



Welcome to the *Employer Basics 101: Membership* webinar. My name is Patty Gordon and joining me today is Todd Wolford. During today's webinar:

- All participants' cameras are off and you are automatically muted.
- You can press the ALT key on your keyboard to open or close the Zoom control panel.
- You can ask questions in the Q&A pane on the control panel.
- Make sure you have printed copies of the handouts for today's session.

Agenda



*Determining
Membership*



*Contracted
Service
Providers*



*Reemployed
Retirees*



*Notification
Process*



Resources

Today we will discuss:

- Who is a member of STRS Ohio and how that is determined;
- How membership is determined for contracted service providers filling STRS Ohio-covered positions;
- Who is considered a reemployed retiree and the restrictions for retirees returning to public employment;
- The notification process for both new hires and reemployed retirees as well as other required forms; and
- Review where you can access resources to assist you on the STRS Ohio Employer Website.

Determining Membership

What determines STRS Ohio membership?

Ohio Revised Code 3307.01:

Any person paid from public funds and employed in the public schools under any type of contract described in Section 3311.77 or 3319.08, R.C., in a position for which the person is required to have a license or registration issued pursuant to 3319.22 to 3319.31, R.C.

Any other teacher or faculty member employed in any school, college, university, institution or other agency wholly controlled and managed, or supported in whole or in part, by the state or any of its subdivisions.



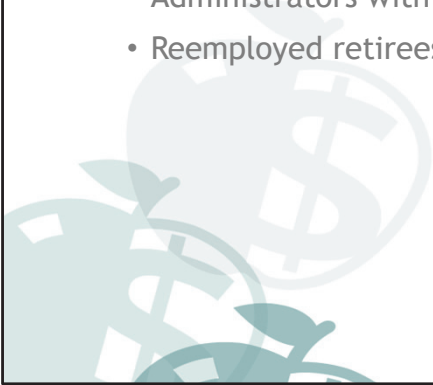
Ohio Revised Code 3307.01 defines membership for STRS Ohio.

STRS Ohio has the authority to make membership determinations.

Determining Membership: Higher Education Employers

For college and university employers:

- Faculty, instructors, academic deans
- Administrators with faculty status
- Reemployed retirees holding STRS Ohio-covered positions



Let's take a look at some common positions for colleges and universities.

Determining Membership: K-12 Employers

- Membership is based on the position, not the person
- Forward a job description to report@strsoh.org for review and determination if you are unsure

STRS Ohio	School Employees Retirement System (SERS)
<ul style="list-style-type: none">• Full-time and part-time teachers• Superintendents• Substitute teachers• County board of developmental disabilities teachers• Adult education instructors• Tutors• Guidance counselors• Psychologists• Occupational or physical therapists and assistants• Auxiliary services personnel in positions that require licensure*• Social workers• Faculty members• Community school directors and academic administrators	<ul style="list-style-type: none">• Teachers' aides/paraprofessionals• Bus drivers• Food service personnel• Custodial or maintenance personnel• Technology coordinators• Treasurers• Business managers• Secretarial or clerical personnel• Latchkey employees• School board members• Early childhood instructors• Security officers• Auxiliary services personnel in positions that do not require licensure*

*Under Sections 3319.22 to 3319.31, Revised Code

Now let's take a look at some common positions for K-12 employers.

Membership is based on the position, not the person.

Take a look at this list of typical positions that contribute to STRS Ohio.

If you are unsure, email a job description to report@strsoh.org to receive a membership determination.

Now that you know the main positions that require STRS Ohio membership, let's take a look at a few exceptions.

Determining Membership: K-12 Employers

- There are a few exceptions where licensure of the individual determines membership

Position	Retirement System Membership Determination
Coaches and athletic directors	<p>Does the individual hold a valid teaching license?</p> <ul style="list-style-type: none"> • Yes – STRS Ohio • No – SERS
Nurses	<p>Does the individual hold an Ohio Department of Education (ODE) school nurse license or is he or she a registered nurse (RN) with a bachelor's degree?*</p> <ul style="list-style-type: none"> • Yes – STRS Ohio • No – SERS
<p>Preschool teachers <i>ODE does not require that head preschool teachers in regular preschools have a professional educator license. This ODE licensing requirement is the determining factor for membership, regardless of the license an individual holds or what the district may require.</i></p>	<p>Special Education Preschool Program</p> <ul style="list-style-type: none"> • Head teachers – STRS Ohio • Itinerant teachers – STRS Ohio • Secondary classroom teachers or aides – SERS <p>Regular or Typical Preschool Program</p> <ul style="list-style-type: none"> • Head teachers – SERS • Itinerant teachers – STRS Ohio • Secondary classroom teachers or aides – SERS

*Effective May 14, 2021, for new hires. RNs with a bachelor's degree hired prior to that date should have started contributing to STRS Ohio as of July 1, 2021.

