Employers' Reference Manual – Chapter 1

*Public School Employees' Retirement System*

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Chapter 1: Accessing the Employer Self Service (ESS) Portal

The Employer Self Service (ESS) portal is the online system used to submit most required reporting as well as view available account information. Before attempting any procedure described in this manual, ensure that you know how to access the system and that your contact information is correct.

To access ESS, navigate to www.psers.pa.gov in your web browser. ESS is compatible with all three major browsers (Google Chrome, Firefox, and Internet Explorer) but works best with Google Chrome.

There are two ways to access ESS from the PSERS website:

1. Use the "EMPLOYERS" tab on the far right within the top banner, then select "EMPLOYER SELF SERVICE" from the dropdown menu. This is shown in red below.
2. Select "EMPLOYER LOGIN" located within the gray banner, which will take you directly to the ESS log in screen. This is shown in green below.
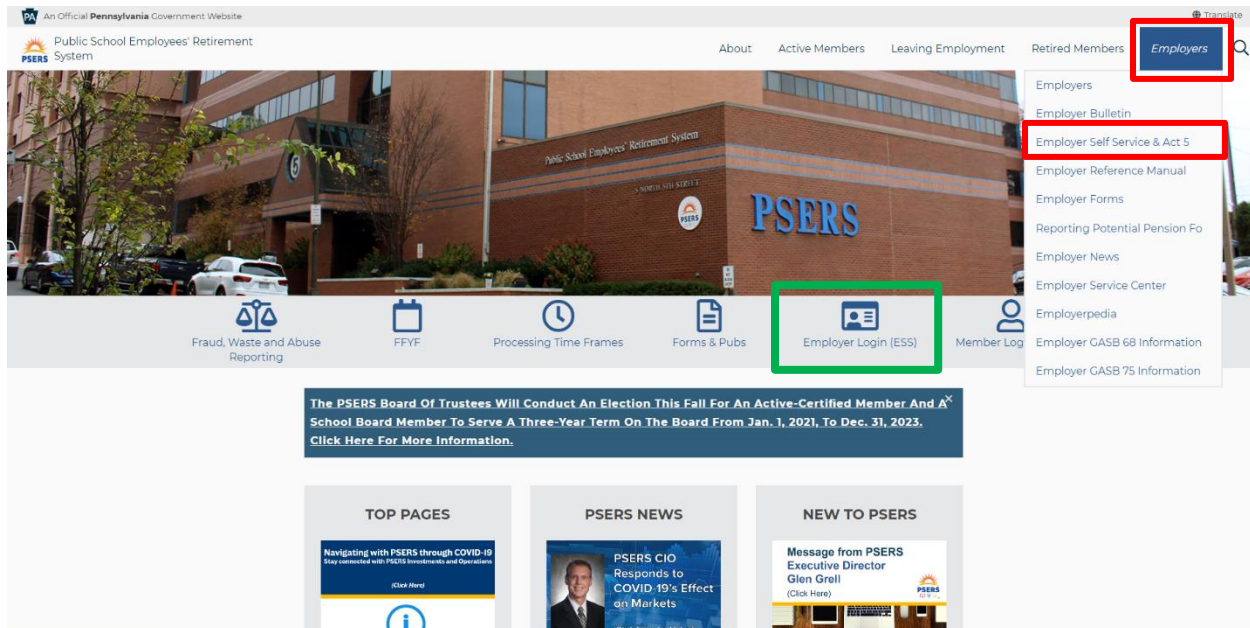
Using the Employer Tab to access ESS will take you to the Terms and Conditions page. To reach the ESS login screen, you must scroll down and ACCEPT the terms and conditions.

Terms and Conditions

By registering and logging on to this site, you are representing that you are an authorized user, and you will be deemed to have read, understood and accepted the disclaimers that are a part of this site.
PLEASE READ THE DISCLAIMERS BEFORE YOU ENTER THE APPLICATIONS. PSERS DISCLAIMERS.

