

PSERS Employer Bulletin

Volume 3 2025

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Public School Employees' Retirement System

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Publication #9265

Resources for New Employees

As a public school employer, it is important for you to take an active role in notifying your employees about the PSERS resources available to them. The resources below can be found on the PSERS public website.

Information for New Employees Handout

Distributing the [Information for New Employees](#) handout is the first step in educating your employees about PSERS and helping them get started on the path to retirement readiness. This handout is on our website at pa.gov/PSERS. It is the first document at the top of the Employer Forms page. The handout includes information on what PSERS is, the plans we offer, how to qualify for membership, what actions new employees need to take, QR codes directing employees to the class election calculator and more! Within the first few weeks of members qualifying for membership, PSERS will send them a Welcome Packet and Class Election Packet with more information.

Introduction to PSERS Email

At the beginning of each school year, PSERS provides a template email to business managers and monthly reporters that is to be sent to all new hires. The email introduces the new employee to PSERS and provides important information about their retirement benefits and the benefit elections they may have. Now more than ever, it is important to educate our new members on their retirement benefits so they can begin their journey to a secure retirement.

Retirement Estimate Calculator with Defined Contribution

To assist members in deciding which membership class may be right for them, PSERS provides an [online calculator](#) to estimate the possible benefit amounts for each class at the time they plan on retiring. Members simply enter their age, starting annual salary and the number of years they plan to work. If members are unsure what to input, PSERS also has class election examples that members can review.

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Class Election Videos

PSERS has [three videos](#) to help members understand their retirement benefit and their membership class options:

- [Understanding Your PSERS Benefit](#) – High-level overview of the PSERS retirement benefit options.
- [Membership Class Options](#) – Comparison of the PSERS membership classes: Class T-G, Class T-H and Class DC.
- [How to Select a Membership Class](#) – Examples of what a member's benefit may look like in each membership class as well as instructions for remaining in their current membership class or electing a new class.

Active Member Handbook

The PSERS [Active Member Handbook](#) is a valuable resource for all new and existing members that provides essential information about PSERS retirement benefits and services. Employers can post a link to the Handbook on their website and as part of the onboarding process to ensure all new members have access to this important information.

Total Service Credit Report

Last fall, a column titled *ATC Rate* was added to the Total Service Credit Report so you can identify which members have an after-tax contribution (ATC) election percentage on file with PSERS. This is the fastest way to find all employees who currently have an ATC percentage on file, which includes new hires that you recently enrolled.

To quickly find members on this report with an ATC percentage, PSERS suggests selecting the CSV format when you run the report. Highlight the header row (row 3) and select the *Data* tab at the top of the excel sheet to find the filter symbol. In the *ATC Rate* column, click on the filter button to sort the results to find members who have an ATC percentage.

Only members who are part of Class T-G, Class T-H and Class DC can elect an ATC percentage. Members make this election and can modify the percentage at any time through their online account with Voya. When changes are made to a member's after-tax election, PSERS will notify you by email and on the CROQ report. Employers are required to withhold and report to Voya the elected ATC percentage for members.

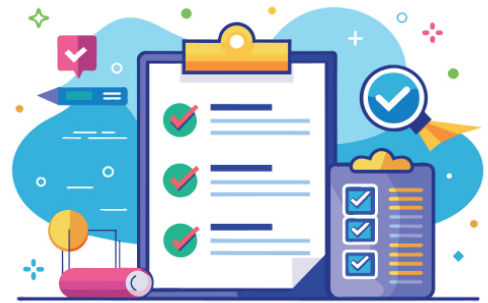
If this is not reported, PSERS runs a monthly report to identify who was missed and will send you a letter billing the employer for 40% of the amount missed. The letter will be added to the Documents page in the Employer Self-Service (ESS) Portal and is labeled *PSERS Employer Correspondence*.

Note: You may generate the Total Service Credit report in a PDF format and save it electronically. With the additional column included, it requires legal size paper to print unless you change column settings prior to printing.

Return to Service Reminders

The Retirement Code generally prohibits PSERS retirees from returning to school service for a public school in any capacity, full-time or part-time, qualifying or nonqualifying service, while receiving a PSERS retirement benefit. Members must terminate all employment and experience a bona fide break in service to be eligible to retire. Once retired, a PSERS retiree may return to assist without their monthly retirement benefit being stopped if one of the following exceptions applies:

- **Personnel Shortage** – Employment in the event of a shortage of appropriate subject-certified teachers or other personnel.
- **Emergency that Increases the Workload** – Employment resulting from an unforeseen emergency which increases the workload and creates a serious impairment of service to the public.
- **Extracurricular Position** – Employment in an extracurricular position under a separate written contract that includes the statutorily required verbiage regarding PSERS membership.
- **Independent Contractor** – Employment when validly employed as an independent contractor under a separate written contract.
- **Employment with a Third-Party Employer** – Employment when validly employed by, and providing services through, a legitimate third-party employer that is not a reporting unit of PSERS.
- **Enrollment in Alternate Retirement Plan** – Employment by any of the state's community colleges, Pennsylvania State University, the 14 state-owned universities and charter schools where the PSERS retiree enrolls in an alternate retirement plan – such as the State Employees' Retirement System or the Teachers Insurance and Annuity Association.



These exceptions, including the request and approval process, are detailed in the [Return to Service Exceptions](#) publication available on the PSERS website.

As the employer, you should obtain approval from PSERS using one of the approval processes for exceptions before hiring a PSERS retiree. If the PSERS retiree returns to service under one of the exceptions, then the retiree cannot earn or purchase service credits for the time period they were employed under the exception. If the PSERS retiree does not qualify under an exception, their monthly payment will be stopped and they will be reenrolled as an active, contributing member of PSERS. The PSERS retiree will also be required to pay back the benefit they received, if any, after their return to active service to when their annuity stopped. Special rules may apply for employment at a community college, public university, or Pennsylvania charter school.

Please contact your Employer Service Center (ESC) representative if you have questions about hiring a PSERS retiree.

Introducing Our New Employer Service Center Supervisor

ESC is excited to announce the promotion of ESC Region 2 Representative, Deanna Brown, to Regional Office Administrator.

In January 2014, Deanna joined PSERS in the Account Verification Unit reviewing member accounts and employer reporting. After two years, she moved to the Exceptions Processing Unit where she worked with multiple service and frozen annuity retirement calculations. In 2019, she began as an ESC representative. She is now looking forward to continuing to serve our employers and supporting our ESC staff as an ESC supervisor and continuing to serve our PA school districts and employers with PSERS reporting.



Prior to joining PSERS, she worked at the West Perry School District for five years while raising four children. In her free time, she enjoys walking the dog, spending time with her family and volunteering in her community.

Voya August Training

Thank you to all who attended the Voya PayCloud training! The [presentation slides and recording](#) are now available online under the Employer Resources>DC Plan/Voya Resources section of our website.