OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Employer Outreach Winter 2024

Theresa Tabish and Alison Burman

Employer Service Center

Agenda

- Preparing for year-end
- Employer support
- Questions and answers

Preparing for year-end

- Year-end reconciliation check list
- Get your reports posted
- Correct your suspended records
- Run reports
- Gold Star program

Preparing for year-end
Year-end reconciliation checklist

All Regular reports for 2023 posted by
March 5 deadline.

Inactive employees terminated.

Eligibility reports run (current and prior year).

Suspended records cleared.

Oregon PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Preparing for year-end
Get your reports posted

Top **8** benefits for your employer reporting team and your bottom line.

Prior-year earnings paid

More accurate rate

More accurate member annual statements

Easier reconciling

Smaller workload

More accurate budgeting

Faster retirement processing

Fewer corrections

100% SUBMITTED

Preparing for year-end
Correct your suspended records

When you complete a report and release it, EDX checks it for errors during the overnight batch run.

If it finds an error, EDX "suspends" the report. Each record with an error has a message explaining the error.

ADD/EDIT A MEMBER RECORD

The status of this member record is: **Suspended**

> ⚠ **Error Messages For Member**
>
> S - Dates reported correspond to a Leave of Absence segment on file; only wage codes of 06, 08, 14 can be reported for Leave of Absence segments.

Preparing for year-end
Correct your suspended records

There are four types of error messages.

Type of error	Example message explaining the error
S: Suspended	*S - Employee has 600 or more hours of service reported in the plan year; wage code '02 - Regular/Non-Qualifying' may not be used.*
B: Bad Format	*B - Date of Birth must be numeric.*
F: Flagged	*F - The Hours Worked (Regular) are greater than 200.*
VLID: Valid	There are several reasons why a record may be flagged as valid. Contact your account representative for help.

Preparing for year-end
Correct your suspended records

EDX gives four options for addressing a suspended record:

Deletes entire report.

Displays a Reject/Edit report of all suspended records in report with reason or reasons why each one was suspended.

UNPOSTED DEMOGRAPHICS AND ADJUSTMENT REPORTS

Status	Date Submitted	Report Date	Delete	Edit	Release / Un-Release	Reject/Edit Report	View Details	View Totals
Suspended	06/02/2022	06/04/2022	delete	edit	n/a	View Report	View Details	n/a
Suspended	09/07/2022	09/10/2022	delete	edit	n/a	View Report	View Details	n/a

Lists all suspended records in report. Choose this option to open each suspended report and fix errors.

Displays status of every record in report and its status: posted (PSTD) or suspended (SUSP).

Learn more
Employer-Guide_Ch6_Correcting-Suspended-Records.01-23.pdf (oregon.gov)

OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Preparing for year-end
Run reports

EDX offers four types of reports that let you check for employee eligibility and status changes.

Report name	What it checks for
Inactive Employment	Employees for whom you haven't reported wages in at least the last three months but have not been terminated in EDX. Does not include working PERS retirees.
Eligibility	Employees whose eligibility to earn PERS benefits may have changed. Allows you to run eligibility reports going back two years.
Year-to-Date Wage and Contribution	Employee wages and contributions paid on those wages for a calendar year.
IAP Voluntary Contribution	Employees who have opted to make voluntary contributions: that is, contributions to their Individual Account Program (IAP) account to make up for the amount redirected to their Employee Pension Stability Account (EPSA).

Learn more
Employer-Guide_Chap24-Running-Reports.pdf (oregon.gov)

OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Preparing for year-end

Gold Star Award

Employers who submit 100% of their Regular reports on time* the whole calendar year.

*Within three business days after the due date.

OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Employer support

- Get informed
- Stay informed
- Help employees stay informed
- Employer Service Center

Employer support
Get informed

Employer reporting guides

Beginner reporting

1 Overview of PERS

2 Employer Requirements and Support

3 Reporter Roles and EDX Access

4 Creating a Report

5 Creating a Record

6 Correcting Suspended Records

Financial reporting

25 Sending an Encrypted Message to PERS

26 Understanding Your Statement

27 Paying Your Invoice

28 How to (Potentially) Reduce Your Bill

Intermediate to advanced employer reporting

7 Reporting a New Employee

8 Hiring a PERS Retiree

9 Reporting Wages for a Qualifying Employee

10 Reporting Wages for a Non-Qualifying Employee

11 Reporting a Leave

12 Military Leave

13 Family and Medical Leave

14 Disability Benefits

15 Reporting a Termination or Death

16 Reporting a Retirement

17 Calculating Unused Sick Leave Hours at Termination or Retirement

18 Reporting or Changing "Average Overtime"

19 Completing Work List Requests

20 Creating a Demographic Correction Request (DCR)

21 Viewing Employee Information

22 Changing Employee Demographic Information

23 Submitting an Adjustment Record

24 Running Reports

Gray = not yet available

OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Employer support
Get informed

New and updated resources

NEW Guide 26, *Understanding Your Statement*. A deep dive into your EDX statement.

