A Step-by-Step Guide to the Employer Web Portal (EWP)

The EWP Home Page

Welcome to the PSRS/PEERS Employer Web Portal (EWP)! The EWP home page was created to make it easier for you to keep an eye on things that your district has pending within the Retirement Systems. You will see:

- Current status of all pending ER Summaries and Adjustments
- Current status of all pending deposits
- Up-to-date Statement of Account totals
- Alerts and notifications
- Secure file upload capabilities direct to your ESA
- And more!

Uploading and Submitting an ER Summary/Payroll File

- Go to the *File Upload* menu.
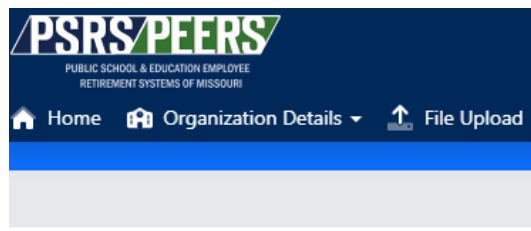
- Click the *Select File* button to browse your computer for the file you want to upload or drag and drop the file from your computer into the box where indicated.
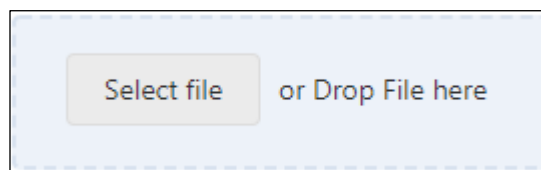
- A notification will populate in the notifications field that will tell you if your file upload is in process, successful or voided.
- The file will show below in the results field once the upload is complete.

Locating an ER Summary for Submission

- Go to the *Employer Reporting* menu.
- Select *ER Summary Lookup*.
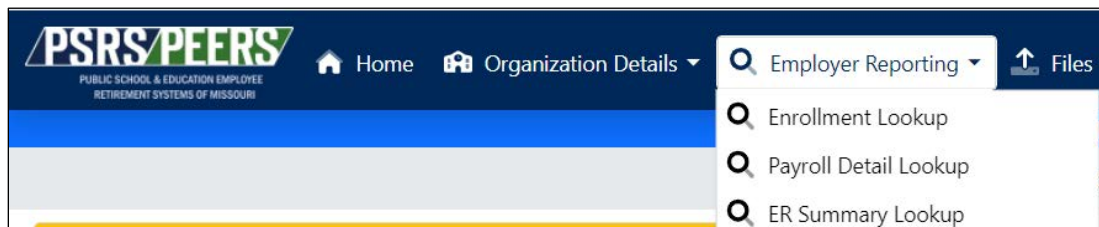
- All ER summaries submitted will be listed below. You can use the filter tool to search for files from a certain year, etc.

- Choose the ER Summary you want to review by clicking on the *ER Summary ID*.
- You can also access any currently pending ER Summaries from the EWP Home Page.

Working Through an ER Summary in Review Status

In this example, you can click on the Summary ID or the 23 payroll records in review.

- From the EWP Home Page, you have two options for reviewing your ER Summary. You can either:
  - Click the *Summary ID* to go to the ER Summary Maintenance Screen, which shows you the overall view of your ER Summary.
  - Or you can click on the *Review* hyperlink that will take you straight to the records in your file that need your attention. They will populate as "cards" on the left-hand side of your screen and will disappear as you work through the warnings/errors.
- Clicking the *Summary ID* will bring you to the ER Summary Maintenance Screen. This screen shows a snapshot of your entire file including the statuses of each section. Each header status must be valid to submit/post the file.
- Starting with the Enrollment Information tab, verify that the status of each plan is Valid.

In this example, all enrollments are valid and need no attention.

- If the status is Review, open the corresponding plan to view members in review by clicking the left-hand drop-down arrow. You can view all enrollments, just those that are in review, or those that are valid.
- Review errors and warnings located under *Validation Information* at bottom of each enrollment record and make corrections as necessary.
- Once errors are corrected, navigate back to the ER Summary Maintenance screen to check the statuses in the Payroll Summary Information section.
- Identify any plans in review and open the corresponding plan to view any payroll records in review.

You can click to view all records, just those that are in review, or those that are valid.

- Review errors and warnings located at bottom of each payroll record under *Validation Information* and make corrections as necessary.
- Navigate back to ER Summary maintenance screen to see if any additional plans are in review. If so, follow the previous steps listed to correct any records in review.
- When both the Enrollment Information and Payroll Summary Information sections have a valid status, a *Submit/Post* button will be found on the ER Summary Maintenance screen.
- Click *Submit/Post* to submit your ER Summary to PSRS/PEERS.

