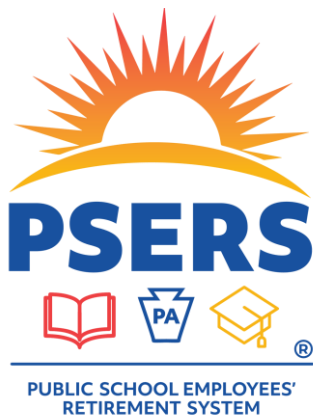


2024 SPRING WORKSHOP

PRESENTED BY PSERS EMPLOYER SERVICE CENTER

1

1

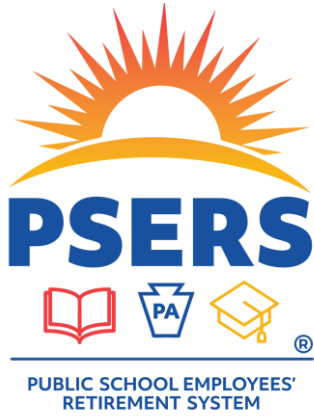


WELCOME TO THE 2024 EMPLOYER WORKSHOP!

- 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 SESSION

2

2



REPORTING
REMINDERS

TRANSACTION
PAGE

LEAVES OF
ABSENCE

3

3

REPORTING REMINDERS

- DC (Voya) reminders
- Shared risk/gain
- Employer contribution rate
- End of Fiscal Year reminders



4

4

DC REPORTING

Who should be on the reporting file to Voya?

- Only qualified members with a DC component (Class T-G, T-H, or DC)
- Part-Time hourly and per diem members must qualify before DC contributions can be withheld and reported.
- Full-Time and Salaried employees are qualified from day one. PT Hourly and PT Per Diem must have 500 hours or 80 days reported before they qualify.



5

5

DC REPORTING

Does the employee have a DC component?

- After entering a contract record, either through the manual new hire process or by contract record upload, check the class/rate and if they are required or optional.
- All brand new PSERS members default into Class T-G membership . After they qualify for membership, they have 90 days to elect Class T-H, Class DC, or waive membership, if they are eligible.
- You will be notified on your CROQ (**C**lass/**R**ate or **O**btaining **Q**ualification) report when an employee is reported to the DC plan, when they have elected a new class, if a member waives, or if a member elects to have voluntary after-tax contributions withheld.



6

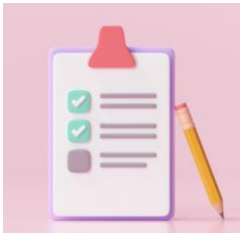
6

REVIEW YOUR DC REPORTING OFTEN

- Employers are responsible for verifying that all qualified T-G, T-H or DC members are reported on DC payroll files.
- DC Reporting occurs per payroll and through the Voya PayCloud reporting tool. Wages reported should match what is reported on the DB monthly work reports.
- Use the ESS Transaction page to be sure you see DC Payment credit per payroll date in your account.
- If you realize something didn't get reported correctly, fix it right away.
- Earnings may be assessed and charged to the employer for late DC reporting.

Additional DC Training Coming

June 6 9 – 11
 June 12 1:30 – 3:30
 June 25 9 - 11



7

7

CROQ REPORT

NOTE: Previously qualified employees will not show on the CROQ report unless there is a change to their membership class, rate or qualification.

SSN	Name	Updated On	Current Membership Class	DB Contribution Rate	DC Contribution Rate	Voluntary After Tax DC %	Reason For Change
123-45-6789		01/4/2023	TD	7.5	0		Account Update
124-56-7891		01/7/2023	TG	6.25	2.75		Member Qualified this fiscal
125-67-8912		01/06/2023	TG	6.25	2.75		Membership Waived
126-78-9123		01/06/2023	TG	6.25	2.75		Member Reported to DC Admin
127-89-1234		01/08/2023	TG	6.25	2.75	5.00	Change in After Tax Def%
128-91-2345		01/05/2023	TH	5.25	3		TH Election
129-12-4567		01/06/2023	DC	0	7.5		DC Election



8

8

AFTER-TAX CONTRIBUTIONS (ATC)

How do I know an employee's After-Tax Percentage?

Roster Page - Contract Record

Processed Work Report

Membership Class and Rates
Current Class TG
DB Contrib Rate 6.25 %
DC Contrib Rate 2.75 %
DC Employer Share 2.25 %
After Tax Def % 5 %
Withhold Info Required

Enroll Dt	Mem Class	DB Contrib Rt	DC Contrib Rt	After Tax Def %	W/hold Notif
07/01/2019	TG	6.25%	2.75%	8.00%	02012020
05/16/2022	TG	6.25%	2.75%	5.00%	05012022
04/06/2022	TG	6.25%	2.75%	3.00%	04012022
05/10/2022	TG	6.25%	2.75%	3.00%	08012022
03/05/2020	TG	6.25%	2.75%	1.00%	03012020
08/28/2019	TG	6.25%	2.75%	0.00%	08012019

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SHARED RISK/SHARED GAIN CONTRIBUTION RATE FOR FY 2024-25

Because PSERS' investment performance exceeded the target range for the ten-year evaluation period ending June 30, 2023, the total Defined Benefit (DB) member contribution rate will decrease by 0.50% or 0.75% until the next evaluation period in three years.

Class	Current DB Contribution Rate	Shared Risk/ Shared Gain Rate Decrease	Total DB Contribution Rate Starting July 1, 2024
Class T-E	8.00%	-0.50%	7.50%
Class T-F	10.80%	-0.50%	10.30%
Class T-G*	6.25%	-0.75%	5.50%
Class T-H**	5.25%	-0.75%	4.50%

*+2.75% DC Contribution Rate; **+3.00% DC Contribution Rate



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What should employers do before July 1st?

Generate a Total Service Credit report for FY 2024 which will provide current class and rate for all your employees.

Select the report and click Next. Make sure to enter the fiscal year as "2024"

Click Generate a Report under the Shortcuts

Your ESC Representative: RIDDLE, RACHAEL

Shortcuts

- [Generate a Report >](#)
Run an Employer Self-Service report
- [Employer Reference Manual >](#)
This manual provides information and instructions on sub reports to PSERS

Scheduling a Report

1 Report 2 Report parameters

Please select a report from the following list:

- ESS - Employer POS NQ Refund Report
- ESS Employer summary report
- ESS Employer total service credit report
- Employer Notification CROQ Report

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THINGS TO REMEMBER

- Shared Risk/Gain only impacts the DB member contribution rate for members in Classes T-E, T-F, T-G, and T-H.
- The amount being withheld for the DC component of their benefit (what is paid to Voya) is not impacted.
- Any work performed on or after July 1st is considered the next fiscal year and should be reported to FY 2025. These wages will be affected by the contribution rate decrease.
- Balance of contract should be reported to FY 2024 even though they are disbursed in July and August. The rate change will not affect these wages.



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EMPLOYER CONTRIBUTION RATE



- The employer contribution rate for fiscal year 2024-2025 rate was determined by PSERS' actuary and certified by the PSERS Board of Trustees at its meeting on December 15, 2023.
- The rate for fiscal year 2025 will be **33.9%**, a decrease from the current fiscal year rate of 34.00%. The rate applies to salary and wages earned from July 1, 2024, through June 30, 2025.

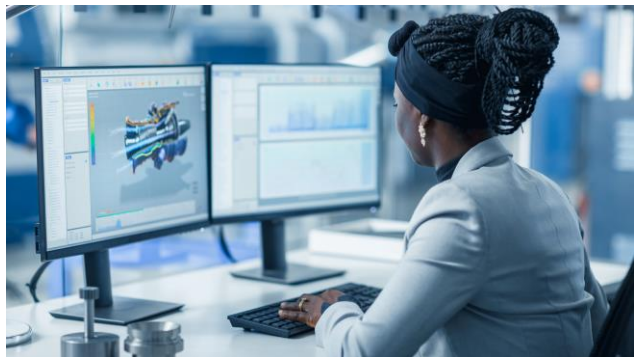


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TERMINATION CONTRACTS

- Termination records should be entered only when the employee terminates **all employment**.
- Wait to enter the record until a termination date is known, and you can identify when the last pay will be issued.



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TERMINATION OF SERVICE CONTRACTS

New Hire

Identification
 Demographics
 Address
 Phone Numbers

Job Title*
 Teacher

Employment Type* Wage Type*
 Full-Time Salaried

Work Status*
 TRMNTN - Termination

Start Date* End Date
 12/16/2022

Expected Months* Expected Units*
 10 180

Working Status* Contract Status*
 Certified Eligible

BOC Flag Service Flag
 Yes Yes

BOC SVC Report
 01/31/2023

Cancel 15

Last day worked

BOC and Service Flags

BOC Svc Report Date

REPORTING BALANCE OF CONTRACT (BOC)

- For 10-month employees with BOC wages, they must be reported for the previous fiscal year because the wages were earned before July 1st.
- For 12-month employees, July and August wages must be reported for the next fiscal year because the wages were earned in July and August.
- Summer work that is performed after June 30th must be reported for the next fiscal year because the wages were earned after July 1st.



