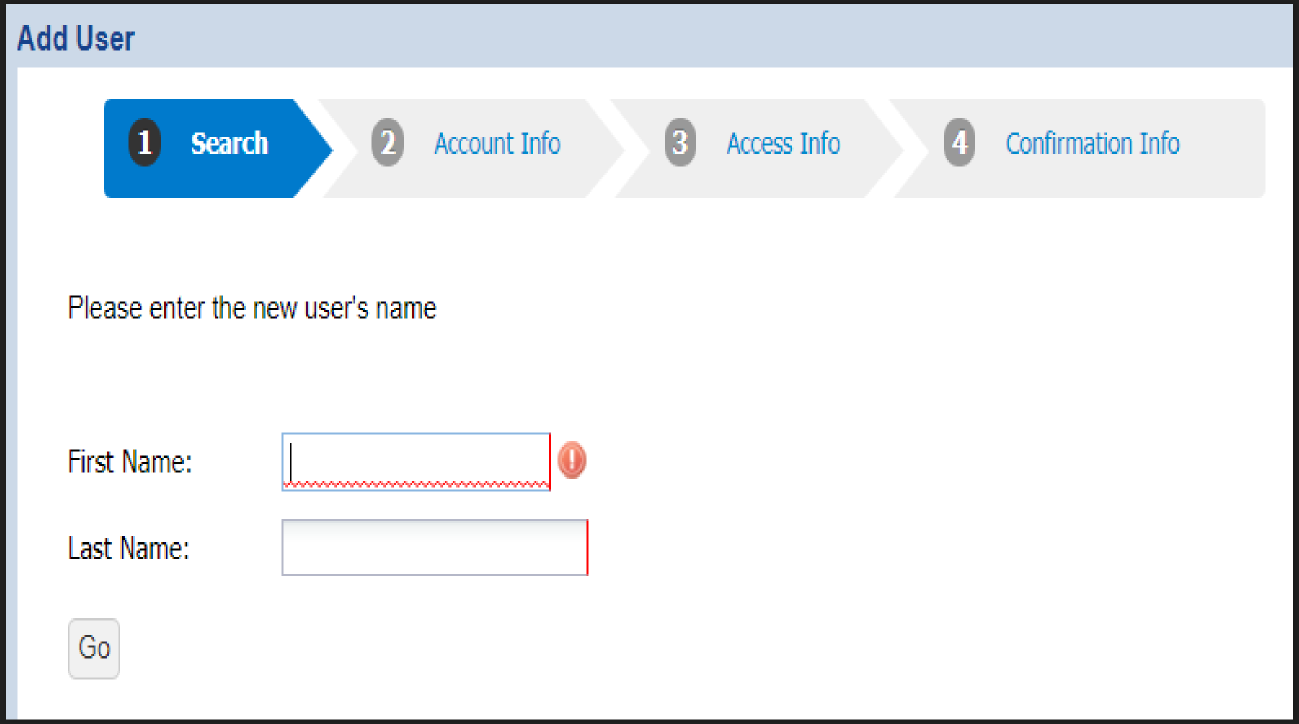
Creating a User account



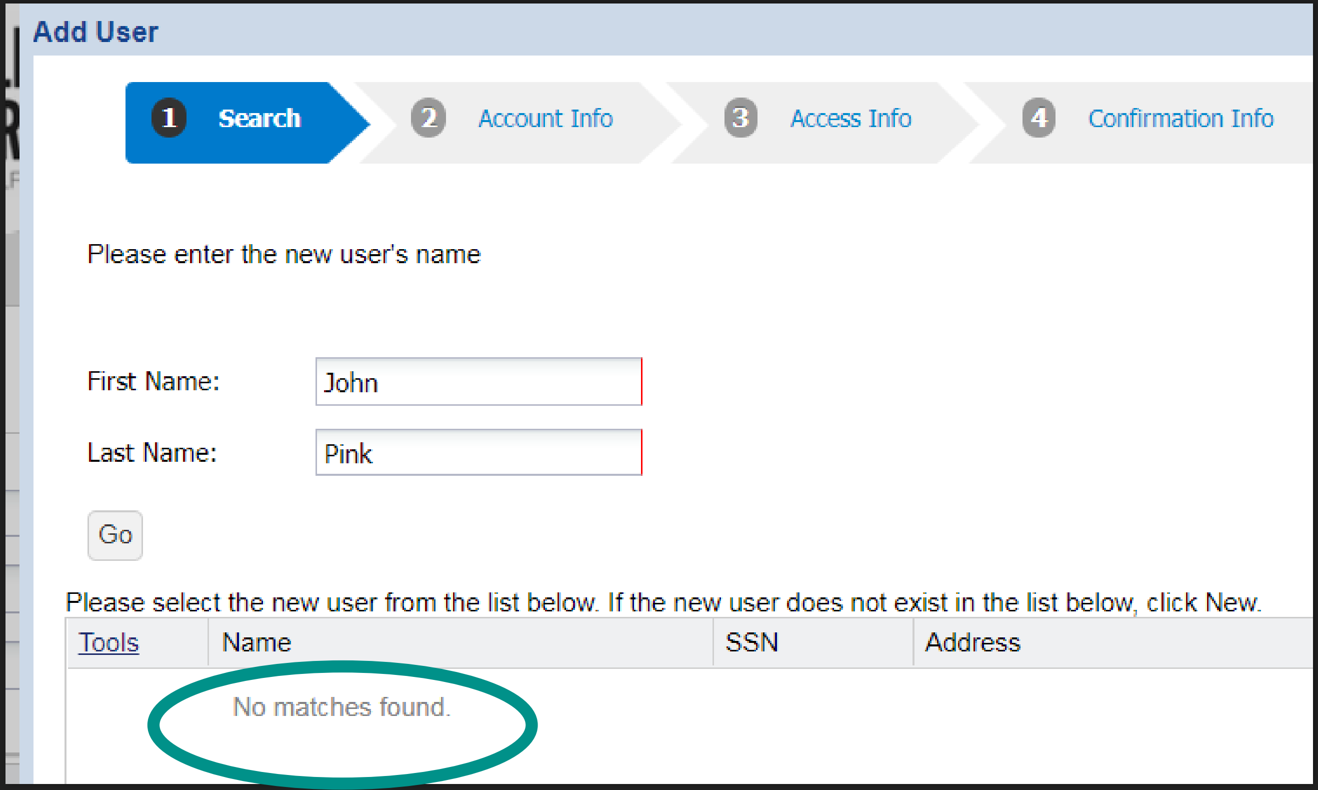
- Click the Add User button at the top right of your screen.

Step 1: Search

- Step 1 of the Add User process is to search the system for the new user's name.
- Both First Name and Last Name are mandatory fields.
- When the name is entered click the Go button, or click Next at the bottom right of the page.