There are a few positions that require some additional information to determine if they should be STRS Ohio members.

Contracted Service Providers

- Individual in STRS Ohio-covered position
- Independent or third-party contractor
- Membership determination process
- *Determination of STRS Ohio Membership for Contracted Services form*
- *Contracted Services Membership Determination fact sheet*



Hiring a contractor to fill an STRS Ohio-covered position does not necessarily mean that they do not need to contribute to STRS Ohio.

All individuals working in an STRS Ohio-covered position are considered members and are required to make contributions on earnings — unless a membership determination is filed and STRS Ohio states that they are not members.

The main issue when determining whether an individual is an employee or an independent contractor is **the right to control the means and manner** of performing the work. **The factors reviewed are:**

- Who controls the quality of work?
- Who supervises the individual?
- How is the individual paid?
- Who trains the individual?

If a membership determination is requested, there are sections on the form for both the school and the service provider to complete. Include a copy of the contract and the names and emails of individuals providing service. STRS Ohio will review all the information submitted and make a determination regarding membership.

Find a helpful fact sheet and the membership determination form on the employer website.

Reemployed Retirees

Anyone receiving a retirement benefit from an Ohio public retirement system or alternative retirement plan (ARP) who has returned to public employment.



Another type of member is a reemployed retiree.

A reemployed retiree is anyone receiving a retirement benefit from an Ohio public retirement system **or alternative retirement plan (ARP)** who has returned to Ohio public employment.

This does not apply to employees receiving retirement benefits from federal, out-of-state or private employment.

Reemployed Retirees

Restrictions:

- Cannot work with any Ohio public employer for the first two months following retirement effective date
- Cannot volunteer in the same position

If the two-month restriction is violated:

- There must be a one-day break in service between the last day of employment as a member and the first day of employment as a reemployed retiree
- Will result in the loss of benefits for the period of violation
- Contributions on earnings during the violation period do not accrue interest



If a retiree chooses to return to work, there are certain restrictions he or she needs to consider.

Section 3307.35 of the Ohio Revised Code stipulates that public employees who retire under one of the six Ohio retirement systems are prohibited from returning to work in public employment for two months after their retirement effective date. Retirees who violate this restriction will forfeit monthly retirement benefits for any month they are in violation.

Retirees receive documentation when their retirement is being finalized that states these restrictions and lists the first day they are eligible to return to work. They are also notified of restrictions during retirement counseling sessions with STRS Ohio.

A **minimum one-day break in service** is required.

If a retiree worked for more than one employer, he or she retires from the highest-paying employer. The individual can continue working if compensation was earned in 12 consecutive months prior to and in the month of service retirement. **Again, there are no restrictions for individuals who had federal, out-of-state or private employment.**

Violation certification reports are sent in Employer Self Service (ESS) to the employer when contributions are reported during the violation period. If you receive this report, you are asked to verify the employee's earnings for the first and second month after retirement.

Reemployed Retirees

Public notice and meeting

- Employers proposing to continue the employment of a person in a position that is customarily filled by a vote of a board or commission, or rehire a person as a reemployed retiree to the **same position** he or she held before retiring and at the **same school** must comply with the following guidelines:
 - No less than 60 days before employment, the board must give public notice that the person is or will be retired and is seeking employment
 - Between 15 and 30 days before employment, the board must hold a public meeting on the issue of the person being employed
- Employers must certify these requirements have been met on the reemployed retiree notification



A public notice and public meeting are required for retirees who will be continuing in the same position within the same district.

Public notice: no less than 60 days before employment.

Public meeting: between 15 and 30 days before employment.

Notification Process

Notifying STRS Ohio of new hires and reemployed retirees

- Employer is required to send the new hire or reemployed retiree notification within **10 business days of the member's first day worked**
- Notification is completed in Employer Self Service (ESS) or sent via secure file upload in a properly formatted file
- State software users complete the new hire report
- *Member Information* form (optional)



Use the *Member Information* form to request the information you need to complete a new hire or reemployed retiree notification.

The employee's email address is required on the notification so he or she can be contacted about STRS Ohio plan options. STRS Ohio prefers a personal email address so members can still be reached if they change jobs.

