

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



EMPLOYER NEWS

AUGUST
2023

- 1 Results of 2023 legislative session
- 2 Three steps to hiring retirees
- 3 Use updated beneficiary forms
- 5 Reminder: Include your employer number
- 5 Registration open for 'Destination: Retirement,' the annual PERS Expo
- 6 EDX tip: The right way to enter employee addresses

QUICK LINKS

[PERS employer website](#)

[Newsletter archive](#)

[SB 1049 programs](#)

SUPPORT

[Employer Service Center](#)

[Employer support email](#)

[Contact PERS](#)



Pacific tree frog

Results of 2023 legislative session

The 2023 Oregon Legislative Session ended June 25, 2023.

Here are the results of some of the bills that affect PERS.

This list is not comprehensive. PERS is compiling a list of all the bills that affect the PERS agency and the PERS plan. We will communicate with employers about specific bills through our website, this employer newsletter, and other communications as needed.

PASSED

- ✓ **House Bill (HB) 2054** — Add deputy district attorneys to the definition of “police officer” for PERS purposes, giving them Police and Fire (P&F) benefits.
- ✓ **HB 2283** — Clean up language, align standards where appropriate, and align statutes to agency practice in some statutes to prepare for PERS Modernization Program.
- ✓ **HB 2284** — Increase the fee charged by PERS to set up an account for an alternate payee (typically in cases of divorce). Raises the fee from the current \$300 to \$1,300 to reflect the actual administrative cost. Tie fee adjustments to Consumer Price Index yearly (beginning in 2025) to keep administrative fee in line with actual cost.
- ✓ **HB 2285** — Update Social Security statutes to remove obsolete references to the PERS Director’s previous role as state social security administrator.
- ✓ **HB 2296** — Extend the Senate Bill (SB) 1049 Work After Retirement program for another 10 years to 2034. The program allows most retirees to work unlimited hours for a PERS-participating employer.
- ✓ **HB 5033** — Approve PERS agency budget for 2023-25.

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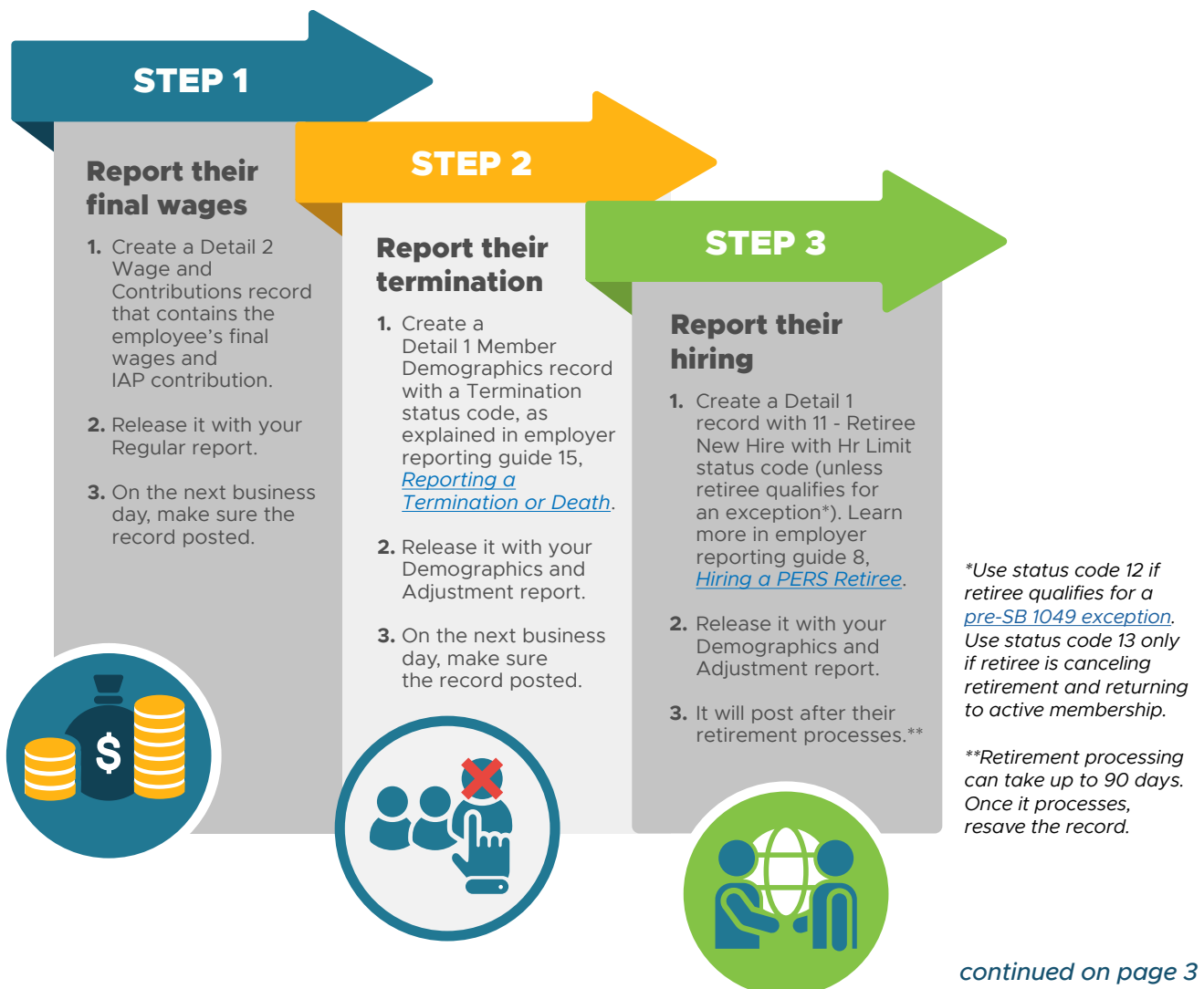
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NOT PASSED

