



# Welcome to Employer Self-Service (ESS)



2019



# Agenda

- Introduction
- Enrollments
- Contributions
- Services



# Introduction



# “The Sandbox”

In the test environment you will be able to practice with functions such as:

1. Setting up your agency info and your users of the ESS system
2. Uploading enrollment and contribution files
3. Manually entering employees into ESS
4. Correcting errors
5. Searching for employee information

Please note that the sandbox is for practice only and the only information that will be brought over to the live environment is that of the Administrator for your agency



# Welcome to ESS!

## Log-in to the Sandbox following these four steps:

### 1. Log-in to the ESS sandbox

- Use the following link: <https://test1-ess.rsa-al.gov/Common/Pages/Login.aspx>

### 3. For the F5 Login :

- Username: portal\_admin
- Password: R3tirementForTheFuture!



### 4. For ESS Login:

- User the credentials you created

The image shows a screenshot of a web form titled "F5 Login Only:". At the top left of the form is a red circular logo with the white text "f5". Below the title, there are two input fields: "Username" and "Password". Each field has a small cursor icon at the beginning. Below the password field is a button labeled "Logon".



# Overview of ESS Tabs

## Report

- Submit Enrollments
- Submit Contributions
- View the History of submitted files
- Set up a Payroll Schedule
- View Invoices

### Report

Submit Report

View History

View Reporting Packets

Download PIDs

Invoices

Payroll Schedule

Error Correction



# Overview of ESS Tabs

## Services

- Death Notice (for current or prior employees)
- Employer Certification for retirements, service purchase, or refunds
- Employee Information to look up anyone in RSA's database
- Search Demographics of your employees
- Employer Information
- Reports
- Message and Question Centers

### Services

Death Notice  
Employer Certification  
Employee Information  
Search Demographics  
Employer Information  
Reports  
Message Center  
Question Center



# Overview of ESS Tabs

## Account

- Change Password, Pin, or Security Questions

## Admin

- Manage Payment Accounts

- Office Locations
- Contact Persons
- Manage Users



Must complete in this order

### Account

- Change Password
- Change PIN
- Change Security Questions

### Admin

- Manage Payment Accounts
- Office Locations
- Contact Persons
- Manage Users





# ESS Homescreen

The menus shown on the prior slides display across the top of the screen

The screenshot shows the RSA Employer Self-Service web site. At the top left is the RSA logo. To its right is the text "The Retirement Systems of Alabama" in orange. Below this is a dark navigation bar with the following links: "Employer Self-Service" (highlighted in blue), "Employer Home", "Report", "Services", "Account", "Admin", and "Logout". To the right of the navigation bar is a blue rectangular button. Below the navigation bar is a white content area. It begins with a welcome message: "Welcome to The Retirement Systems of Alabama (RSA) Employer Self-Service web site. This site provides employers with a number of resources to accurately and efficiently report employee data to The Retirement Systems of Alabama (RSA). From this site, employers are able to interact with us in a number of ways, including:". This is followed by a bulleted list of services: "Reporting wages and contributions", "Processing EFT Payments", "Processing employee wage adjustments", "Adding or updating employer information", "Reviewing employer reports and invoices", "Verifying Personal Identification numbers (PIDs)", "Reviewing and verifying contribution rates", and "Providing access to the secure message center". Below the list is a paragraph: "This tool is designed to improve the service that The Retirement Systems of Alabama (RSA) provides by offering secure online access to your account information. It is our privilege to provide this additional level of service to you." At the bottom of the page, there is a footer section with two columns. The left column contains links: "The Retirement Systems of Alabama", "Home", "Contact Us", "Disclaimer", "Privacy", and "Non-Discrimination Notice". The right column contains contact information: "The Retirement Systems of Alabama", "P.O. Box 302150", and "Montgomery, AL 36130-2150". Below these columns is the "Hours of Operation: 8:00am-5:00pm CT" and "Phone: (334) 517-7000 or Toll Free: (877) 517-0020". At the very bottom is the copyright notice: "© 2019 - The Retirement Systems of Alabama. All rights reserved."



