Summer Earnings

PERA prohibits recording and distribution of this presentation.

Today's Program

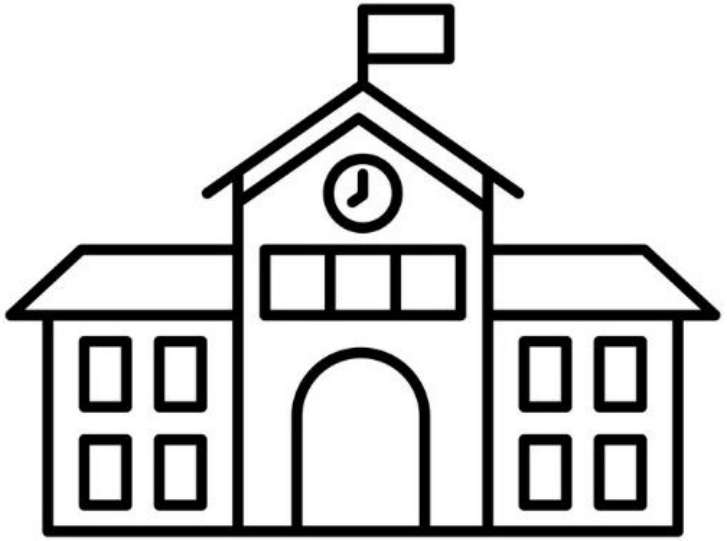
- Introduction to Summer Earnings
- Recommendations and File Reporting
- Report Walk-Through
- Summer Earnings Examples

PERA

The Five W's of Summer Earnings

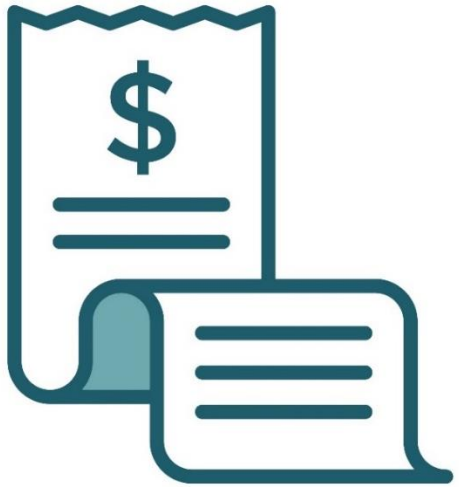
Who completes this report?

- School district employers



What is the *Summer Earnings Report*?

- An audit of school district employees' earnings
- Confirms if earnings are for
  - Actual hours worked; or
  - A summer contract payout



What is the School Fiscal Year Indicator?

- Identifies employees who are being paid summer contract payouts
- Signals PERA to prorate the member's earnings over the months in which the pay was earned

Where

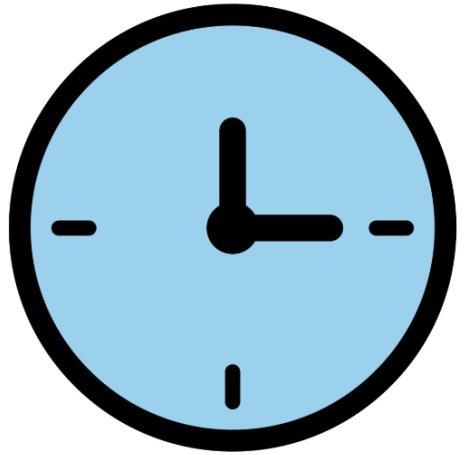
Where is the Fiscal Year Indicator reported?

- Directly on the SDR file; or
- On the *Summer Earnings Report* via ERIS

When

When does this report generate?

- When a school district employee begins to draw their PERA benefit
- There is an influx at the end of each school year in June/July



Why is this report important?