PSERS web-based applications and PSERS information assets are to be used by authorized users strictly for business purposes. As the owner of a PSERS Employer Web Application account, it is important that you understand you have the responsibility to:

use the system only for the purposes specified by PSERS;
comply with controls established by the Commonwealth of Pennsylvania, PSERS, and public law as referenced on the PSERS website;

- prevent disclosure of sensitive information.

Please remember, for your own personal protection, do not keep your password written down, do not give your password to anyone, even to employees of PSERS. It is important that you keep your email address current with PSERS. We advise that the email address you supply to PSERS is an account to which you have exclusive access. All Commonwealth systems and usage are monitored for security purposes. Violations of PSERS' security policy will result in the termination of your account.

If you ACCEPT the above Terms and Conditions, please indicate below:

Accept   **Cancel**

Clicking Accept will take you to the PSERS' Employer Self-Service Portal.

Clicking Cancel will return you to the PSERS' Home Page

After accepting the Terms and Conditions, you will see the ESS log in screen:

Revised: 08/25/2020

Enter the **User** Name and **Password (PSERS ID)** provided to you by PSERS. If you do not have a User Name set up yet, see *Setting up Your Online User Names and Passwords* for more information.

After entering your User Name and Password, select the "**Log In**" button. The ESS Homepage appears. This is your main screen for the ESS portal. All of the online functions described in this *Employers Reference Manual* are accessed from the Tabs located from left to right across the top of the page.

Home	Profile	Account	Roster	Documents	Contacts

Quick Links

- Generate Report
- Enroll an Employee
- Upload a New Payroll File
- Terminate a current Employee

Web Links

- Employer Reference Manual
- PNC Cash Concentration
- PSERS External Linking Policy
- Employer GASB 68 & 75 Links to Information
- Voya Employer Self Service Portal

Forms

HTML Questionnaire to determine the applicant's eligibility for PSERS membership
10/11/2017

PDF Return to Service Template Letter
08/17/2018

HTML Authorization Agreement for Restricted (ACH) Debits
10/11/2017

HTML Approved Leave of Absence - Employer Verification
10/11/2017

Employer News

Important Notice Regarding Contract Records

08/15/2019: Please DO NOT make changes to contract records for members who have an end date of 6/30/2019, followed by a new record of 7/1/2019. The system created a new record starting 7/1/2019 with the same Job Description, Work Status, Wage Type etc. The creation of a new record was done to ensure that the T-G class displays with the correct 5.50% DB contribution rate, due to a system glitch as non-qualifying members were converted for Class T-E to Class T-G. If you remove the 6/30/2019 end date of these records and create a new record with a start date prior to 7/1/2019, an incorrect 4.75% contribution rate is displaying in our system, which will cause errors when you upload work reports. PSERS must correct the accounts individually for those who are displaying the incorrect 4.75% contribution rate.

System Maintenance

05/02/2018: PSERS Employer Self-Service Portal is temporarily unavailable each Thursday starting at 6 p.m. until 10 p.m. for scheduled system maintenance. Thank you for your patience.

PNC Cash Concentration Link

04/10/2018: When accessing the PNC Cash Concentration website link from the Web Links section, please copy and paste the link into Internet Explorer.

Welcome to ESS

03/28/2018: The "Help" link at the top right provides Help Text that may answer your questions as you move through the system. For additional help, you may also contact your ESC Rep by using our Toll Free phone number 1.866.353.1844.

Requesting User Access for the ESS Portal

You must complete and submit a *PSERS Employer Reporting Systems User Access* (PSRS-1270) form to request access from PSERS to use the ESS portal. The *PSERS Employer Systems User Access* (PSRS-1270) form is on the PSERS website, under the Employer Tab, under Forms. You may also request this form by calling the Employer Service Center toll-free at 1.866.353.1844. Your signature, and a co-signature from another person in your business office are required for this form to be processed.

PSERS recommends that each employer have at least two users with access to the Employer Self Service portal.

