



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



WHEN

WHERE

WHAT

WHO

HOW

WHY

The Five W's of Summer Earnings



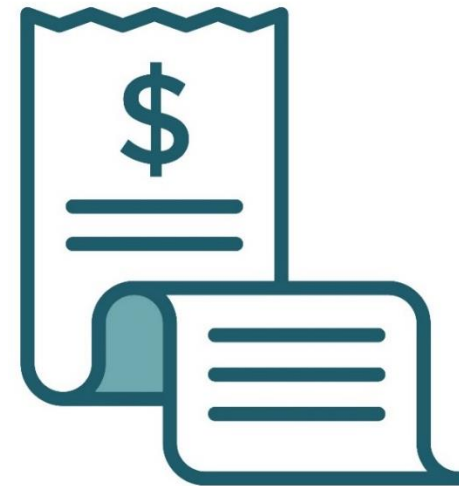
Who completes this report?

- 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



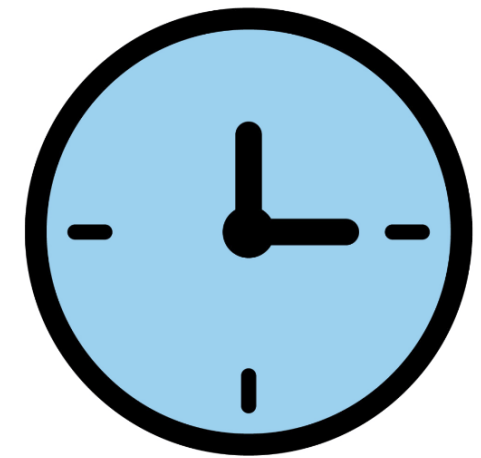
Where is the Fiscal Year Indicator reported?

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



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

SEARCH

Employee

Benefit Recip

ENROLL I

New Enrollm

MAINTAIN

Employer Co

TRANSMI

TRANSMI

CHANGE

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?

Sort Option

Alpha by Plan

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

Name Search

Delete	SSN	Member Name	PERA Plan	Pay Type	Total Eligible Earnings	Portion that is Overtime	Member Deduction	Begin Date	End Date	School Year
<input type="checkbox"/>	7013	BEIRNE, BRUNO	CORD	REG ▼	0.00	0.00	0.00	07/01/2025 📅	07/15/2025 📅	2025
<input type="checkbox"/>	1277	CARLUCCI, CRISTEN	CORD	REG ▼	0.00	0.00	0.00	07/01/2025 📅	07/15/2025 📅	2025
<input type="checkbox"/>	5999	ELLWOOD, EDMUND	CORD	REG ▼	0.00	0.00	0.00	07/01/2025 📅	07/15/2025 📅	2025
<input type="checkbox"/>	5402	HODGINS, HERIBERTO	CORD	REG ▼	0.00	0.00	0.00	07/01/2025 📅	07/15/2025 📅	2025
<input type="checkbox"/>	1827	JACQUEMIN, JONATHAN	CORD	REG ▼	0.00	0.00	0.00	07/01/2025 📅	07/15/2025 📅	2025

HOME

MEMBER ACCOUNT

SEARCH

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CHANGE

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?

Sort Option

Alpha by Plan



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

- **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



HOME**MEMBER ACCOUNT****SEARCH**

Employee

Benefit Recipient

ENROLL MEMBER

New Enrollment

MAINTAIN EMPLOYER

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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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](#).

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[HOME](#)[MEMBER ACCOUNT](#)[SEARCH](#)[Employee](#)[Benefit Recipient](#)[ENROLL MEMBER](#)[New Enrollment](#)[MAINTAIN EMPLOYER](#)[Employer Contacts](#)[TRANSMIT FILE](#)[TRANSMIT TEST FILE](#)[CHANGE PASSWORD](#)[SDR REPORTING](#)[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

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 .

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		<input type="radio"/> Yes <input type="radio"/> No	
2	06/15/2018	06/01/2018	06/15/2018	\$719.37	Regular		<input type="radio"/> Yes <input type="radio"/> No	
3	06/28/2019	06/01/2019	06/15/2019	\$1,033.87	Regular		<input type="radio"/> Yes <input type="radio"/> No	
4	06/30/2020	06/01/2020	06/15/2020	\$653.67	Regular		<input type="radio"/> Yes <input type="radio"/> No	

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

Cancel

Save – Do Not Submit to PERA

Save – Submit to PERA

Export to Excel

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	07/01/2017	07/15/2017	\$738.39	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
2	06/15/2018	06/01/2018	06/15/2018	\$719.37	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
3	06/28/2019	06/01/2019	06/15/2019	\$1,033.87	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
4	06/30/2020	06/01/2020	06/15/2020	\$653.67	Regular		<input checked="" type="radio"/> Yes <input type="radio"/> No	2020
5	06/30/2021	06/01/2021	06/15/2021	\$1,208.01	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
6	07/12/2021	06/16/2021	07/01/2021	\$1,400.76	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
7	07/29/2022	07/01/2022	07/15/2022	\$499.21	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
8	08/31/2022	08/01/2022	08/15/2022	\$798.54	Regular	2023	<input checked="" type="radio"/> Yes <input type="radio"/> No	2023
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10	06/14/2024	05/16/2024	05/31/2024	\$1,511.43	Regular	2024	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Cancel