- PERA needs this data to accurately calculate the member's benefit amount
- Incorrect data will cause member to be underpaid/overpaid

If the Fiscal Year Indicator is incorrectly marked…

No:

- PERA will estimate a smaller average salary = **decreased** benefit amount
- Member is being underpaid

Yes:

- PERA will estimate a larger average salary = **inflated** benefit amount
- Member will owe PERA money

Recommendations and File Reporting

PERA Recommendations

- Send all summer payout SDRs at the beginning of the summer
- Submit separate SDRs;
  1. SDR for summer contract employees
  2. SDR for year-round employees and employees who work summer programs

HOME

MEMBER ACCOUNT

SEARCH

Employee

Benefit Recipient

ENROLL MEMBER

New Enrollment

MAINTAIN EMPLOYER

Employer Contacts

TRANSMIT FILE

TRANSMIT TEST FILE

CHANGE PASSWORD

SDR REPORTING

New SDR

SDR History

SDR Summary Report

PENDING REPORTS

No Reports

ERIS Home Page

Broadcast Message

Electronic Funds Transfer for New Users

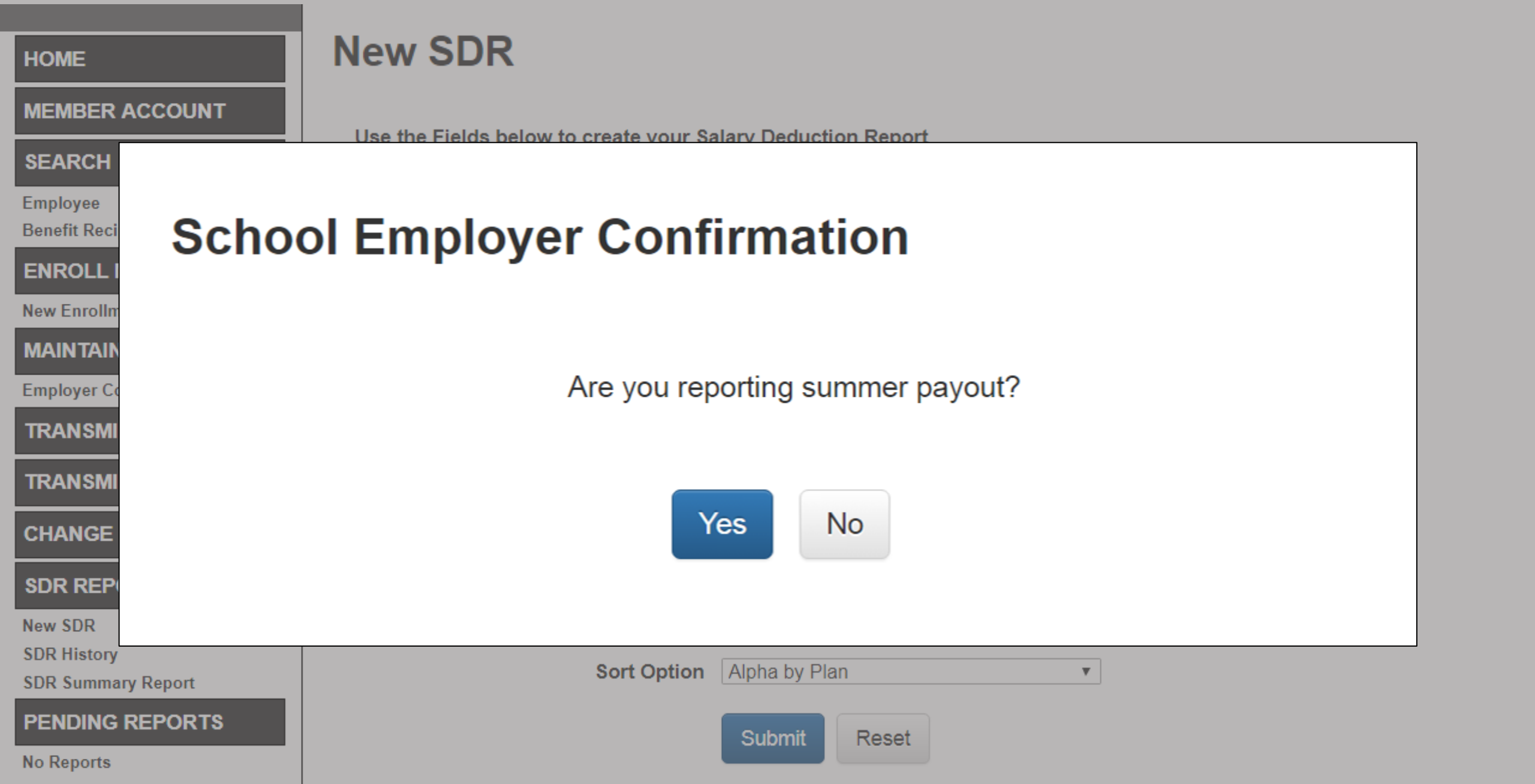
To simplify the process for new EFT users, we have created User IDs and Passwords for employers not already registered.
If you want to start making your PERA payment electronically, access our EFT site and use the following entry keys:

- As the 'Employer ID' input your agency's six-digit PERA ID (without the dash, such as 123400)
- As the EFT 'Password' input the five-digit zip code of your entity's mailing address

Once in the EFT system, you can change your password if you wish. If you have trouble logging in with these instructions, call PERA at 651-296-3636 or 1-888-892-7372 (option 2).

Your User ID and Password have been validated. As an authorized user you may use this system to maintain information on employees of your agency that are members of the Minnesota Public Employees Retirement Association (PERA). By using this tool, you are certifying that the information you transmit is accurate. Certain member information accessible through ERIS is private and shall not be disclosed to any person or agency other than as provided in the Data Privacy laws of this state. For a complete list of terms and conditions for ERIS use, click here.

For the ERIS Glossary, click here.


HOME
MEMBER ACCOUNT
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SDR REP
New SDR
SDR History
SDR Summary Report
PENDING REPORTS
No Reports
New SDR
Use the Fields below to create your Salary Deduction Report
School Employer Confirmation
Are you reporting summer payout?
Yes
No
Sort Option
Alpha by Plan
Submit
Reset

Completing the SDR

Salary Deduction Report

Pay Schedule Semi-Monthly
Pay Calendar Regular
Pay Period 07/01/2025 through 07/15/2025
SDR Status New
Paid Date 07/15/2025