TRANSACTION PAGE

- Column Descriptions
- Understanding Transaction Tabs
- How Transaction Payments Are Applied
- Determining Amount Due and Due Date



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TRANSACTION PAGE

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

Your ESC Representative: RIDDLE, RACHAEL

Account Export Transaction List

Filter: Status (Open, Hold)

Show Fund Groups Show Fund Details

<input type="checkbox"/>	Posting Date	Activity Date	Trans #	Type	Identifier	Status	Mbr Due Date	Emp Due Date	Emp Cont.	Member Savings Contributions	Member POS Installment
<input type="checkbox"/>	03/07/2024	11/01/2023	2713628	WH Report	Billing Report 11/30/2023	Open	12/10/2023		\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	02/29/2024	12/06/2023	2712350	DC Payment	DC Pmt 12/06/2023 for 12/08/2023 Payroll	Open			(\$959.96)	\$0.00	\$0.00
<input type="checkbox"/>	02/29/2024	11/22/2023	2712349	DC Payment	DC Pmt 11/22/2023 for 11/24/2023 Payroll	Open			\$1,073.38	\$0.00	\$0.00
<input type="checkbox"/>	02/20/2024	01/01/2024	2711521	Estimated Work Report	Est WH Rpt 2024-01	Open	02/10/2024	06/26/2024	\$1,418,313.62	\$305,501.50	\$1,382.16
<input type="checkbox"/>	01/14/2024		2708856	POS Employer Contribution	PQB, Lump POS: SSN 3068687: POS 641917	Open	04/13/2024		\$1,195.65	\$0.00	\$0.00
<input type="checkbox"/>	01/14/2024		2708854	POS Employer Contribution	PQB, Lump POS: SSN 3068506: POS 641916	Open	04/13/2024		\$1,685.17	\$0.00	\$0.00
<input type="checkbox"/>	12/20/2023	11/01/2023	2706870	Estimated Work Report	Est WH Rpt 2023-11	Open	12/10/2023	03/25/2024	\$1,508,430.58	\$323,932.17	\$1,330.16
<input type="checkbox"/>	11/27/2023	11/22/2023	2705837	DC Payment	DC Pmt 11/22/2023 for 11/24/2023 Payroll	Open			(\$3,658.84)	\$0.00	\$0.00
<input type="checkbox"/>	11/21/2023	11/15/2023	2705041	DC Payment	DC Pmt 11/15/2023 for 11/20/2023	Open			(\$3,975.67)	\$0.00	\$0.00
Total in current view									\$2,922,103.93	\$629,433.22	\$2,712.32
Total of all records									\$6,321,591.33	\$619,432.41	\$2,712.32

NOTE- Scrambled data

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TRANSACTION PAGE COLUMN DESCRIPTIONS

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Show Fund Groups		Show Fund Details											
<input type="checkbox"/>	Posting Date	Activity Date	Trans #	Type	Identifier	Status	Mbr Due Date	Emp Due Date	Emp Cont.	Member Savings Contributions	Member POS Installment		
<input type="checkbox"/>	11/20/2023 > 10/01/2023		2704676	WH Report	Billing Rpt 2023-10	Open	11/10/2023	03/25/2024	\$139,183.16	\$0.00	\$0.00		
<input type="checkbox"/>	10/10/2023 > 09/01/2023		2690775	WH Report	Billing Rpt 2023-09	Open	10/10/2023	12/26/2023	\$142,385.50	\$0.00	\$0.00		
<input type="checkbox"/>	09/06/2023 > 08/01/2023		2677684	WH Report	Billing Rpt 2023-08	Open	09/10/2023	12/26/2023	\$107,524.33	\$0.00	\$0.00		



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TRANSACTION NUMBER

Trans # ⇅
2674279
2673171
2673099
2673023

- Can use the transaction number to sort – ascending or descending order
- Can use the transaction number to Target PNC Cash Con Payments
- Can use the transaction number to cross reference with SOA

This is not the same transaction number that you receive from PNC Cash Con, this is the transaction number ESS generates for this transaction



TRANSACTION DESCRIPTION COLUMNS

Type ⇅	Identifier	Status ⇅
---	------------	--

Type : WH Report
 WH Adj
 Estimated Work Report
 POS Employer Contribution
 Balance Adj
 Payment
 DC Payment

Identifier: Employer provided,
 or system generated

Status: Open
 Closed
 Hold



DUE DATES AND AMOUNTS DUE COLUMNS

Mbr Due Date	Emp Due Date	Employer Cont.	Member Savings Contributions	Member POS Installment
-----------------	-----------------	-------------------	---------------------------------	---------------------------

Member Due Date – The 10th of the month following the reporting month.

For example: The May Work report is due by the 10th of June for member savings contributions and member POS installment.

Employer Due Date – Five days after receipt of the Commonwealth portion issued for the previous quarter.

For example: Employer contribution amounts owed for Jan, Feb, March transactions are due June 26th.

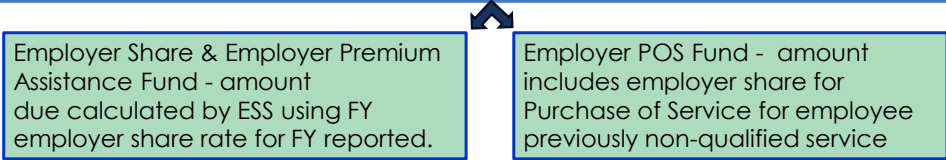


23

23

Mbr Due Date	Emp Due Date	Employer Cont.	Member Savings Contributions	Member POS Installment
-----------------	-----------------	-------------------	---------------------------------	---------------------------

Employer Contributions- Includes 2 Fund Groups



Member Savings Contributions– Amount ESS calculates based on reported wages. Amount should match the amount withheld from member paychecks.

Member POS Installments- Amount withheld by employer to pay a member's purchase of service. Employers should monitor amounts owed by employee, so overpayment does not occur.

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SHOW FUND GROUPS/ SHOW FUND DETAILS

Account

Show Fund Groups Show Fund Details

Employer Cont.

\$139,183.16

Account

Show Fund Groups Show Fund Details

Employer Share

\$136,563.23

Employer Premium Assistance

\$2,619.93



FILTERING

Account

Filter: Status (Open, Hold) X

Show Fund Groups Show Fund Details

<input type="checkbox"/>	Posting Date	Activity Date	Trans #	Type
<input type="checkbox"/>	12/20/2023	>11/01/2023	2706805	Estim Rep

Help Center User Profile Logout

Filters Apply Reset X

Search by
Trans #

Collapse All

Filter by

Activity Date ^

Last 3 Months

Last 6 Months

Last 12 Months

Custom Dates

Type ^

Member POS Installment

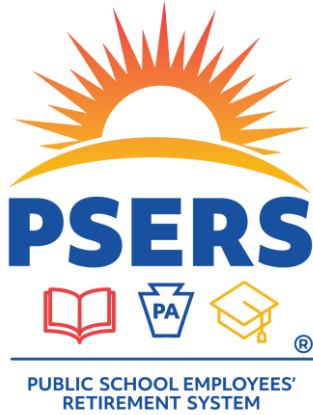
\$0.00

\$0.00

\$0.00

\$0.00





- Opening Transaction Page
- Removing Open and Hold transaction filter
- Switching between Fund Groups and Fund Details
- Using the filters

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- Home
- Employer Info
- Documents
- Roster
- Work Reports
- Import Files
- Transactions
- Forms and Reports
- FAQs
- Contact Us

Your ESC Representative: BROWN, DEANNA

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](#) > 05/19/2021
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

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**TRANSACTION
TABS**

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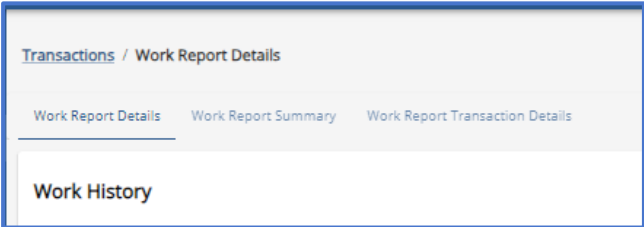
29

WORK REPORT TRANSACTIONS

Click on the Posting date to open transaction



Posting Date	Activity Date	Trans #	Type	Identifier
08/08/2023 >	07/01/2023	2669001	WH Report	Billing Rpt 2023-07



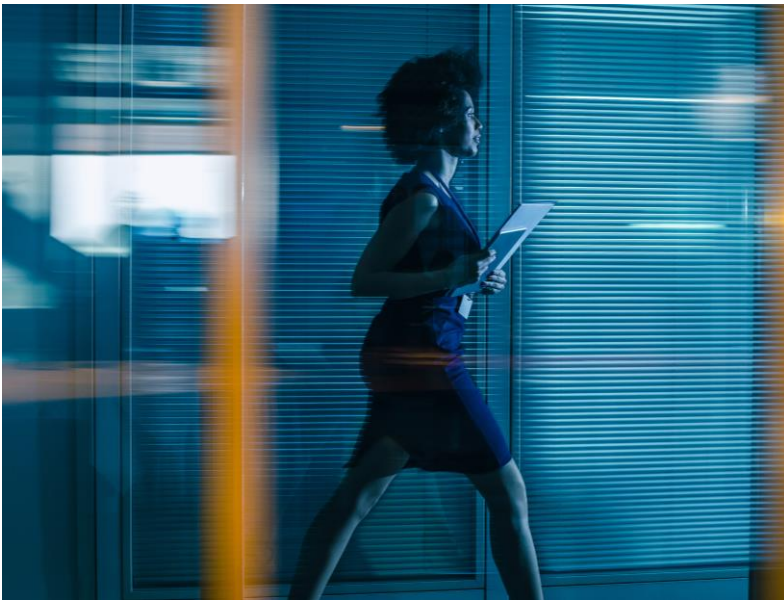
Work Reports and Adjustments have three tabs providing a wealth of information