Notification Process

Other required notification: SSA-1945 form

Social Security Administration
Statement Concerning Your Employment in a Job Not Covered by Social Security

Employee Name	Employee ID#
Employer Name	Employer ID#

Your earnings from this job are not covered under Social Security. When you retire, or if you become disabled, you may receive a pension based on earnings from this job. If you do, and you are also entitled to a benefit from Social Security based on either your own work or the work of your husband or wife, or former husband or wife, your pension may affect the amount of the Social Security benefit you receive. Your Medicare benefits, however, will not be affected under the Social Security law. There are two ways your Social Security benefit amount may be affected.

Windfall Elimination Provision
Under the Windfall Elimination Provision, your Social Security retirement or disability benefit is figured using a modified formula when you are also entitled to a pension from a job where you did not pay Social Security tax. As a result, you will receive a lower Social Security benefit than if you were not entitled to a pension from this job. For example, if you are age 62 in 2012, the maximum monthly reduction in your Social Security benefit as a result of this provision is \$20.50. This amount is updated annually. This provision reduces, but does not totally eliminate, your Social Security benefit. For additional information, please refer to Social Security Publication, "Windfall Elimination Provision."

Government Pension Offset Provision
Under the Government Pension Offset Provision, any Social Security spouse or widow(er) benefit to which you become entitled will be offset if you also receive a Federal, State or local government pension based on work where you did not pay Social Security tax. The offset reduces the amount of your Social Security spouse or widow(er) benefit by two-thirds of the amount of your pension.

For More Information
Social Security publications and additional information, including information about exceptions to each provision, are available at www.ssa.gov/ssa-1945. You may also call (800) 772-1213, or for the deaf or hard of hearing call the TTY number 1-800-325-0778, or contact your local Social Security office.

I certify that I have received Form SSA-1945 that contains information about the possible effects of the Windfall Elimination Provision and the Government Pension Offset Provision on my potential future Social Security benefits.

Signature of Employee _____ Date _____

Form SSA-1945 (01-2013)
Do not Print Edition

- Send via secure file upload or mail
- Can also fax to 614-744-3340 – use this number for this form only, no cover sheet needed
- Form is available as a handout
- Complete form and print for employee’s signature
- SSA-1945 Forms Upload Instructions



Employers must submit a signed SSA-1945 form for every new hire. This is a federally required form regarding employment in a job not covered by Social Security.

STRS Ohio prefers this form be scanned and uploaded using secure file upload on the employer website. You can also mail or fax the form to 614-744-3340. This fax number is dedicated to SSA-1945 forms and you do not need a cover sheet.

For our members’ protection, do not email scanned copies to STRS Ohio.

Notification Process

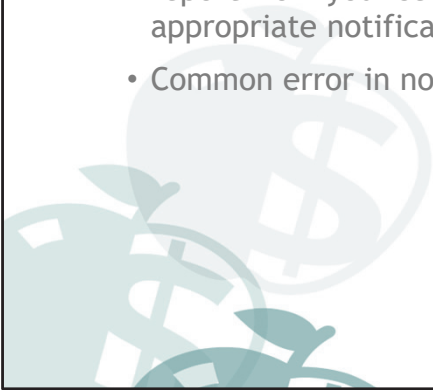
- If an employee is included on a payroll report but STRS Ohio has not received a new hire or reemployed retiree notification, a *New Hire Report* will be emailed to the payroll and main contacts listing members' names and the first pay date contributions were reported
- Information is needed to establish membership in the system, contact eligible members to select a retirement plan and include accurate information in our annual actuarial valuation