NEW Guide 27, *Paying Your Invoice*. Instructions for paying your invoice through Automated Clearing House (ACH).

Updated Guide 3, *Employer Roles and EDX Access*.

Updated Guide 7, *Reporting a New Employee*.

NEW Video, "The Role of the Employer Reporter." Shows what an employer reporter does and explains how to learn the role.
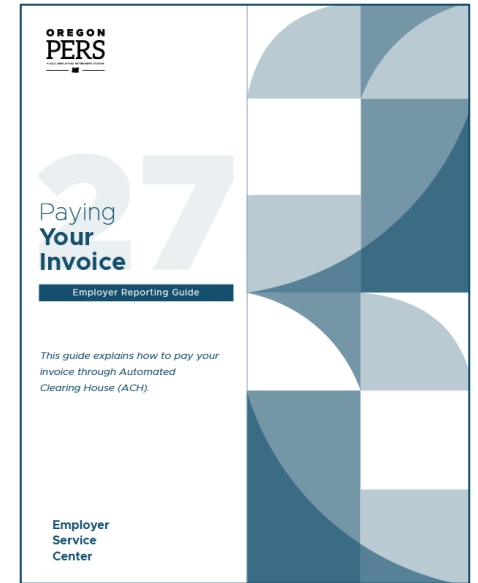
Employer support
Stay informed

PERS website

- PERS benefits info

- Employer contribution rates

- Actuarial reports

- Forms and instructions

- FAQs

- Training

- Videos

- Much more

EDX support

Using the EDX reporting system
Password reset
Requesting help
Automated data upload

Help, guides, and resources

Employer Service Center
Employer publications
Training
Employer Advisory Group

Actuarial and financial

Actuarial and financial resources
Contribution rates list
Governmental Accounting Standards Board (GASB) resources

Employer support
Stay informed

Publications

- Newsletter *Employer News:* Emailed monthly.
  [Newsletter webpage.](#)

- News Bites: Emailed as needed

- Employer announcements: Published to explain new/changed benefits and legislative rules.
  [Announcements webpage.](#)

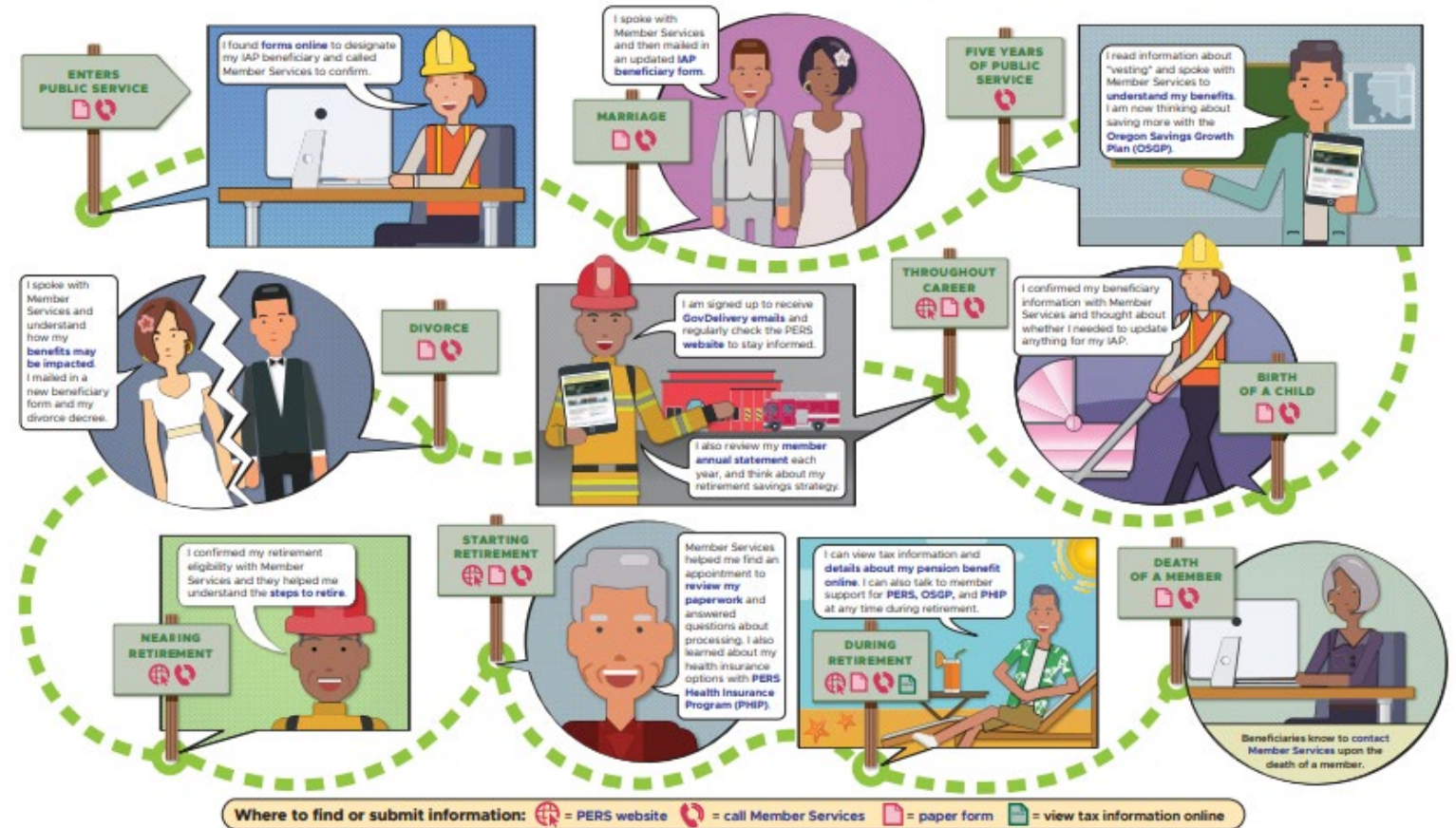Not getting emails? [Sign up through GovDelivery](#).