- Work Report Details
- Work Report Summary
- Work Report Transaction Details



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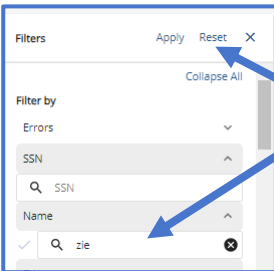


WORK REPORT DETAILS TAB

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FILTER TO SEARCH WORK REPORT DETAIL RECORDS



Example filter results

Work History						
Search: Name (zie) X		Sort: Name (Descending) X				
Errors	SSN	Name	Wage Type	FY	Work Status	
	XXX-XX-1403	ZIESMAN, DANIEL MIDDLE	Salaried	2023	ACTIVE	
	XXX-XX-5003	ZIELINSKI, AMY MIDDLE	Hourly	2023	ACTIVE	
	XXX-XX-7199	ZIEGLER, ELIZABETH MIDDLE	Hourly	2023	ACTIVE	
	XXX-XX-7199	ZIEGLER, ELIZABETH MIDDLE	Salaried	2023	ACTIVE	
	XXX-XX-7222	SZYMANSKI, MACKENZIE MIDDLE	Hourly	2023	ACTIVE	
	XXX-XX-4505	OPARANOZIE, EUGENE MIDDLE	Hourly	2023	ACTIVE	

Total for All Records

Click Filter action button, select filter. This example is by **Name** with "zie" typed in search field



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SORT TO SEARCH WORK REPORT DETAIL RECORDS

Sort: Work Status (Descending)

Errors	SSN	Name	Wage Type	PY	Work Status
	XXX-XX-4258	WATKINS, ESTHER MIDDLE	Salaried	2023	TRMNTN
	XXX-XX-5462	GOLDBERG, LEE MIDDLE	Salaried	2023	TRMNTN
	XXX-XX-4994	LYTER, WANDA MIDDLE	Salaried	2023	TRMNTN
	XXX-XX-4500	LEGIN, DERRICK MIDDLE	Salaried	2023	TRMNTN
	XXX-XX-9564	FORRY, M MIDDLE	Salaried	2023	TRMNTN
	XXX-XX-0987	TURNBAUGH, SARA MIDDLE	Salaried	2023	SABTLC
	XXX-XX-0115	DIALLO, MATTHEW MIDDLEJR.	Salaried	2023	SABTLC
	XXX-XX-7496	RAVERT, ROSEMARY MIDDLE	Salaried	2023	ACTIVE

Sorted using the column action button for Work Status, in descending order.

Note: the grey bubble showing the sort





- Opening a transaction
- Work Report Details
- Filter and Search Work Report Details tab

Your ESC Representative: BROWN, DEANNA

Account Export Transaction List

Filter: Status (Open, Hold)

Show Fund Groups Show Fund Details

<input type="checkbox"/>	Posting Date	Activity Date	Trans #	Type	Identifier	Status	Mbr Due Date	Emp Due Date	Employer Cont.	Member Savings Contributions	Member POS Installment
<input type="checkbox"/>	03/20/2024	02/01/2024	2713887	Estimated Work Report	Est WH Rpt 2024-02	Open	03/10/2024	06/26/2024	\$312,771.39	\$66,432.32	\$44.02
<input type="checkbox"/>	02/20/2024	01/01/2024	2711609	Estimated Work Report	Est WH Rpt 2024-01	Open	02/10/2024	06/26/2024	\$320,239.83	\$68,160.19	\$44.02
<input type="checkbox"/>	01/22/2024	12/01/2023	2709839	Estimated Work Report	Est WH Rpt 2023-12	Open	01/10/2024	03/25/2024	\$323,122.45	\$68,793.96	\$464.02
<input type="checkbox"/>	11/22/2023	11/22/2023	2705524	WH Adj.	Adjustment Rpt. - FY 2023	Open	12/10/2023	03/25/2024	\$2,233.37	\$0.00	\$0.00
<input type="checkbox"/>	11/21/2023	11/01/2023	2705431	WH Report	Billing Rpt 2023-11	Open	12/10/2023	03/25/2024	\$310,916.48	\$0.00	\$0.00
<input type="checkbox"/>	10/31/2023	10/31/2023	2697800	WH Adj.	[KAUFMAN ADJ]	Open	12/10/2023	03/25/2024	\$758.58	\$0.00	\$0.00
<input type="checkbox"/>	10/31/2023	10/01/2023	2697676	WH Report	Billing Rpt 2023-10	Open	11/10/2023	03/25/2024	\$296,951.21	\$0.00	\$0.00
<input type="checkbox"/>	10/03/2023	09/01/2023	2688158	WH Report	Billing Rpt 2023-09	Open	10/10/2023	12/26/2023	\$291,435.75	\$0.00	\$0.00
<input type="checkbox"/>	08/28/2023	08/01/2023	2675616	WH Report	Billing Rpt 2023-08	Open	09/10/2023	12/26/2023	\$233,052.46	\$0.00	\$0.00
<input type="checkbox"/>	07/28/2023	07/28/2023	2666363	WH Adj.	Adjustment Rpt. - FY 2022	Open	08/10/2023	12/26/2023	\$349.40	\$0.00	\$0.00
Total in current view									\$2,091,830.92	\$203,386.47	\$552.06
Total of all records									\$2,309,322.82	\$203,386.47	\$552.06

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WORK REPORT SUMMARY TAB

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WORK REPORT SUMMARY

Work History Summary

Work History Summary	
Report Status Released	Total Due \$1,930,022.92
Trans # 2650704	Date Released 06/07/2023
Billing Type Contribution	Trans Status Open
Date Received 06/07/2023	Report Source Employer
Inserted By TARNOLD	Last Updated Date 06/07/2023 12:00:00 AM
Last Updated By EXEBATCH	

Financial Summary

Financial Summary			
Fund	Due Calculated	Amount Paid	Amount Owed
Mem Saving	\$339,472.11	\$339,472.11	\$0.00
Mem POS	\$289.52	\$289.52	\$0.00
Emp Share	\$1,556,435.45	\$14,031.57	\$1,542,403.88
Emp Prem	\$33,825.84	\$304.95	\$33,520.89
Total in current view	\$1,930,022.92	\$354,098.15	\$1,575,924.77
Total of all records	\$1,930,022.92	\$354,098.15	\$1,575,924.77

1 - 4 of 5 Page 1 of 2 > >>



WORK HISTORY SUMMARY BOX

Provides an overall summary of the report

- Report status
- Transaction #
- Billing type
- Date the report was received
- Who inserted the report
- Who made the last change to the report
- Total amount owed on the report
- Date the report was released to PSERS
- Transaction status
- Originator of the report
- Date and time of the last update to the report

Work History Summary	
Report Status Released	Total Due \$1,930,022.92
Trans # 2650704	Date Released 06/07/2023
Billing Type Contribution	Trans Status Open
Date Received 06/07/2023	Report Source Employer
Inserted By TARNOLD	Last Updated Date 06/07/2023 12:00:00 AM
Last Updated By EXEBATCH	

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FINANCIAL SUMMARY BOX

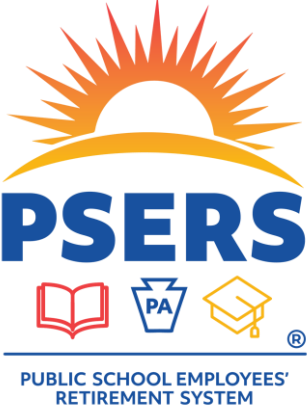
Financial Summary			
Fund	Due Calculated	Amount Paid	Amount Owed
Mem Saving	\$339,472.11	\$339,472.11	\$0.00
Mem POS	\$289.52	\$289.52	\$0.00
Emp Share	\$1,556,435.45	\$14,031.57	\$1,542,403.88
Emp Prem	\$33,825.84	\$304.95	\$33,520.89
Total in current view	\$1,930,022.92	\$354,098.15	\$1,575,924.77
Total of all records	\$1,930,022.92	\$354,098.15	\$1,575,924.77

1 - 4 of 5 < < Page 1 of 2 > >

Financial Summary box contains all the fiduciary information to reconcile your work report against your payroll

NOTE: Employer Share contributions are separated into Share and Premium Assistance





- Work Report Summary tab.