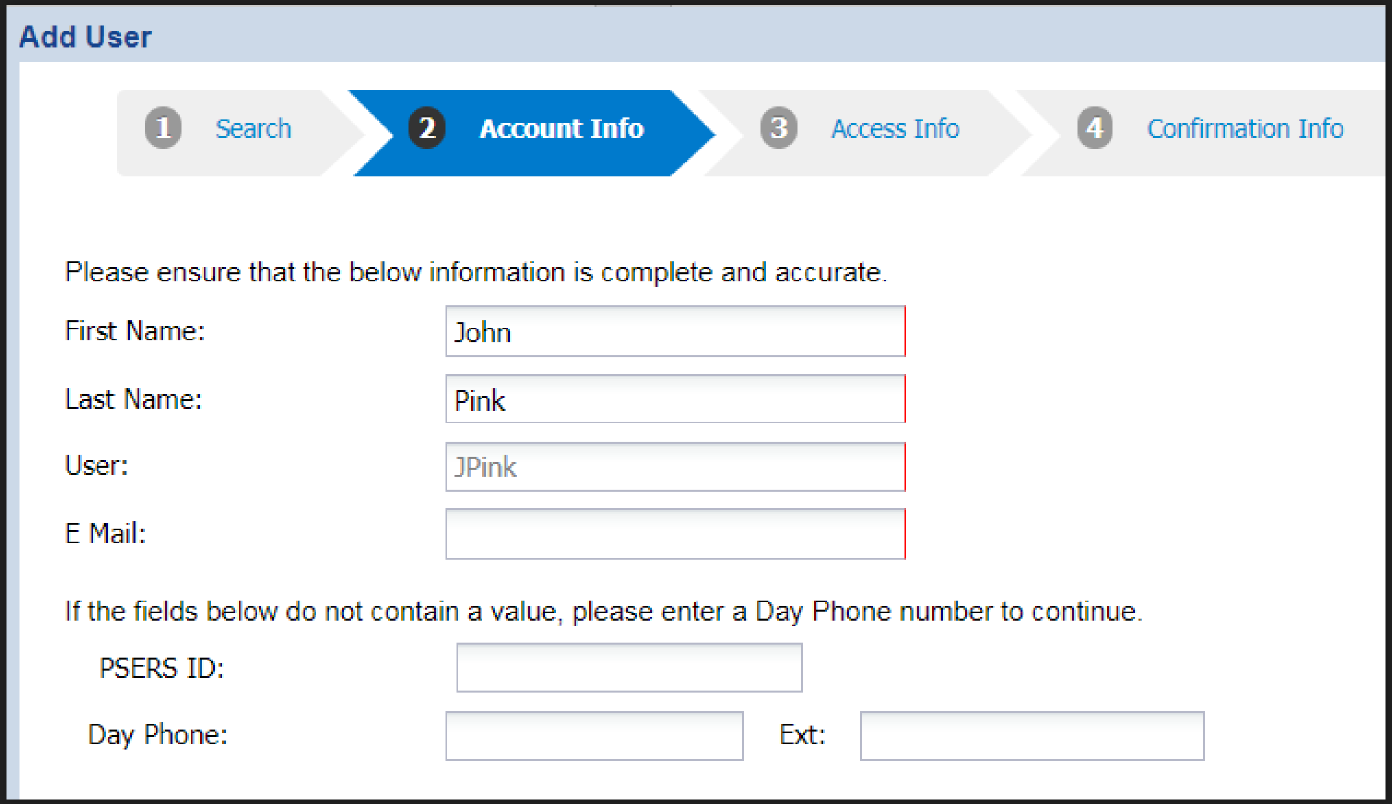
Step 1 continued



- If any matches are found they will populate on the screen.
- This new user's name was not found. Click the New button at the bottom of the page to move to step 2.