Checking File Status

- Go to the *Employer Reporting* menu.
- Select *ER Summary Lookup*.
- The file status column will provide the status of the ER Summary. Options are Review, Valid, Void, Posted with Warnings and Posted.

Reviewing Files that Fail to Upload into EWP

If you are trying to upload an ER Summary and you receive a notification that the file has voided, you will want to check the file upload status.

- Go to the *File Upload* menu.
- Click the drop-down arrow on the left-hand side to view the reason the file failed to upload.

Changing the Unique Identifier in an ER Summary

- Go to the location where the file is saved.

Name	Date modified	Type	Size
📊 Unique Identifier Example	1/9/2019 3:40 PM	Microsoft Excel Comma Separated Values File	1 KB
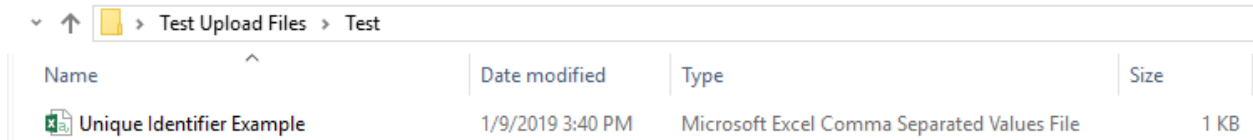
- Right click on the file name, then go to Open With, and select Notepad.

Name	Date modified	Type	Size
📊 Unique Identifier Example	1/9/2019 3:18 PM	Microsoft Excel C...	1 KB

Open
Print
Edit
↪ Share
Open with   >
Give access to   >
Restore previous versions
Send to   >
Cut
Copy
Create shortcut
Delete
Rename
Properties

- Excel
- Internet Explorer
- Notepad
- WordPad
- Search the Store
- Choose another app

1 item selected 338 bytes
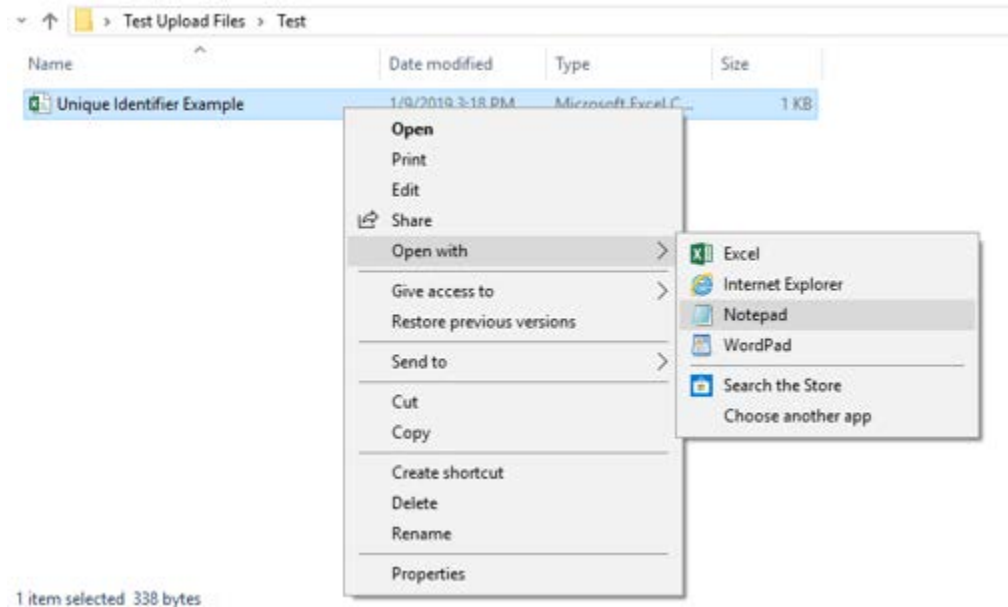
- The file will open in notepad as shown below.

```
Unique Identifier Example - Notepad
File  Edit  Format  View  Help
000~2018-2019~N~N~N~Y~Y~20190107081135~777~N
001~1
111~345345345~Doe~John~~~3210 W Truman Blvd~~~Jefferson City~MO~65109~~19800415~M~S~20181121~5735551212~N~N~N~N~Y~N~24000.00~080~N~09~john.doe@email.com
002~0
003~1
333~345345345~Doe~John~~~N~2000.00~2350.00~161.21~161.21~350.00~24000.00~20181121~20181220~080~M~~~~09~N~N~N
```

This is the unique identifier. Changing any number in this field will allow the file to be re-uploaded. For example, you can change the last digit from 5 to 6.