Use this form to register as a PSERS Employer Reporting Systems User for the PSERS Employer Self-Service (ESS) Reporting System and Voya's Sponsor Web.

Terms and Conditions of Use:
PSERS ESS Reporting System and Voya's Sponsor Web are to be accessed by authorized users only, who are registered as a PSERS Employer Reporting Systems User. A registered PSERS Employer Reporting Systems User must comply with the following:

- Use the resource for PSERS business only.
- Comply with controls established by PSERS and applicable law.
- Prevent unauthorized disclosure of sensitive information.
- Comply with all information security and access policies of the Commonwealth of Pennsylvania and PSERS. Such policies can be found on PSERS' website on the Employer Self-Service page under the Employer tab.

All Commonwealth systems and usage are monitored for security purposes. Violations of PSERS' security policy will result in the termination of your user account and any other remedy that may be provided by law. Any individual who knowingly makes a false statement or falsifies or permits the falsification of any record or records of PSERS in an attempt to defraud PSERS commits a misdemeanor. 24 Pa.C.S. § 8534(a).

Instructions:
To assign or remove a user's access to PSERS ESS Reporting System and/or Voya's Sponsor Web, check the appropriate boxes below.

| **PSERS** | ☐ **Create ESS Reporting System Access** | ☐ **Delete ESS Reporting System Access** |
| **Voya** | ☐ **Create Sponsor Web Access #5** | ☐ **Delete Sponsor Web Access #5** |

PSERS Employer Reporting Systems User Requesting Access		
Employer Name	Employer Number	User's Last Name
Administrator's Employer Mailing Address		User's First Name
		User's Email Address
		User's Phone

User Certification
By registering as a PSERS Employer Reporting Systems User, I acknowledge and agree to comply with the Terms and Conditions of Use listed above when using PSERS ESS Reporting System and/or Voya's Sponsor Web. Use of PSERS ESS Reporting System and/or Voya's Sponsor Web by any registered user is deemed an acceptance and acknowledgment of the above Terms and Conditions of Use.

PSERS Employer Reporting Systems User Requesting Access Signature	Date

Employer Certification
The individual signing below certifies that they are currently employed within the Business Office by the employer listed above, that the user identified above is authorized to act on behalf of the employer with respect to employer reporting to PSERS, and that information listed for the user requesting access to PSERS ESS Reporting System and/or Voya's Sponsor Web is correct to the best of their knowledge and belief.
*Signature not required for access deletion

Name	Title/Position
Approving Signature	Date

PSERS Employer Reporting Systems User Access	**Page 1 of 1**

PSERS will process your request and will send you; 1) an email containing your User Name and, 2) a letter - via U.S. mail - containing a PSERS ID for your ESS account. The first time you log in you will be required to set up a new password as well as select, from a pre-established list, three security questions for use in resetting the password going forward. **NOTE:** The ESS portal will prompt you to change your password every 120 days.