- ⊗ **HB 2297** — Allow employers to purchase up to three years of military service credit for employees.
- ⊗ **HB 2875** — Raise the limit on average overtime for Oregon State Police.
- ⊗ **HB 3387** — Allow P&F members to retire at a lower retirement age if they had served 25 years in a P&F position, regardless of position at time of retirement.
- ⊗ **SB 987** — Have PERS study how to reduce contribution rates for charter schools.

Three steps to hiring retirees

PERS retirees are able to return to work for a PERS-participating employer while maintaining their “retired member” status and receiving their retirement benefits. However, their employer (or employers) must follow three steps to avoid delaying a retiree’s benefit payments.



continued on page 3

continued from page 2

Tips

Status code	Retired Oregon Public Service Retirement Plan (OPSRP) members are always hired with a Detail 1 - 11 Retiree With Hour Limit status code. Tier One/Tier Two are also status code 11 unless they fall under a preexisting exception to the hour limit .
Membership plan	Retirees stay in the plan they were in when they retired: Tier One, Tier Two, or OPSRP. Do not change their plan in your system.
Job class	Be sure to update the employee's new hire record to match their current job, regardless of what kind of work a retiree did before they retired. For example, if a career police officer retires and seven months later takes a position at a school district, their new job will have a school employee 09 job class.
Wage code	Unless you are reporting retiree wages prior to 2020, use wage code 17 Retiree Wage – ER Rate to report retiree wages.
If record suspends (fails to post)	If a Detail 1 retiree new-hire record and any subsequent Detail 2 retiree wage records suspend, wait at least 90 days to re-save the records. Post-retirement employment segments and associated wages will not post until PERS staff have processed the employee's retirement, which takes up to 90 days. If you are still having trouble getting records to post, contact your ESC account representative .
Disability retirees	Different rules apply to hiring disability retirees. For help hiring someone on disability retirement, contact your ESC representative .

Learn more

For a detailed explanation of the rules for hiring a PERS retiree, read the [Work After Retirement webpage](#) for employers.

Use updated beneficiary forms

PERS will no longer accept beneficiary forms that are older than 2019.

If you have copies of the forms shown below that you provide to employees, check the date on the bottom of the page. If the form is older than 2019, go to the links provided below and print or download a new form.

Tier One/Tier Two Pre-Retirement Beneficiary Designation form

This form was updated in 2019. Use the version dated 9/25/2019.

Tier One/Tier Two Pre-Retirement Beneficiary Designation
 This form is strictly for Tier One/Tier Two members.
 A separate designation form is required for the Individual Account Program (IAP).

Section A: Member information

First name	MI	Last name	PERS ID (optional)
Mailing address (street or PO box)			Social Security number (SSN)*
City	State	ZIP code	Country
Date of birth (mm/dd/yyyy)			
Home phone number	Work phone number	Cell phone number	Personal email

Section B: Beneficiary designation (select only one)

SPECIFIC - I elect to use the Specific designation. (Complete Section C and D.)