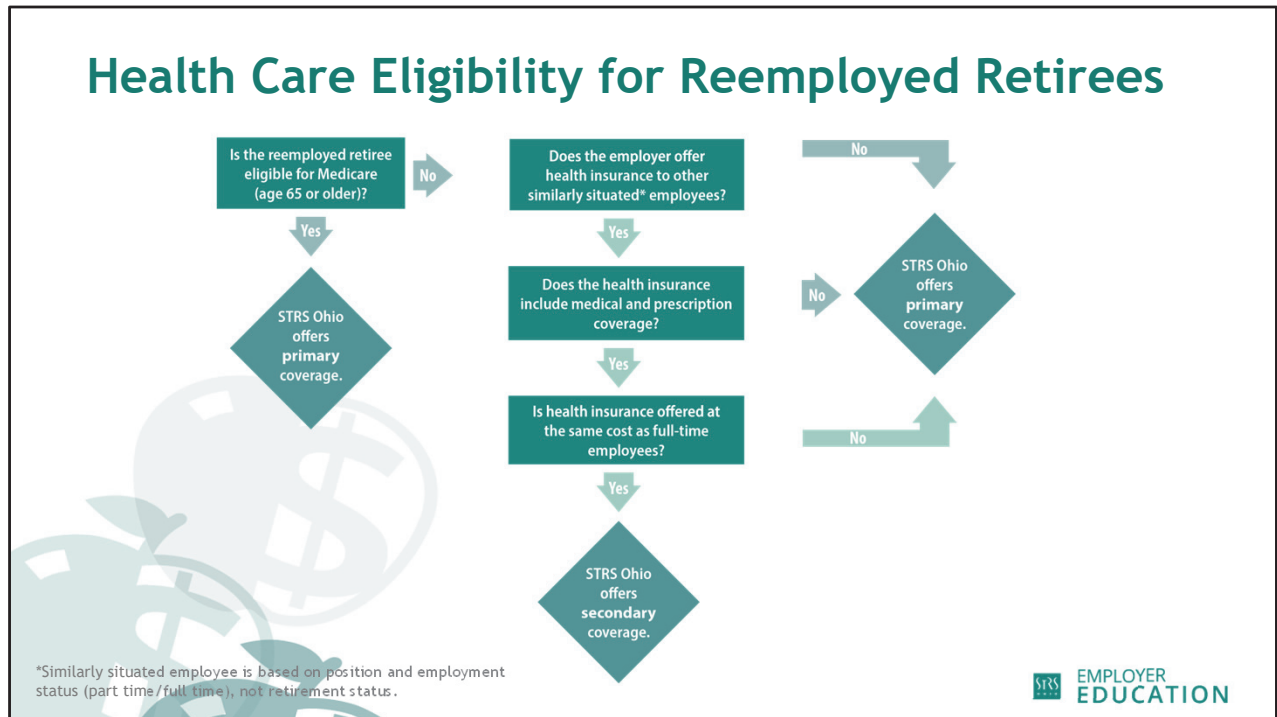
If STRS Ohio does not receive a new hire or reemployed retiree notification, the payroll and main contacts will receive a *New Hire Report* via email.

Notification Process

- In addition, you will receive a **new hire 30-day report** every month via email.
 - Report lists all members who have appeared in at least one payroll report from your school but STRS Ohio has not yet received the appropriate notification
 - Common error in notifications is a Social Security number mismatch



The **new hire 30-day report** is also emailed every month.



Coverage under the STRS Ohio Health Care Program is limited for individuals without Medicare who are employed in a public or private position.

Reemployed Retirees are only eligible for secondary health care coverage through STRS Ohio if they:

- Are eligible for medical and prescription coverage through the employer, **or**
- Hold a position for which other similarly situated employees are eligible for health care at the same cost as full-time employees. Note that eligibility is based on **position and employee status, not retirement status.**

Online Personal Account Handout



- STRS Ohio members can register for an Online Personal Account for secure 24-hour access to account information. After registering, you will be able to manage your account on your computer or mobile device.
- Select your STRS Ohio retirement plan online (new members only).
 - Review your contact information and keep it current so you stay abreast of important news about your account and benefits.
 - Access important documents such as your Annual Statement, service retirement estimates and account change confirmations.
 - Review your beneficiary information and make updates after life events.
 - Use the Calculators section to estimate your retirement benefits amount, disability benefits and survivor benefits as well as retiree tax withholding and health care premiums.
 - Schedule an appointment with an STRS Ohio benefits counselor or register for educational events such as retirement planning webinars.
 - Choose to opt out of receiving paper copies of correspondence such as newsletters and your Annual Statement.
 - Complete and submit your Service Retirement Application or application to withdraw your STRS Ohio account.



To register for an Online Personal Account:

1. Visit www.strsoh.org and select "register" in the top right corner of the home page.
2. Complete the Account Setup information and click "Finish".
3. Log in to your new account. A successful login triggers Multifactor Authentication, a verification method and enhanced security measure that requires additional pieces of information to gain access to your account.

To recover forgotten login information, click on "Forgot user name" or "Forgot password" on the Login screen. After three unsuccessful login attempts, accounts lock for security reasons. You can contact STRS Ohio toll-free at 888-227-7877 for help in unlocking an account. If you suspect your account has been compromised, contact STRS Ohio immediately.

For more information about the Online Personal Account, visit www.strsoh.org/videos to view the Online Personal Account Features — During Your Career video.