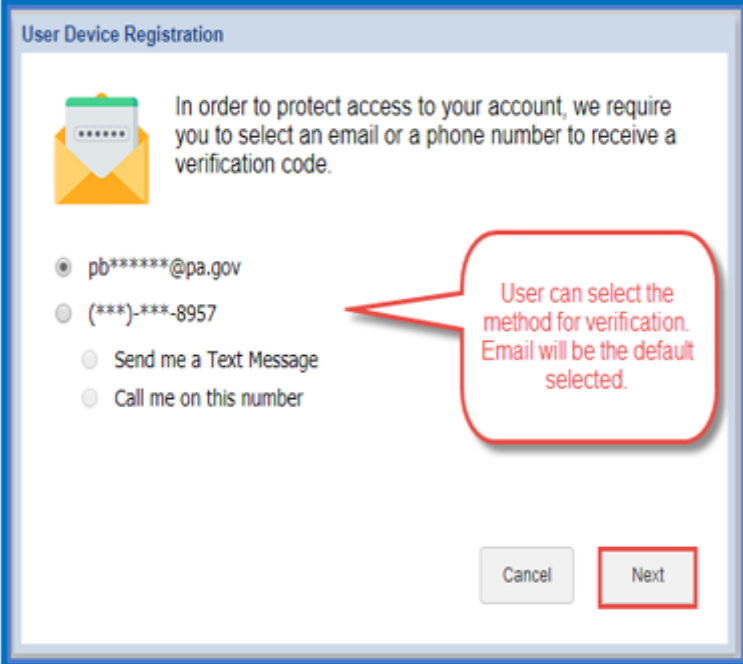## MFA – Multi Factor Authentication

Multi-Factor Authentication (MFA) is one of the most effective ways to prevent security threats to protect sensitive data. MFA is an authentication method in which a computer user is granted access only after successfully presenting two of more pieces of information (factors). This is to ensure that sensitive data is kept secure and is only available to the authorized user.

You will be required to perform an MFA transaction when you log into ESS for the first time as well as on the same schedule that you are asked to update your password. ESS users are required to update their ESS password every 120 days. You may update your password more frequently if you wish. This will also trigger an MFA transaction.

When you are prompted to complete the MFA transaction, you must choose a method to receive a verification code. Available information for you to choose from, such as your email address and phone number, are pulled from the contact information displayed in the Contacts tab in ESS. If one of those fields is blank in your contact record, then the field will not display on the screen as an available option, so it is important to enter in as much information as possible when creating a new contact inside ESS. Additionally, it is your responsibility to update your contact information if there is a change to your phone number or email address.

*NOTE: Employers should use email to receive their verification code to complete MFA unless they already have a contact phone number that will allow for a direct call/text. MFA outreach does not handle phone extensions.

Select the method in which you wish to receive the verification code. After selecting the verification method either via email or phone, click **Next.**

The verification code is then sent via the method selected. There is a 15-minute time limit to which to enter the verification code. Once the code has been received the user will enter the code into the screen, then click **Done**.

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

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

What do I do if my verification code does not work?

Time Limit expires: If you do not enter the code within the 15-minute time limit, a pop-up message will appear stating that your verification code has expired. Click **Resend Code** to receive a new code.

Verification code is not received: If that code is not received, or if the code expires, click **Resend Code** to send a new code via the selected verification method. The 15-minute countdown restarts when this new code is sent.
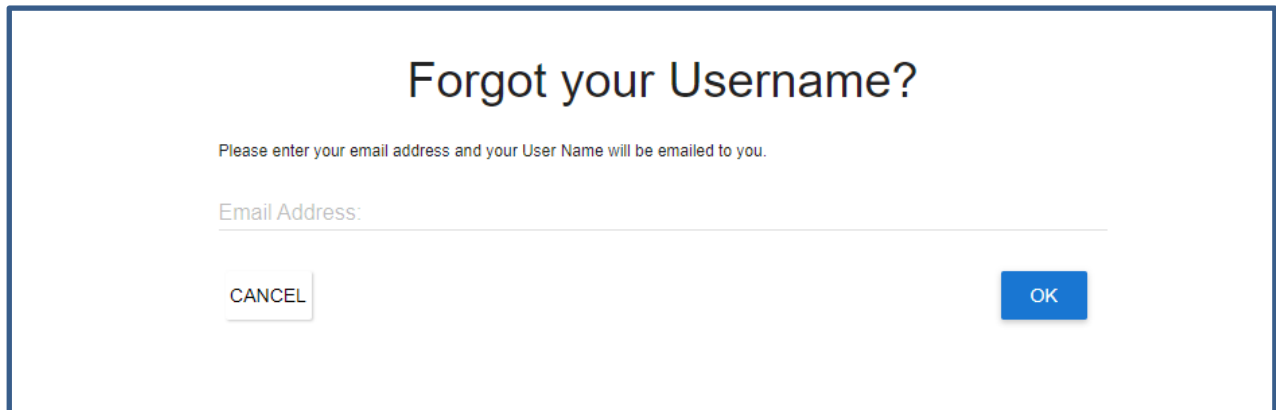
- Check your spam/junk email folder in case verification code got stuck there.
- Verifying that your phone number or email address is correct

- Your main office number may have an extension - MFA outreach does not handle extensions.
- Works best with Google Chrome.