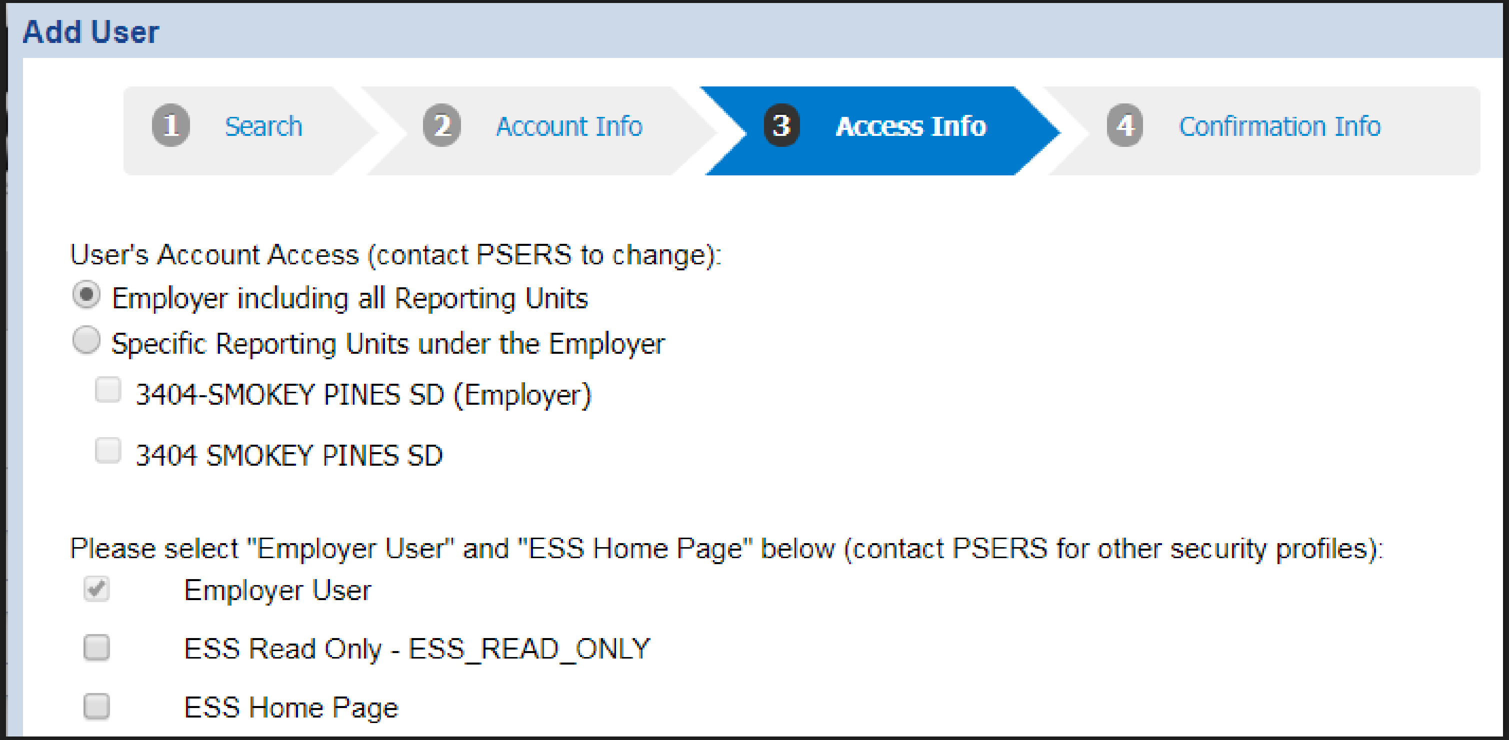
Step 2: Account Info

- The user's name and user ID name will populate inside the boxes for step 2.
- An email address must also be entered.
