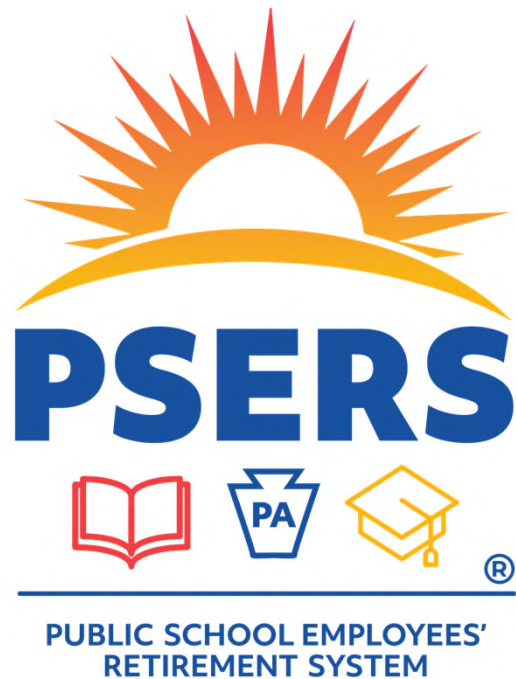


2026 SPRING WORKSHOP

PRESENTED BY:

PSERS EMPLOYER SERVICE CENTER (ESC)



WELCOME TO THE 2026 EMPLOYER WORKSHOP!

- **TODAY'S PRESENTATION WILL RUN APPROXIMATELY 2 HOURS**
- **ALL PARTICIPANT MICROPHONES WILL BE MUTED**
- **PLEASE USE THE MEETING CHAT FEATURE THROUGH TEAMS TO ASK QUESTIONS AND TO PARTICIPATE**
- **WHEN THE PRESENTATION ENDS ESC WILL BE AVAILABLE IN THE MEETING CHAT TO CONTINUE TO ANSWER ANY QUESTIONS**
- **A LINK TO A COPY OF THE PRESENTATION AND THE HANDOUTS HAS BEEN UPLOADED INTO THIS TEAMS CHAT**

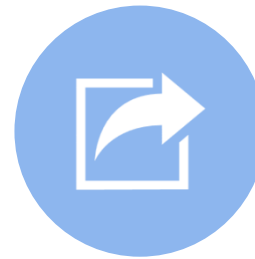
TODAY'S AGENDA



PSERS MEMBERSHIP



REPORTING
COACHES



RETURN TO SERVICE



ESS FEATURES





PSERS MEMBERSHIP

RETIREMENT CODE

§ 8102. Definitions. "School employee". Any person engaged in work relating to a public school for any governmental entity and for which work he is receiving regular remuneration as an officer, administrator or employee excluding, however, any independent contractor or a person compensated on a fee basis.



EXAMPLES OF THOSE WHO ARE NOT SCHOOL EMPLOYEES

- A student who is hired to render service that is part of the student's curriculum or part of a financial aid package
- A person performing services as an independent contractor
- A person compensated on a fee basis
- School crossing guards, as per an amendment made in 2000 to the (Pennsylvania) Township and Borough codes, which expressly excludes school crossing guards as school employees and prohibits them from membership in PSERS.



QUESTIONABLE JOBS: ARE YOU A SCHOOL EMPLOYEE?

If you require PSERS assistance in determining whether an employee is a school employee and eligible for PSERS membership, you can complete the *Questionnaire to Determine PSERS Membership Eligibility (PSRS-349)* form. PSERS will review the questionnaire and determine if the employee is a school employee and eligible to be enrolled. Questionable job titles can include:

- Consultant
- Dentist
- Doctor
- Psychologist
- Solicitor
- Tax Collector



MANDATORY PSERS MEMBERSHIP

If an individual is a school employee, then membership in the DB Plan and the DC Plan is **MANDATORY** as of the effective date of employment for **all school employees** unless they fall under an exception.



EXCEPTIONS TO MANDATORY PSERS MEMBERSHIP

1. Any officer or employee of:
 - a. Department of Education
 - b. State-owned educational institutions
 - c. Community colleges
 - d. Area vocational-technical schools
 - e. Technical institutes
 - f. Pennsylvania State University
 - g. Charter Schools

ONLY IF such employee is a member of the State Employees' Retirement System or an approved alternate retirement plan as of the effective date of employment.

2. Any school employee who is not a member of the system and who is employed on a per diem or hourly basis for less than 80 full-day sessions or 500 hours in any fiscal year.
3. An annuitant who returns to school service under an approved RTS exception.
4. A part-time school employee for whom PSERS approved a waiver of membership.



PSERS DEFINITION: FULL-TIME VS PART-TIME

FULL-TIME

- Salaried = works at least 5 full days per week
- Hourly = works at least 25 hours per week not including overtime hours
- Per Diem = works at least 5 full days per week and is hired and paid on a day-to-day basis.
- Adjunct = works at least 30 credit hours in a fiscal year

PSERS full day of service = 5 hours

PART-TIME

- Salaried = works fewer than 5 full days a week
 - Works five 5 or more hours per day, but fewer than five 5 days per week
 - Works fewer than five 5 hours per day
- Hourly = works less than 25 hours a week and is hired and paid on an hour-to-hour basis
- Per Diem = works fewer than 5 days a week and is hired and paid on a day-to-day basis
- Adjunct = work fewer than 30 credit hours in a fiscal year

INITIAL QUALIFICATION

Qualified as of day one of work:

- Any FT contract
 - Salaried, hourly, per diem
- PT salaried contract
 - Example: coaches, band director, musical staff, any employee paid by stipend

Qualified after service threshold:

- PT Hourly—500 hours during the FY
- PT Per Diem—80 days during the FY
(or any combination of the above)

Note: Even though your new employee is new for your school, they may not be new to PSERS. Always check the class, rate, and withhold requirements after enrolling a new employee.



ENROLLING EMPLOYEES

Entering correct demographic and contract record details enrolls your employee into the PSERS system.

- Regardless of an employee's qualification status, all employees must be enrolled into PSERS unless they are specifically ineligible for membership.
- Remember that all **full-time employees** and all **salaried employees** **qualify immediately for membership** into PSERS from the first day of service.



PSERS BENEFIT STRUCTURE

- **Defined Benefit (DB):** guarantees a monthly benefit for life based on a calculation of:



- **Defined Contribution (DC):** composed of contributions and investment performance based on the investment options chosen by the participant. No guarantee against loss, and is subject to DC costs and expenses.



CONTRIBUTION RATES-DB ONLY CLASSES

	Employer Contribution to DB (FY26)	Member Contribution to DB*
Class T-C	34.00%	5.25/6.25%
Class T-D	34.00%	6.50/7.50%
Class T-E	34.00%	7.50%*
Class T-F	34.00%	10.30%*

* Includes shared risk/shared gain contribution rate.

Note: Employer Contribution Rate for Fiscal Year 2027 will be 33.59%



CONTRIBUTION RATES-DC COMPONENT CLASSES

	Employer Contribution to DB (FY26)	Employer Contribution to DC	Member Contribution (DB)	Member Contribution (DC)	Total Member Contribution
Class T-G (default)	34.00% less employer contribution already paid to DC	2.25%	5.50%*	2.75%	8.25%
Class T-H (elective)	34.00% less employer contribution already paid to DC	2.00%	4.50%*	3.00%	7.50%
Class DC (elective)	34.00% less employer contribution already paid to DC	2.00%	0.00%	7.50%	7.50%

The actual employer contribution rate will be blended so it is the **same** per member/participant, **regardless** of their Membership Class, and it is applied across total payroll.

Note: Employer Contribution Rate for Fiscal Year 2027 will be 33.59%



WITHHOLDING FOR PT NON-QUALIFIED MEMBERS

Prior to qualification for membership, Non-Qualified PT employees:

- Are not eligible for membership in the PSERS **DB plan** or **DC plan**, BUT
- Must be enrolled and reported to the PSERS **DB plan** to track service.

Withholding DB Plan contributions is optional.

- **Either** withhold and report the PSERS DB contributions.
- **Or** report wages under WNC (Wages No Contributions).

Withholding DC Plan contributions is prohibited before members qualify.



ONCE QUALIFIED, ALWAYS QUALIFIED (OQAAQ)



Prior to the passage of Act 120- 2010 (November 23, 2010), PT hourly and per diem members had to re-qualify each year.