System will not accept verification code: The verification code is looking for a 6-digit number. If you receive your verification code by text or email and double-click on it to copy and paste, an extra space is sometimes also brought forward. If the system seems to be rejecting your verification code, look to see if there is an extra space behind the last number.

Forgot User Name

When an employer forgets their User Name, the user should click the 'Forgot User' link on the Login Page. Clicking the link will begin the Forgot User Name process. There are two screens within this process.
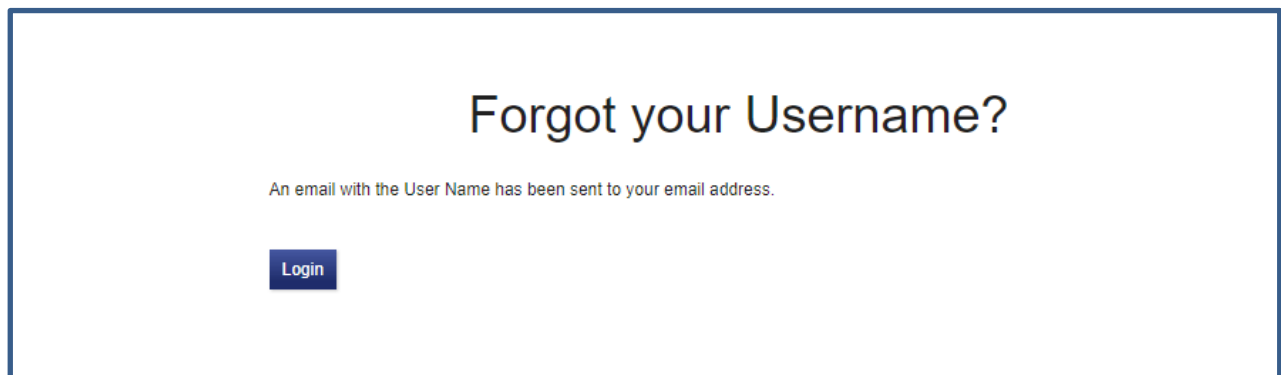
In the Forgot User Name screen, the user enters the email address that was used when registering for ESS. Then, the user clicks 'Ok.' If the email address is found in V3, then V3 sends an email to the user with their ESS User Name. Next, a Forgot User Name Confirmation window will appear. The user can then click 'Login' to return to the Login Page.

When an employer forgets their password, the user should click the 'Forgot Password' link on the Login Page. Clicking the link will begin the Forgot Password process. There are four screens within this process.

In the Account Lookup screen, the user enters their ESS Username and clicks 'Next'. If the User Name exists in V3, the process continues to the next screen

In the Security Questions screen, the user answers the Security Questions that they set up when registering for ESS (i.e., the first time they logged into ESS). When finished, the user clicks 'Next'. If the questions were answered correctly, the process continues to the next screen.

In the Password Reset screen, the user updates their password and clicks 'Confirm'. They then continue to the complete screen.

The complete screen indicates that the user has successfully finished resetting their password. The user can then click 'Login' to return to the Login Page or can simply wait to be returned to that page.

Add a New Contact

There are many occasions when PSERS needs to contact an employer. To ensure that PSERS communicates with the correct person about each issue, keep all your contact information current.

A new contact may be added by selecting the "**Add a new Contact**" button under the "Contacts" tab.