- After the change is made, click on File at the top of the screen and Save as shown below.

```
Unique Identifier Example - Notepad                                                         —  □  ×
File  Edit  Format  View  Help
  New          Ctrl+N   20190107081136~777~N
  Open...       Ctrl+O
  Save          Ctrl+S   ~3210 W Truman Blvd~~~Jefferson City~MO~65109~~19800415~M~S~20181121~5735551212~N~N~N~N~Y~N~24000.00~080~N~09~john.doe@email.com
  Save As...
  Page Setup...          ~N~2000.00~2350.00~161.21~161.21~350.00~24000.00~20181121~20181220~080~M~~~~09~N~N~N
  Print...       Ctrl+P
  Exit
```
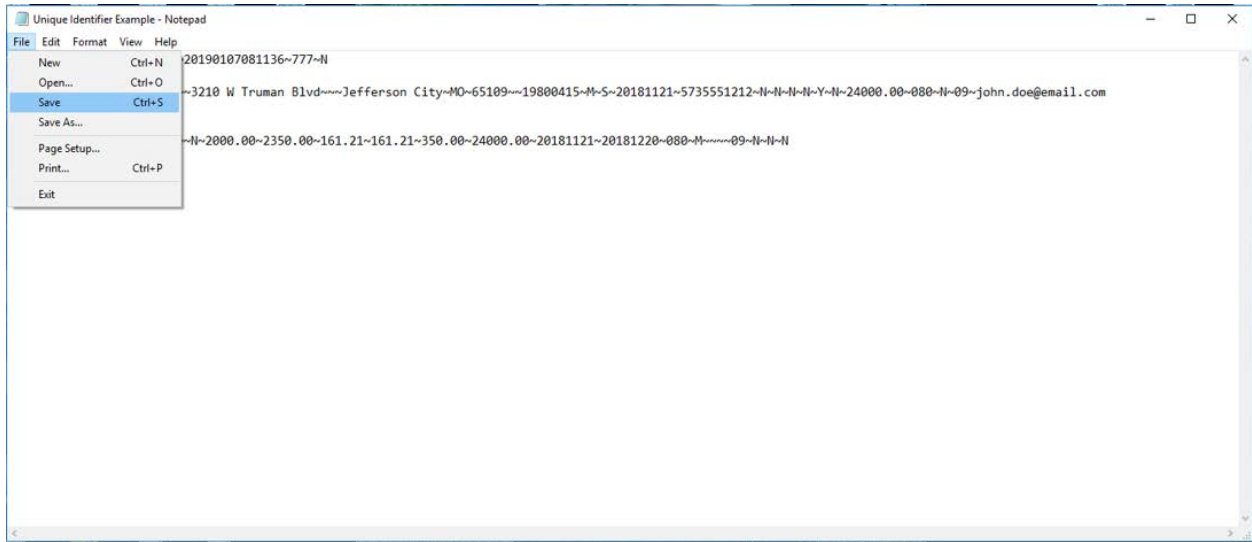
Making A Payment to PSRS/PEERS by ACH

- Go to the *Payments* menu.
- Select *Make a Payment*.
- Select the plan in which you want to make a payment.
- Choose whether you'd like to pay an existing invoice or make an ACH only payment. Please note: ACH only payments should only be made when there is no invoice to tie the payment to.
- Checkmark the invoice(s) you'd like to pay. Please Note: Invoices are color coded to display how many days delinquent they are. Invoices highlighted yellow are 45-89 days delinquent, and invoices highlighted red are 90 or more days delinquent. Please keep this in mind as you make your payments.
- Click *Next*. This will create your deposit.
- You now have the option to apply any open credit memos to your payment. If you'd like to use a credit, checkmark the credit memo(s) you'd like to use and click *Next*. If you do not want to use any credits, click *Next* without selecting any.
- Next, select your payment method. Select the *ACH* button to make an ACH payment. If you have not yet set up an ACH account, you can choose *Add Bank to make ACH Payment* and follow the steps found below for Adding Bank/ACH Information in EWP.