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FAQs
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Your ESC Representative: BROWN, DEANNA

Account Export Transaction List

Filter: Status (Open, Hold) Filter: Type (All Work Reports)

Show Fund Groups Show Fund Details

<input type="checkbox"/>	Posting Date	Activity Date	Trans #	Type	Identifier	Status	Mbr Due Date	Emp Due Date	Employer Cont.	Member Savings Contributions	Member POS Installment
<input type="checkbox"/>	11/22/2023	11/22/2023	2705524	WH Adj.	Adjustment Rpt. - FY 2023	Open	12/10/2023	03/25/2024	\$2,233.37	\$0.00	\$0.00
<input type="checkbox"/>	11/21/2023	11/01/2023	2705431	WH Report	Billing Rpt 2023-11	Open	12/10/2023	03/25/2024	\$310,916.48	\$0.00	\$0.00
<input type="checkbox"/>	10/31/2023	10/31/2023	2697800	WH Adj.	JKAUFMAN ADJ	Open	12/10/2023	03/25/2024	\$758.58	\$0.00	\$0.00
<input type="checkbox"/>	10/31/2023	10/01/2023	2697676	WH Report	Billing Rpt 2023-10	Open	11/10/2023	03/25/2024	\$296,951.21	\$0.00	\$0.00
<input type="checkbox"/>	10/03/2023	09/01/2023	2688158	WH Report	Billing Rpt 2023-09	Open	10/10/2023	12/26/2023	\$291,435.75	\$0.00	\$0.00
<input type="checkbox"/>	08/28/2023	08/01/2023	2675616	WH Report	Billing Rpt 2023-08	Open	09/10/2023	12/26/2023	\$233,052.46	\$0.00	\$0.00
<input type="checkbox"/>	07/28/2023	07/28/2023	2666363	WH Adj.	Adjustment Rpt. - FY 2022	Open	08/10/2023	12/26/2023	\$349.40	\$0.00	\$0.00
<input type="checkbox"/>	07/28/2023	07/01/2023	2666357	WH Report	Billing Rpt 2023-07	Open	08/10/2023	12/26/2023	\$217,491.90	\$0.00	\$0.00
Total of all records									\$1,353,189.15	\$0.00	\$0.00

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Transactions / Work Report Transaction Details Comments

Work Report Details Work Report Summary **Work Report Transaction Details**

Transaction Information Due Dates

Activity Date 09/01/2023	Transaction Number 2690775	Status Open	Identifier Billing Rpt 2023-09	Mbr Due Date 10/10/2023	Emp Due Date 12/26/2023
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Transaction Details Transaction #

Transaction Number: 2690775

Original amounts due for report

Posting Date	Activity Date	Trans Type	Identifier	Applied To/From	Employer Cont.	Member Savings Contributions	Member POS Installment
10/10/2023	09/01/2023	Original	2023-09 MASTER AGREEMENT		\$144,372.00	\$32,174.12	\$0.00
10/10/2023	09/15/2023	Credit In	DC Payment Ref# - 2682199 (Auto)	2682199	(\$1,042.20)	\$0.00	\$0.00
10/10/2023	09/29/2023	Credit In	DC Payment Ref# - 2687339 (Auto)	2687339	(\$944.30)	\$0.00	\$0.00
10/10/2023	08/31/2023	Credit In	Payment Ref# - 2676502 (Auto)	2676502	\$0.00	(\$142.79)	\$0.00
Total in current view					\$142,385.50	\$32,031.33	\$0.00
Total of all records					\$142,385.50	\$0.00	\$0.00

1 - 4 of 5

New total amount due

Page 1 of 2 > 43

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Transactions / Payment Details

Payment Information

Posting Date 08/31/2023	Activity Date 08/31/2023	Status Closed	Identifier Dep. Date 08/31/2023	Payment Type ACH	Payment Amount \$23,595.19
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Transaction Details

Transaction Number: 2676502

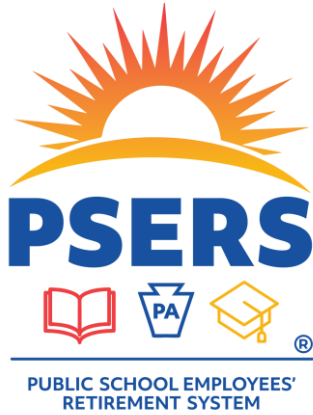
Work reports where payment was applied

Original payment amount through PNC Cash Con

Posting Date	Activity Date	Trans Type	Identifier	Applied To/From	Employer Cont.	Member Savings Contributions	Member POS Installment
08/31/2023	08/31/2023	Original	Dep. Date 08/31/2023		\$0.00	(\$23,595.19)	\$0.00
09/06/2023	08/31/2023	Credit Out	WH Report - 2677684 (Auto)	2677684	\$0.00	\$23,452.40	\$0.00
10/10/2023	08/31/2023	Credit Out	WH Report - 2690775 (Auto)	2690775	\$0.00	\$142.79	\$0.00
Total of all records					\$0.00	\$0.00	\$0.00



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- Work Report Transaction Details tab
- Click on "Applied To/From" links to go to the credits and payments

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Your ESC Representative: BROWN, DEANNA

Account Export Transaction List

Filter: Status (Open, Hold) Filter: Type (All Work Reports)

Show Fund Groups Show Fund Details

<input type="checkbox"/>	Posting Date	Activity Date	Trans #	Type	Identifier	Status	Mo Due Date	Emp Due Date	Employer Cont.	Member Savings Contributions	Member POS Installment
<input type="checkbox"/>	11/22/2023	11/22/2023	2705524	WH Adj.	Adjustment Rpt. - FY 2023	Open	12/10/2023	03/25/2024	\$2,233.37	\$0.00	\$0.00
<input type="checkbox"/>	11/21/2023	11/01/2023	2705431	WH Report	Billing Rpt 2023-11	Open	12/10/2023	03/25/2024	\$310,916.48	\$0.00	\$0.00
<input type="checkbox"/>	10/31/2023	10/31/2023	2697800	WH Adj.	JKAUFMAN ADJ	Open	12/10/2023	03/25/2024	\$758.58	\$0.00	\$0.00
<input type="checkbox"/>	10/31/2023	10/01/2023	2697676	WH Report	Billing Rpt 2023-10	Open	11/10/2023	03/25/2024	\$296,951.21	\$0.00	\$0.00
<input type="checkbox"/>	10/03/2023	09/01/2023	2688158	WH Report	Billing Rpt 2023-09	Open	10/10/2023	12/26/2023	\$291,435.75	\$0.00	\$0.00
<input type="checkbox"/>	08/28/2023	08/01/2023	2675616	WH Report	Billing Rpt 2023-08	Open	09/10/2023	12/26/2023	\$233,052.46	\$0.00	\$0.00
<input type="checkbox"/>	07/28/2023	07/28/2023	2666363	WH Adj.	Adjustment Rpt. - FY 2022	Open	08/10/2023	12/26/2023	\$349.40	\$0.00	\$0.00
<input type="checkbox"/>	07/28/2023	07/01/2023	2666357	WH Report	Billing Rpt 2023-07	Open	08/10/2023	12/26/2023	\$217,491.90	\$0.00	\$0.00
Total of all records									\$1,353,189.15	\$0.00	\$0.00

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PAYMENT TRANSACTION DETAILS

OPEN THE PAYMENT TRANSACTION BY CLICKING ON A PAYMENT POSTING DATE



<input type="checkbox"/>	<u>08/31/2023</u> > 08/31/2023	2676502	Payment	Dep. Date 08/31/2023	Closed
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Original member amount due \$23,595.18

Posting Date	Activity Date	Trans Type	Identifier	Applied To/From	Emp Cont.	Member Savings Contributions	Member POS Installment
09/06/2023	08/01/2023	Original	2023-08 MASTER AGREEMENT		\$108,954.09	\$23,595.18	\$0.00

Overpayment from 7/31/2023

09/06/2023	07/31/2023	Credit In	Payment Ref# - 2667150 (Auto)	2667150	\$0.00	(\$142.78)	\$0.00
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Payment from payroll estimated payment in amount of \$23,595.19

08/31/2023	08/31/2023	Original	Dep. Date 08/31/2023		\$0.00	(\$23,595.19)	\$0.00
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Rolling credit \$142.79 is added to next monthly work report (Sept) on 10/10/2023 when it is released

Transaction Details							
Transaction Number: 2676502							
Posting Date	Activity Date	Trans Type	Identifier	Applied To/From	Emp Cont.	Member Savings Contributions	Member POS Installment
08/31/2023	08/31/2023	Original	Dep. Date 08/31/2023		\$0.00	(\$23,595.19)	\$0.00
09/06/2023	08/31/2023	Credit Out	WH Report - 267684 (Auto)	267684	\$0.00	\$23,452.40	\$0.00
10/10/2023	08/31/2023	Credit Out	WH Report - 2690775 (Auto)	2690775	\$0.00	\$142.79	\$0.00
Total of all records					\$0.00	\$0.00	\$0.00



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DC PAYMENT

Transactions / Transaction Details

Transaction Information

Posting Date 07/03/2023	Activity Date 06/29/2023	Transaction Number 2658800	Transaction Type DC Payment	Status Closed
Mr Due Date	Emp Date 09/25/2023	Identifier DC Pmt 06/29/2023 for 06/29/2023 Payroll	Payroll date as reported to VOYA	

Transaction Details

Posting Date	Activity Date	Trans #	Trans Type	Identifier	Applied To	Emp Cont.	Member Savings Contributions	Member POS Installment
07/03/2023	06/29/2023	2658800	Original	DC Pmt 06/29/2023 for 06/29/2023 Payroll		(\$4,713.06)	\$0.00	\$0.00
07/06/2023	07/06/2023	2658800	Transfer	Fund Transfer (Auto)		\$0.00	\$0.00	\$0.00
07/06/2023	06/29/2023	2658800	Credit Out	WH Report - 2659866 (Auto)	2659866	\$4,713.06	\$0.00	\$0.00
Total of all records						Work Report credited the employer share		