# Manage Payment Accounts

- All payments will be made by debit to your account
- You must ensure that you have removed debit blocks from your account
- To do this, contact your financial institution and provide them with the ACH Company ID for the transactions

<u>Type of Transaction</u>	<u>ACH Company ID</u>
Employer	F636045055
RSA-1	H636045055



# How to Set up a Payment Account

- Select Admin
- Select Manage Payment Accounts
- Select Add Payment Account
- Fill in the Account Information (such as Routing Number and Account Number)
- Select Continue
- You will receive a message that your account was added successfully



# Enrollments



# Enrollment

Enrollments take the place of the Form 100. After a new participating employee is enrolled, they will receive a welcome packet that includes beneficiary designation.

Any time an employee changes in contribution group or position status, they should have a new enrollment; you must end the previous enrollment.



# Enrollment Record Overview



## Job-Related Information

- Record Type
- Contribution Group
- Position Status
- Enrollment Begin Date
- Enrollment End Date
- Enrollment End Reason
- LOA Status Effective Date
- LOA Status
- Scheduled Units Effective Date
- Scheduled Type of Units Worked
- Scheduled Units to Work per Week
- Schedule Full Time Units per week
- Payroll Frequency
- Number of Months Paid
- Tier/Group



## Personal and Demographic Information

- First Name
- Middle Name
- Last Name
- Suffix
- Date of Birth
- Gender
- SSN
- PID
- Primary Address Line
- Secondary Address Line
- City
- State
- Zip Code
- Foreign Address Line
- Country Code



# Position Status

Alphanumeric Code	Definition
01 = Regular	Should be used for full-time employees, as well as part-time employees who have a regular work schedule.
03 = Seasonal / Irregular	Should be used for employees who do not have a regular work schedule. This includes retirees who have returned to work.
04 = Temporary	Should be used for someone hired with a pre-determined termination date that is less than one year from the date of hire.
08 = Ineligible to Contribute	Should be used for positions that are by definition never eligible to contribute towards an RSA retirement benefit regardless of the fulltime/part-time status of the person or any previous eligibility that was established for the member.



# Contribution Groups- ERS LOCAL

Description	Position Code	Contribution Group for a Contributing Member	Contribution Group for a Non-Participating Employee
Firefighter	021	021CONT	021NONP
Law Enforcement Officer	022	022CONT	022NONP
Elected Official	031	031CONT	031NONP
FLC Elected Official	032	032CONT	032NONP
County Engineer	043	043CONT	043NONP
Local Employee	044	044CONT	044NONP
FLC Dual	099	099CONT	Not Applicable





# Leave of Absence (LOA)

## **What is LOA?**

LOA is used to indicate that someone has been placed on **unpaid** leave

## **What does LOA impact?**

LOA helps track service credit that members may be eligible to purchase at a later time

Examples of when to place someone on LOA include medical, maternity, or military leave



# Payroll Schedule

Under Reports, select Payroll Schedule

Select Plan Year 2018-2019

Select Payroll Frequency of Monthly

Select Initial Pay Date 10/31/2018

Select 0 Days in Arrears

Select Generate

Report

Submit Report

View History

View Reporting Packets

Download PIDs

Invoices

Payroll Schedule

Error Correction



# Payroll Schedule

- Payroll Schedule must be set up for each plan year for each type of payroll.
- Three components to the payroll schedule:
  - Pay date: Date the wages are paid
  - Pay period begin date: the first day of the pay period
  - Pay period end date: the last day of the pay period
- The dates in the payroll schedule must match the same dates used when reporting wages and employee contributions.
- Edit Payrolls

Payroll Schedule

Payroll Schedule

Retirement System	Plan Year	Payroll Frequency	Initial Pay Date	Arrears	Generate
⊕ Employees' Retirement System of Alabama	2017 - 2018	Monthly	10/31/2017	0 Days	
⊕ Employees' Retirement System of Alabama	2017 - 2018	Weekly	10/01/2017	0 Days	
⊕ Employees' Retirement System of Alabama	2016 - 2017	Monthly	10/31/2016	0 Days	
* Employees' Retirement System of Alabama ▼	* ▼	* ▼	* <input type="text"/>	* ▼	Generate

1


















# Payroll Schedule

Warning: One or more rows has a Pay Date on a weekend or holiday and has been adjusted to the previous business day.