Select A Payment Method
ACH
Select A Payment Method
Add Bank to make ACH Payment

- Choose the bank account number from the dropdown provided, enter the amount you'd like to pay, choose the deposit date, checkmark the box to authorize your payment from the bank account provided, and click *Apply Payment*.

Making A Payment to PSRS/PEERS Using Multiple Checks

Please Note: In EWP, all payments must be made by ACH, unless your superintendent's or executive officer's sign-off has been provided and reviewed by PSRS/PEERS. A valid reason is required to approve check payments.
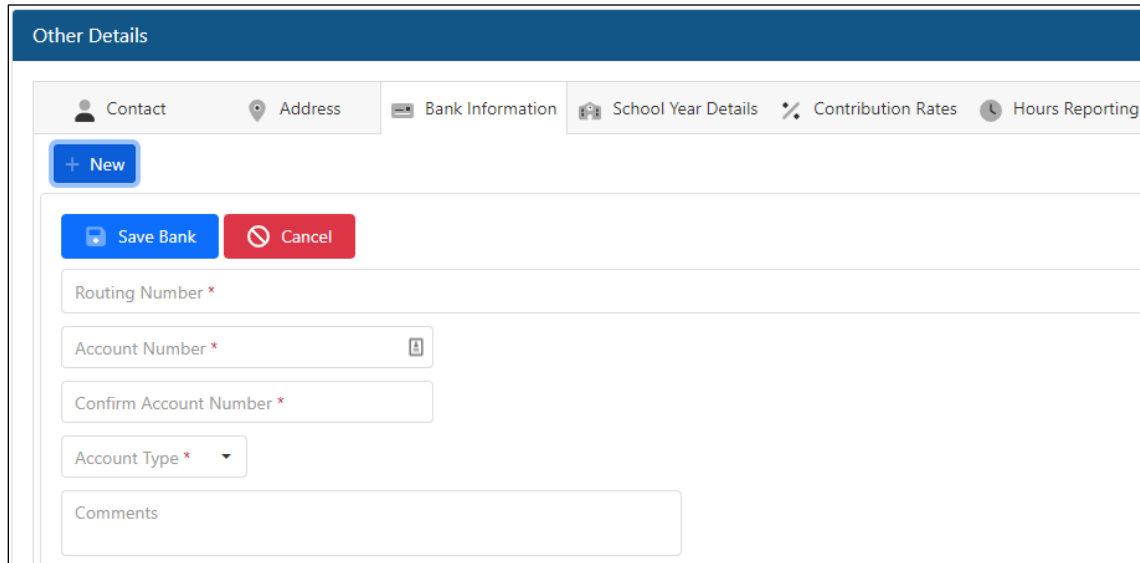
To pay an invoice using multiple checks, each check must be entered as a separate deposit. You can contact Employer Services to walk through making payments with multiple checks if this applies to your school district.

Making a Payment to PSRS/PEERS by Credit Memo Only

- Go to the *Payments* Menu.
- Select *Make a Payment*.
- Select the plan in which you want to make a payment.
- Choose whether you'd like to pay an existing invoice or make an ACH only payment. Please Note: ACH only payments should only be made when there is no invoice to tie the payment to.
- Checkmark the invoice(s) you'd like to pay. Please Note: Invoices are color coded to display how many days delinquent they are. Invoices highlighted yellow are 45-89 days delinquent, and invoices highlighted red are 90 or more days delinquent. Please keep this in mind as you make your payments.
- Click *Next*. This will create your deposit.
- You now have the option to apply any open credit memos to your payment. Checkmark the credit memo(s) you'd like to use and click *Next*.
- Next, select your payment method. Since you are paying with a credit memo **only**, click *Continue – Credit Memo Only* and submit your payment.

Adding Bank/ACH Information in EWP

- Go to *Organization Details* menu.
- Select *Employer Profile*.
- Under the *Other Details* section, select the *Bank Information* tab.
- You can review your district's current ACH/ Bank information or Click *New* to add a new payment method. You can also delete an old ACH/Bank account by clicking the Trash icon.
- Complete all required fields, then click *Save Bank*.

Reviewing Your Employer Statement of Account

There are several ways to view your district's Statement of Account in EWP. You can view each plan individually on the home page by clicking *View* on the PSRS or PEERS Statement of Account fields.

Or, to see both plans at once:

- Go to the *Payments* menu.
- Select *Statement of Account*.
- View invoices due, credit memos and invoices paid by selecting the record(s) in the corresponding sections.
- You can filter by different categories at the top of the screen, as well as export the data to Microsoft Excel.
- Please Note: Invoices are color coded to display how many days delinquent they are. Invoices shown as yellow are 45-89 days delinquent, and invoices shown as red are 90 or more days delinquent. Please keep this in mind as you make your payments.