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Transactions / Work Report Transaction Details

Work Report Details | Work Report Summary | Work Report Transaction Details

Transaction Details

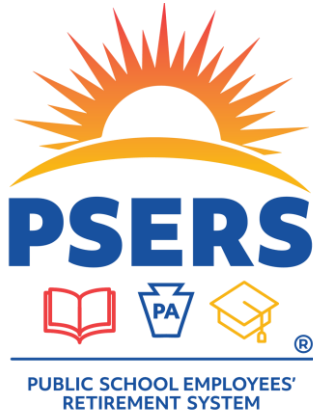
Posting Date	Activity Date	Trans #	Trans Type	Identifier	Employer Cont.	Member Savings Contributions	Member POS Installment
07/06/2023	06/01/2023	2659866	Original	2023-06 MASTER AGREEMENT	\$2,515,330.98	\$538,202.43	\$227.49
07/06/2023	06/05/2023	2659866	Credit In	DC Payment Ref# - 2653033 (Auto)	(\$7,537.29)	\$0.00	\$0.00
07/06/2023	06/15/2023	2659866	Credit In	DC Payment Ref# - 2654723 (Auto)	(\$7,849.12)	\$0.00	\$0.00
07/06/2023	06/29/2023	2659866	Credit In	DC Payment Ref# - 2658800 (Auto)	(\$4,713.06)	\$0.00	\$0.00
Total in current view					\$2,495,231.51	\$538,202.43	\$227.49
Total of all records					\$2,495,231.51	\$0.00	\$0.00

Work Report transaction Details showing DC Credit to Employer Share



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- Click on a posting date to open a payment transaction
- Exploring a payment

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Your ESC Representative: BROWN, DEANNA

Account Export Transaction List  

Filter: Status (Open, Hold) 

Show Fund Groups Show Fund Details

<input type="checkbox"/>	Posting Date	Activity Date	Trans #	Type	Identifier	Status	Mbr Due Date	Emp Due Date	Emp Cont.	Member Savings Contributions	Member POS Installment
<input type="checkbox"/>	03/20/2024	02/01/2024	2713887	Estimated Work Report	Est WH Rpt 2024-02	Open	03/10/2024	06/26/2024	\$312,771.39	\$66,432.32	\$44.02
<input type="checkbox"/>	02/20/2024	01/01/2024	2711609	Estimated Work Report	Est WH Rpt 2024-01	Open	02/10/2024	06/26/2024	\$320,239.83	\$68,160.19	\$44.02
<input type="checkbox"/>	01/22/2024	12/01/2023	2709839	Estimated Work Report	Est WH Rpt 2023-12	Open	01/10/2024	03/25/2024	\$323,122.45	\$68,793.96	\$464.02
<input type="checkbox"/>	11/22/2023	11/22/2023	2705524	WH Adj.	Adjustment Rpt. - FY 2023	Open	12/10/2023	03/25/2024	\$2,233.37	\$0.00	\$0.00
<input type="checkbox"/>	11/21/2023	11/01/2023	2705431	WH Report	Billing Rpt 2023-11	Open	12/10/2023	03/25/2024	\$310,916.48	\$0.00	\$0.00
<input type="checkbox"/>	10/31/2023	10/31/2023	2697800	WH Adj.	JKAUFMAN ADJ	Open	12/10/2023	03/25/2024	\$758.58	\$0.00	\$0.00
<input type="checkbox"/>	10/31/2023	10/01/2023	2697676	WH Report	Billing Rpt 2023-10	Open	11/10/2023	03/25/2024	\$296,951.21	\$0.00	\$0.00
<input type="checkbox"/>	10/03/2023	09/01/2023	2688158	WH Report	Billing Rpt 2023-09	Open	10/10/2023	12/26/2023	\$291,435.75	\$0.00	\$0.00
<input type="checkbox"/>	08/28/2023	08/01/2023	2675616	WH Report	Billing Rpt 2023-08	Open	09/10/2023	12/26/2023	\$233,052.46	\$0.00	\$0.00
<input type="checkbox"/>	07/28/2023	07/28/2023	2666363	WH Adj.	Adjustment Rpt. - FY 2022	Open	08/10/2023	12/26/2023	\$349.40	\$0.00	\$0.00
Total in current view									\$2,091,830.92	\$203,386.47	\$552.06
Total of all records									\$2,309,322.82	\$203,386.47	\$552.06

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PURCHASE OF SERVICE (POS) EMPLOYER CONTRIBUTION

To determine which employee and years-
Locate the Emp POS Qualification SOAD document with the same posting date

Transactions / Transaction Details

Transaction Information				
Posting Date	Activity Date	Transaction Number	Transaction Type	Status
10/08/2023		2673099	POS Employer Contribution	Open
Mer Due Date	Emp Date	Identifier		
01/06/2024		PQB, Lump POS; SSN 2982699; POS 638726		

Transaction Details									
Posting Date	Activity Date	Trans #	Trans Type	Identifier	Applied To	Emp Cont.	Member Savings Contributions	Member POS Installment	
10/08/2023	10/08/2023	2673099	Original	PQB, Lump POS; SSN 2982699; POS 638726		\$2,433.63	\$0.00	\$0.00	
Total of all records:						\$2,433.63	\$0.00	\$0.00	

	Download	10/20/2023 10:00:12 AM
Home	Download	Employer Contract Record - Follow up > 10/19/2023 7:36:52 PM
Employer Info	Download	Employer Notification CROQ > 10/16/2023 2:36:17 AM
Documents	Download	Employer Contract Record - Follow up > 10/12/2023 7:38:19 PM
Roster	Download	Employer Contract Record - Follow up > 10/08/2023 5:50:51 PM
Work Reports	Download	Emp POS Qualification SOAD > 10/08/2023 8:24:38 AM



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POS EMPLOYER CONTRIBUTION – STATEMENT OF AMOUNT DUE

The statement includes:

- The employee name
- Social security number
- School year(s) for which employer share is due
- WNC wages reported
- Employer Share amount due for WNC wages
- Transaction Number

Employer Statement of Amount Due for WNC Reported for Qualified Members

The Public School Employees' Retirement System (PSERS) is billing you for the following member(s) for whom you reported wages with no contributions (WNC) while a qualified member. Once a school employee qualifies for PSERS membership in any given school year, both the employee and employer are required to remit contributions for all service rendered in that school year.

The Total Amount Due shown below is due and payable by you within 90 days of the date of this statement. Review this statement carefully to confirm that all information is accurate. If you have questions, contact your Employer Service Center (ESC) representative. If you dispute the transaction for any member(s) on this billing, you must notify PSERS in writing by January 6, 2024. Disputes received after the due date must follow PSERS' formal appeal process.

Member Name	Member SSN	School Year	WNC Reported	Amount Due	Trans Number
VIVIANO, DONITA	002-26-0157	2022-2023	\$10,233.00	\$3,880.32	2673023
NEVEN, JEFFREY	002-98-2999	2022-2023	\$5,799.63	\$2,433.63	2673099
HERSHEY, RONALD MIDDLE	003-08-1510	2022-2023	\$15,662.50	\$5,833.05	2673171
Total Amount Due:					\$11,747.00

Note: Delinquencies may be recovered from your basic education subsidy payment.

If you have any questions, please contact the Employer Service Center by calling toll-free 1 866 353 1544. 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.

Public School Employees' Retirement System



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INTERMISSION

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LEAVE OF ABSENCE – TRAINING OBJECTIVES

- Leave Codes- What are they?
- Requirements for most used leave codes
- Reporting for common leave types
- Practice selecting leave codes
- Practice reporting leave codes
- Working on a Leave



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WHAT IS A LEAVE CODE?

A leave code is a contract record that explains to PSERS a member is not currently working but is still employed by the district.

The leave code entered tells PSERS the reason an employee is not working, or why the reported wages are different than previous reporting.



WHAT ARE THE LEAVE CODES?

CONTRACT CODE – LEAVE NAME



- LEAVEN** – Any other leave not listed
- SABTLC** – Sabbatical- Health and Professional Study
- SSLWCC/SSLWCN**-Special Sick Leave Workers Compensation
- SSLSSC/SSLSSN**-Special Sick Leave-School Sponsored
- WKCMPN** – Workers Compensation
- STUDYC/STUDYN**-Professional Study Leave
- UNIONC**-Union Leave
- EXCHGC/EXCHGN**-Exchange Teacher Leave
- ACTMLC/ACTMLN**- Military Leave (prior to 7/1/2013)
- ACTMLN** - USERRA (Uniformed Services Employment & Reemployment Rights of 1994)





REQUIREMENTS FOR MOST USED LEAVE CODES

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IS SCHOOL BOARD APPROVAL REQUIRED TO RETAIN SERVICE CREDIT?



All leaves require school board approval. Some leaves, however, may not give the board a choice such as **Workers Compensation** or **USSERA** leave.

PSERS will assume that board approval was given but will verify board minutes when needed to answer questions.