Payroll Schedule

Payroll Schedule

		Retirement System	Plan Year	Payroll Frequency	Initial Pay Date	Arrears					Generate	
<a href="#">Edit</a>			Employees' Retirement System of Alabama	2018 - 2019	Monthly	10/31/2018	0 Days					
								Pay Date	Pay Period Begin Date	Pay Period End Date	Skip Report	
<a href="#">Edit</a>								10/31/2018	10/01/2018	10/31/2018	<input type="checkbox"/>	
<a href="#">Edit</a>								11/30/2018	11/01/2018	11/30/2018	<input type="checkbox"/>	
<a href="#">Edit</a>								12/31/2018	12/01/2018	12/31/2018	<input type="checkbox"/>	
<a href="#">Edit</a>								01/31/2019	01/01/2019	01/31/2019	<input type="checkbox"/>	
<a href="#">Edit</a>								02/28/2019	02/01/2019	02/28/2019	<input type="checkbox"/>	
<a href="#">Edit</a>								03/29/2019	03/01/2019	03/31/2019	<input type="checkbox"/>	
<a href="#">Edit</a>								04/30/2019	04/01/2019	04/30/2019	<input type="checkbox"/>	
<a href="#">Edit</a>								05/31/2019	05/01/2019	05/31/2019	<input type="checkbox"/>	
<a href="#">Edit</a>								06/28/2019	06/01/2019	06/30/2019	<input type="checkbox"/>	
<a href="#">Edit</a>								07/31/2019	07/01/2019	07/31/2019	<input type="checkbox"/>	
<a href="#">Edit</a>								08/30/2019	08/01/2019	08/31/2019	<input type="checkbox"/>	
<a href="#">Edit</a>								09/30/2019	09/01/2019	09/30/2019	<input type="checkbox"/>	
												



# Enter Online Enrollments - Demo

- Adding Employee
- Adding Enrollments
- Updated Existing Enrollments
  - Search Demographics

[Getting Started >](#) [Details >](#) [Summary >](#) [Payments](#) [Results](#)

Enrollments	Contributions
<p>Choose this option to upload only enrollments in a file.</p> <p>You can upload multiple enrollment files per month as needed to enroll new members or update enrollment information for existing members.</p>	<p>Choose this option to upload only contributions in a file.</p> <p>Once an enrollment has been created for an employee, you can upload a contribution file to report contribution details. An enrollment must exist before contributions can be reported for an employee.</p>
<div><a href="#">Upload File</a> <a href="#">Enter Online</a></div>	<div><a href="#">Upload File</a> <a href="#">Enter Online</a></div>

[View History](#)

The Retirement Systems of Alabama

The Retirement Systems of Alabama



# Manual Enrollments

The Retirement Systems of Alabama

Employer Self-Service   Employer Home   **Report**   Services   Account

Submit Report  
View History  
View Reporting Packets  
Download PIDs  
Invoices  
Payroll Schedule  
Error Correction

Getting Started >   Details >   Summary >

**Enrollments**

Choose this option to upload **only enrollments** in a file.

You can upload multiple enrollment files per month as needed for existing members.