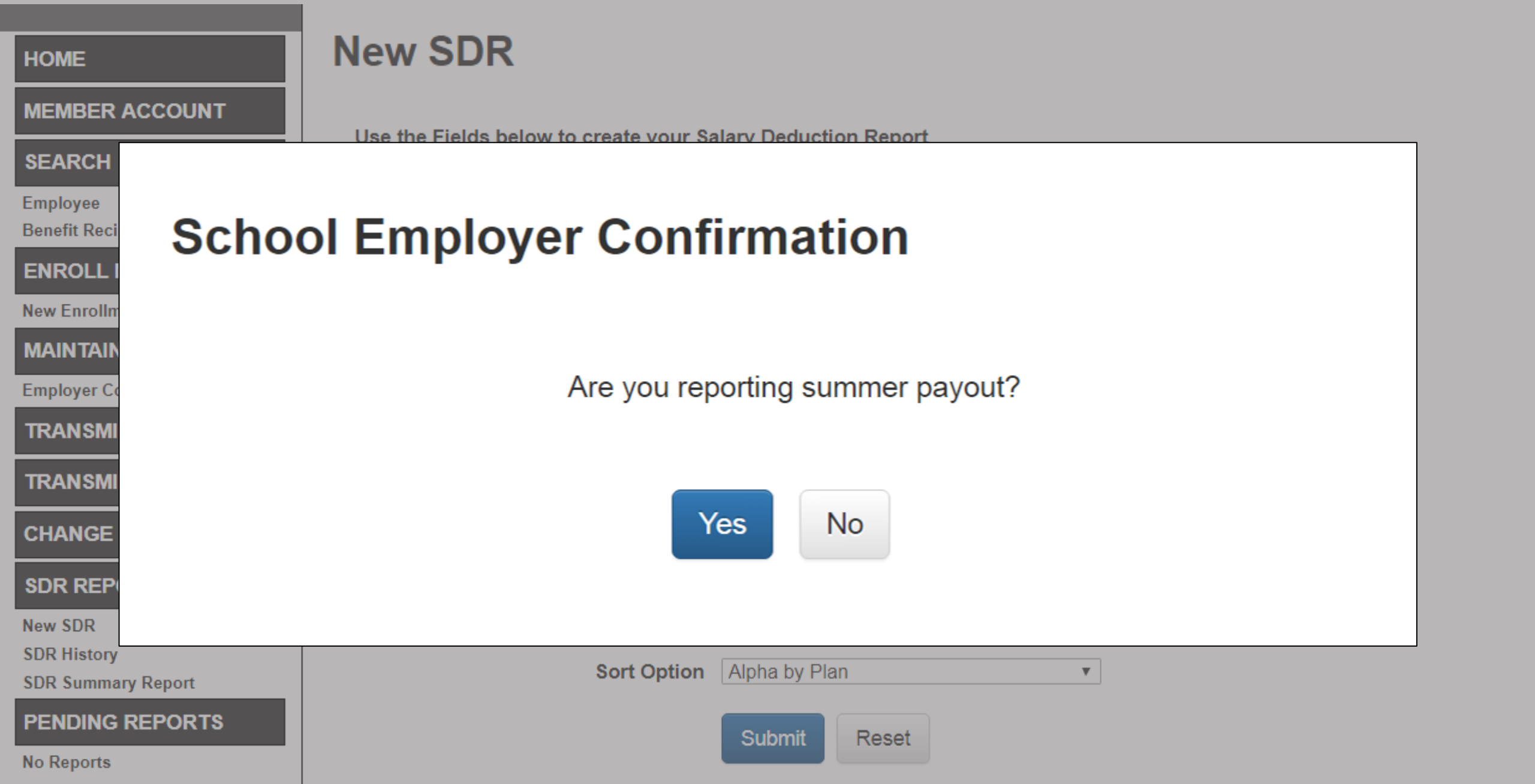
Add Member | Delete SDR
Print | Save | Close

Name Search

Search | Reset

Detail | Summary/Submit to PERA | Note to PERA | Items in Review

Delete	SSN	Member Name	PERA Plan	Pay Type	Total Eligible Earnings	Portion that is Overtime	Member Deduction	Begin Date	End Date	School Year
☐	7013	BEIRNE, BRUNO	CORD	REG	0.00	0.00	0.00	07/01/2025	07/15/2025	2025
☐	1277	CARLUCCI, CRISTEN	CORD	REG	0.00	0.00	0.00	07/01/2025	07/15/2025	2025
☐	5999	ELLWOOD, EDMUND	CORD	REG	0.00	0.00	0.00	07/01/2025	07/15/2025	2025
☐	5402	HODGINS, HERIBERTO	CORD	REG	0.00	0.00	0.00	07/01/2025	07/15/2025	2025
☐	1827	JACQUEMIN, JONATHAN	CORD	REG	0.00	0.00	0.00	07/01/2025	07/15/2025	2025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SDR REP
New SDR
SDR History
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No Reports
New SDR
Use the Fields below to create your Salary Deduction Report
School Employer Confirmation
Are you reporting summer payout?
Yes
No
Sort Option
Alpha by Plan
Submit
Reset

Report Walk-Through

You must review the summer transactions for any fiscal year a member had wages reported during;

a) The summer months; and

b) Their high-five period

School Fiscal Year Indicator

School Fiscal Year Indicator

- **Include** the four-digit School Fiscal Year when reporting summer contract pay issued in June, July, or August
- **Do not include** the fiscal year when reporting salary;
  - That was earned during any non-summer months; or
  - For employees who work year-round

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Benefit Recipient

ENROLL MEMBER

New Enrollment

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Employer Contacts

TRANSMIT FILE

TRANSMIT TEST FILE

CHANGE PASSWORD

SDR REPORTING

PENDING REPORTS

Summer Earnings Verification

ANNUAL LEAVE REPORT

Amend Report Data

ERIS Home Page

Broadcast Message

Electronic Funds Transfer for New Users

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- As the EFT 'Password' input the five-digit zip code of your entity's mailing address

Once in the EFT system, you can change your password if you wish. If you have trouble logging in with these instructions, call PERA at 651-296-3636 or 1-888-892-7372 (option 2).