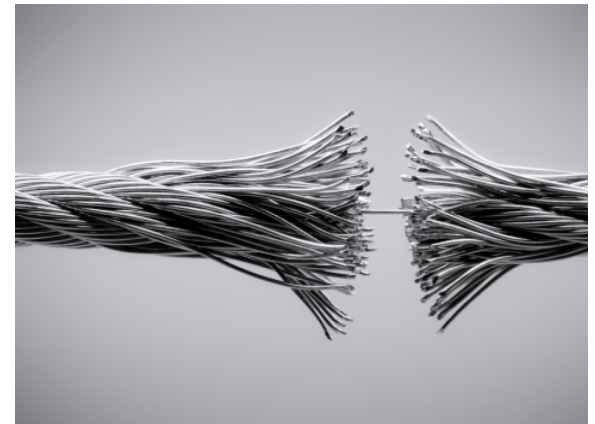
Now, a member remains qualified until there is break in membership.



WHAT IS A BREAK IN MEMBERSHIP?

PSERS membership is broken when:

- A member terminates and refunds contributions and interest.
- A non-vested member terminates all public-school employment, regardless of whether they refund their contributions and interest, **AND** does not return to service prior to the expiration of Inactive status.
 - Inactive Status: A non-vested member is in an inactive status when not reported by a public-school employer for a period of two full fiscal years from June 30 of the last fiscal year of the member's last day of paid service.
- A non-vested disability retiree whose annuity is terminated.



REQUALIFICATION: WHY DOES THE SYSTEM TELL ME I HAVE A PART-TIME MEMBER WHO NEEDS TO REQUALIFY?

- Prior PSERS members must re-qualify for membership upon a subsequent return to school service if:
 - They are not vested in their membership class or have refunded their account, and
 - Are employed on a part-time basis, hourly or per diem wage type.
- Such PSERS member must reach the minimum service threshold to requalify, but they retain their original membership class.
- **Class DC members only** do not need to re-qualify to participate in the DC Plan upon returning to service.



CROQ NOTIFICATION TO EMPLOYERS

CROQ Report

"Change in Rate/Obtaining Qualification"

- The report runs every Monday, but employers only receive a report if there is activity for them to review.
- Contained on the report:
 - Newly qualified members
 - Class election or return to a prior class changes
 - Approved PT waivers
 - New or updated After-tax election (ATC) deferral rates
- Members do not reappear on the list unless they have a new status change.
- If qualified members go to a new school, the employer must look up their class/rate and withholding status.

SSN	Name	Updated On	Current Membership Class	DB Contribution Rate	DC Contribution Rate	Voluntary After Tax DC %	Reason For Change
		01/4/2023	TD	7.5	0		Account Update
		01/7/2023	TG	5.50	2.75		Member Qualified this fiscal
		01/06/2023	TG	5.50	2.75		Membership Waived
		01/06/2023	TG	5.50	2.75		Member Reported to DC Admin
		01/08/2023	TG	5.50	2.75	5.00	Change in After Tax Def%
		01/05/2023	TH	4.50	3		TH Election
		01/06/2023	DC	0	7.5		DC Election

NOTIFICATION: NEW MEMBERS AND RATE CHANGES

VIEWING MEMBERSHIP CLASS AND WITHHOLDING DETAILS INCLUDING AFTER-TAX PERCENTAGE

There are three different ways to view this important information.

Employers can:

- Use the Roster Page in ESS to look up members individually.
- Run a Total Service Credit Report to see class information for multiple employees.
- Review a submitted contract or work report to see class/withholding details by scrolling to the fields on the far right.



ROSTER PAGE IN ESS

Membership Class and Rates

Current Class

TG

DB Contrib Rate

5.50 %

DC Contrib Rate

2.75 %

DC Employer Share

2.25 %

After Tax Def %

5 %

Withhold Info

Required

- Individual members
- All details provided in one place

Note: If a member is not qualified, then the withhold info will display.

Withhold Info
Optional DB/No DC



TOTAL SERVICE CREDIT REPORT

- The primary use of the total service credit report is to provide employers with an overall service credit total for their employees.
- It provides details for class/rate, service/DC eligibility points accrued, and also confirms if a valid address is on file.
- After tax deferral percentage and DC contribution rates are also displayed.



TOTAL SERVICE CREDIT REPORT

	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Employer Total Service Credit Report											
2		Run Date : 1/1/2026			Employer Code : 1234		Employer Name :		ESC SD	Fiscal Year :		2025	
3													
4	SSN	Member Name	PSERS Service	DC Elig Points	Birth Date	Member Status	Enrollment Date	Membership Class	DB Rate	DC Rate	ATC Rate	Valid Address	
5	000-00-0000	LAST, FIRST	2	3		Active	9/5/2023	TG	5.5	2.75	0	Y	
6	000-00-0001	LAST, FIRST	1.36	0		Active	7/1/2009	TD	7.5	0	0	Y	
7	000-00-0002	LAST, FIRST	0	0		Terminated Non-Qualified	4/25/2023	TG	5.5	2.75	0	Y	
8	000-00-0003	LAST, FIRST	0.16	1		Active	3/25/2025	TG	5.5	2.75	0	Y	
9	000-00-0004	LAST, FIRST	21.2	0		Retired	7/1/2003	TD	7.5	0	0	Y	
10	000-00-0005	LAST, FIRST	5.96	0		Active	8/25/2017	TE	7.5	0	0	Y	
11	000-00-0006	LAST, FIRST	2	3		Active	8/15/2023	TG	5.5	2.75	0	Y	
12	000-00-0007	LAST, FIRST	2.92	4		Active	10/17/2022	TH	4.5	3	0	Y	
13	000-00-0008	LAST, FIRST	8	0		Active	8/22/2017	TF	10.3	0	0	Y	
14	000-00-0009	LAST, FIRST	19.49	0		Active	7/1/2004	TD	7.5	0	0	Y	
15	000-00-0010	LAST, FIRST	5	7		Active	8/7/2019	DC	0	7.5	0	Y	
16	000-00-0011	LAST, FIRST	0	0		Pending Qualification	6/2/2025	TG	5.5	2.75	0	Y	
17	000-00-0012	LAST, FIRST	0	0		Pending Qualification	6/2/2025	TG	5.5	2.75	0	Y	



SUBMITTED WORK REPORT

Employers can scroll to the right on a submitted work report to see class/rate, withholding, and ATC % details.

The columns can be sorted, like the After-Tax Def % field.

Enroll Dt	Mem Class	DB Contrib Rt	DC Contrib Rt	After Tax Def %	W/hold Notif
07/01/2019	TG	5.50%	2.75%	8.00%	02012020
05/16/2022	TG	5.50%	2.75%	5.00%	05012022
04/06/2022	TG	5.50%	2.75%	3.00%	04012022
05/10/2022	TG	5.50%	2.75%	3.00%	08012022
03/05/2020	TG	5.50%	2.75%	1.00%	03012020
08/28/2019	TG	5.50%	2.75%	0.00%	08012019



NOTIFICATION TO VOYA



Demographic information to Voya File — Sent to Voya each Monday

- Creates participant records in Voya's system for newly qualified members.
- Updates class/rate, address, member status
- Active, Deceased, Inactive, Ineligible, Leave, Terminated





KNOWLEDGE CHECK

- Eligible?
- Qualified?
- Should you withhold?

FIRST SCENARIO: TEMPORARY EMPLOYMENT OF A STUDENT

Your district hires students over the summer to assist in grounds keeping and has hired a student from your high school to work through the summer.

The student will be working five days a week beginning at the close of school until the new school year.

Groundskeepers work 6-hour shifts and are paid hourly.



KNOWLEDGE CHECK



- Is the student groundskeeper eligible for PSERS membership?
- Does the student groundskeeper qualify for PSERS membership?
- Does the school district need to withhold contributions from the student worker?

IS THE STUDENT GROUNDSKEEPER ELIGIBLE FOR PSERS MEMBERSHIP?



YES!

PSERS makes no distinction between temporary and permanent employees nor is there an age restriction.

In this case, the student is not receiving college or school credit for the work being performed and, therefore, has a true employee/employer relationship.

The position is not a position that is excluded from mandatory enrollment.

For these reasons, the student groundskeeper is eligible for PSERS membership.



DOES THE STUDENT GROUNDSKEEPER QUALIFY FOR PSERS MEMBERSHIP?

YES!

Groundskeepers work 5 days a week, 6 hours a day which meets the PSERS definition of a full-time employee.

The district's classification of this student groundskeeper's position as temporary does not determine PSERS qualification. Your student groundskeeper will work enough days and hours of the week to qualify from day one.

Your student groundskeeper is **NOT eligible** to waive membership because they work full-time.



DOES THE SCHOOL DISTRICT NEED TO WITHHOLD CONTRIBUTIONS FROM THE STUDENT WORKER?



YES!

DB contributions will be required because your student groundskeeper is eligible and qualified from day one based on PSERS definitions.