**Upload File**   **Enter Online**

**Submissions in Progress**

No records found.

est2-ess.rsa-al.gov/Employer/Pages/ERGettingStarted.aspx

- To manually enroll an employee,
- Select Report
- Select Submit Report
- Select Enter Online



## Manual Enrollments

The screenshot displays the 'Employer Self-Service' interface. At the top, there is a navigation bar with links: Employer Home, Report, Services, Account, Admin, and Logout. A user profile 'EXYZ - John Doe' is visible in the top right. Below the navigation bar, there is a section for 'Search Employee Demographics'. It includes a search instruction: 'Enter an Employee SSN, PID, First Name, or Last Name and click the Search button.' and a note: 'Note: Clicking the Show All button will display all employees for the logged in employer. If you would like to view employees who do not have an enrollment with your agency, use the search options.' Below this, there is a 'Search Employee' section with input fields for 'Employee SSN', 'PID', 'First Name', and 'Last Name'. These fields are highlighted with a red rectangle. Below the search fields, there is an 'Advanced Search' section with a 'Display Records' dropdown set to '10'. A 'Search' button with a magnifying glass icon is highlighted with a red rectangle. To the right of the 'Search' button are buttons for 'Show Active', 'Show All', and 'Add New Employee'. Below the search section, there is a 'Search Details' table. The table has columns: Last Name, First Name, PID, SSN, Birth Date, Employer, and Action. The first row of data shows 'MEMBER', 'MICHAEL', '10000001', 'XXX-XX-0001', '12/17/1981', 'XYZ\_AIRPORT', and 'Maintain'. The 'Maintain' link in the Action column is highlighted with a red rectangle.

Last Name	First Name	PID	SSN	Birth Date	Employer	Action
MEMBER	MICHAEL	10000001	XXX-XX-0001	12/17/1981	XYZ_AIRPORT	Maintain

- You may search for any employee in the RSA database by SS#, PID, or name
- Enter Data and Select Search
- If the person is in RSA's database, you can enroll the employee by clicking Maintain, and updating the employee's data



# Manual Enrollments

### Employee Information

SSN: \*

Date of Birth: \*

Verify SSN and Date of Birth

Foreign National with no SSN : ☐

### Personal Information

First Name: \*

Suffix:

Select Suffix ▼

Middle Name:

Gender: \*

Select Gender ▼

Last Name: \*

### Address Information

- Select Add New Employee
- Enter Personal and Demographic Data
- Select Save Changes





# Manual Enrollments

A light gray rectangular button with a white border. It contains a small icon of a document with a checkmark and the text "Go to Enrollments".

A blue rectangular button with rounded corners and a white border. It contains the text "Add New Enrollment" in white.

A blue rectangular button with rounded corners and a white border. It contains a small icon of a floppy disk and the text "Save Changes" in white.

- Select Go to Enrollments
- Add New Enrollment
- Fill in Enrollment information
- Select Save Changes

Note that the Tier automatically populates to Tier 99 because RSA does not have a record of this person in the system. You must determine if they are a Tier 99 (NONP) or Tier 2 (CONT).

If the employee has ever been a Tier 1 employee, they will be a Tier 1 employee for life.



# Enrollment Details

Edit Enrollment

Current Tier/Group:

Tier 1

Retirement Plan: \*

ERS T1 Regular

Contribution Group: \*

Contribution Local Employee

Position Status: \*

Regular

Scheduled Units Effective Date: \*

Scheduled Units to Work per week: \*

Scheduled Type of Units Worked: \*

Scheduled Full Time Units per week: \*

Payroll Frequency: \*

Number of Months Paid: \*

Enrollment Begin Date: \*

Enrollment End Date:

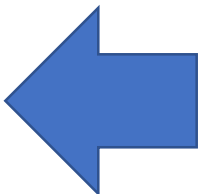
Enrollment End Reason:

LOA Status Effective Date: \*

LOA Status: \*

Cancel

Save Changes



Users will enter Enrollment details in the table shown here



# Enrollment Reports

- Current Enrollment Summary
- Current Enrollment Detail

**View Reports**

**Report Name:**

**Description:**

**Format:**

**RSA PIN: \***

Outstanding Edit Errors

Demographic Errors

Non-Participating Part-Time Status

Leave Without Pay

Outstanding Load Errors

Employer Historical Payments

Annual Checklist Report for ERS

Exception Report for ERS

Post-Retirement Employment

Current Enrollment Summary

Error Summary

Overtime Limit

Current Enrollment Detail



# Common ENRL Errors

- Position Status Not Valid
- Full Time Units vs Scheduled Units
- Contribution Group
- Enrollment Begin date