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PENDING REPORTS

Summer Earnings Verification

ANNUAL LEAVE REPORT

Amend Report Data

Summer Earnings Verification Report

PERA has started to pay estimated monthly retirement, disability or survivor benefits for the individual listed below based on prior employment with your school district. Before we can finalize these benefits, we need to confirm the earnings periods for the summer paychecks that fall in the person's estimated high-five salary period.

For each member, select "Response" to view the transactions that need validation. Refer questions to 651.296.3636 or 1.888.892.7372, option #2.

	SSN (last 4)	Name of Employee	Date Requested
Response	1903	OLSON, OLGA	10/31/2024
Response	5815	DODD, DIANE	11/01/2024
Response	0938	JAMESON, JIM	12/02/2024
Response	2984	LEONG, LANA	03/03/2025

PERA

Summer Earnings Report

Date Requested	11/01/2024
Name of Retiring Member	DODD, DIANE
Date of Termination	05/31/2024

On each line of the report, update “yes” if the pay is a contract payment due from the prior school year, or “no” if the pay is for hours that the member worked during the noted payroll period. As you complete each line, the last column will display the pay that you indicate should be marked with a school fiscal year indicator in PERA’s records.

Submit the report no later than 30 days after the date of request. Refer questions to 651-296-3636 or 1-888-892-7372, option #2 .

Cancel | Save – Do Not Submit to PERA | Save – Submit to PERA | Export to Excel

SUMMER EARNINGS IN PERA RECORDS FOR THIS MEMBER							FOR COMPLETION BY SCHOOL DISTRICT	
Line #	Paid Date	Coverage Start Date	Coverage End Date	PERA-Eligible Earnings	Pay Type	Fiscal Year Indicator	**Are earnings a contracted summer payout?**	Actual Fiscal Year Indicator
1	07/28/2017	07/01/2017	07/15/2017	$738.39	Regular		◯ Yes ◯ No	
2	06/15/2018	06/01/2018	06/15/2018	$719.37	Regular		◯ Yes ◯ No	
3	06/28/2019	06/01/2019	06/15/2019	$1,033.87	Regular		◯ Yes ◯ No	
4	06/30/2020	06/01/2020	06/15/2020	$653.67	Regular		◯ Yes ◯ No	

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2	06/15/2018	06/01/2018	06/15/2018	$719.37	Regular		◯ Yes ◯ No	
3	06/28/2019	06/01/2019	06/15/2019	$1,033.87	Regular		◯ Yes ◯ No	
4	06/30/2020	06/01/2020	06/15/2020	$653.67	Regular		◯ Yes ◯ No	
5	06/30/2021	06/01/2021	06/15/2021	$1,208.01	Regular		◯ Yes ◯ No	
6	07/12/2021	06/16/2021	07/01/2021	$1,400.76	Regular		◯ Yes ◯ No	
7	07/29/2022	07/01/2022	07/15/2022	$499.21	Regular		◯ Yes ◯ No	
8	08/31/2022	08/01/2022	08/15/2022	$798.54	Regular	2023	◯ Yes ◯ No	
9	06/15/2023	05/16/2023	05/31/2023	$1,541.82	Regular	2023	◯ Yes ◯ No	
10	06/14/2024	05/16/2024	05/31/2024	$1,511.43	Regular	2024	◯ Yes ◯ No	

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Final View of Completed Report