Using the Member Verification Tool

- Go to the *Tools* menu.
- Select *Verify Member*.
- Search for the employee you wish to verify and review results.

Creating a Manual ER Summary

- Go to the *Employer Reporting* menu.
- Select *ER Summary Lookup*.
- Click *New*.
- Select the school year and reporting type, then choose *Create New ER Summary*.
- Enter a comment in the ER Summary Comments field about what you are reporting, then click *Save*.
- ER Summaries have two categories – Enrollment Information and Payroll Summary Information. Use the enrollment information section to enter or edit enrollments for new or changing members at your district.

- o Click the left-hand drop-down arrow to explore the records in the section.
- o Click the plus-sign icon to add a new enrollment into that plan.
- o Click the trash icon to void all enrollments in a plan. **Do not click this option to void one specific enrollment.**

- The Payroll Summary Information section is where all payroll records are entered.

- o Click the left-hand drop-down arrow to explore the records in the section.
- o Click the plus-sign icon to add a new payroll record into that plan.
- o Click the trash icon to void all payroll records in a plan. **Do not click this option to void one specific payroll record**.
- Review all records in the ER Summary for accuracy before submitting by clicking *Submit/Post*.
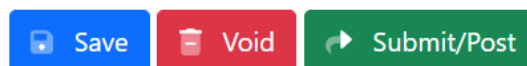
Creating a Manual Adjustment

- Go to the *Employer Reporting* menu.

- Select *Adjustment Summary Lookup.*
- Click *New.*
- First, indicate if the adjustment you are doing is an Unpaid Sick Leave Remittance by toggling the button "yes" or "no." Select the school year you are correcting, and enter a comment regarding the reason for the adjustment.

- Click *Next.*
- Click the *add* + button for the corresponding plan that applies to the member account you are adjusting.
- Enter the Social Security number (SSN) of the employee for which the adjustment is being made.
- Enter pay period begin and end dates.
- Enter the Wage Type.
- Enter all required adjustment field information.
- Click *Save.*
- Review for errors.
- Navigate back to the Adjustment Summary Maintenance screen and click *Submit.*

Reporting an Employee Date of Death

- Go to the *Organization Details* menu
- Select *Notify Date of Death for Employee.*
- Enter the employee's Social Security number (SSN) and date of death.
- Click *Save.*
- Down below, you will see the record is Pending. Click *Submit* if all is correct or *Void* if you need to make any changes.

Reporting a Termination Date and Final Pay

Entering a Termination Date for the Current School Year:

- Go to the *Tools* menu.
- Select *Employees*.
- Enter the member's criteria to search for them – you can use the last four digits of their Social Security number (SSN), name, etc.
- The member's name will appear in the search results below – click on the left-hand drop-down arrow to expand.
- To terminate the member's employment, choose the school year from the drop-down box.
- Enter the last date the member worked in eligible employment in the *Termination Date* field.
- Check the Final Pay box and click *Save*.

Entering a Termination Date for a Previous School Year:

These are best entered in your ER Summary. If you are currently working on an ER Summary, you can terminate the member's employment by entering the termination status and date in the *Employment Status* and *Employment Status Date* fields. If you need to create a manual ER Summary just to terminate someone, please see the steps for Creating a Manual ER Summary.

Reporting an Employee on Leave

- Termination/Leave is reported either in your monthly ER Summary or in a manual ER Summary.
- In an ER Summary, open the member's payroll record and change Employment Status drop-down box to reflect termination or other appropriate leave status.
- Enter *Employment Status Date* as the date of termination or other status change.
- If the member does not have an existing payroll record in your file, you can create one by clicking *New* after opening the appropriate payroll header.

Reporting an Unpaid Sick Leave Remittance

- Go to the *Employer Reporting* menu.
- Select *Adjustment Summary Lookup*.
- Click *New*.
- Change the *Unpaid Sick Leave Remittance* toggle button to yes.
- Choose the School Year during which the unpaid sick leave occurred. (Must be within the current or previous two school years.)
- Enter a detailed comment about what is being reported.
- Click *Next*.
- Click the *add* + button for the corresponding plan that applies to the member account for which you are entering the unpaid sick leave remittance.
- Enter all necessary information including:
  - Social Security number (SSN)
  - Payroll Start Date – Date the docked leave started
  - Payroll End Date – Date the docked leave ended
  - Retirement Salary – Total docked amount
  - Insurance Only – if it wasn't remitted upon while out on leave
  - Wage Type

- o   Daily Rate
- o   Days Docked
- o   Detailed comment about the details of the remittance
- Click *Save.*
- Click *Return* to navigate back to the Adjustment Summary Maintenance screen.
- Click *Submit.*

Reporting Employer Final Pay

- Go to the *Home* Screen.
- Click *Submit* in the *Report Final Pay* section.

