Section 12
Retirement Reporting

The following instructions explain how to submit a deposit and service report as well as a request for additional information in ESS.

Deposit and Service Report

Step 1

You will receive an email when a deposit and service report is ready to complete.

To access the report from the home page:

1. Click on “Deposit & Service Reports” in the banner menu, or
2. Click on “Deposit & Service” in the Outstanding Reports section.

This will take you to the Reports To Be Completed tab on the Deposit and Service Report screen shown on the next page.
Step 2

Click on the employee’s SSN to open the report. This will take you to the screen shown on the next page.

**Navigation Notes**

- You will automatically be taken to the Reports To Be Completed tab when you access a deposit and service report from the home page.
- The Available for Updates tab contains submitted reports that can be corrected if needed. **Important:** Only click on reports in this tab if you are submitting a revised deposit and service report.
- The Submitted Reports tab contains submitted reports that are available for viewing or printing.
- You may notice two reports are available for the same member. When a member’s retirement effective date is between Aug. 1 and Oct. 1, STRS Ohio requires you to complete a deposit and service report for the current year and prior fiscal year while the annual report is being processed.
Step 3

Complete each section of the report.

**Earnings**

1. Compensation earned during the fiscal year under the most recent contract.
2. Any amounts earned during the fiscal year that were included in the annual report for work under a prior year contract. Only complete this line for members whose contracts cross fiscal years and who work in July.
3. Any amount reported and/or paid in the current year that was earned in the prior fiscal year and not backposted. Do not include accrued contributions.
4. Any supplemental earnings paid in addition to the regular contract. List and describe each supplemental earning and enter the amount earned.
5. The percentage of pickup only if included in compensation for retirement purposes (pickup-on-pickup).
6. Total member earnings.

**Contributions**

7. Taxed contributions reported as after-tax during the fiscal year.
8. Pretax contributions reported as tax-deferred during the fiscal year.
9. 14% of total earnings (line 6 multiplied by 14%).

*Step 3 continued on next page.*
**Step 3 (continued)**

**Service Credit and Contract Information**

10. Service credit earned by the member during the fiscal year.
11. Last pay date that payment was or will be issued to the member.
12. Last date the member worked, including any paid sick leave or vacation days used (other than severance pay for unused benefits).
13. Position held by the member during the fiscal year.
14. Most recent contract salary.
15. Month and day service was contracted to begin and end, and number of days in contract.
16. Percentage increase generally granted to teaching members from previous year to current year.

**Contact Information/Certification**

17. Treasurer or other fiscal officer authorized to certify the report.
18. Phone number for any necessary follow-up.

**Comments**

Provide any information necessary to process the account.

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**Step 4**

Click “Save Form” when finished entering information. Then go to Step 5a or Step 5b based on the situation.

**Step 5a**

If the member had supplemental contracts or additional earnings in the past five fiscal years or has a contract that crosses fiscal years, click “Request for Additional Information.” This will take you to Step 1 of Completing a Request for Additional Information on the next page.

**Step 5b**

If you do not need to complete a request for additional information, click “Save and Submit” to submit the report.
Request for Additional Information

If a member had supplemental contracts or additional earnings in the past five fiscal years or has a contract that crosses fiscal years, you need to complete a request for additional information after you complete the deposit and service report.

Step 1

After completing Step 5a on the previous page, you will be taken to the Request for Additional Information screen. Complete each section of the report for each applicable fiscal year.

General Information

1. The position the member held for the respective fiscal year.
2. The amount of the member’s full contract, even if not completed.
3. Deducted amount for board-approved docked days or unearned contract amounts.
4. Any amount reported and/or paid in the current year that was earned in the prior fiscal year and not backposted. Do not include accrued contributions.
5. The beginning date of the respective contract.
6. The ending date of the respective contract.
7. The number of days in the member’s full contract.

Step 1 continued on next page.
Supplemental or Additional Earnings

8. The percentage of pickup only if included in compensation for retirement purposes (pickup-on-pickup).

9. Compensation for days worked outside the beginning and ending contract dates.

10. Any supplemental earnings. Provide brief description of each.

11. Any amounts earned during the fiscal year that were included in the annual report for work under a prior year contract. Only complete this line for members whose contracts cross fiscal years and who work in July.

Step 2
Click “Save” to save data for the request for additional information.

Step 3
If you are ready to submit both the deposit and service report and request for additional information, click “Save and Submit.” Your reports will not be submitted until you complete this action. Please note:

• If you need to return to the deposit and service report to make corrections before submitting, click “Deposit & Service Report.”

• If you need to start over, click “Reset.” Caution: This will delete all data you have entered.

• To print a copy for your files, click “Print.”