Employer support
Help your employees stay informed

Member resources

- Member Information Center

  Phone: 888-320-7377
  (toll free)
  Phone hours: 8:30 a.m. to 5
  p.m., Monday through Friday
  Member Services Submit a
  Question form

- Member education sessions

- Overview of PERS Benefits for
  New Employees webpage

Employer support
Employer Service Center

About Employer Service Center (ESC)

PERS ESC provides one-on-one help for employer reporters.

ESC is staffed with specially trained PERS experts who are split into three teams based on employer type:

1. Local governments (such as fire departments, cities, and special districts).

2. State agencies.

3. Schools, universities, and community colleges.

1:1

OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Employer support
Employer Service Center

ESC assists employers who are having challenges reporting in EDX, such as:

- Reporting demographic, wage, and hour information.

- Conducting status checks.

- Correcting a suspended record.

- Making changes that only PERS is authorized to make.

Employer support
Employer Service Center

Communication between employers and ESC

Phone and email

- Quick questions and status checks, call the Employer Call Center line 888-320-7377 between 8:30 a.m. and 12:00 p.m. Pacific.

- For in-depth questions and assistance, call or email your ESC account representative.

Employer support
Employer Service Center

Communication between employers and ESC

Demographic Correction Requests (DCR)

Demographic Correction Request (DCR) is an EDX form you can submit to PERS to request changes that only PERS can make, including:

- Start date
- Termination date
- Last day of service
- Job classification
- Position type

- Average overtime hours
- Contract number of months
- Hire intent
- Unused sick leave
- Contribution start date
- Delete position

Create Demographic Correction Request (DCR).

Learn more
Employer-Guide-20-Creating-DCR.pdf

Employer support
Employer Service Center

Communication between employers and ESC

Work List requests

When PERS needs information from you, we place a request on your EDX Work List. Like a to-do list, your Work List items need to be addressed as soon as possible. Work item types you may see on your Work List:

- Demographic Correction Request
- Disability employment status
- Employer data verification request
- IAP voluntary contribution

- Last day paid leave
- Salary breakdown
- Salary certification
- Termination
- Unused sick leave

WORK LIST

Work Item Type
Termination
Unused Sick Leave
Demographic Correction Request

Learn more
Employer-Guide_19_Completing-Work-List-Requests.pdf

OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

Employer support
ESC projects

OPSRP loss of membership (LOM)

- Each year, PERS runs the **OPSRP LOM batch** on the third Friday of January during the PERS nightly batch schedule.

- The OPSRP LOM batch updates member accounts to apply **LOM status** to those who meet the LOM criteria as of December 31 of the prior year.

- If EDX records indicate the employee is still working on or after January 1 of the current year, ESC adds an employment end date (termination) of December 31 of the prior year.

- If you have an impacted employee who is still working for you, **submit a DCR** to request PERS add a January 1 employment start date to continue the employment with the same qualifying or non-qualifying hire intent originally posted on the previously reported employment segment.

LOM

Employer support
Upcoming ESC projects

Educational service credit for school employees

- If the last day of school for the year is December 15, ESC manually modifies the last day of service from 12/15 to 12/16.

- This allows the member to receive the correct amount of educational service credit (members must work majority of month to get credit).

- If last day school was in session in December is before December 15, ESC will not make changes to the account. Member will not receive educational service credit for July and August for that year and will not receive service credit for December.

SERVICE CREDIT

Questions and answers

Questions and answers
Questions?

OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

THANK YOU