Report Final Pay

Final Pay can be reported for 2022 - 2023 school year.

Submit ✓
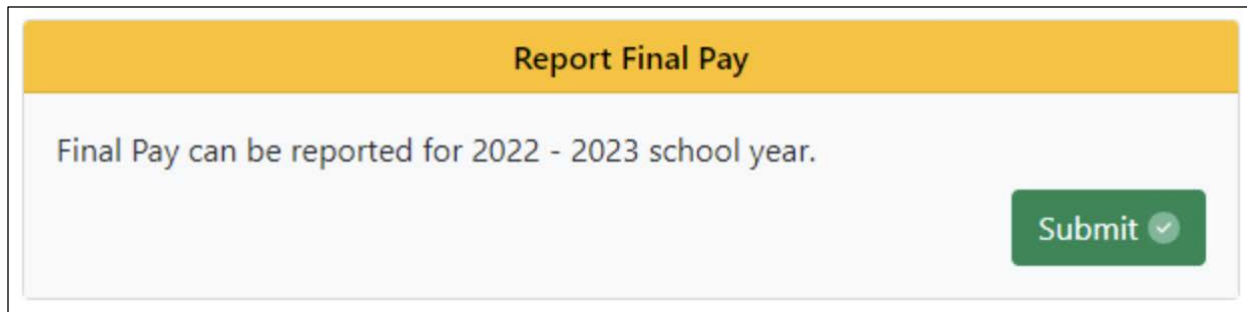
Correcting Hours Reported for Non-Members

- Go to the *Employer Reporting* menu.
- Select *ER Summary Lookup.*
- Click *New.*
- Choose the school year and the Reporting Method from the drop-down fields.
- Click *Create New ER Summary.*
- Enter a comment about the hours you are correcting in the ER Summary Comments field, then click *Save.*
- Under Payroll Summary Information, click on the *add* + button for the plan that applies to the member.
- Input the necessary information – Social Security number (SSN), name, wage type, hours (if you are correcting an overage of hours, you will negate the number of hours necessary to give you a total of the corrected hours. For example, if you have reported a total of 800 hours for a member, but should have only reported 300, you will enter "-500" in this field).
- Click *Save.*
- Return to the ER Summary Maintenance page.
- Click the *Submit/Post* button.

Running the Audit Report

- Go to the *Employer Reporting* menu.
- Select *Audit Report.*
- Choose the school year and click *Search.*
- The report will open in EWP. Use the numerous filtering options to view the data you'd like. Choose the *Show/Hide Columns* button to customize the report, and choose *Export Shown Columns* if you'd rather view the report in Microsoft Excel.
- The report is grouped in PSRS, PEERS, Retiree and Non-Member categories. Names should be in alphabetical order in their appropriate groups.

Selecting a Time Reporting Method

- Go to the *Organization Details* menu.
- Select *Employer Profile.*
- Select the *Hours Reporting* tab.
- From the dropdown box, choose either Actual Minutes or Hundredths of an Hour - Decimal from the drop-down box.
- Click *Add New Time Reporting Method.*
- Once selected, your chosen time reporting method will show in the box below under Reporting Method. Once you select your time reporting method, it is set for all future years. You only need to revisit this if the time reporting method changes at your district.
- Examples of each time reporting method are available for review.