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- **Non-specified Leave (LEAVEN)** – may not exceed 24 months in a row with no reporting
- **Sabbatical (SABTLC)** Health restoration not to exceed 24 months. Professional Study length is unspecified. If the leave is non-contributing, it will not exceed two years
- **Special Sick Leave(SSLWCC/SSLWCN/SSLSSC/SSLSSN)** – One Year per Occurrence. If a second leave is granted, must be one active service day between occurrences
- **Workers Compensation (WKMPN)** – may not exceed 24 months in a row with no reporting
- **Professional Study (STUDYC/STUDYN)** - unspecified time frame
- **Collective Bargaining Unit (UNIONC)**– no time frame
- **Exchange Teacher Leave (EXCHGC/EXCHGN)** – no time frame
- **Activated Military Leave (ACTMLN)**- prior to 7/1/2013 - no time frame

**LEAVE CODE
ALLOWABLE
TIME FRAMES**



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LEAVE ELIGIBILITY REQUIREMENTS						
LEAVE CODE	BOARD APPROVAL	REQUIRED WAGES	LENGTH OF LEAVE	STUDY REQ.	RETURN REQUIREMENTS	PURCHASABLE
SABTLC - Professional Development	Yes - 10 yrs - 5 consecutive w/ district/ 7 yrs before next Sabbatical	50% or more	1 school term, 1/2 school term or 2 half terms within 24 months	YES	Must equal leave or be unable to return for health or employer reasons/prorated for partial return if exceptions do not apply	Service received at time of leave
SABTLC - Health Restoration	Yes - 10 yrs - 5 consecutive w/ district/ 7 yrs before next Sabbatical	50% or more	1 school term, 1/2 school term or 2 half terms within 24 months	NO	Must equal leave or be unable to return for health or employer reasons/prorated for partial return if exceptions do not apply	Service received at time of leave
LEAVEN	NO	NO	24 months	NO	NO	NO
SSLSSC	YES	50% or more	1 Year per leave/must return for 1 day before 2nd SSL granted	NO	NO PSERS requirements - district may stipulate return requirements	Service received at time of leave
SSLSSN	YES	50% or more	1 Year per leave/must return for 1 day before 2nd SSL granted	NO	NO PSERS requirements - district may stipulate return requirements	Must return to service & receive employer approval to purchase
SSLWCC	YES	50% or more	1 Year per leave/must return for 1 day before 2nd SSL granted	NO	NO PSERS requirements - district may stipulate return requirements	Service received at time of leave
SSLWCN	YES	50% or more	1 Year per leave/must return for 1 day before 2nd SSL granted	NO	NO PSERS requirements - district may stipulate return requirements	Must return to service & receive employer approval to purchase
WKMPN	NO	NO	24 Months	NO	NO	NO
STUDYC	YES	Full contracted salary	Unspecified	YES	Lesser of 1 school term or time of leave	Service received at time of leave
STUDYN	YES	NO	24 Months	YES	Lesser of 1 school term or time of leave	YES
ACTMLN (USERRA)	NO	District option	Based on DD214	NO	<31 days rtn w/in 1 day.> 30-and<181 days rtn w/in 14 days, >180 days rtn w/in 90 days	YES, must purchase within specified time frame

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DEEPER DIVE INTO THE 4 MOST COMMON LEAVE TYPES

SABBATICAL
LEAVEN
SPECIAL SICK LEAVE
WORKER'S COMPENSATION

AND THEIR REQUIREMENTS

www.psers.pa.gov/Employers/Pages/Reporting-Resources.aspx

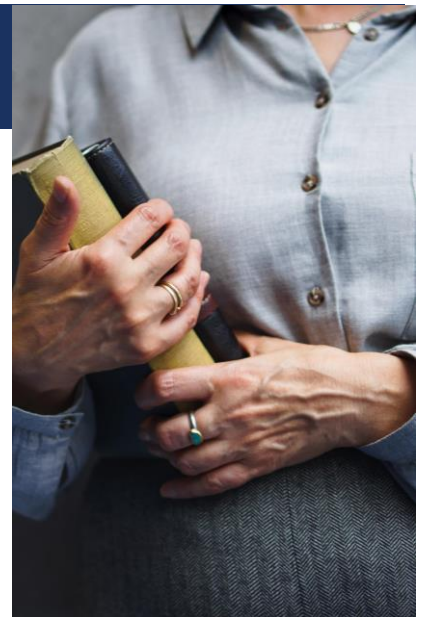
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SABBATICAL (SABTLC) ELIGIBILITY REQUIREMENTS

- **School Board Approval** for Professional development, Restoration of Health Or at the discretion of the school board, for other purposes
- Active professional, supervisory, instructional, or administrative staff at least 10 years PA service and **5 consecutive** years with the granting district
- Employer pays at least 50% of contracted Salary
- Professional Development must have a pre-approved plan of study related to current position.
- At least 7 additional service years before a subsequent sabbatical may be granted
- May be taken for one full school term, one half school term, or two half school terms within a 24-month period.

**Employer must pay at least 50% of employee's contracted salary.
Employer & member pay contributions on 100% of the contracted salary.**



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DOES AN EMPLOYEE HAVE TO RETURN FROM A SABBATICAL LEAVE TO RETAIN SERVICE CREDIT?

Short answer :

“Yes” The member must return to the employer who granted the sabbatical leave for at least one full school term immediately following the latest period of leave to retain the full sabbatical service credit.

A member will be permitted to retain the full sabbatical credit if:

1. The member cannot return, or only returns for a portion of one school term, due to illness, disability, or death.
2. Or the member is prevented from returning by the employer.

NOTE - If an employee returns for less than a school term, service is prorated based on the time they returned to work



Commonwealth of Pennsylvania - Public School Employees' Retirement System 2026

5 N 39 Street
Harrisburg PA 17101-1005
Tel: 717.772.3960
www.pers.pa.gov
Fax: 717.772.3960
PSERS 705A (07/2019)

**Approved Leave of Absence -
Employer Verification**

PSERS

Mail Center

This form is used to confirm a member's leave of absence information and to determine a member's eligibility to retain service, salary, and contributions reported during an Approved Leave of Absence (as defined by the Retirement Code). Some Approved Leaves of Absence require the member to return to school employment for a specific length of time immediately following the leave of absence.

Based on the Contract Record you submitted, our records indicate that the member did not return from an approved leave for the required period of time. You must complete this form so that PSERS can confirm the leave of absence information and to determine whether the requirement to return from leave was met. If the return from leave requirement was met, the member's service, salary, and contributions will be reduced on a day-for-day basis. Your signature on this form authorizes PSERS to make the required adjustments to the member's record on your behalf according to the information you provide.

Please return this form via fax (717.772.3960), Attention: PSERS, or mail it to the above address.

<p>PART A (Submit one form per member)</p> <p>Member's Name (please print) _____</p> <p>SSN _____</p>	<p>PART B</p> <p>Leave Start Date _____</p> <p>Leave End Date _____</p>
--	--

PART C

Type of Leave of Absence (check one)

Leaves of Absence with no return requirement:

- Collective Bargaining Unit Leave
- Special Sick Leave

Leaves of Absence with a return requirement but the return requirement may be waived:

- Exchange Teacher Leave
- Professional Study Leave

Leaves of Absence with a return requirement that may not be waived:

- Activated Military Leave
- Sabbatical Leave (Instead of completing this form, please complete Member Sabbatical Leave - Employer Verification (PSRS-120))
- Uniformed Services Employment and Reemployment Rights of 1994 (USERRA) Leave
- Any Other Leave Not Listed (Please Indicate): _____

Approved Leave of Absence - Employer Verification Page 1 of 2

Member's SSN []-[]-[]-[]-[]-[]

PART D

Did Member Return from Leave? (check only one)

Yes Date returned _____

Report the number of days and/or hours the member would have worked for the School Year of the Leave of Absence.

School Year of Leave: _____ days worked and/or _____ hours worked

Report the number of days and/or hours the member worked immediately following the leave.

School Year following Leave: _____ days worked and/or _____ hours worked

No

Did you waive the member's return requirements?

Yes, waived in Full.

Yes, waived in Part.

(State the reason for waiving the return from leave of absence requirements (e.g. medical reasons, position eliminated, chose to retire, etc.)

No, did not waive the member's return requirements. Explain the situation:

PART E

Employer Certification

I certify that the above record:

- is accurate;
- Was extracted from Board Minutes or from other credible sources of information;
- is available for examination upon request.

Authorized Signature of Employer _____	Employer Phone Number _____
Print Name and Title _____	Date Signed _____

Approved Leave of Absence - Employer Verification Page 2 of 2





LEAVEN ELIGIBILITY REQUIREMENTS

NONE! The Leaven is any paid or unpaid administrative leave that does not meet the criteria for any PSERS eligible leave.

The amount of salary paid to an employee while on a Leaven is completely at the school board's discretion.

LEAVEN wages are not retirement covered compensation and should not be reported to PSERS. No service time may be reported or purchased for LEAVEN.

Pursuant to the Retirement Code, a member can only maintain an inactive status with PSERS for 24 months from the start of a leave.