Home	Profile	Account	Roster	Documents	Contacts

Contacts

Add a New Contact

Tools	Name	Role	Phone(s)	Fax	▾ Email	Street	Start Date▴	Stop Date
Actions		Employer Newsletter					03/23/2018	
Actions		Superintendents					03/23/2018	
Actions		Business Manager					03/23/2018	
Actions		Member Demographics/Contracts					03/23/2018	
Actions		Member Newsletter					03/23/2018	
Actions		Employer Statement of Account					03/23/2018	
Actions		Refunds					03/23/2018	
Actions		Retirements					03/23/2018	
Actions		Employee Statement of Account					03/23/2018	
Actions		Purchase of Service Receivables					03/23/2018	

After selecting "Add a new Contact" the "New Contact Search" screen will appear. Enter the new contact's last name in the empty search box and then select the "**Search**" button to ensure that the contact is not already in the system.

Add Details ⊠

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

Please search to ensure that this contact doesn't already exist in V3's world.

[All ▼]   [|]   [Search]

[Cancel]   [Next]

If no matches are found, then the "**Add Person**" button may be selected to move to the "Add Details" screen where all pertinent Contact information should be entered. First Name, Last Name, Role and Start Date are all required information. After entering the information, the "**Next**" button should be selected to move to the "Confirm" page.

IMPORTANT: You must enter a stop date for a role before adding a new contact for that role.

Example: Your new staff person Betty will be taking the Monthly Reporting role. Sarah is currently listed as the Monthly Reporting contact. You must update Sarah's contact information by entering a stop date before you enter Betty as a new contact for this role.

Provided all the information is correct the "**Confirm**" button should be selected. The "**Back**" or "**Cancel**" buttons may be selected to either revise the information submitted or cancel the addition of the new Contact's information.

Add Details

1. New Contact Search → 2. Enter Details → **3. Confirm**

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.

Role	Person

Prefix:		Role:	Monthly Reports
First Name:	Betty		
Middle Name:		Start Date:	06/05/2020
Last Name:	Blue	Stop Date:	
Suffix:		PSERS ID:	

Cancel   Back   Confirm

Updating an Existing Contact

If there is a change regarding an existing contact, this information should be updated as soon as possible.

To update contact information, select the "**Contacts**" tab. The "Contacts" window will appear showing a list of all contacts. Select the "Actions" menu to the left of the contact you would like to edit and then select "**Details.**"

After selecting "Details", the "Demographics" page will display for the chosen contact and by selecting the "**Change**" button the contact's information may be modified on the next page shown.

Make the desired changes to the Contact's information and then select the "**Next**" button. Following this, a confirmation disclosure page will appear, and the "**Confirm**" button must be selected to complete any edits. The "**Back**" or "**Cancel**" buttons may be selected to either revise the information submitted or cancel the modification to the Contact's information.

Contacts ⊠

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.

🕓

Prefix:	Role:	Superintendents
First Name:		
Middle Name:	Start Date:	03/23/2018
Last Name:	Stop Date:	
Suffix:	PSERS ID:	

Contacts

Cancel   Back   Confirm

Contact Role Descriptions

Monthly Reports	The person who will submit monthly Work Reports to PSERS
Employer Newsletter	The person who should receive a PSERS newsletter with information pertaining to business operations
Refunds	The person who should be contacted regarding any refunds of contributions being processed for a former employee
Retirements	The person who handles retirement application processing within your district or entity
Business Manager	The Business Manager or person in charge of Accounting
Information Technology	The person in charge of your Information Technology (computer) needs
Healthcare	The person who handles the health care program/insurance for your employees
Superintendents	The individual who oversees the activities of the entire entity. • For a school district, this is the District Superintendent • For a charter school, this is the Director, Principal, Board Chairperson, or other relevant position • For a non-school entity, this is the CEO, President, or other relevant position
Member Newsletter	The person who should receive a copy of all newsletters that PSERS sends to its members (your employees)
Purchase of Service Receivables	The person who coordinates the completion of forms and the payments of Purchase of Service for the members (employees) and employer
Member Demographics/Contracts	The person who enters Member Demographic Records and Member Contract Records for employees
Employer Statement of Accounts	The person who receives *Employer Statement of Accounts* (billings) from PSERS. This *Employer Statement of Accounts* shows the following activity: • Member Savings • Employer Share • Member Purchase of Service Payments