SUMMER EARNINGS IN PERA RECORDS FOR THIS MEMBER							FOR COMPLETION BY SCHOOL DISTRICT	
Line #	Paid Date	Coverage Start Date	Coverage End Date	PERA-Eligible Earnings	Pay Type	Fiscal Year Indicator	**Are earnings a contracted summer payout?**	Actual Fiscal Year Indicator
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2	06/15/2018	06/01/2018	06/15/2018	$719.37	Regular		○ Yes ◉ No	
3	06/28/2019	06/01/2019	06/15/2019	$1,033.87	Regular		○ Yes ◉ No	
4	06/30/2020	06/01/2020	06/15/2020	$653.67	Regular		◉ Yes ○ No	2020
5	06/30/2021	06/01/2021	06/15/2021	$1,208.01	Regular		○ Yes ◉ No	
6	07/12/2021	06/16/2021	07/01/2021	$1,400.76	Regular		○ Yes ◉ No	
7	07/29/2022	07/01/2022	07/15/2022	$499.21	Regular		○ Yes ◉ No	
8	08/31/2022	08/01/2022	08/15/2022	$798.54	Regular	2023	◉ Yes ○ No	2023
9	06/15/2023	05/16/2023	05/31/2023	$1,541.82	Regular	2023	○ Yes ◉ No	
10	06/14/2024	05/16/2024	05/31/2024	$1,511.43	Regular	2024	○ Yes ◉ No	

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Notes

2	06/15/2018	06/01/2018	06/15/2018	$719.37	Regular		○Yes ◉No	
3	06/28/2019	06/01/2019	06/15/2019	$1,033.87	Regular		○Yes ◉No	
4	06/30/2020	06/01/2020	06/15/2020	$653.67	Regular		◉Yes ○No	2020
5	06/30/2021	06/01/2021	06/15/2021	$1,208.01	Regular		○Yes ◉No	
6	07/12/2021	06/16/2021	07/01/2021	$1,400.76	Regular		○Yes ◉No	
7	07/29/2022	07/01/2022	07/15/2022	$499.21	Regular		○Yes ◉No	
8	08/31/2022	08/01/2022	08/15/2022	$798.54	Regular	2023	◉Yes ○No	2023
9	06/15/2023	05/16/2023	05/31/2023	$1,541.82	Regular	2023	○Yes ◉No	
10	06/14/2024	05/16/2024	05/31/2024	$1,511.43	Regular	2024	○Yes ◉No	

Cancel | Save – Do Not Submit to PERA | Save – Submit to PERA | Export to Excel

Notes

Final View of Completed Report

SUMMER EARNINGS IN PERA RECORDS FOR THIS MEMBER							FOR COMPLETION BY SCHOOL DISTRICT	
Line #	Paid Date	Coverage Start Date	Coverage End Date	PERA-Eligible Earnings	Pay Type	Fiscal Year Indicator	**Are earnings a contracted summer payout?**	Actual Fiscal Year Indicator
1	07/28/2017	07/01/2					○ Yes ◉ No	
2	06/15/2018	06/01/2					○ Yes ◉ No	
3	06/28/2019	06/01/2					○ Yes ◉ No	
4	06/30/2020	06/01/2					◉ Yes ○ No	2020
5	06/30/2021	06/01/2					○ Yes ◉ No	
6	07/12/2021	06/16/2					○ Yes ◉ No	
7	07/29/2022	07/01/2					○ Yes ◉ No	
8	08/31/2022	08/01/2022	08/15/2022	$798.54	Regular	2023	◉ Yes ○ No	2023
9	06/15/2023	05/16/2023	05/31/2023	$1,541.82	Regular	2023	○ Yes ◉ No	
10	06/14/2024	05/16/2024	05/31/2024	$1,511.43	Regular	2024	○ Yes ◉ No	

Data succesfully saved and submitted.