STANDARD - I elect to use the Standard designation. (Complete only Section D.)

The standard designation directs PERS to pay benefits in the order listed below:

- 1) Your spouse, if legally married at the time of death. If not married, then to
- 2) Your child** or children in equal shares. If any of your children are deceased, their portion is equally divided between their children who are alive at the time of your death. If all of your children predecease you, the benefit will be awarded to your grandchildren living at the time of your death, in equal shares. If no children or grandchildren survive you, then to
- 3) Your mother and father in equal shares, or to the survivor. If neither survives, then to
- 4) Your brothers and sisters in equal shares, and the share of any brother or sister who does not survive you, to his or her children living at the time of your death in equal shares. If none of your brothers or sisters survive you, to the children of your brothers and sisters living at the time of your death in equal shares. If neither your siblings nor their children survive you, then to
- 5) Your estate.

**Natural born and adopted children are considered "children" even if you selected the standard designation before or after their adoption or birth. If your children are adopted by someone else, they are not considered your "children" under the standard designation. If you wish to name the adopted-out children as your beneficiary, use the specific designation part of this form.

Section C: Specific designation (persons, charity, trust, or estate) instructions

Naming specific beneficiaries
 Providing the requested information assists in locating your beneficiary.

If you need to add more beneficiaries, attach an additional sheet of paper that includes all the same information listed in the table for each beneficiary. Include your name and SSN at the top of each additional sheet.

- The percentages assigned to primary beneficiaries must total 100 percent.
- If you do not assign percentages, the beneficiaries on that level (primaries or alternates under each specific primary) will share equally.

Form # 459-094 (9/25/2019) SL3 HM code 2208 Page 1 of 3

9/25/2019

IAP Pre-Retirement Designation of Beneficiary form

This form was updated this year. Use the version dated 4/3/2023.

IAP Pre-Retirement Beneficiary Designation
 This form is strictly for the Individual Account Program (IAP).

Things to consider

- You must fill out a beneficiary form for the Individual Account Program (IAP) even if you have already submitted a PERS Tier One/Tier Two Pre-Retirement Beneficiary form.
- **It is important that you file a Designation of Beneficiary form with PERS for your IAP account.** If you die before retirement and there is no IAP Designation of Beneficiary form on file, distribution of your IAP account will be in accordance with statute, in the following order of priority: your surviving spouse or other person who is constitutionally required to be treated in the same manner as a spouse, your surviving children, and your estate.
- If your designated beneficiary predeceases you, any IAP death benefits that might be due and payable will be distributed in accordance with statute.
- If you have an IAP and an alternate payee IAP account, you need to fill out a separate form for each account.

Information for married applicants

- Your IAP account must be paid to your spouse unless your spouse consents to a different beneficiary.
- If you want to designate someone other than your spouse, your spouse must sign a notarized consent.
- Your spouse can revoke this consent up to the time of your death. To revoke spousal consent, your spouse must complete and submit the IAP: *Revocation of Spousal Consent of Beneficiary Designation* form. Once PERS accepts and approves the revocation form, your spouse will be considered the beneficiary unless PERS receives another valid IAP Designation of Beneficiary form.
- If you name your spouse as beneficiary and you get divorced, your spouse will be deemed as having predeceased you unless you or a court order expressly designates your former spouse to continue as beneficiary after the effective date of your divorce. This means that your former spouse is no longer your beneficiary unless otherwise provided by you or a court order.
- **If your spouse has consented to another beneficiary and you have designated a primary beneficiary other than your spouse in Section C, your spouse must sign the form in front of a notary to complete Section D.**

Instructions for form #459-46 (4/3/2023) SL3 HM Code: 12208

(4/3/2023)

There is no pre-retirement beneficiary designation form for OPSRP members. If an OPSRP member dies before retirement, PERS can only pay a death benefit to their spouse, former spouse under a court order, or any other person required to be treated like a spouse.



ONLINE NOTARIZATION

PERS now accepts documents with remote online notarization by vendors who meet the requirements of the Oregon Secretary of State. Learn more on the [Oregon Secretary of State website](https://www.oregon.gov/secretary).



Reminder

Include your employer number

When leaving a voice message or emailing the Employer Service Center, make sure to include your employer number.