The employee will default to Class T-G and both DB and DC contributions will need to be withheld and reported.

A member under the age of 18 will not be eligible to elect a different class. All contributions will be Class T-G.



SECOND SCENARIO: PART-TIME SECRETARY

The district needs temporary help transferring records into a new data system. The district hired an hourly employee to enter the data. The position requires 3 hours a day, five days a week and is paid per hour until the project is completed. It is estimated it will take two months to get everything transferred.

The new employee is not hired by a temp firm and is not an independent contractor.





KNOWLEDGE CHECK

- Is this position eligible for PSERS?
- Does the position qualify for PSERS membership?
- Does the school district need to withhold contributions?

IS THE PART-TIME SECRETARY ELIGIBLE FOR PSERS MEMBERSHIP?



YES!

Public-school employees are eligible for PSERS membership unless the position is specially excluded.

Your new part-time secretary is a school employee and does not work under one of the excluded positions.



DOES THE NEW HIRE QUALIFY FOR PSERS MEMBERSHIP?

NO!

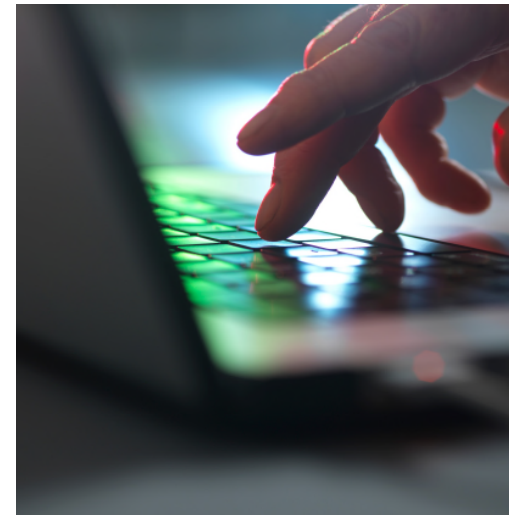
As a part-time employee who is working less than 5 hours a day, your new secretary must first reach the service threshold to qualify for PSERS membership.

The employee is an hourly employee and will be required to reach 500 hours of service within the fiscal year to qualify for membership.

After the employee has 500 hours reported to PSERS, you will be notified by a CROQ report the following Monday that the individual is now qualified.

The member will receive a welcome packet which will provide her with information on class election and membership waiver.

Note: If the new hire has already qualified previously, they may be qualified upon being hired for this position. Check the Roster page to verify.



DOES THE DISTRICT NEED TO WITHHOLD CONTRIBUTIONS FOR THE NON-QUALIFIED EMPLOYEE?



The contract record will display Optional DB/No DC.

- If the employer elects to withhold contributions, only withhold and report **DB contributions**.
- DC contributions cannot start until the part-time employee has qualified by reaching 500 hours.
- If no DB contributions are withheld, then report wages in the WNC column along with associated hours.



THIRD SCENARIO: SCHOOL POLICE OFFICER



- The school board has entered into a contract with a security firm to provide a police officer to patrol the premises during school hours.
- The officer will typically work FT, 8:00 am – 4:00 pm on each school day.

KNOWLEDGE CHECK

- Is the police officer eligible for PSERS?
- Does the police officer qualify for PSERS membership?
- Does the school district need to withhold contributions for the officer?



IS THE POLICE OFFICER ELIGIBLE FOR PSERS?

NO - The police officer is an employee of the security firm, and not a direct employee of the school district, so not eligible for PSERS membership.

DOES THE POLICE OFFICER QUALIFY FOR PSERS MEMBERSHIP?

NO - The police officer is not eligible for PSERS membership and will not qualify for PSERS membership.

DOES THE SCHOOL DISTRICT WITHHOLD CONTRIBUTIONS FOR THIS OFFICER?

NO - Contributions should not be withheld.





REPORTING COACHES

1. ENTER THE MEMBER DEMOGRAPHIC INFORMATION

Coaches are school employees and should be enrolled in PSERS.

- Is the newly hired coach a new or existing employee of the district?
- If new, enter demographic information in ESS manually or by file import.
- If existing, demographic information is already in PSERS system. Check Roster page in ESS to verify that PSERS has the current information.



2. DETERMINE THE COACH'S WAGE TYPE



Salaried – The coach is contracted and paid a lump sum or stipend for the season regardless of hours spent with the students.



Per Diem – The coach is contracted and paid on a daily basis, or a pro-rated daily rate.



Hourly – The coach is contracted and paid on an hourly basis.



3. ENTER THE COACH'S CONTRACT RECORD

- Employment Type = PT
- Wage Type = Salaried, Hourly, or Per Diem
- Work Status = Active
- Start Date = First day of work
- Expected Months = 10
- Expected Units = 180 (or 1100 if paid by the hour)
- Job Title = Football coach or Fall coach (include sport or season)



4. CONFIRM THE COACH'S MEMBERSHIP CLASS/RATE AND WITHHOLDING STATUS

Membership Class and Rates

Current Class

TG

DB Contrib Rate

5.50 %

DC Contrib Rate

2.75 %

DC Employer Share

2.25 %

After Tax Def %

1 %

Withhold Info

Required

Don't forget to look for an After-tax election!

Once enrolled, confirm membership class and withholding status by checking ESS Roster or the processed contract import file.

DB Contrib Rate	DC Contrib Rate	DC Employer Share	After Tax Def%	Current Class	Withhold
5.50	2.75	2.25	0	TG	Required
5.50	2.75	2.25	0	TG	Optional DB/No DC



5. INCLUDE THE COACH ON YOUR PSERS AND VOYA REPORTING



DB Contributions to PSERS: Report the coaching wages under BASE field of the work report.

If the member is an existing FT Salaried employee, add a coaching contract record and report wages earned in the SUPP field.

DC Contributions to Voya: The new member can be reported to Voya if qualified. PT salaried would be qualified from day one or if the coach could have been previously qualified with another employer.



6. REPORT THE COACH'S SERVICE TO PSERS

Per Diem or Hourly - service will be included with monthly work report.

Salaried - service will be on the June work report.

If the coach will not be on the June report, then include the service with the last reported wages, or else by service adjustment.

For salaried coaches, annual service can be calculated as:

weeks/season x # days/week x # hours/day = Total hours

Total hours/5 hours per PSERS day = # PSERS days



Calculating Coaching Service

Fall Season: Runs the beginning of the second week in August through the end of the second week in November:

PSERS will assume the coach works two hours per day for six days per week.

There are 14 weeks in the Fall Season.

Service Units to be reported as **34 days**.

Winter Season: Runs the beginning of the third week in November through the end of the second week in March:

PSERS will assume the coach works two hours per day for six days per week.

There are 17 weeks in the Winter Season.

Service Units to be reported as **41 days**.

Spring Season: Runs the beginning of the first week in March through the end of the second week in June:

PSERS will assume the coach works two hours per day for six days per week.

There are 16 weeks in the Spring Season.

Service Units to be reported as **38 days**.





KNOWLEDGE CHECK

- How many days should be reported for these PT/Salaried coaches?

weeks/season x # days/week x # hours/day = Total hours
Total hours/5 hours per PSERS day = # PSERS days

- The soccer season is 12 weeks long. The part-time salaried coach works three hours a day five days a week.
- The hockey coach works two hours a day three times a week for 16 weeks.



The new coach may only be here for a few seasons.

WHAT ARE THE PSERS OPTIONS?

DEADLINES WITH INITIAL QUALIFICATION

1

Class Election – 90 Day
deadline

2

Waiver (PT Only) – 90 Day
deadline

3

Multiple Service – 1 Year
deadline

4

Purchase of Previous NQ
Service – 1 Year deadline



IMPORTANT CONSIDERATIONS FOR COACHES

The newly qualified member of PSERS will have the option to remain as T-G or elect T-H or Class DC or waive membership if eligible.

Class T-G and T-H members need 10 years of service to be vested (eligible for a benefit) or three years of service if termination after age 67.

Class DC members need three eligibility points to be vested in the employer contributions.

An eligibility point is not a service credit – it is not earned incrementally. One eligibility point is earned with one day of contributing work in a year.

Class DC members can be vested in their employer contributions with one day of work in each of three years.



WHAT HAPPENS WHEN YOUR COACH ELECTS ANOTHER CLASS?

- If a coach elects a different membership class, your CROQ report will report the change, and your payroll software must be updated for newly elected class.
- If Class T-H or DC is elected, PSERS will transfer contributions between PSERS and Voya to make the DB and DC accounts whole. Any excess contributions will be returned to the member. Employers should not make adjustments to correct what has already been reported.
- For DC members, continue to include them on your monthly PSERS report with zero DB contributions.