OK

Cancel | Save – Do Not Submit to PERA | Save – Submit to PERA | Export to Excel

Summer Earnings Examples

Summer Earnings Report

Summer Earnings Verification Report

Employer ID: 178237 PEANUTS ELEMENTARY

	SSN (last 4)	Name of Employee	Date Requested
Response	1294	BROWN, CHARLIE	03/11/2025
Response	5878	BROWN, SNOOPY	03/21/2025
Response	1169	PEN, PIG	04/05/2025
Response	3462	PATTY, PEPPERMINT	04/15/2025

Year-Round Employee

Transaction	Paid Date	Coverage Start Date	Coverage End Date	Eligible Earnings	Original FY Indicator	Upon Review, Answer Y/N	Updated FY Indicator
1	06/30/2022	06/01/2022	06/15/2022	$505.81			
2	07/15/2022	06/16/2022	06/30/2022	$122.19			
3	07/31/2022	07/01/2022	07/15/2022	$200.49			
4	08/15/2022	07/16/2022	07/31/2022	$410.32			
5	08/31/2022	08/01/2022	08/15/2022	$420.78			
6	09/15/2022	08/16/2022	08/31/2022	$135.66			
7	06/30/2023	06/01/2023	06/15/2023	$625.15			
8	07/15/2023	06/16/2023	06/30/2023	$575.25			
9	07/31/2023	07/01/2023	07/15/2023	$555.50			
10	08/15/2023	07/16/2023	07/31/2023	$600.80			
11	08/31/2023	08/01/2023	08/15/2023	$490.75			
12	09/15/2023	08/16/2023	08/31/2023	$580.90			

Nine-Month Employee

Transaction	Paid Date	Coverage Start Date	Coverage End Date	Eligible Earnings	Original FY Indicator	Upon Review, Answer Y/N	Updated FY Indicator
1	06/15/2020	06/01/2020	06/15/2020	$998.51			
2	06/30/2020	06/16/2020	06/30/2020	$998.51			
3	07/15/2020	09/03/2019	06/05/2020	$998.51	2020		
4	07/31/2020	09/03/2019	06/05/2020	$998.51	2020		
5	08/14/2020	09/03/2019	06/05/2020	$998.51	2020		
6	08/31/2020	09/03/2019	06/05/2020	$998.51	2020		
7	06/15/2021	06/01/2021	06/15/2021	$1,037.68			
8	06/30/2021	06/16/2020	06/30/2021	$5,191.60			
9	06/15/2022	06/01/2022	06/15/2022	$1,086.42			
10	06/30/2022	06/16/2022	06/30/2022	$6,127.36	2022		
11	06/15/2023	06/01/2023	06/15/2023	$931.86			
12	06/30/2023	09/06/2022	06/06/2023	$5,559.57			

Nine-Month Employee

Transaction	Paid Date	Coverage Start Date	Coverage End Date	Eligible Earnings	Original FY Indicator	Upon Review, Answer Y/N	Updated FY Indicator
1	06/15/2020	06/01/2020	06/15/2020	$998.51		No	
2	06/30/2020	06/16/2020	06/30/2020	$998.51		Yes	+2020
3	07/15/2020	09/03/2019	06/05/2020	$998.51	2020	Yes	2020
4	07/31/2020	09/03/2019	06/05/2020	$998.51	2020	Yes	2020
5	08/14/2020	09/03/2019	06/05/2020	$998.51	2020	Yes	2020
6	08/31/2020	09/03/2019	06/05/2020	$998.51	2020	Yes	2020
7	06/15/2021	06/01/2021	06/15/2021	$1,037.68			
8	06/30/2021	06/16/2020	06/30/2021	$5,191.60			
9	06/15/2022	06/01/2022	06/15/2022	$1,086.42			
10	06/30/2022	06/16/2022	06/30/2022	$6,127.36	2022		2022
11	06/15/2023	06/01/2023	06/15/2023	$931.86			
12	06/30/2023	09/06/2022	06/06/2023	$5,559.57			