Reporting Military Leave and the USERRA Process

USERRA (Uniformed Services Employment and Reemployment Rights Act) is a federal law that ensures employment rights to individuals who serve in the U. S. Armed Forces, National Guard, or other designated service categories in time of war or emergency. To be eligible, the member must have left covered employment after December 11, 1994 either to serve in the military or for training required for his or her military position. The member has 90 days after their discharge date to return to or make an intent to return to the same covered employer. He or she would then have the option to be granted the missed service, as well as remit contributions on the missed service. To ensure that the USERRA process works correctly, it is vital that payroll contacts indicate in their ER Summaries when a member goes out on military leave and change them back to active status when they return. If this process is done correctly, it will prompt an email that will provide the following steps to be completed:

- Go to the *Employer Reporting* tab.
- Select *USERRA Granted Lookup.*
- Click in the *Find Eligible Member Account* field and a list of eligible members (those currently being reported as on military leave) will appear in the drop-down. Click the member you wish to add service information for and click *New.*
- On the USERRA Granted screen, enter the Service Start Date (date the member's military leave began) and Service End Date (date the member's military leave ended) in the USERRA Granted Details section, then click *Save.*
- If the member is covered by PSRS, check the Social Security 218 check box if applicable.
- Enter the amount of salary and insurance the member missed during the period of leave for each school year listed, then click *Save* (Important: Members who are on active duty for long periods of time a usually placed on military insurance, and the districts may not cover them while they are out. In this situation, insurance should be entered if the member was still receiving insurance while on leave and/or if the employer would have provided insurance if the member had not been on leave and working. The employer should enter the base salary amount docked, no extra duties or stipends, plus what the

employer would have or did provide for board paid health, vision and dental insurance premiums while the member was on military leave.)

- Verify the Total Retirement Salary (including insurance) for each year. This amount will include Reported Retirement Salary (including insurance) and, if applicable, missed retirement salary and insurance. If the amount appears accurate, click *Submit*.

Position Codes

000 – Non-Member

001 – Superintendent/CEO

005 – Asst Superintendent/VP

010 – Principal/Asst Principal

020 – Office Administration

025 – School/Home Coordinator

030 – Teachers

040 – Instructional Aides/Paraprofessionals/Non-Certificated Teachers

045 – Coach

050 – Nurses/Health Services

055 – Speech/Language Pathologist

060 – Transportation

070 – Food Services

080 – Maintenance

090 – Other

095 – Qualified Public Safety Personnel

100 – Secondary Position

Using the Contribution Calculator

- Go to the *Tools* menu.
- Select *Contribution Calculator*.
- Click the school year field and choose the year for which you are wanting to calculate contributions. You can select all, one year or multiple years.
- Next, choose the plan for which you are wanting to calculate corrections.
  - PEERS or PSRS plans will require the retirement salary on which the contributions will be calculated.
  - Non-Member selection is possible for a PSRS as Non-Certificated contribution calculation. You will enter the gross salary and the insurance amounts.
- Enter the salary information and click *Calculate*. Results will populate below, and contributions will be shown.

Using the Eligibility Wizard

- Go to the *Tools* menu.
- Select *Eligibility Wizard*.
- The Wizard will walk you through a series of questions to determine plan eligibility.
  - You can go back to correct a previous answer.
  - You can restart to begin again.

Find/Register for an Employer Services Meeting

- Go to the *Meetings* menu.
- The Meeting Lookup screen will populate and will display by month. You can change this to view by day, work week, or upcoming meetings, if preferred.
- Next, navigate to the meeting you would like to register for, and click the meeting to view details. Click the *Create Enrollment* button to enroll in the selected meeting. Enter required information and click *Save Enrollment.*
- You will now see this meeting listed on your EWP homepage as a reminder.

Reviewing Less Than 1 Year of Service Report

Once your school district has reported **all** payroll for the school year and you have reported your district's final pay in EWP, a secure message will be sent to the district's primary payroll contact that will advise how to access the Less Than 1 Year of Service report.

- In EWP, navigate to the *Employer Reporting* Tab. Select *Less Than 1 Year of Service.*
- Click on the ID for the current school year to open the Less Than 1 Year of Service List
- The payroll contact/HR contact will work through the list, providing the reasons why each member did not receive a full year of service. Click the left-hand drop-down arrow to enter the necessary information. The reasons are pre-populated as follows:
  - Late Hire
  - Early Term
  - Leave of Absence
  - Docked Wages/Absences
  - Change in Position-Change in Plan
  - Change in Annual Base due to Change in Position
  - FMLA/Maternity Leave/Unpaid Sick Leave
  - PSRS Part-Time
  - PEERS Less than Full Time
  - Annual Base is Incorrect
  - Other
  - Critical Shortage
- Certain reasons (late hire, early term, maternity leave, leave of absence, FMLA) will require start and end dates to move forward with submitting. Some reasons will also require a comment for further information. Click *Save.*
- Once all criteria are met, click *Submit.*

Using Secure Messages to Contact Your Employer Services Analyst (ESA)

