

Here are the OPERS documents most frequently used by employers on which you'll see masked SSNs as of July 2009 (not an all-inclusive list).

Informational documents including reports, forms and billings

- Missing Personal History Records Report
- Employer Account Summary
- ARP Form
- Report of Retirement Contributions (pre-list)
- Service Purchase by Payroll Deduction (pre-list)
- Missing Address/Date of Birth Report
- ORS Confirmation report
- Reversal of Overpayment to Pension Billing
- Reversal of Delinquent Contribution Billing
- Reversal of Elected Official Service Purchase Billing

Letters from OPERS (Some sent directly to employees, but employers receive a courtesy copy):

- Re-employment Letter
- Payroll Deduction Letter
- Deductions on Savings Which May Be Due to Reemployment
- Breakdown Letter
- Large Earnings Letter with Breakdown
- Large Earning Letter (Multiple Employees)
- ARP Eligibility Notice
- STRS Notification of application being received
- Missing Personal History Records
- Start Date Letter
- Request for a Photocopy of Members SS Card
- Service Purchase Payroll Deduction Enrollment letter
- Service Purchase Payroll Deduction Reminder Enrollment letter
- Service Purchase Final Deduction Underpayment letter
- Final Payroll Deduction letter (did not receive final deduction)
- Change in Tax Deferred Payroll Deduction letter
- Service Purchase Missing Deduction letter
- Service Purchase Payroll Deduction Change Request letter
- Service Purchase Final Deduction Notice letter

Information and certifications requiring employer action

- Certification of Employee's Final Payroll
- Certification of Employee's Final Payroll-2nd Request
- ARP - Sent to ER for member termination date
- Missing ARP Employees
- Service Purchase Billing - Elected Official
- Service Purchase Billing - Delinquent Contributions
- Service Purchase Billing - Interrupted Military Leave
- Employee Approaching Compensation Limit
- Employee has met Annual Compensation Limit

This document is written in plain language for use by public employers who are subject to coverage under the Ohio Public Employees Retirement System. It is not intended as a substitute for the federal or state law, namely the Ohio Revised Code, the Ohio Administrative Code, or the Internal Revenue Code, nor will its interpretation prevail should a conflict arise between it and the Ohio Revised Code, Ohio Administrative Code, or Internal Revenue Code. Rules governing the retirement system are subject to change periodically either by statute of the Ohio General Assembly, regulation of the Ohio Public Employees Retirement Board, or regulation of the Internal Revenue Code. If you have questions about this material, please contact our office or seek legal advice from your attorney.



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Inside

Sample documents showing new changes

On Back

List of most-frequently used documents that will change (partial listing)

Questions or comments?

Contact Employer Outreach at
1-888-400-0965.



Enhanced security: Use of masked Social Security numbers (SSN) starts in July

This information is important for:

- Anyone who handles retirement reporting, contributions, or correspondence

Situation overview

To enhance security of sensitive information transmitted from OPERS to employers, OPERS will begin masking the first five digits of all Social Security numbers (SSNs) found on printed documents generated at OPERS, effective July 2009.

Masking SSNs on documents is not new at OPERS, but will be new for printed documents frequently used by employers. Please be aware that masked SSNs will appear on paper contribution reports and the monthly Account Summary—two documents frequently used by employers.

Because masking SSNs provides you and your employees with enhanced security, this change will ultimately affect all printed documentation from OPERS. However, you'll notice the enhanced security does not jeopardize the integrity of the documents.

You'll continue to see:

- Paper contribution reports pre-populated with all current information, but
- Names will be shown with only the last four digits of the employee's SSN.

Of special note:

- All newly hired employees must be reported to OPERS with their full SSN, and
- Because electronic correspondence is secure, ECS reports will not be changed—ECS employers will continue to report and see full SSNs within the ECS application.

Changes you'll see

After July 1, 2009, any recipient of printed documentation from OPERS, including correspondence, will see:

- Only the last four digits of any SSN, and
- The individual's name (as it appears on OPERS records).