- Please also enter a Day Phone; the PSERS ID will be assigned by the system.
- Click Next at the bottom of the screen to move to step 3.

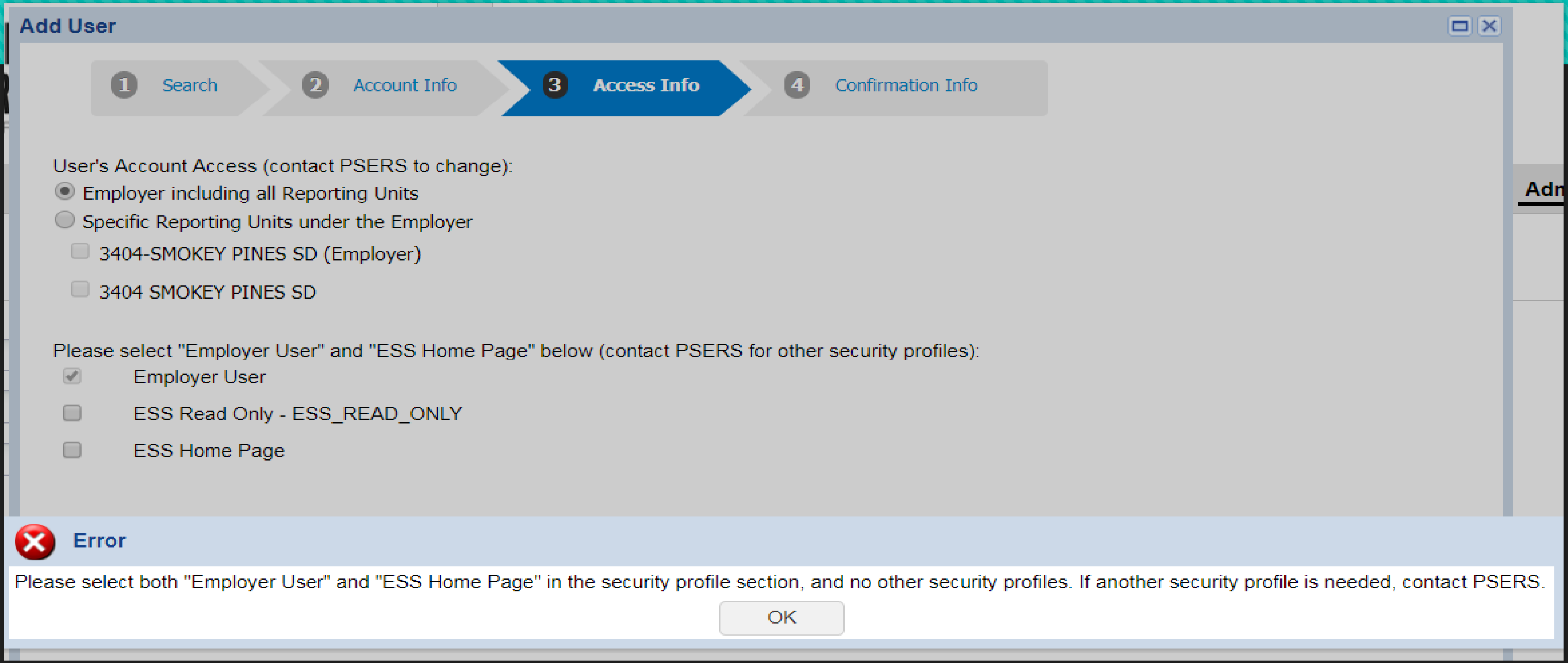


Step 3: Access Info: Which one??