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SPECIAL SICK LEAVE (SSLWCC/SSLWCN/SSLSSC/SSLSSN) ELIGIBILITY REQUIREMENTS



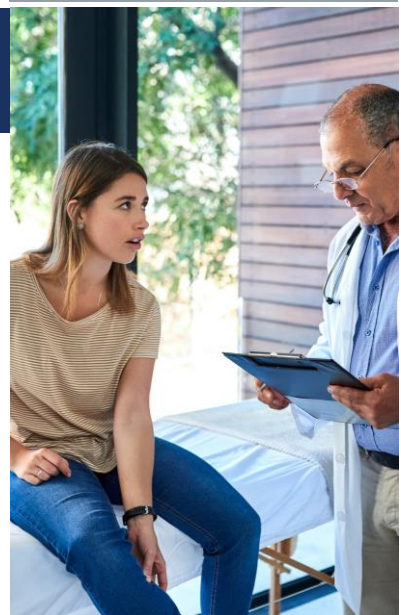
- Must be approved by the School Board on an individual basis. May be contributing or non- contributing
- The member must receive at least 50% of their contracted salary from the employer, workers' compensation, or disability insurance paid by the employer
- The leave is limited to one year, per occurrence
- Both member and employer contributions must be paid on 100% contracted salary

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WORKERS COMPENSATION LEAVE (WKCMPN)

- Member is receiving **Workers' Compensation**
- The leave is not approved under **Special Sick Leave**
- A member cannot be reported for more than 24 months
- After 24 months, the PSERS system will automatically create a termination record for the member



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REPORTING FOR COMMON LEAVE CODES/CONTRACTS

www.psers.pa.gov/Employers/Pages/Reporting-Resources.aspx

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SABBATICAL (SABTLC) LEAVE REPORTING ROW

Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
\$5,250.92	\$5,250.92	\$0.00	\$0.00	0	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$787.64

Employer's portion is reported under Base, the remaining salary is reported in URCC column

Both employer and member pay contributions on 100% of the member's contracted salary



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LEAVEN REPORTING - THERE IS NO REPORTING FOR A LEAVEN



- Sometimes an employer may enter a LEAVEN contract prior to reporting all the earned wages for the period prior to the LEAVEN start time.
- ESS will allow for reporting for one monthly work report following the entry of a LEAVEN contract record.



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SPECIAL SICK CONTRIBUTING (SSLWCC/SSLSSC) LEAVE REPORTING ROW

Work Status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
SSLSSC	\$2,651.88	\$2,169.78	\$0.00	\$0.00	0	22.00	\$0.00	\$0.00	\$0.00	\$0.00	\$361.62
SSLSSC	\$2,651.88	\$2,169.78	\$0.00	\$0.00	0	22.00	\$0.00	\$0.00	\$0.00	\$0.00	\$361.62
SSLSSC	\$2,651.88	\$2,169.78	\$0.00	\$0.00	0	22.00	\$0.00	\$0.00	\$0.00	\$0.00	\$361.62

Employer's portion is reported under Base, the remaining salary is reported in URCC column

Both employer and member pay contributions on 100% of the member's contracted salary



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SPECIAL SICK NON-CONTRIBUTING LEAVE REPORTING ROW

Work Status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
SSLSSN	\$0.00	\$0.00	\$0.00	\$0.00	0	10.00	\$4,535.93	\$0.00	\$0.00	\$0.00	\$0.00

Employer reports days/hours in appropriate column – **DO NOT WAIT TILL YEAR END** for salary members

Employer reports the full contracted salary in the WNC column



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WORKER'S COMPENSATION REPORTING -THERE IS NO REPORTING



A member who is absent from work while receiving Workers' Compensation and has not been approved by the School Board for a Special Sick Leave is not eligible to earn or purchase service credit for this time.



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LEAVE - REPORTING REQUIREMENTS						
WORK STATUS	BASE	URCC	WNC	EMP	MEMBER CONTRIBUTIONS	SERVICE REPORTED
SABTLC - ANY	dollar amount of 50% or more paid to employee	dollar amount of remaining contracted salary	NO	BASED ON 100 % SALARY	WITHHOLD BASED ON 100% SALARY	As normal active service - if salaried may be reported in June. If per diem or hourly must be reported monthly
LEAVEN	NO	NO	NO	NO	NO	NO
SSLSSC - PAID by EMPLOYER	dollar amount paid to employee equaling 50% or more from employer	dollar amount of remaining contracted salary for employee	NO	BASED ON 100 % SALARY	WITHHOLD BASED ON 100% SALARY	As normal active service - if salaried may be reported in June. If per diem or hourly must be reported monthly
SSLSSC or SSLWCC- Paid by Employer's disability Insurance or Worker's Compensation	\$0.01	Dollar amount equal to 100% of employee's contracted salary	NO	BASED ON 100 % SALARY	employee pays district contributions on full salary/Employer reports contributions on 100% salary	As normal active service - if salaried may be reported in June. If per diem or hourly must be reported monthly
SSLSSN or SSLWCN	NO	NO	Dollar amount equal to 100% of employee's contracted salary	Employer will be billed if leave is purchased by member	Member will receive bill for contributions if they purchase leave	report service the member would have worked on the last work report including this leave
WKMPN	NO	NO	NO	NO	NO	NO
STUDYC	dollar amount paid to employee equaling 50% or more from employer	dollar amount of remaining contracted salary for employee	NO	BASED ON 100 % SALARY	WITHHOLD BASED ON 100% SALARY	As normal active service - if salaried may be reported in June. If per diem or hourly must be reported monthly
STUDYN	NO	NO	Dollar amount equal to 100% of employee's contracted salary	Member pays both employer and member share	Member will receive bill for employer and member contributions if they purchase leave	report service the member would have worked on the last work report including this leave
ACTMLN (USERRA)	NO	NO	Dollar amount equal to 100% of employee's contracted salary	Employer will be billed if leave is purchased by member	Member will receive bill for contributions if they purchase leave	report service the member would have worked on the last work report including this leave

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DB Reporting											
Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR

DC Reporting											
Employee SSN	PSERS Employer 4-digit Code	Madatory Pre-Tax Contributions	After-tax Cont.	Employer Share	RCC paid this period	RCC less pick-ups	URCC	Pay date	POS	NRCC	CONTR

DB Reporting											
Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR

DC Reporting											
Employee SSN	PSERS Employer 4-digit Code	Madatory Pre-Tax Contributions	After-tax Cont.	Employer Share	RCC paid this period	RCC less pick-ups	URCC	Pay date	POS	NRCC	CONTR



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SELECTING A LEAVE CODE/CONTRACT

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PHIL'S STORY



Phil is a math teacher who has asked the School District (SD) for time starting January 1st to the end of the school year so he may complete his last two graduate classes in statistics and analysis.

Phil has been with the SD for 15 years and is a Class T-D member with a 7.5% contribution rate.

Phil makes \$100,000/year, \$10,000/month over a 10-month contract, and has never taken a leave except for the usual earned vacation and sick days.

What type of leave would Phil qualify for?



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PHIL'S ANSWERS

- **SABBATICAL – PROFESSIONAL DEVELOPMENT**
- **PROFESSIONAL STUDY – CONTRIBUTING**
- **PROFESSIONAL STUDY – NON-CONTRIBUTING**



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SABBATICAL – PROFESSIONAL DEVELOPMENT

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
SABTLC	5000.00	5000.00									750.00

PROFESSIONAL STUDY - CONTRIBUTING

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
STUDY C	5000.00	5000.00									750.00

PROFESSIONAL STUDY – NON-CONTRIBUTING

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
STUDYN						20	10000.00				



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ESTHER'S STORY

Esther is a secretary who was recently diagnosed with an auto-immune disease that requires several stays in a hospital. She has asked the SD for a year off to battle this condition at which time she hopes to return to the district.

Esther would like to retain her service during the leave. Esther wants to start her leave on July 1st and will be receiving workers compensation in the amount of \$1,500 per month.

Esther has been with the SD for 3 years and makes \$36,000 salary per year. She has a 12-month contract and earns \$3,000/month. Esther is Class T-G with a DB rate of 6.25% and DC rate of 2.75%.

What type of Leave does Esther qualify for?



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ESTHER'S ANSWERS

- SPECIAL SICK LEAVE CONTRIBUTING – WORKERS COMPENSATION
- SPECIAL SICK LEAVE NONCONTRIBUTING – WORKERS COMPENSATION
- WORKER'S COMPENSATION



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SPECIAL SICK LEAVE- WORKERS COMPENSATION - CONTRIBUTING

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
SSLWCC	0.01	3000.00									187.50

DC Reporting

Employee SSN	PSERS Employer 4-digit Code	Mandatory Pre-Tax Contributions	After-tax Cont.	Employer Share	RCC paid this period	RCC less pick-ups	URCC	Pay date	POS	NRCC	CONTR
Esther's SSN	EMP RU#		82.50	0.00	67.50	0.01	2730.00	3000.00	date of payroll		

SPECIAL SICK LEAVE WORKERS COMPENSATION - NONCONTRIBUTING

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
SSLWCN						20.00	3000.00				

WORKERS COMPENSATION - NONCONTRIBUTING

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
WKCOMPN											

No Reporting



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AMELIA'S STORY



Amelia will need to take FMLA maternity leave in November. She requires 50 days off counting holidays for at least 3 months off. Amelia has 25 days of paid vacation and sick she will use. She hopes to continue getting a check during that time even if it's small.