This will change the look of more than 40 frequently used paper documents and forms—enhancing security for all. A list of affected documents most-often used by employers can be found on the back of this *Facts at a Glance*. However, this is not an all-inclusive list.

Action requested

Although no negative impact on productive workflow is anticipated, employers are encouraged to:

- Make sure employees who handle retirement information are informed of the change.

SSN Job Aid:

Here are six documents used most frequently by employers. As you can see, the documents remain the same, but the SSNs are masked.

Report of Retirement Contributions

REPORT OF RETIREMENT CONTRIBUTIONS											
MONTH ENDING	5/31/09	PAGE	1	OF	1	POST DATE	6/30/09	EMPLOYEE RATE	10.00%	EMPLOYER RATE	14.00%
Code:	4999-00	Employer Name:	OPERS Employer								
Social Security Number	NAME (Last, First, MI)	A	B	C	D	E	F	PAY PERIOD BEGIN	PAY PERIOD END	EARNABLE SALARY	RETIREMENT CONTRIBUTION
XXX-XX-1211	Allen, Timothy										
XXX-XX-5712	Bessley, Sara										
XXX-XX-8314	Belmer, Lisa										
XXX-XX-1119	Burns, Patrick										
XXX-XX-4112	Cherry, Bill										
XXX-XX-3113	Dalton, Matthew										
XXX-XX-8964	Jones, Robert										
XXX-XX-8426	Reed, Thomas										
XXX-XX-6683	Turner, Chris										

Here's where you'll see the masked Social Security number

Service Purchase Billing - Delinquent Contributions

OPERS Ohio Public Employees Retirement System
277 East Town Street Columbus, Ohio 43215-4642 1-888-400-0965 www.opers.org

August 14, 2008

Tom Jones
Ohio Public Employer
1234 Main St
Columbus, OH 43215-9999

Re: Delinquent Contributions Billing

Dear Employer:

A charge representing delinquent contributions has been added to your OPERS account. The amount due below is required by Section 145.483 of the Ohio Revised Code.

Employee's Name	:	John Smith
Social Security #	:	XXX-XX-1767
Dates of Service	:	03/10/1991 to 06/30/1991
Employee Contribution	:	\$437.11
Interest on Employee Contribution	:	\$445.85
Employer Contribution	:	\$705.03
Interest on Employer Contribution	:	\$719.13
Total Amount Due	:	\$2,307.12

The total amount of \$2,307.12 is due by 09/30/2008. This amount was calculated based on the reported earnings and the contribution rates in effect during the dates of service.

Please direct any questions regarding the above information to your Employer Outreach Representative at 1-888-400-0965 or e-mail us at employeroutreach@opers.org.

Sincerely,

Here's where you'll see the masked Social Security number

Missing Personal History Records

OPERS Ohio Public Employees Retirement System
277 East Town Street Columbus, Ohio 43215-4642 1-888-400-0965 www.opers.org

JULY 31, 2008

TOM JONES
PERSONNEL OFFICER
OHIO PUBLIC EMPLOYER
ATTN A/P VENDOR
1234 MAIN ST
COLUMBUS OH 43215-9999

RE: John Smith
SSN: XXX-XX-1767

Retirement contributions have been withheld from the earnable salary for the above member and reported to the retirement system. However, a Personal History Record (Form A), covering this employment, has not been filed with the retirement system. The Ohio Revised Code requires that a Personal History Record (Form A) be filed within 30 days of the first day the employee earned wages from which retirement deductions were withheld.

Thank you for your cooperation regarding the above situation. If you have any questions, please feel free to contact an Employer Outreach Representative at 1-888-400-0965 or e-mail us at employeroutreach@opers.org.

Sincerely,
Ohio Public Employees Retirement System

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Here's where you'll see the masked Social Security number

Service Purchase Payroll Deduction Enrollment Letter

OPERS Ohio Public Employees Retirement System
277 East Town Street Columbus, Ohio 43215-4642 1-888-400-0965 www.opers.org

April 24, 2009

Tom Jones
Ohio Public Employer
1234 Main St
Columbus, OH 43215-9999

Re: Service Purchase Payroll Deduction Enrollment
John Smith
XXX-XX-1767

Dear Tom Jones:

OPERS has received and approved a request from your employee referenced above to begin purchasing service credit by payroll deduction. Payroll deductions must begin within sixty days from the date of this letter or no later than the Begin Date indicated below. The following information will assist you in setting up this deduction in your payroll system. Once this deduction begins, please include this amount on your Report of Service Purchase Deductions remitted to OPERS.