MEMBERSHIP WAIVER – IS THE COACH ELIGIBLE?

Only Part-time members (SAL, HR, PD) may waive membership.

If new to PSERS, PT members will have 90 days after notification of qualification to elect a waiver. They will use the election wizard in Member Self Service to request to waive membership in the system.

The member must certify that they have an approved IRA in their name.

Once the waiver is approved, the system will end-date any ACTIVE records and create an ACTIVW record. If a member already holds waived status, additional PT contracts will only reflect a waived status.

Reminder: Service time can never be purchased for waived service.



WHAT DO YOU DO WHEN YOU FIND OUT A COACH WAIVED?

After CROQ notification of the waiver, do not withhold PSERS contributions. Any contributions deducted from the member's pay prior to the CROQ report notice should still be reported to PSERS and Voya.

DB Contributions:

- PSERS will reverse the DB reporting upon receipt of the last monthly report. Employers should not make adjustments to reporting after a member waives membership.
- The DB member and employer contributions will be returned through a transaction visible on the ESS transaction page.
- The employer must return the member DB contributions to the member.

DC Contributions:

- Voya will refund the member's DC contributions directly to the member by check.



TERMINATION OF THE MEMBERSHIP WAIVER

When an employer enters a full-time contract record, the system will automatically create a new ACTIVE record and end-date the existing ACTIVW record.

Notification of the member's status change will be on the next CROQ report. Contributions for both the DB and DC components should be withheld prospectively with the start of the FT position.

As a reminder, members cannot purchase any service that was rendered while in a waived status.





QUESTIONS?

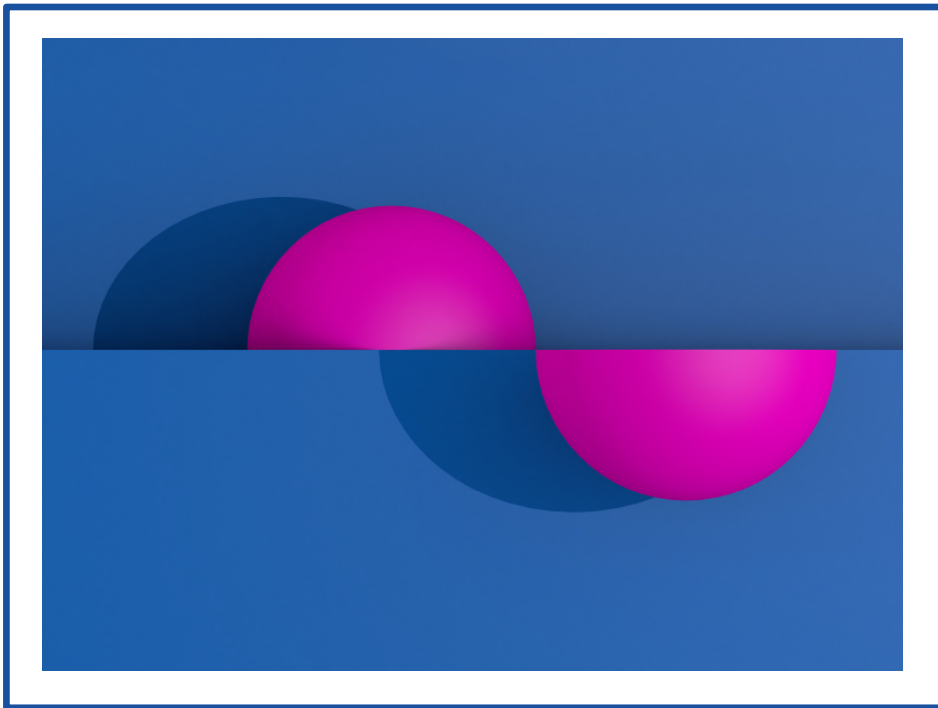


INTERMISSION



**HIRING
PSERS RETIREES**

BREAK IN SERVICE



A member must experience a true break in service to retire from PSERS and collect a benefit.

The break in service occurs when there is a termination from all public school employment.



IS THIS A BONA FIDE BREAK IN SERVICE?

PSERS will consider these factors:

1. Whether the change in the employment relationship is more than a formal or technical change, the employment connection with the employer must be severed;
2. Whether there has been a reasonable anticipation or prearranged agreement between the member and the employer to return to service;
3. The amount of time that has elapsed from the date of retirement and the return to school service;
4. Whether the services are a continuation of the member's previous service with the same employer;
5. Any other factors that PSERS deems appropriate.









GENERAL RULE

The Retirement Code prohibits retirees from returning to school service for a public school in any capacity while receiving a monthly benefit from PSERS DB Plan and/or installment distributions from PSERS DC Plan **unless they qualify for a specific statutory exception.**



WHAT ARE THE EXCEPTIONS?

A retiree **may be permitted to perform service for a public school** without a loss of benefit under these limited exceptions:

-  Extracurricular Contract
-  Emergency Creating an Increase in Workload
-  Shortage of Personnel
-  Independent Contractor
-  Employment with a Third-Party Employer
-  Enrollment in Alternate Retirement Plan

EXCEPTION – EXTRACURRICULAR CONTRACT

To be eligible for the extracurricular exception, the retiree must:

- Have a written, separate contract expressly waiving any potential retirement benefits. [RTS Extracurricular Contract](#)
- Perform the duties primarily outside regular instructional hours and not as part of the mandated educational curriculum.
- The position of Athletic Director is not eligible for the Extracurricular Exception.



IMPORTANT REMINDER

If an employee is planning to retire and is currently also in an extracurricular position...they **MUST** terminate from **all** public school employment to retire.

An employer cannot hire a retiree in an extra-curricular position until after they have retired with PSERS.





- After retirement, a retiree can be approved for school employment under the extracurricular exception, including coaches, ticket takers, musical directors, etc.
- Do not enroll the retiree in PSERS, and do not deduct or report contributions.
- The retiree will continue to collect their PSERS benefit and will not accrue additional PSERS service.



EXCEPTION – INCREASE IN WORKLOAD

- An “emergency” situation that increases the workload in a sudden or unexpected manner, and that requires immediate action by the employer to avoid a serious impairment of service to the public.
- The termination, resignation, or retirement of an employee is not an “emergency.” The workload remains the same; what changes is who is available to complete it.
- The need to train a replacement is not an emergency that increases the workload.



EXCEPTION - SHORTAGE OF PERSONNEL



A shortage of personnel does not exist until the employer attempts to fill the position with a non-PSERS retiree.

Thus, a lack of qualified candidates must be established before a PSERS retiree is hired.

[RTS Emergency Approval Processes](#)

An employer cannot claim a continuing shortage for the same position year after year without a continued bona fide effort each year to fill the position with someone who is not a PSERS retiree.



HOW TO ESTABLISH A SHORTAGE OF PERSONNEL

The Retirement Code broadly states: “a shortage of appropriate subject certified teachers or other personnel.”

The template School Year Approval letter is a SAMPLE for substitute teachers. Checking your non-PSERS retiree list before your PSERS retiree list is the easiest way to establish a shortage of personnel.

What are some other ways?

- What are your mission critical positions?
- How many employees are needed to fill those positions?
- What are your calling off rates for those positions?
- Is there a high turnover?
- What is the average time to fill a vacancy for a particular position or department?
- What is the vacancy/applicant ratio for the position?
- Are there skill gaps that need to be addressed?
- Do you have an action plan to address the shortage?



EXCEPTION – THIRD PARTY EMPLOYER



- Employment by a legitimate, third-party employer that is not a reporting unit of PSERS.
- A third-party employer is often a private entity retained by a school employer to provide personnel or perform service.

EXCEPTION – ALTERNATE RETIREMENT PLAN

A retiree employed by any of the state's community colleges, Penn State University, or the 14 state-owned universities may be eligible to elect membership in an alternate retirement plan without a suspension of their PSERS retirement benefit.

A retiree can work for a Pennsylvania charter school without loss of benefit if the retiree is eligible and elects into an approved alternate retirement plan.



EXCEPTION - INDEPENDENT CONTRACTOR

To determine whether a person is an independent contractor, PSERS must review all of the circumstances of employment including:

Control of work to be done	Work being the employer's business
Nature of work	Right to terminate
Skill required	Presence at employer's site
Distinct occupation/business	Comparable conditions and benefits
Tool supplier	Payment by time or job
Responsibility for result only	Terms of agreement

[Enrollment Eligibility Questionnaire](#)

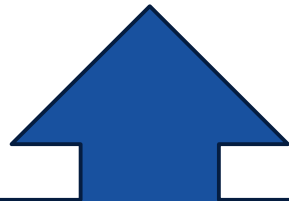
This form can be found under Employer Forms on the PSERS Public Website, and also under Forms in ESS.