EMPLOYER DATA EXCHANGE

HS

HIGH SCHOOL #27

Employer Number: 06000

ESC representatives need your employer number to look up your account. Providing it in your voice message or email helps them assist you faster.

Don't know your number? Simply log into EDX, go to the employer home page, and jot down the five-digit number under the employer name.

Registration open for 'Destination: Retirement,' the annual PERS Expo

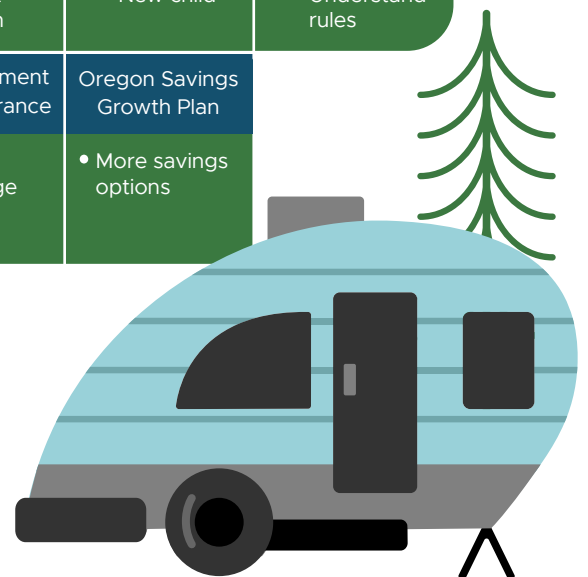
Mark your calendar for October 10 and 11, 2023

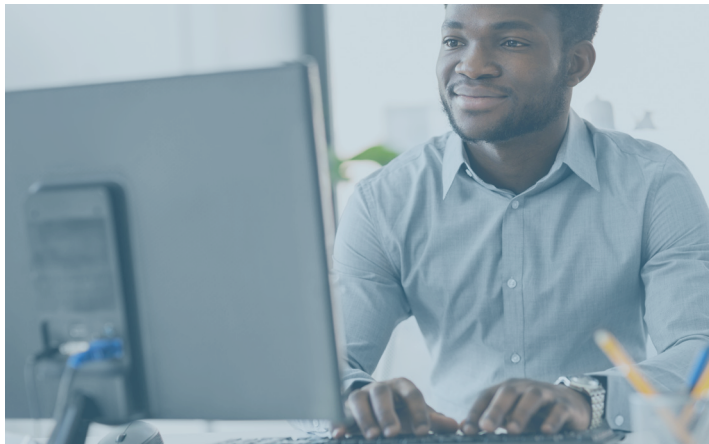
REGISTER NOW

The entirely virtual PERS Expo will feature two days of live, interactive, and on-demand presentations and question-and-answer sessions about PERS retirement benefits. The content repeats on the second day, so there is no need to attend both days.

Whether retiring in three months or 30 years, PERS members can learn about:

Retirement benefits	When to talk to PERS	When and how to retire
<ul style="list-style-type: none"> • Pension • Individual Account Program 	<ul style="list-style-type: none"> • Marriage • Divorce • New child 	<ul style="list-style-type: none"> • Maximize benefits • Understand rules
<ul style="list-style-type: none"> • Costs • Coverage 	<p>Oregon Savings Growth Plan</p> <ul style="list-style-type: none"> • More savings options 	





Designating a unit number

When designating a particular location, use these USPS-approved unit designators.

Designator	Abbreviation
Apartment	APT
Building	BLDG
Floor	FL
Suite	STE
Unit	UNIT
Room	RM
Department	DEPT
#	Must have a space after (e.g., # 425)

EDX tip

The right way to enter employee addresses

When entering or changing an employee's address in EDX, follow guidelines from the US Postal Service (USPS).

First Name	<input type="text" value="JANE"/>	
Last Name	<input type="text" value="DOE"/>	All capital letters
Middle Name	<input type="text"/>	
Name Change Indicator	<input type="text" value="N"/>	
Address - 1	<input type="text" value="123 FIRST ST UNIT 204"/>	Address on one line, if possible
Address - 2	<input type="text"/>	
Address - 3	<input type="text"/>	No punctuation or symbols
City	<input type="text" value="BAKER CITY"/>	
State	<input type="text" value="OREGON"/>	
Zip - 1	<input type="text" value="97814"/>	For four-digit extension, if you have it
Zip - 2	<input type="text"/>	
Province	<input type="text"/>	Only for foreign addresses
Country Code	<input type="text" value="USA"/>	