- The User's Account Access will default to the first option: Employer including all Reporting Units.
- The Employer User box is automatically checked but ESS Home Page will also need to be selected for the user to be able to navigate ESS.

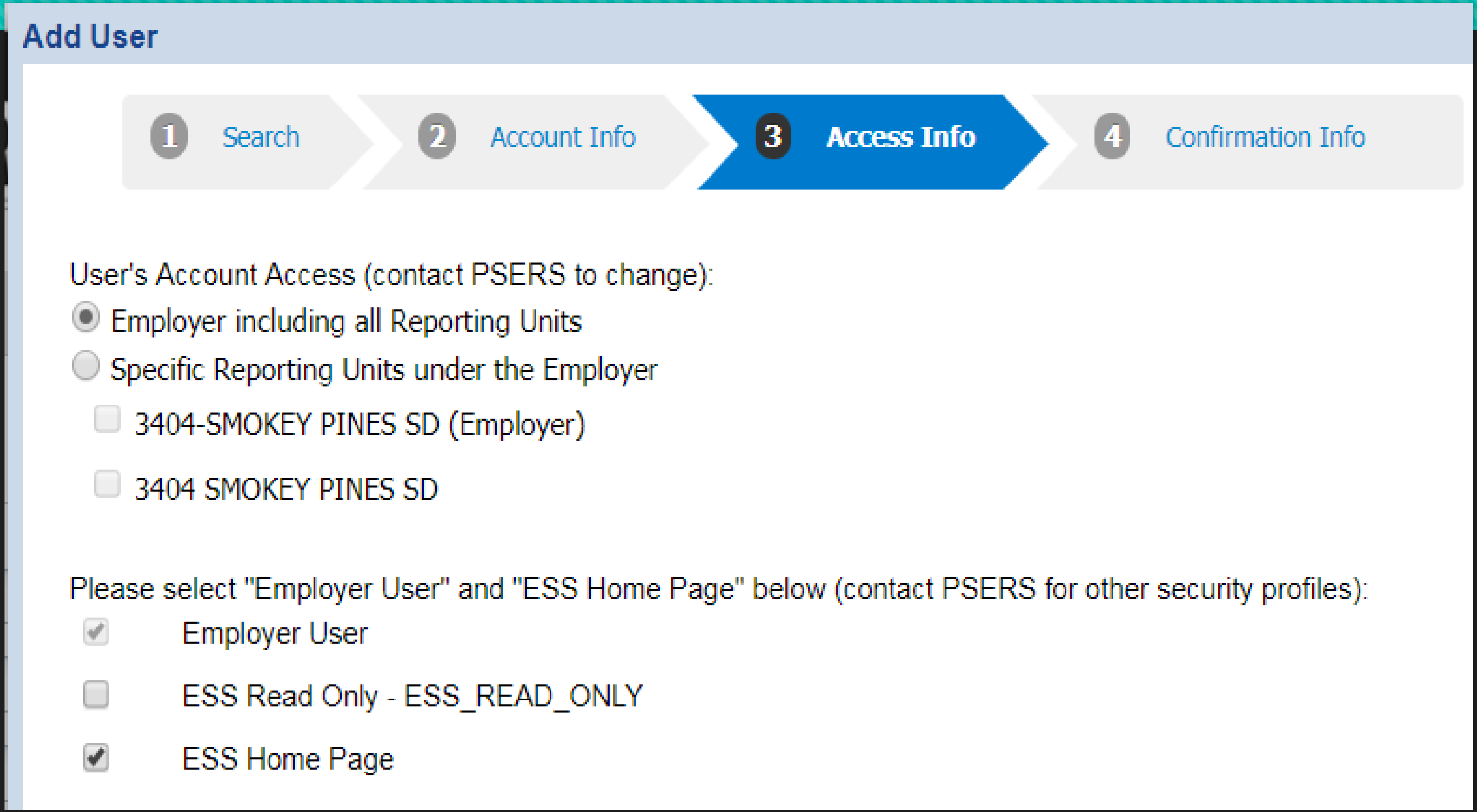


Error due to not selecting ESS Home Page



- If you do not select the ESS Home Page access, you will receive an error that states that both "Employer User" and "ESS Home Page" both need to be selected to complete the security profile.