THE 1299 FORM **STOPS** A RETIREE'S PENSION

Notice the Red Stop Signs on the form!

These two questions are very important and must be answered **BEFORE** returning this form.




Are you applying for one of the Emergency Exceptions to hire this person?

Will this person only be working in an extracurricular position outside of normal school hours?

Commonwealth of Pennsylvania - Public School Employees' Retirement System
5 N 6th Street
Harrisburg PA 17101-1905
Toll-free: 1.888.773.7748
www.psers.pa.gov
Fax: 717.772.3860
PSRS-1299 (07/2019)

PSERS Retirees Returning to Service



Worksheet to Determine Eligibility for Emergency or Extracurricular Employment

The following guidelines may be helpful to employers in determining the eligibility of retirees to work in public school employment without an effect on their benefits being received from PSERS.

- 1. Is the employee retired and receiving a monthly retirement benefit from PSERS?**
 - If YES, an error message will appear when the employer attempts to enter a contract record for the retiree. Proceed to # 2.
 - If NO, report the employee to PSERS in accordance with established rules.
- 2. Is the employment due to an emergency or shortage of school personnel?**
 - If YES, do NOT report the employee to PSERS. **STOP** Do NOT return this worksheet to PSERS.
NOTE: Employers must make a bona fide effort to hire non-retirees before the position can be offered to a retiree. For example, retirees should be placed at the bottom of the substitute list and called only after the pool of non-retirees is exhausted. PSERS reserves the right to request information from the employer to support that the bona fide effort has been made. The employer must continue efforts to recruit and hire a non-retiree. If the emergency extends into the next school year, the employer may be required to provide information to support the need for continued employment of the retiree.
 - If NO, proceed to # 3.
- 3. Is the employment under separate contract by a Pennsylvania public school in an extracurricular position performed primarily outside regular instructional hours and not part of the mandated educational curriculum?**
 - If YES, do NOT report the employee to PSERS. **STOP** Do NOT return this worksheet to PSERS.
NOTE: Employment of retirees in an extracurricular position does NOT require that either an emergency or shortage of personnel exists. There is NO limit on the length of time that a retiree may work under an extracurricular contract.
 - If NO, report the employee to PSERS as a "Return to Service" and inform the employee that retirement benefits will cease and a new retirement application must be filed upon a subsequent termination of school employment.

Employers must complete and submit the attached PSRS-1299, PSERS Retirees Returning to Service form.



After receipt of the PSRS-1299 form indicating that a PSERS retiree is returning to school service, **PSERS will:**

- Stop the retirement benefit,
- Create a bill for the retiree if any benefit overpayments were made, and
- Add the new contract record so that the employer can begin to report earnings and service.



PUBLICATIONS

For additional information on return-to-service exceptions, refer to the PSERS public website:

Employer Resources > PSERS Reporting Resources > Return to Service Resources

- [Return to Service Exceptions Booklet](#) 
- [Return to Service Guidance Chart](#) 
- [Return to Service Presentation for Monthly Reporting Person](#)  (Dec 2019)
- [Return to Service Presentation](#) 
- [Annual Shortage Request Template Letter](#) 
- [School Transportation Drivers Template Letter](#) 





KNOWLEDGE CHECK

- Does the retiree qualify for an RTS exception?
- Or should I withhold and report contributions?

SCENARIO ONE: FOOTBALL COACH

Employer A approved Mr. Smith to be the head football coach for next fall's season at the April board meeting.

Mr. Smith is also a full-time math teacher at Employer B.

Mr. Smith submits his retirement application and resignation letter to Employer B effective the last day of school. He does not submit a resignation letter to Employer A for his coaching position as he still intends on coaching in the next football season.

Because he is still actively reported to PSERS, his retirement application cannot be processed by PSERS.

He comes to your office at Employer A and asks you to terminate his coaching contract because it is delaying his retirement.





KNOWLEDGE CHECK

- Do you terminate the coach's contract in your system?
- Do you continue to withhold contributions moving forward for the coach?
- What options does the coach have if he wants to retire?

DO YOU TERMINATE THE COACH'S CONTRACT IN YOUR SYSTEM?

NO!

The hiring agreement with your school district is for the upcoming year. Unless the coach submitted a resignation letter after the signing of his hiring agreement for next season, he is still considered an ACTIVE employee of your district.

The coach has agreed to coach for the upcoming year and, therefore, is not terminating from all public school employment.



DO YOU CONTINUE TO WITHHOLD CONTRIBUTIONS GOING FORWARD?



YES!

Contributions will be required until the employee officially terminates from all public school employment. This includes his part-time coaching position with your school.



WHAT OPTIONS DOES THE COACH HAVE IF HE WANTS TO RETIRE?

- The coach will need to resign and terminate from his position as head football coach with School District A if he intends to retire at the conclusion of this school year.

or

- The coach can delay his retirement until he terminates employment after the fall sports season.



SCENARIO TWO: RETIREE WORKS TWO PART-TIME POSITIONS

The district has had difficulty hiring employees to help with cafeteria duty and classroom aides. The district publicly advertised the positions.

A PSERS retiree has applied for both permanent positions through the normal hiring process with your district, interviewed, and was hired. The cafeteria position is for three hours a day, five days a week and is paid hourly. The classroom aide is also for three hours a day to assist with morning classes. The retiree will start their aide position at 7:30 am and finish at 1:30 pm.





KNOWLEDGE CHECK

- Does the retiree qualify for an emergency exception?
- Should the school district withhold contributions?

DOES THE RETIREE QUALIFY FOR A SHORTAGE EXCEPTION?



NO!

The shortage exception allows employers to fill absences or vacancies temporarily with retirees if the employer experiences a shortage. If the employer advertises for a permanent position and a retiree applies for and accepts the permanent position with the district, then the retiree has agreed to return to service and their retirement benefit must stop.



SHOULD THE DISTRICT WITHHOLD CONTRIBUTIONS FOR THIS RETIREE?



YES!

Complete and submit the PSRS-1299 form to PSERS and withhold contributions from day one. The benefit will be stopped and PSERS will enter the new contract record.



SCENARIO THREE: ENGLISH INSTRUCTOR

A high school English teacher retired from PSERS last year and has been offered a position at the local community college.

She plans to teach one of the sections of freshman English 100, a general education requirement. The schedule is MWF 6:00 – 7:30 pm.





KNOWLEDGE CHECK

- Does the retiree qualify for an extracurricular exception?
- Or should I withhold and report contributions?

DOES THE RETIREE QUALIFY FOR AN EXTRACURRICULAR EXCEPTION?

NO!

To qualify for an extracurricular exception, the retiree must perform the duties primarily outside regular instructional hours and not as part of the mandated educational curriculum.

In this scenario, the English 100 course is required for graduation, so the retiree cannot instruct this course under the extracurricular exception.



SHOULD THE COMMUNITY COLLEGE WITHHOLD AND REPORT CONTRIBUTIONS?

To remain retired from PSERS, the retiree must elect to enroll in SERS or the alternate retirement plan of the community college.

If the retiree doesn't qualify for enrollment in SERS or the alternate retirement plan, then she must be returned to service and enrolled with PSERS. Her benefit will be stopped, and she will begin making contributions and earning additional PSERS service.





**EMPLOYER
SELF SERVICE
(ESS) PORTAL
FEATURES**

ESS FEATURES

- Updating password and Multi-Factor Authentication (MFA)
- Employer Contacts
- The New ESS Users Page - Who has ESS access for your school



PSERS 9359 - ESC SCHOOL DISTRICT ESC ER

Your ESC Representative: JEANETTE RIEDEL

Shortcuts

- Generate a Report >**
Run an Employer Self-Service report
- Employer Reference Manual >**
This manual provides information and instructions on submitting necessary reports to PSERS
- PNC Cash Concentration >**
Use Cash Concentration to make a payment to PSERS
- PSERS External Linking Policy >**
External Linking Policy and Disclaimer
- GASB Links >**
Employer GASB 68 & 75 Links to Information
- Voya Employer Self Service Portal >**
Report Salary and Defined Contributions to Voya for Class T-G and T-H members and Class DC participants
- W-9 Forms >**
PSERS DB and DC Plan W-9 Forms

News

System Maintenance > 09/11/2025
PSERS Member and Employer Self-Service Portals are temporarily unavailable each Thursday starting at 6 p.m. until 10 p.m. for scheduled system maintenance. Thank you for your patience.

Alerts

- Delinquent Work Report - One or more Work Reports overdue
- Previous monthly Work Report has not been approved

The Home Screen page in ESS provides employers access to quick links and important news and alerts.