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2	06/15/2018	06/01/2018	06/15/2018	\$719.37	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
3	06/28/2019	06/01/2019	06/15/2019	\$1,033.87	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
4	06/30/2020	06/01/2020	06/15/2020	\$653.67	Regular		<input checked="" type="radio"/> Yes <input type="radio"/> No	2020
5	06/30/2021	06/01/2021	06/15/2021	\$1,208.01	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
6	07/12/2021	06/16/2021	07/01/2021	\$1,400.76	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
7	07/29/2022	07/01/2022	07/15/2022	\$499.21	Regular		<input type="radio"/> Yes <input checked="" type="radio"/> No	
8	08/31/2022	08/01/2022	08/15/2022	\$798.54	Regular	2023	<input checked="" type="radio"/> Yes <input type="radio"/> No	2023
9	06/15/2023	05/16/2023	05/31/2023	\$1,541.82	Regular	2023	<input type="radio"/> Yes <input checked="" type="radio"/> No	
10	06/14/2024	05/16/2024	05/31/2024	\$1,511.43	Regular	2024	<input type="radio"/> Yes <input checked="" type="radio"/> 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	07/01/2017					<input type="radio"/> Yes <input checked="" type="radio"/> No	
2	06/15/2018	06/01/2018					<input type="radio"/> Yes <input checked="" type="radio"/> No	
3	06/28/2019	06/01/2019					<input type="radio"/> Yes <input checked="" type="radio"/> No	
4	06/30/2020	06/01/2020					<input checked="" type="radio"/> Yes <input type="radio"/> No	2020
5	06/30/2021	06/01/2021					<input type="radio"/> Yes <input checked="" type="radio"/> No	
6	07/12/2021	06/16/2021					<input type="radio"/> Yes <input checked="" type="radio"/> No	
7	07/29/2022	07/01/2022					<input type="radio"/> Yes <input checked="" type="radio"/> No	
8	08/31/2022	08/01/2022	08/15/2022	\$798.54	Regular	2023	<input checked="" type="radio"/> Yes <input type="radio"/> No	2023
9	06/15/2023	05/16/2023	05/31/2023	\$1,541.82	Regular	2023	<input type="radio"/> Yes <input checked="" type="radio"/> No	
10	06/14/2024	05/16/2024	05/31/2024	\$1,511.43	Regular	2024	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Data successfully saved and submitted.



Summer Earnings Examples



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

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			

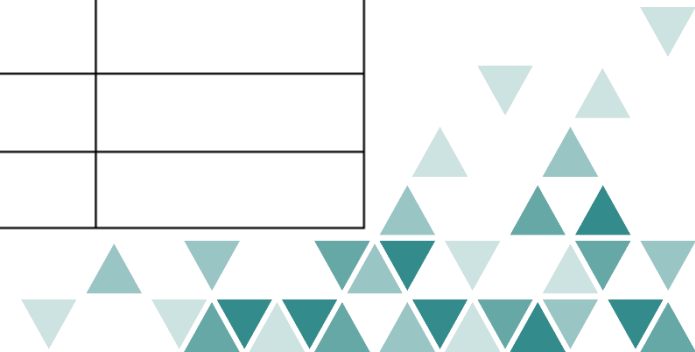


Transaction	Paid Date	Coverage Start Date	Coverage End Date	Eligible Earnings	Original FY Indicator	Upon Review, Answer Y/N	Updated FY Indicator
1	06/15/2020	06/01/2020	06/15/2020	\$998.51			
2	06/30/2020	06/16/2020	06/30/2020	\$998.51			
3	07/15/2020	09/03/2019	06/05/2020	\$998.51	2020		
4	07/31/2020	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			

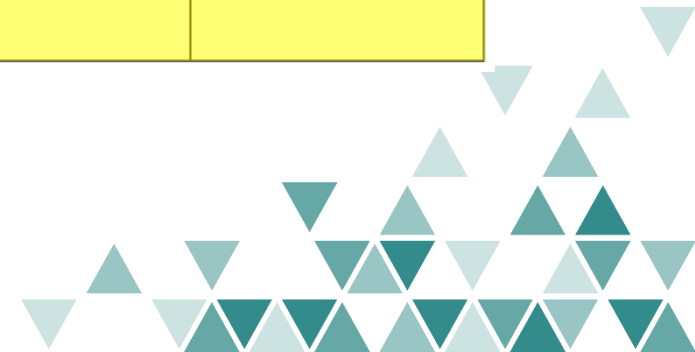
Transaction	Paid Date	Coverage Start Date	Coverage End Date	Eligible Earnings	Original FY Indicator	Upon Review, Answer Y/N	Updated FY Indicator
1	06/15/2020	06/01/2020	06/15/2020	\$998.51		No	
2	06/30/2020	06/16/2020	06/30/2020	\$998.51		Yes	+2020
3	07/15/2020	09/03/2019	06/05/2020	\$998.51	2020	Yes	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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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		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

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			



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			



- 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.



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Wrap-up and questions

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