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- PDF handout created to promote STRS Ohio Online Personal Account to members and show how to register
- Available on the employer website in the Publications section under Instructions and Guidebooks
- Help spread the word by including in your new hire packets or sending to your employees who are STRS Ohio members

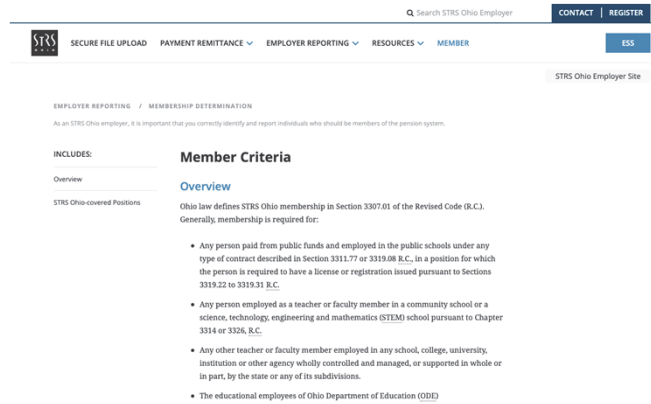


STRS Ohio members can sign up for an Online Personal Account to manage their account online. We have created a one-page PDF handout that you can print out to include in new hire packets or email to your employees who are STRS Ohio members. The handout gives an overview of the benefits of signing up for an account and instructions on how to register.

You can find this handout on the employer website in the Publications section under Instructions and Guidebooks or under the New Hire Reporting topic.

Resources

- Fact sheets
 - *Determining Membership*
 - *Contracted Services Membership Determination*
 - *Understanding Health Insurance Rules for Reemployed Retirees*
- Employer website:
www.strsoh.org/employer



The screenshot displays the STRS Ohio Employer Site interface. At the top, there is a search bar and navigation links for CONTACT and REGISTER. Below this is a main navigation menu with options: SECURE FILE UPLOAD, PAYMENT REMITTANCE, EMPLOYER REPORTING, RESOURCES, and MEMBER. A secondary menu includes ESS. The page title is "STRS Ohio Employer Site". The breadcrumb trail shows "EMPLOYER REPORTING / MEMBERSHIP DETERMINATION". A note states: "As an STRS Ohio employer, it is important that you correctly identify and report individuals who should be members of the pension system." The page is divided into two columns. The left column, under "INCLUDES:", lists "Overview" and "STRS Ohio-covered Positions". The right column, under "Member Criteria", has an "Overview" section. The text reads: "Ohio law defines STRS Ohio membership in Section 3307.01 of the Revised Code (R.C.). Generally, membership is required for:" followed by a bulleted list of criteria:

- Any person paid from public funds and employed in the public schools under any type of contract described in Section 3311.77 or 3319.08 R.C., in a position for which the person is required to have a license or registration issued pursuant to Sections 3319.22 to 3319.31 R.C.
- Any person employed as a teacher or faculty member in a community school or a science, technology, engineering and mathematics (STEM) school pursuant to Chapter 3314 or 3326, R.C.
- Any other teacher or faculty member employed in any school, college, university, institution or other agency wholly controlled and managed, or supported in whole or in part, by the state or any of its subdivisions.
- The educational employees of Ohio Department of Education (ODE)



Questions?

We're here to assist you!

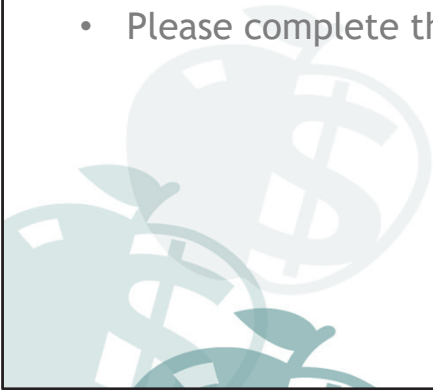
- Send an email: report@strsoh.org
- Call toll-free: 888-535-4050
- Visit our website: www.strsoh.org/employer



If you have additional questions related to the information presented in this webinar, please email report@strsoh.org or call us toll-free at 888-535-4050.

Thank You!

- This webinar will be available in the Education & Training section of the employer website
- Certificates of completion will be emailed within two weeks
- Please complete the evaluation when you exit the webinar



Thank you for participating in today's webinar. All parts of this live webinar will be available on the employer website to view on demand. Click on "Webinars" under Education & Training to access the recorded webinars library.

We will stay connected to the webinar for a few more minutes to answer any additional questions.

Certificates of completion will be emailed within two weeks.

A short evaluation will pop up when you exit the webinar. We would appreciate you taking the time to complete it and providing your feedback.

Thank you for taking the time to attend this webinar. Have a great day!