New Enrollment <span>×</span>			
Enrollment Validation Errors			
Error Code	Error Message	Severity	Category
ER0274	Invalid work schedule provided. (Scheduled Units per Week must be greater than 0, Scheduled Full Time Units per week must be greater than 0, and Scheduled Units per Week cannot exceed Scheduled Full Time Units per Week or the Scheduled Fulltime units is outside the allowable limits).	Error	GENERAL



# Contributions



# Enrollments vs. Contributions

## Enrollments

- Contribution Group
- Position Status
- Type of Units Worked
- Begin Date
- End Date
- Unpaid Leave (LOA)
- Expected Work Schedule
- Payroll Frequency

## Contributions

- Contribution Group
- Position Status
- Type of Units Worked
- Pay Period Begin Date
- Pay Period End Date
- Pay Date
- Units worked during the Pay Period
- Wages earned during the Pay Period



# Contribution Components



## Personal Information

- PID
- SSN



## Enrollment Information

- Contribution Group
- Position Status
- Type of Units Worked



## Pay Record Information

- |   |   |
|---|---|
| • Payroll Frequency                               | • Increase / Decrease Employee Contribution |
| • Pay Period Begin Date                           | • Rate of Pay                               |
| • Pay Period End Date                             | • Type of Rate of Pay                       |
| • Payment Reason                                  | • Summer Position                           |
| • Wages   | • Full Time Units                           |
| • Increase / Decrease Wages                       | • Actual Units Worked                       |
| • Wages that Exceed IRS Limit                     | • RSA-1 Contribution                        |
| • Increase / Decrease Wages that Exceed IRS Limit |   |
| • Employee Contribution                           |   |



# FIRST TIME CONTRIBUTION SET-UP FOR ENTER ONLINE

Getting Started >

Details >

Summary >


Payments

Results

## Enrollments

Choose this option to upload **only enrollments** in a file.

You can upload multiple enrollment files per month as needed to enroll new members or update enrollment information for existing members.


 Upload File

 Enter Online

## Contributions

Choose this option to upload **only contributions** in a file.

Once an enrollment has been created for an employee, you can upload a contribution file to report contribution details. An enrollment must exist before contributions can be reported for an employee.

 Upload File

 Enter Online





# Entering Contribution Information

Users will enter or adjust Contribution Information as needed

Personal Information

PID:

XXXXXXXX

First Name:

John

Tier/Group:

Tier 1

Contribution Group:

Contribution Local Employee

Payroll Period:

09/01/2018-09/30/2018

LOA Status Effective Date:

11/01/2012

Scheduled Units Effective Date:

11/01/2012

Scheduled Units to Work per Week:

5.00

Units Annually Contracted to Work:

SSN:

XXX-XX-XXXX

Last Name:

Doe

Employment Begin / End Date:

11/01/2012 - Present

Position Status:

Regular

Payroll Frequency:

Monthly

LOA Status:

Not on Unpaid Leave

Scheduled Type of Units Worked:

Days

Scheduled Full Time Units per Week:

5.00

Contribution Information

	Payment Reason	Error Count	Units Worked	Type of Units Worked	Full Time Units	Wages	Excess of IRS	Employee Contribution	Employer Contribution	RSA-1 Contribution	Rate of Pay	Rate Of Pay Type	Summer Position	Override Warnings
<input checked="" type="radio"/>	Regular Pay	0	20.00	Days	20.00	\$1,129.87		\$84.74	\$138.30	\$0.00	\$1,129.87	Monthly	<input type="checkbox"/>	<input type="checkbox"/>
	Total:		20.00		20.00	\$1,129.87	\$0.00	\$84.74	\$138.30	\$0.00				



# Correcting Contribution Errors

A few common errors are:

- Incorrect/missing full time units
- Actual units worked invalid
- Same payment reason reported
- Unexpected employee contribution
- Type of units worked mismatch
- Invalid payment reason



# Add Adjustment or New Contribution

Contribution records can be added or adjusted anytime before payment is submitted.