PLEASE PAY ATTENTION TO THESE IMPORTANT ALERTS

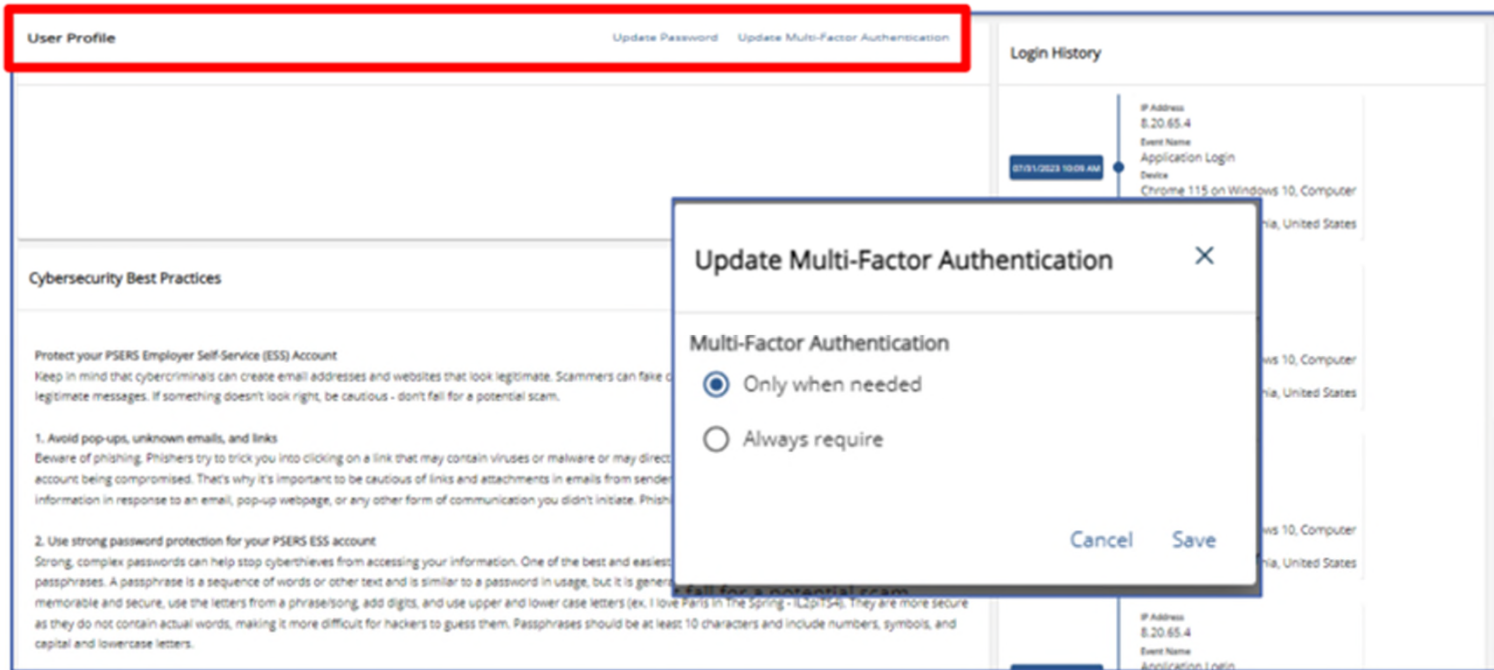
Alerts

Delinquent Work Report - One or more Work Reports overdue

Previous monthly Work Report has not been approved

Pending Adjustment - Must be approved or released within 30 days






Click here to access your profile

From this screen, you can update your password or update your Multi-Factor Authentication.



The Employer Info Page

 9359 - ESC SCHOOL DISTRICT
ESC ? ER ↗

- [Home](#)
- [Employer Info](#)
- [Documents](#)
- [Roster](#)
- [Work Reports](#)
- [Import Files](#)
- [Transactions](#)
- [Forms and Reports](#)
- [FAQs](#)
- [Contact Us](#)
- [ESS Users](#)

Your ESC Representative: JEANETTE RIEDEL

Employer Information ?

Employer Name ESC SCHOOL DISTRICT	Emp # 9359	Employer Status Participating
--------------------------------------	---------------	----------------------------------

Main Employer Address

Residence
423 K5TBNNST2QLV2Q71 STREET
PHILADELPHIA, PA 19139

Main Employer Contact Information

Work Phone
US • (888) 888-8888
School Primary Email Address
Emp_9359_email@example.com

Contacts Add Contact +

Sort: Role (Descending) x

Name ↕	Role ↕	Start Date ↕	Stop Date ↕	Email
HEFLIZZ, TAZZ >	Retirements	07/01/2020		PSERS_ID-9616802@example.com
SANFAZZ, DAIZZ >	Purchase of Service	03/25/2021		PSERS_ID-9713198@example.com
REP_ESC >	Monthly Reports	03/23/2018		Test@test.com
LANDZZ, LEFAZZ >	Member Demographics/Contracts	12/21/2020		PSERS_ID-9675850@example.com
BUCHINSZZ, ANASTACZZ >	Employer Statement of Account	02/08/2021	08/10/2022	PSERS_ID-9693752@example.com

1 - 5 of 9 < < Page 1 of 2 > >



Contacts Add Contact

Sort: Role (Descending)

Name	Role	Start Date	Stop Date	Email
HEFLIZZ, TAZZ	Retirements	07/01/2020		PSERS_ID-9616802@example.com
SANEAZZ, DAIZZ	Purchase of Service	03/25/2021		PSERS_ID-9713198@example.com
REP, ESC	Monthly Reports	03/23/2018		Test@test.com
LAW, LEAZZ	Member Demographics/Contracts	12/21/2020		PSERS_ID-9675850@example.com
BUCHSZZ, ANASTACZZ	Employer Statement of Account	02/08/2021	08/10/2022	PSERS_ID-9693752@example.com

1 - 5 of 9 Page 1 of 2

This employee has left the district. Click on the name to access the contact info.



Click Edit to Stop Date the contact

The screenshot shows the PSERS web application interface. At the top, there is a blue header with the PSERS logo on the left, the text '9359 - ESC SCHOOL DISTRICT' in the center, and 'ESC' followed by help and user icons on the right. A dark blue sidebar on the left contains navigation links: Home, Employer Info (highlighted), Documents, Roster, Work Reports, Import Files, Transactions, Forms and Reports, FAQs, Contact Us, and ESS Users. The main content area is titled 'Employer Info / Contact Info' and displays details for a contact role 'REP, ESC'. It is divided into three panels: 'Contact Details', 'Contact Info', and 'Address'. The 'Contact Details' panel includes fields for Full Name (REP, ESC), Role (Monthly Reports), Start Date (03/23/2018), Stop Date, and PSERS ID (9172866). An 'Edit' button with a question mark icon is circled in blue. The 'Contact Info' panel includes Day Phone (US • (888) 888-8888 • Ext.126) and Email Address (Test@test.com), with an 'Edit' button. The 'Address' panel shows Residence (5 N. 5TH ST., HARRISBURG, PA 17101) and an 'Edit This Address' link with a pencil icon.

Note: A contact role must be Stop Dated before a new individual can be assigned to that role.



After selecting the Stop Date click "Save".

Edit Contact Details [X]

Prefix [v]

First Name
ESC

Middle Name

Last Name
REP

Suffix [v]

Role*
Monthly Reports [v]

Start Date*
03/23/2018 [calendar icon]

Stop Date [calendar icon]

Cancel Save

Edit Contact Details [X]

Prefix [v]

First Name
ESC

Middle Name

January 2026 [v] [calendar icon]

S M T W T F S

1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30 31

MM/DD/YYYY [calendar icon]

Date Picker

Cancel Save

Contacts [Add Contact]

Sort: Role (Descending) [x]

Name	Role	Start Date	Stop Date	Email
HEELIZZ_TAZZ >	Retirements	07/01/2020		PSERS_ID-9616802@example.com
SANEAZZ_DAIZZ >	Purchase of Service	03/25/2021		PSERS_ID-9713198@example.com
REP_ESC >	Monthly Reports	03/23/2018	12/31/2025	Test@test.com
LANDZZ_LEAZZ >	Merchandise/Photographics/Contracts	12/21/2020		PSERS_ID-9675850@example.com
BUCHINSZZ_ANASTACZZ >	Employment Statement of Account	02/08/2021	08/10/2022	PSERS_ID-9693752@example.com

1 - 5 of 9 [Navigation icons] Page 1 of 2

The contact is now no longer active.



Click "Add Contact" to add the new contact.