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2	06/30/2020	06/16/2020	06/30/2020	$998.51		Yes	+2020
3	07/15/2020	09/03/2019	06/05/2020	$998.51	2020	Yes	2020
4	07/31/2020	09/03/2019	06/05/2020	$998.51	2020	Yes	2020
5	08/14/2020	09/03/2019	06/05/2020	$998.51	2020	Yes	2020
6	08/31/2020	09/03/2019	06/05/2020	$998.51	2020	Yes	2020
7	06/15/2021	06/01/2021	06/15/2021	$1,037.68		No	
8	06/30/2021	06/16/2020	06/30/2021	$5,191.60		Yes	+2021
9	06/15/2022	06/01/2022	06/15/2022	$1,086.42		No	
10	06/30/2022	06/16/2022	06/30/2022	$6,127.36	2022	Yes	2022
11	06/15/2023	06/01/2023	06/15/2023	$931.86		No	
12	06/30/2023	09/06/2022	06/06/2023	$5,559.57		Yes	+2023

Year-Round Employee

Transaction	Paid Date	Coverage Start Date	Coverage End Date	Eligible Earnings	Original Fiscal Year Indicator	Upon Review, Answer Y/N	Updated Fiscal Year Indicator
1	06/15/2020	06/01/2020	06/14/2020	$1,800.00			
2	06/30/2020	06/15/2020	06/30/2020	$1,800.00			
3	07/15/2020	07/01/2020	07/15/2020	$1,800.00			
4	07/31/2020	07/16/2020	07/31/2020	$1,800.00			
5	08/15/2020	08/01/2020	08/15/2020	$1,800.00			
6	08/31/2020	08/16/2020	08/31/2020	$1,800.00			
7	06/15/2021	06/01/2021	06/15/2021	$2,000.00			
8	06/30/2021	06/15/2021	06/30/2021	$2,000.00			
9	07/15/2021	07/01/2021	07/15/2021	$2,000.00			
10	07/31/2021	07/16/2021	07/31/2021	$2,000.00			
11	08/15/2021	08/01/2021	08/15/2021	$2,000.00			
12	08/31/2021	08/16/2021	08/31/2021	$2,000.00			

Nine-Month Employee

Transaction	Paid Date	Coverage Start Date	Coverage End Date	Eligible Earnings	Original FY Indicator	Upon Review, Answer Y/N	Updated FY Indicator
1	06/15/2023	06/01/2023	06/15/2023	$1,200.00	2023		
2	06/30/2023	06/16/2023	06/30/2023	$1,200.00	2023		
3	07/15/2023	07/01/2023	07/15/2023	$1,200.00	2023		
4	07/31/2023	07/16/2023	07/31/2023	$1,200.00			
5	07/31/2023	07/01/2023	07/15/2023	$250.00	2023		
6	08/15/2023	08/01/2023	08/15/2023	$1,200.00			
7	08/31/2023	08/16/2023	08/31/2023	$1,200.00	2023		
8	08/31/2023	08/01/2023	08/15/2023	$250.00			

Recap

- The *Summer Earnings Report* looks at transactions paid in June – August during a member's high-five period
- Employers must indicate whether the wages were pro-rated contract wages or wages earned during the current pay period
- PERA only wants a FY Indicator on contract wages paid in June – August
- Report all Summer Payout SDRs;
  - Once at the beginning of summer
  - Separately from year-round employees

PERA is governed by Minnesota Statutes; especially chapters 11A, 353, 353A, 353D, 353E, 353F, 353G, 356 and 356A.

Changes to PERA's plans, including benefit provisions and contribution rates, are made through the introduction and passage of legislation by the Minnesota Legislature.

Disclaimer

Disclaimer:

Our programs are intended to provide general information; the rights and obligations of PERA members are governed by state and federal laws, rules, and regulations. The Minnesota Legislature or the federal government may change the statutes, rules, and regulations governing PERA at any time. If there is a discrepancy between the law governing PERA and the information contained in this presentation, the statutes and regulations will govern.

Wrap-up and questions

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Select **Option 2** for questions