Deduction Amount:	\$100.00
Tax Status:	Pre-tax
Deduction Begin Date:	June 1, 2009
Opst Statement ID #:	SP-898696999
Total Purchase Cost:	\$1,000.00

Please be advised the deduction indicated above is a monthly amount. However, you may adjust this amount to accommodate your pay schedule (i.e., bi-weekly, bi-monthly, or weekly) as long as the total deduction taken per month is the amount stated above.

Also note the Total Purchase Cost indicated above is intended only for use as an estimate of the deduction end date. Many factors can alter your employee's deduction end date such as additional payments made directly by your employee and payrolls with insufficient earnings to cover the service purchase deduction. Therefore, OPERS will notify you ninety days prior to the end of this purchase, which will provide you with adequate notification to cease payroll deductions.

Since your employee has elected to have the deduction taken on a pre-tax basis, in accordance with federal and state law, this monthly deduction cannot be increased or decreased, nor can the deductions cease without notification from Outreach Representative at 1-888-400-0965.

Here's where you'll see the masked Social Security number

Start Date Letter

OPERS Ohio Public Employees Retirement System
277 East Town Street Columbus, Ohio 43215-4642 1-888-400-0965 www.opers.org

JULY 31, 2008

TOM JONES
PERSONNEL OFFICER
OHIO PUBLIC EMPLOYER
ATTN A/P VENDOR
1234 MAIN ST
COLUMBUS OH 43215-9999

Re: John Smith
SS# XXX-XX-1767

The Personal History Record (Form A) for the above member certifies the starting date of employment as 05/05/2008. However, the first report of retirement contributions covers employment from 06/05/2008 to 06/20/2008. All public employees as defined in Section 145.01(A)(1) of the Ohio Revised Code are subject to contributing membership in the Ohio Public Employees Retirement System beginning on the first date of employment, unless they are exempted or excluded. Please complete the following information and mark the appropriate line below:

Enter the first date the member was subject to OPERS contribution withholding: _____.

_____ The starting date filed with OPERS is correct. Retirement contributions were withheld and submitted for employment starting on this date and were included on the first report. A monthly breakdown of their gross salary and contributions are as follows:

Gross Salary	Contributions	Gross Salary	Contributions
		July	
		August	

Here's where you'll see the masked Social Security number

Employer Account Summary

Here's where you'll see the masked Social Security number

OPERS EMPLOYER Account Summary
Ohio Public Employees Retirement System • 277 East Town Street • Columbus, Ohio 43215-4642 • 1-888-400-0965

JOHN DOE
PAYROLL CLERK
OHIO VILLAGE OHIO COUNTY
1234 MAIN ST
OHIO VILLAGE, OH 43215

Employer Code No. 4999-00
Transactions from 03/17/2009 to 04/15/2009

Employer Contribution Rate 14.00%

Posting Date	Transaction Description (Detail)	Transaction Amount
03/16/2009	BALANCE AT LAST SUMMARY	\$0.00
04/10/2009	SCP JOHN SMITH ELECTED OFFICIAL XXX-XX-1234 01/01/1996 TO 12/31/2000	\$10,000.00

The employer liability for the following Report of Retirement Contribution(s) are not reflected on this Summary:

REPORT DATE	REPORT AND CONTRIBUTIONS DUE	EMPLOYER LIABILITY DUE	STATUS
03/17/2009	04/30/2009	04/30/2009	Not received by OPERS
			LIABILITY DUE ON 6/1/2009 \$10,000.00
			BALANCE AS OF 4/15/2009 \$10,000.00

Note: All payments, adjustments and credits posted after 04/15/2009 will be reflected on your next summary. Page 1 of 1