Contacts				
Sort: Role (Descending) ✕				
Name ⇅	Role ⇅	Start Date ⇅	Stop Date ⇅	Email
HEFLIZZ, TAZZ >	Retirements	07/01/2020		PSERS_ID-9616802@example.com
SANEAZZ, DAIZZ >	Purchase of Service	03/25/2021		PSERS_ID-9713198@example.com
REP, ESC >	Monthly Reports	03/23/2018	12/31/2025	Test@test.com
LANDZZ, LEAZZ >	Member Demographics/Contracts	12/21/2020		PSERS_ID-9675850@example.com
BUCHINSZZ, ANASTACZZ >	Employer Statement of Account	02/08/2021	08/10/2022	PSERS_ID-9693752@example.com

1 - 5 of 9

Page 1 of 2



Add Contact



Information

No search results found.



Enter Search Text

First Last



Search

Please enter the contact's name in the "Enter Search Text" field **and then press the "Search" button (or the [Enter] key on your keyboard)** to search for this person.

After searching, you should do the following to continue:

- If this person is already one of your existing contacts, select the existing record and then click "Next" to add a new role to that record.
- If no matching results are returned (i.e., the person is not already an existing contact), then click "Add a New Contact" to add the new record.

Search Options

Person

Add a New Contact

Cancel

Next

Use the scroll bar to find the "Add a New Contact" button and click "Next" to continue through each page.



Enter the contact's information on each window.

Add Contact

1 Select Contact 2 **Enter Contact Details** 3 Address Information 4 Contact Information 5 Confirm Details

Please enter the Contact's information.

Entity Type
Individual - Person

First Name*
First

Middle Name

Last Name*
Last

Gender
Male

Role*
Monthly Reports

Start Date*
01/01/2026

Cancel Previous Next



Add Contact ✕

Progress: ✓ Select Contact | ✓ Enter Contact Details | ✓ Address Information | ✓ Contact Information | 5 Confirm Details

First Name
First

Last Name
Last

Address
Residence
5 N. 5th St.
HARRISBURG, PA 17101

Day Phone
US • (888) 888-8888

Email Address:
Test@test.com

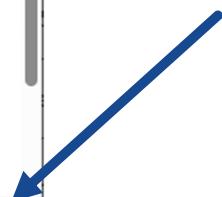
Role
Monthly Reports

Start Date
01/01/2026


Stop Date


Cancel Previous Confirm





Click "Confirm" when finished.



Contacts

Add Contact 

Sort: Role (Descending) 

Name 	Role 	Start Date 	Stop Date 	Email
HEFLIZZ, TAZZ >	Retirements	07/01/2020		PSERS_ID-9616802@example.com
SANEAZZ, DAIZZ >	Purchase of Service	03/25/2021		PSERS_ID-9713198@example.com
LAST, FIRST >	Monthly Reports	01/01/2026		Test@test.com
REP, ESC >	Monthly Reports	03/23/2018	12/31/2025	Test@test.com
LANDZZ, LEAZZ >	Member Demographics/Contracts	12/21/2020		PSERS_ID-9675850@example.com

1 - 5 of 10

Page 1 of 2



Contact Role Descriptions

Monthly Reports- The individual who submits monthly Work Reports to PSERS and/or the DC Plan.

Business Manager- The individual managing the business office and reporting/payment operations.


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, Principle, Board Chairperson, or other relevant position.
- For a non-school entity, this is the CEO, President, or other relevant position.

Monthly Reports 2- If needed, the secondary individual who submits monthly Work Reports to PSERS and/or the DC Plan.



The New ESS Users Page

 9359 - ESC SCHOOL DISTRICT ESC | ER

Your ESC Representative: JEANETTE RIEDEL

ESS Users for This Employer

Name	Username	Status	Account Locked?
TAZZ HEFLIZZ	ESSUSER_190298	ACTIVE	No
LEAZZ LANDZZ	ESSUSER_204037	ACTIVE	No
GUNDOZZ OZAZZ	ESSUSER_206555	ACTIVE	No
DAIZZ SANEAZZ	ESSUSER_215250	ACTIVE	No
SIANZZ TELZZ	ESSUSER_22735	ACTIVE	No
ESC REP	ESSUSER_23023	ACTIVE	No

Navigation: Home, Employer Info, Documents, Roster, Work Reports, Import Files, Transactions, Forms and Reports, FAQs, Contact Us, **ESS Users**



Remember that ESS and Voya users should have access deleted when it is no longer needed.

PSERS 9359 - ESC SCHOOL DISTRICT ESC ER

ESS Users / User Details

Your ESC Representative: JEANETTE RIEDEL

User Information

HEFLIZZ, TAZZ

Need to Update This User's Access?

To revoke this user's access, complete the following form and return it to PSERS: [PSERS Employer Security Administrator Authorization](#)

To restore this user's access (e.g., if the account is suspended), contact your ESC representative, **JEANETTE RIEDEL**, or:

PSERS Employer Service Center

- 1.866.353.1844
- Monday through Friday 8:00 a.m. – 4:00 p.m. EST
- Fax 717.772.3860

User Address Add

No data found

Contact Info Edit/Add Info

Day Phone
US • (888) 888-8888


Email Address
PSERS_ID-9616802@example.com

Login History

No data found

PSERS

To gain access to either or both ESS and Voya systems, you must complete a **PSERS Employer Reporting System User (PSRS-1270) form** and submit it to PSERS.

Commonwealth of Pennsylvania - Public School Employees' Retirement System		1270
5 N 5th Street Harrisburg PA 17101-1905 Toll-free: 1.888.773.7748 www.psers.pa.gov Fax: 717.772.3860 PSRS-1270 (07/2019)	PSERS Employer Reporting Systems User Access	
		Mail Center
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:		
<ul style="list-style-type: none"> • 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. 		
<small>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).</small>		
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	<input type="checkbox"/> Create ESS Reporting System Access	<input type="checkbox"/> Delete ESS Reporting System Access
Voya	<input type="checkbox"/> Create Sponsor Web Access #5	<input type="checkbox"/> 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		
<small>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.</small>		
PSERS Employer Reporting Systems User Requesting Access Signature		Date
Employer Certification		
<small>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</small>		
Name		Title/Position
Approving Signature		Date
PSERS Employer Reporting Systems User Access		Page 1 of 1



Check the box(es) for access or deletion.

PSERS	<input type="checkbox"/> Create ESS Reporting System Access	<input type="checkbox"/> Delete ESS Reporting System Access
Voya	<input type="checkbox"/> Create Sponsor Web Access #5	<input type="checkbox"/> Delete Sponsor Web Access #5

All sections must be clearly written or typed on the form. →

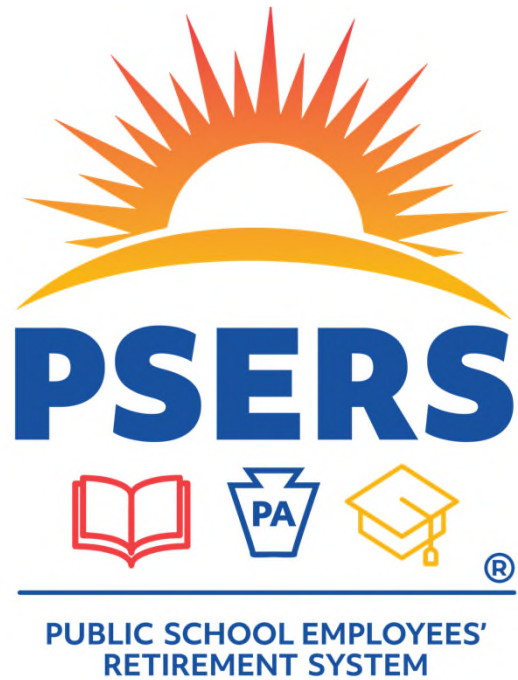
PSERS Employer Reporting Systems User Requesting Access		
Employer Name	Employer Number	User's Last Name
Administrator's Employer Mailing Address		User's First Name
		User's Email Address
		User's Phone

User Certification	
<i>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.</i>	
PSERS Employer Reporting Systems User Requesting Access Signature	Date

Employer Certification	
<i>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</i>	
Name	Title/Position
Approving Signature	Date

Two live signatures are required for an access request: one for the staff member requesting access and one for the supervisor approving the request for access. Electronic signatures will not be accepted.





USE THE QR CODE TO
COMPLETE OUR SURVEY.



<https://www.surveymonkey.com/r/TFMZHMM>

EMPLOYER CONTACT INFO

Assistance from PSERS

PSERS Employer Service Center

1.866.353.1844

Hours: 8:00 a.m. to 4:00 p.m. ET
Monday – Friday

Direct questions by email to your regional
ESC representative.

Voya Dedicated PSERS Payroll

Email: ID-PSERSS@voya.com

Reference your work order ID and 4-digit
Employer Code in the subject line.