- In EWP, you can send secure messages to, and receive secure messages from, your assigned Employer Services Analyst (ESA). Use secure messages when you need to discuss a member's private information (Social Security number (SSN), account numbers, etc.). Do not use email, as it is not considered a secure means of communication.
- Select the messages button located at the top center of the EWP Home page to open the Secure Mail page. You can then choose to open the Inbox or create a new secure message.
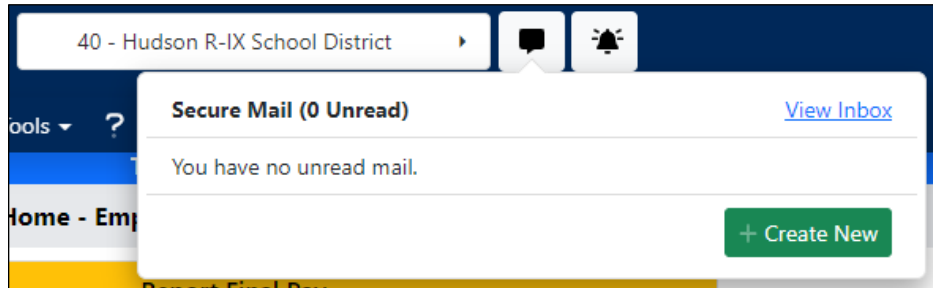
- To create a new message, click the *New Message* button.
  - You can also explore archived messages or deleted messages.
- The To: field will pre-populate to your assigned ESA.
- Choose a subject from the list of most common topics.
- Enter your message – you can copy links to documents or images as well.
- Choose to send or discard your message.
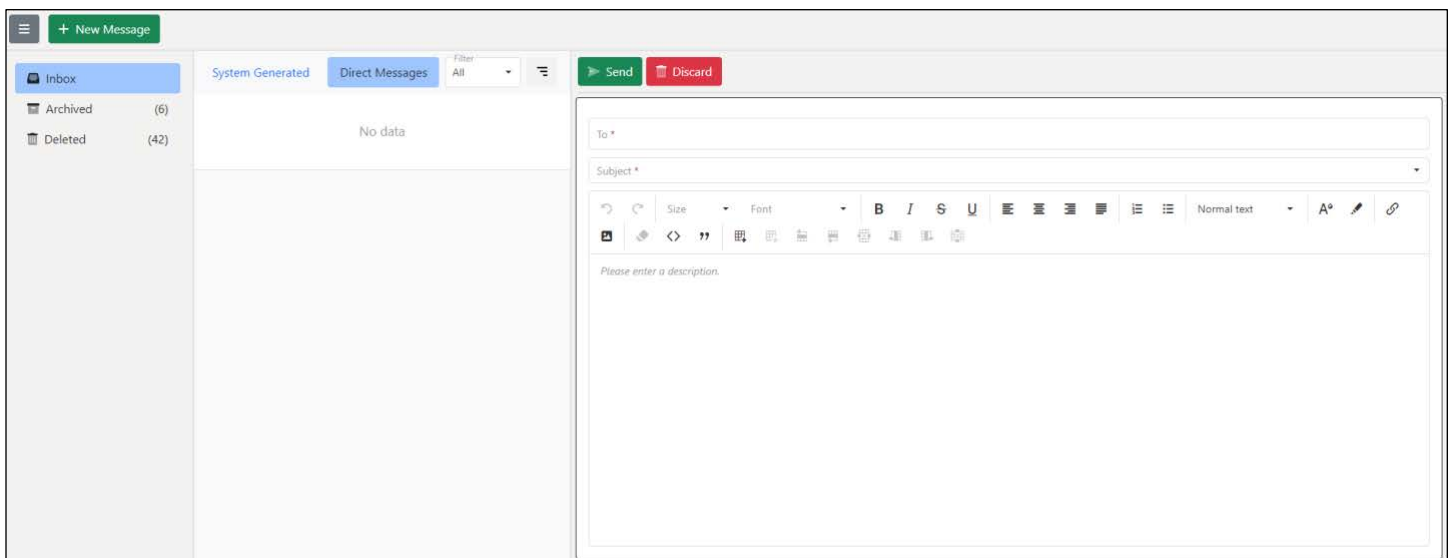
- Your ESA will be notified that you have sent them a secure message. Please be patient while they review.
- Once the ESA replies to your message, you will receive an automated email to your provided district email account advising you that you have an unread message to view in EWP.
- Access the Secure Mail page to read the message.