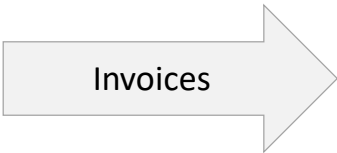
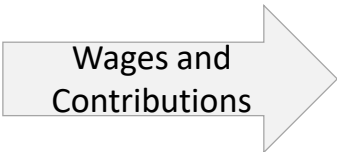
- Example of adjustment: employee was overpaid/underpaid the previous pay period.
- Example of adding: employee was paid overtime or other pensionable wages.
- If contributions do not match what the system is calculating you must correct the amounts before moving forward. An error message will not let you proceed.
- **REMEMBER:** Whatever you adjust or add in ESS you **MUST** add in your system as well.



# Review the Summary

## SUMMARY SCREEN

ESS allows employers to view a summary of the amounts that were submitted. The payment amounts from the accounts display along with any applicable invoices.



Contribution Summary			
Regular Contributions			
Employer / Retirement Plan	Wages	Employee Contributions	Employer Contributions
XYZ - XYZ AIRPORT			
ERS T1 Local Regular- Contributing	\$ 15,102.40	\$ 755.12	\$ 1,895.36
Total	\$15,102.40	\$755.12	\$1,895.36
Employer / Retirement Plan	Wages	Employee Contributions	Employer Contributions
XYZ - XYZ AIRPORT			
ERS T2 Local Regular- Contributing	\$ 2,951.67	\$ 177.10	\$ 275.39
Total	\$2,951.67	\$177.10	\$275.39
Totals	\$18,054.07	\$932.22	\$2,170.75
Prior Period Adjustments and/or Retroactive Contributions			
No Adjustments available.			
Invoices			



# Payment Screen

- The employer will be presented with a finalized list of all costs for the contribution report submission, including any credits or debits that may have resulted from the applied invoices.

Getting Started > Details > Summary > **Payments** Results

Report Submission #: 9553      Submission Date: 06/20/2018      Type: Contributions Only      Mode: Enter Online      Status: In Progress

Contribution Payments

Review Your Payment Information

Employer	Employee Contributions	Employer Contributions	RSA-1 Contributions	Total
XYZ - XYZ Employer	\$22,920.83	\$37,794.49	\$0.00	\$60,715.32
<b>Totals</b>	<b>\$22,920.83</b>	<b>\$37,794.49</b>	<b>\$0.00</b>	<b>\$60,715.32</b>

Invoices

Invoice	Employer	Invoice Type	Date	Amount
2018EMP000554	XYZ - XYZ Employer	Employer Penalty	05/02/2018	\$967.77
2018EMP000630	XYZ - XYZ Employer	Employer Contribution Report	06/13/2018	(\$1,171.22)
<b>Total Invoices Applied</b>				<b>(\$203.45)</b>

Remit Your Employee/Employer Contributions and Invoice Payments:

Pay from	Amount	
bank - WELLS FARGO BANK, ...1234	\$0.00	<input type="button" value="Edit"/>
<b>Total Applied:</b>	<b>\$0.00</b>	
<b>Balance Remaining:</b>	<b>\$60,511.87</b>	
<b>Total Amount Due:</b>	<b>\$60,511.87</b>	
<b>The RSA PIN:</b>	<input type="text" value="0000"/>	



# Contributions Submitted – Now What?

1. RSA will now retrieve the authorized payment amount from your EFT account.
2. The contributions are then posted to the employees' accounts with ERS.
3. Reporting packets will be sent to each employer using ESS Secure Message Center.



## Reporting Packets

- The **Reporting Packets** screen displays all reporting packets for the Plan Year and / or Pay Date.
  - Leave Without Pay
  - Non-Participating Part Time Status
  - Overtime Limit Report
- Click on the **Report Name** link to view a PDF of the reporting packet.

To view a reporting packet, please choose the Plan Year and Report Data from the menus below. To view an individual report, select the appropriate link and the report will open in a new browser window.