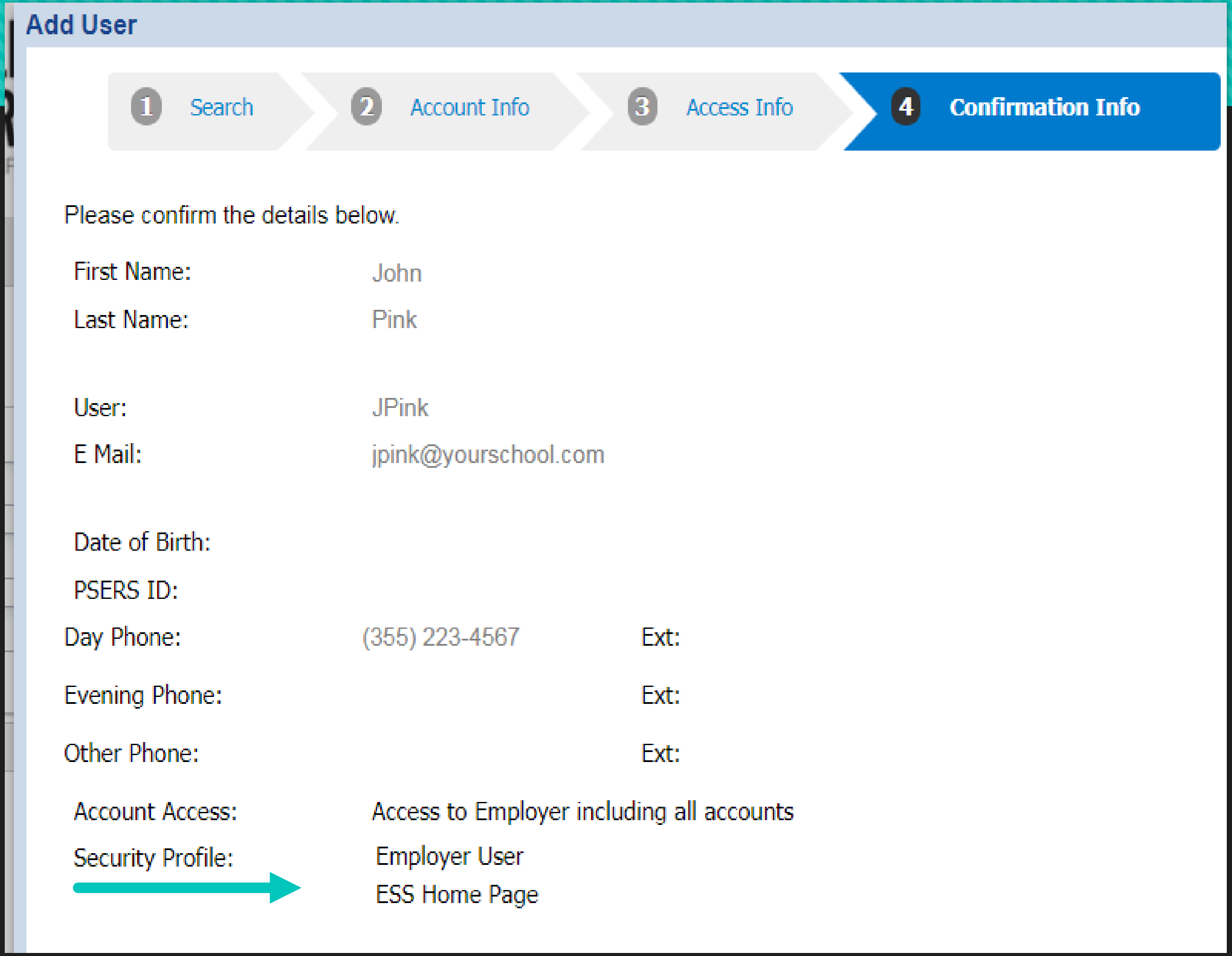
Correct security selected



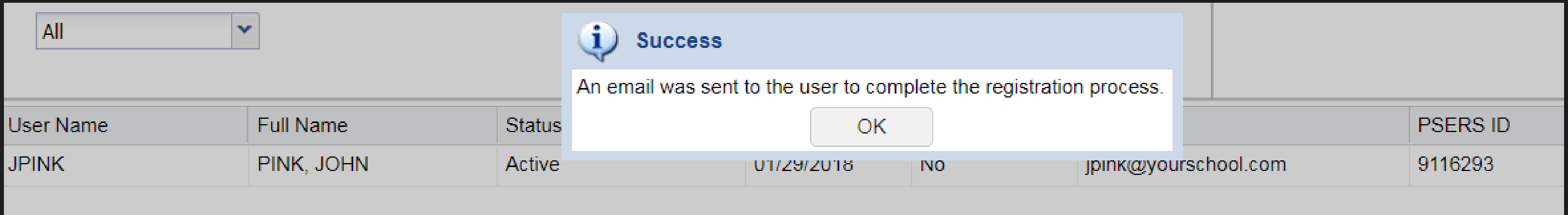
- When these boxes are successfully check marked, click the Next button at the bottom fight of the screen to move to Confirmation Info.

Step 4: Confirmation Info

- Review data entered carefully before clicking Confirm at the bottom right.
- Your new user should have both Employer User and ESS Home Page as part of their Security Profile.



Confirmation Success



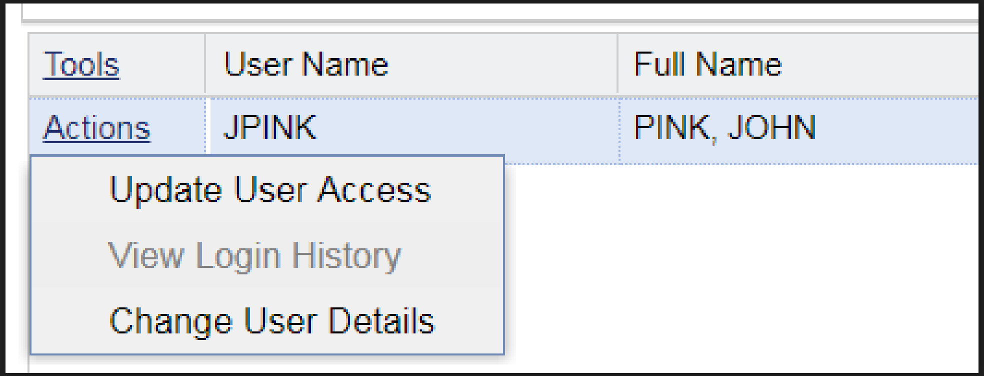
- A confirmation message will appear on your screen.
- The User will receive a registration email that will contain a link for that person to create a password for the system.

Registration Process

Tools	User Name	Full Name	Status	Created On	Registered	Email	PSERS ID
Actions	JPINK	PINK, JOHN	Active	01/29/2018	No	jpink@yourschool.com	9116293

- The Administrator creating the User account should provide the PSERS ID number to the User. This will be used in the registration process after the User receives the registration email.
- The PSERS ID is displayed on the far right and is a system generated number.
- Once registered, the User will be able to being using ESS for reporting. Completing the registration process will change the Registered status to “Yes” in the system.
- Users will also be required to change their passwords every 120 days.

User Actions Button



- Clicking the Actions button for a User allows you to Update User Access, View Login History (after registration is complete), and Change User Details.

Change User Details

- Change User Details will be the most commonly used action.
- Selecting this option opens the Demographics page.
- Click the Apply button, then Save, after changes have been made to the User's Demographic Information.
- Similar to contacts, A role needs to be assigned to the user as well as start and stop dates.
- A user who is no longer worked for your school or needs access to ESS should enter a stop date to deactivate their account.

Employer Service Center Regions

The Employer Service Center (ESC) has six representatives to serve PSERS reporting units across the Commonwealth of Pennsylvania.

ESC Representatives

Toll-free Phone: 1.866.353.1844

Region 1: Glenda Lopez-Rodriguez

Region 2: Crystal Houser

Region 3: Jonathan Malnick

Region 4: Carolina Baez

Region 5: Mike Chappuis

Region 6: Julius Davin (March 2018)