Provides detailed information or research for work
order challenges

*Emails to the dedicated PSERS payroll email inbox are
sent an automatic reply that a response will be
provided within 24 business hours.*

Assistance from Voya

VOYA Employer Help Line **1.877.806.5652**

Hours: 9:00 a.m. to 5:00 p.m. ET Monday - Friday

- Answer general questions about work orders and the Voya PayCloud.
- Assist in submitting a work order in the Voya PayCloud system.
- Delete work orders that have not posted.
- Assist an employer with submitting a manual negative contribution file to Voya's payroll team.
- Assist an employer with corrections to payrolls.

PSERS Employer Accounting Unit Resource Account

Email: RA-PSERSEMPACCT@pa.gov

Hours: 7:30 a.m. to 3:30 p.m. ET Monday – Friday

Assists with general payment and account transaction questions and all questions about PNC's PayerExpress, including password resets and bank account updates.



@PennPSERS



@PAPERS

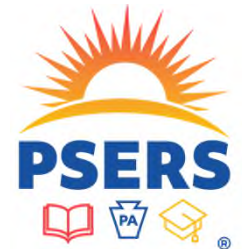
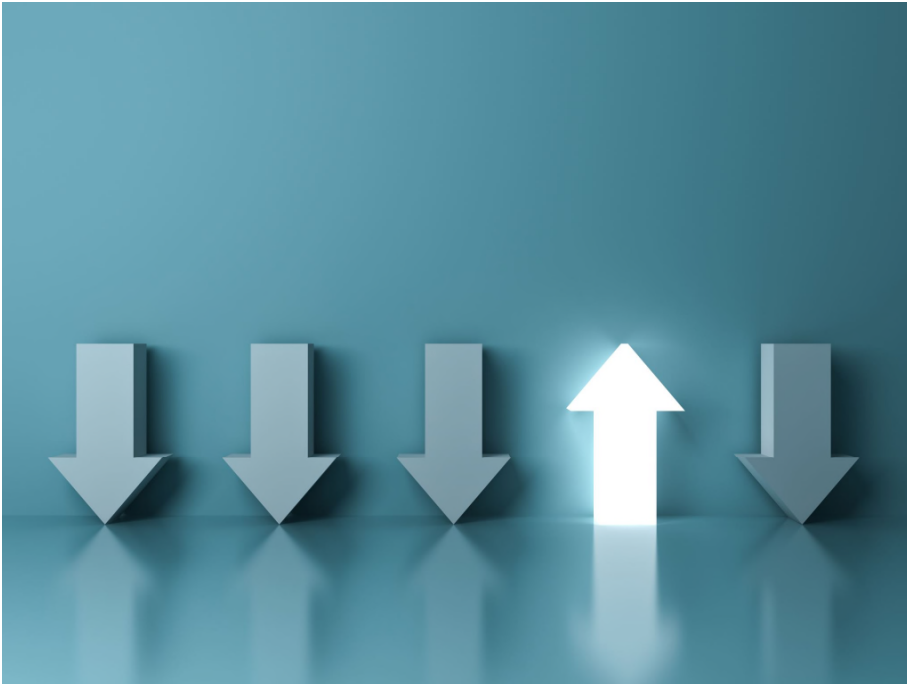


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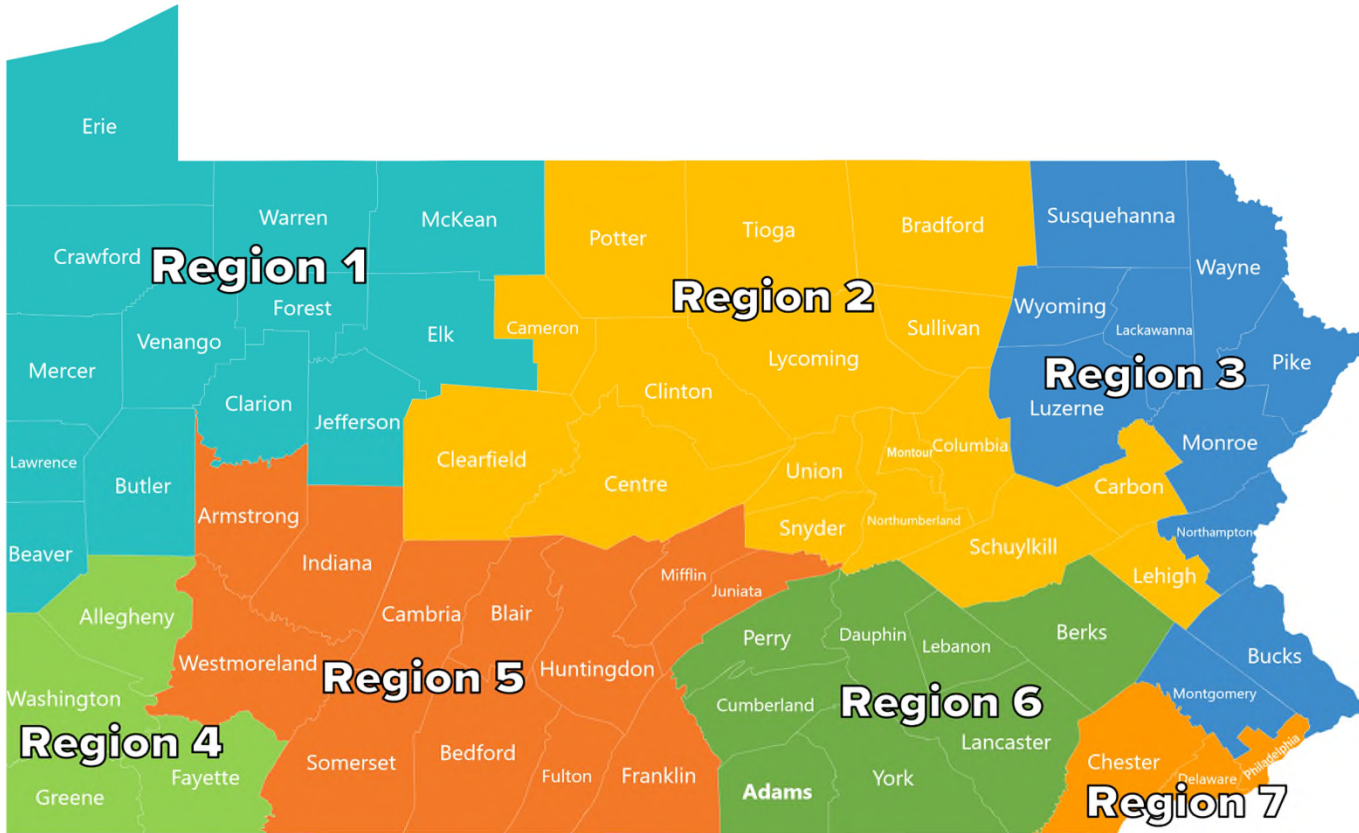
ESC IS HERE TO HELP!



IN PERSON AND VIRTUAL TRAINING FOR EMPLOYERS

Employer HELP LINE 1.866.353.1844

EMPLOYER SERVICE CENTER REGIONAL MAP



Region 1-
**Kristin
Steck**

Region 2-
Beth Jones

Region 3-
**Daniel
Tapia-Ortiz**

Region 4-
**Catherine
(Kate)
Nollau**

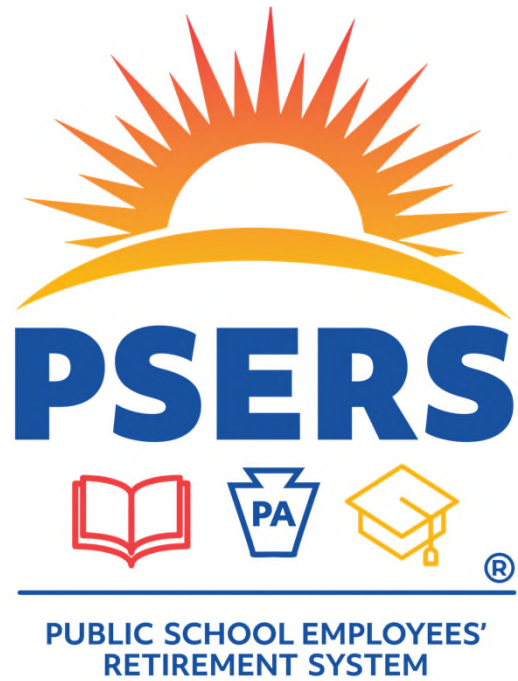
Region 5-
**Kathleen
Pajtis**

Region 6-
**Rachael
Riddle**

Region 7-
**Jeanette
Riedel**

Scott Rainey and Deanna Brown– ESC Regional Office Administrators





THANK YOU!