**Please Note:** Reports are generated for the reporting packet as necessary based on the contribution and employee enrollment information reported since then prior pay date.

Plan Year:  Pay Date:

REPORT NAME	RETIREMENT SYSTEM CODE
<a href="#">Leave Without Pay</a>	Employees' Retirement System of Alabama
<a href="#">Overtime Limit Report</a>	Employees' Retirement System of Alabama
<a href="#">Non-Participating Part-Time Status</a>	Employees' Retirement System of Alabama



# Services





# Services - Overview

**The Retirement Systems of Alabama**

Employer Self-Service   Employer Home   Report   Services   Account   Admin   Logout

Death Notice  
**Employer Certification**  
Employee Information  
Search Demographics  
Employer Information  
Reports  
Message Center  
Question Center

Welcome to The Retirement Systems of Alabama (RSA) Employer Self-Service. From this site, employers are able to perform a variety of tasks, including:

- Reporting wages and contributions
- Processing EFT Payments
- Processing employee wage adjustments
- Adding or updating employer information
- Reviewing employer reports and invoices
- Verifying Personal Identification numbers (PIDs)
- Reviewing and verifying contribution rates
- Providing access to the secure message center

This tool is designed to improve the service that The Retirement Systems of Alabama (RSA) provides by offering secure online access to your account. It is our privilege to provide this additional level of service to you.



# Services – Death Notice

## Death Notice

- Allows you to report the death of active and retired members online
  - This is simply a notification of a member's death which will initiate the proper correspondence be mailed from our office
- Allows you to provide ERS with the beneficiary's contact information
- Provides a link to the Application for Survivor Benefit form



# Services – Enrollment and Contribution Related

### **Employee Information**

- View an employee's basic account information and demographics
  - Address, date of birth, PID, Tier Status, service credit and salary history

### **Search Demographics**

- View an employee's information that your agency has reported to RSA
- Edit demographic information
- Edit enrollment information
  - Add new enrollment
  - Update LOA Status, Enrollment begin/end dates, and FTE changes

### **Employer Information**

- Contribution rates
- Basic plan information
- GASB reports
- Actuarial Valuation reports

These sections will assist you with enrollment and contribution files



## Services - Reports

### Reports

- Allows you to generate reports related to enrollment and contribution files
- Annual Checklists

NOTE: you must click the “Generate” button to view the report

View Reports

Report Name:

Description:

Format:

RSA PIN: \*

Reset

Generate

Outstanding Edit Errors

Demographic Errors

Non-Participating Part-Time Status

Leave Without Pay

Outstanding Load Errors

Employer Historical Payments

Annual Checklist Report for ERS

Exception Report for ERS

Post-Retirement Employment

Current Enrollment Summary

Error Summary

Overtime Limit

Current Enrollment Detail



# Services – Message and Question Center

## Message Center

- RSA can use this feature to contact you for information
- Allows you to maintain records of requests you have received from RSA
- You will receive an email notification to notify you of new messages

## Question Center

- You can use this feature to contact RSA with questions
- RSA will respond to your question accordingly





# Services – Employer Certification

## **Employee Retirement Request**

- Allows RSA to request certification of Retirement Applications by ESS

## **Employee Service Purchase Requests**

- RSA will use this feature to request certification of service or salary credit when calculating purchases

## **Employee Refund Requests**

- If an request for refund form (RSA Form 7) is submitted electronically, then the certification request can be sent to you electronically
- If a paper RSA Form 7 is submitted to RSA, you will still receive a certification request letter by mail, as is currently our process



# Summary



# Summary

- View online CBT (computer based training) videos on the RSA website
- Practice creating and maintaining records in the Test Environment
  - Set-up a Method of Payment
  - Create a Payroll Schedule
  - Create a New Employee
  - Create a New Enrollment
  - Edit an Existing Enrollment
  - Submit a Contribution File
- Ask for help! You may contact the RSA Employer Services Division at 334-517-7005 or [employer.services@rsa-al.gov](mailto:employer.services@rsa-al.gov)
- THANK YOU for all of your cooperation, assistance and patience during this process!