Amelia is a Class T-F/10.8% with a 10 month, 182-day contract. Amelia earns \$75,000 salary a year or \$5,769.23 per month and been with the current district 8 years.

What options does the SD have for this?



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AMELIA'S ANSWERS

- **ACTIVE** –while using all vacation, personal sick days and any sick bank days
- **LEAVEN** – after use of all vacation, personal sick days and any sick bank days
- **ACTIVE** – employer uses half days with her personal vacation and sick days and changes her Employment type from Full time to Part time
- **SPECIAL SICK LEAVE – CONTRIBUTING/NON-CONTRIBUTING**



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ACTIVE –while using all vacation, personal sick days and any sick bank days

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
ACTIVE	5769.23										623.08

ACTIVE/ LEAVEN – after use of all vacation, personal sick days no sick bank – 2nd monthly report

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
LEAVEN	2083.35										225.00

ACTIVE – employer uses half days with her personal vacation and sick days

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
ACTIVE	2884.62										311.54

SPECIAL SICK LEAVE - CONTRIBUTING

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
SSLSSC	2884.62	2884.62									623.08

SPECIAL SICK LEAVE – NON-CONTRIBUTING

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
SSLSSN						20.00	5769.23				



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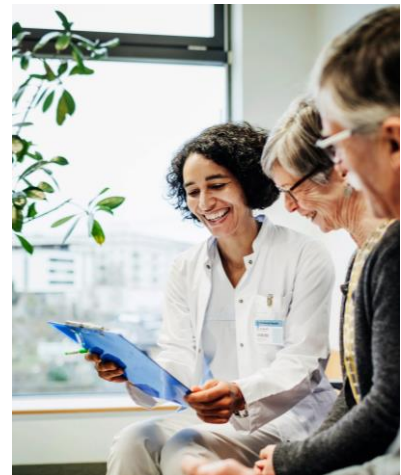
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CHARLES STORY

Charles has a family emergency and must take 2-3 months off. Charles has been with the SD for 20 years but has had a few years of family struggles leaving him with no annual or sick leave. Charles earns \$85,000 salary and is a Class T-D/7.5% member with a 10-month contract.

The school district does not have a sick leave bank for Charles to receive additional paid annual or sick leave. The School Board has opted to pay Charles 50% of his salary while he is out of work because he is a valued employee.

What leave code/contract should be entered for Charles?



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CHARLES'S ANSWERS

- LEAVEN – Charles has no other option even though the district is paying him 50% of his income while he is out of work



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- Create New LEAVEN contract record with a start day as the first day of missed work.
- End date current ACTIVE contract the same day as the first day of missed work.

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
LEAVEN			<i>No Reporting</i>								



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RYAN'S STORY



Ryan took a 6-month LEAVEN from his teaching position starting July 1st. He is a Class T-G/10-month employee and makes \$50,000/year over 12 months. Ryan also has a part time position with a club. He is paid \$15/hour. A time sheet must be returned to payroll for payment. Ryan returned his time sheet with 20 hours from June in September.

How would these earnings be reported?



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RYAN'S REPORTING

RYAN'S ADJUSTMENT FOR THE DB REPORTING

Reason Code	Wage Indicator	Contrib Withheld	Payroll corrected in	FY	Wage type	Work status	Base	URCC	OT	Supp	Contrib	HRS	Days	WNC
Payroll Correction	Y	Y	6302023	2023	HR	ACTIVE				300.00	18.75	20.00		

DC Reporting

Employee SSN	PSERS Employer 4-digit Code	Mandatory Pre-Tax Contributions	After-tax Cont	Employer Share	RCC paid this period	RCC less pick-ups	URCC	Paydate
Ryan's SSN	Emp RU #		8.25	0.00	6.75	300.00	273.00	date of payroll



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ANN'S STORY



For the past 6 months Ann has been receiving Workers' Compensation due to a car accident. Ann is feeling better and asked her doctor to clear her for half days. The school board approved 3.5 hours per day at \$31.98/hr. Normally, Ann is FT 12-month (215 day)salary employee making \$55,000/yr. Ann is Class T-E/8%. Ann will continue to collect her workers compensation.

How should the district report Ann?



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ANN'S REPORTING

- End date current WKCMPN contract the same day as the first day of half day work.
- Create New PART TIME, HOURLY, ACTIVE contract record with a start day as the first day of half day work.

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
ACTIVE	2238.60				70.00						179.01

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CAN AN EMPLOYEE WORK WHILE ON A LEAVE?



HERMAN'S STORY



Herman is on LEAVEN from his regular 10-month shift (6am-2pm) as a student aide. He is Class T-G - DB 6.25% DC 2.75%. Herman's normal contract is a part time hourly wage type at the rate of \$15/hr.

Currently, Herman cannot walk around or stand for periods longer than 5 minutes. Herman was asked to be a ticket taker at the Friday Night Football games at the same rate of pay from 6 p.m. to 8 p.m. where he can be seated for his entire shift.

Is this ticket taker position PSERS eligible and should it be reported?



HERMAN'S REPORTING

- End date current LEAVEN contract the same day as the first day of half day work.
- Create New PART TIME, HOURLY, ACTIVE contract record with a start day as the first day of half day work.

Work status	Base	URCC	OT	SUPP	HRS	DAYS	WNC	EXSAL	POS	NRCC	CONTR
ACTIVE	120.00				8.00						7.50

DC Reporting

Employee SSN	PSERS Employer 4-digit Code	Madatory Pre-Tax Contributions	After-tax Cont	Employer Share	RCC paid this period	RCC less pick-ups	URCC	Paydate
Herman's SSN	Emp RU #	3.30	0.00	2.70	120.00	109.20	0.00	date of payroll



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LILY'S STORY



Lily teaches 8am-4pm but lately has been suffering from migraines. She was approved for a half term contributing Health Restoration Sabbatical. The district has asked Lilly if she is able to substitute for a day here and there due to the teacher shortage. Lily felt this would not be long enough to cause one of her migraines.

How would the district report Lily?



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LILY'S REPORTING

Lily would have no additional reporting

The reporting for her Health Restoration Sabbatical would remain but because she will be working during her normal work hours, she will not be eligible for additional PSERS credit. The Sabbatical is already providing PSERS credit for those hours.



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UNIQUE LEAVE QUESTIONS?

Reach out to your ESC Representative if you have questions about reporting a leave.

There may be a one off or unusual circumstances surrounding an employee's absence,

or

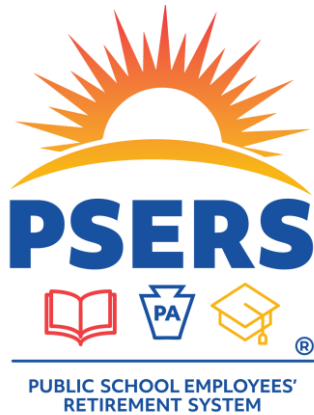
Maybe there are questions on how to report a unique situation.

We are here to help!



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PLEASE COMPLETE OUR SURVEY



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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 Inbox: 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 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 Address: 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 Cash Concentration system, including password resets and bank account updates



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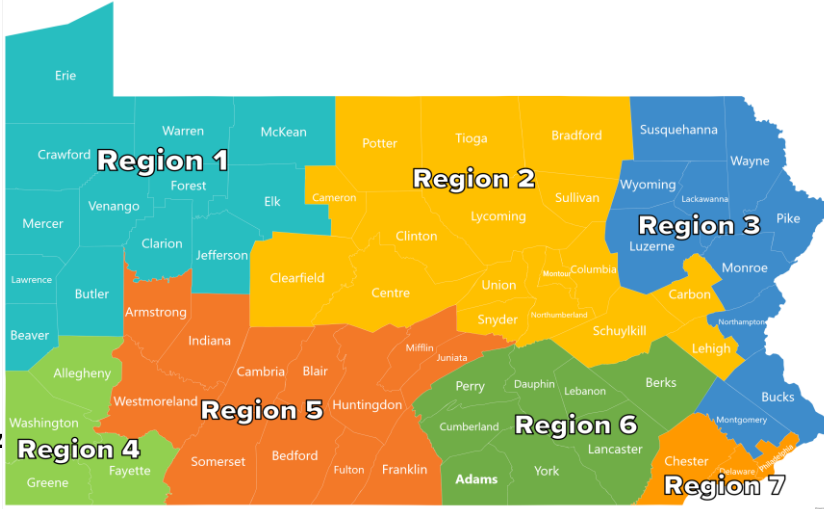
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EMPLOYER SERVICE CENTER REGIONAL MAP

Region 1-
DeAndre Albright

Region 2-
Deanna Brown

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 Lynn Sweigard – ESC Regional Office Administrators

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ESC IS HERE TO HELP!

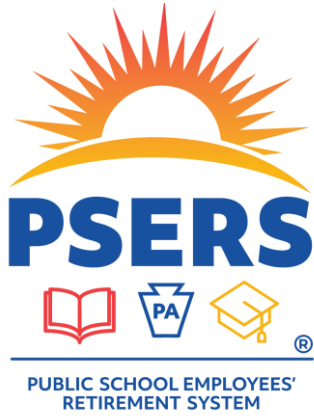


IN SCHOOL AND VIRTUAL TRAINING FOR EMPLOYERS

Employer HELP LINE 1.866.353.1844

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THANK YOU!