

- Year end
- RAAS/member presentations
- Turn in beneficiary forms
- Employer contact information

EMPLOYER NEWSLETTER

Member education and retirement planning sessions

PERS offers a number of opportunities to help PERS-covered employees understand their PERS retirement benefits, including free education sessions throughout the state for members in all stages of their careers. PERS also offers help reviewing retirement forms when it is time to retire.

Please share the following information about our education and retirement planning sessions with your staff.

We offer sessions on the following topics:

Retirement Readiness

This session is for Tier One and Tier Two members within three years of retirement.

Introduction to PERS Retirement

This session is for Tier One and Tier Two members more than three years from retirement.

All About OPSRP (Oregon Public Service Retirement Plan)

This session is for OPSRP members (hired after August 28, 2003) at any stage of their career.

Each of these sessions provide valuable retirement planning information. We hope staff will register and take advantage of one of these educational opportunities.

PERS will be conducting retirement education sessions in the following cities in November and December:

- Ashland
- Astoria
- Bend
- Coos Bay
- Corvallis
- Eugene
- Gresham
- Hillsboro
- La Grande
- Roseburg
- Tigard

Staff can register for a session by going to the following link:

<http://www.oregon.gov/pers/MEM/Pages/index.aspx>

Once there, click on “Education Sessions” under either the [Tier One/Tier Two](#) or the [OPSRP](#) headings. Class size is limited, so registration is required.

2018 year-end continues

2018 year-end processing is underway. Please concentrate on correcting and posting suspended records for calendar year 2018. The Year-to-Date Wage and Contribution Summary screen and the Eligibility Reports screen are good places to find answers regarding wages, hours, and contributions reported and posted in 2018. These pages can be found on the site navigation of your EDX employer home page.

If you have questions that cannot be answered at the above locations, or if you need help resolving suspended records and reports for 2018, contact your ESC Account Representative for assistance.

Retirement Application Assistance Sessions (RAAS)

PERS also offers individual appointments with a PERS staff member where retiring members can have their PERS retirement paperwork reviewed for accuracy and completeness within the 90 days before their PERS retirement date. Members can also have their paperwork notarized during the session at no cost. These appointments are called Retirement Application Assistance Sessions (RAAS).

PERS will be available for Retirement Application Assistance Sessions in the following cities in November and December:

- Albany
- Ashland
- Bend
- Coos Bay
- Corvallis
- Eugene
- Gresham
- La Grande
- Oregon City
- Roseburg
- Salem
- Tigard

Registration can be found through this link:

<http://www.oregon.gov/pers/MEM/Pages/RAAS/Retirement-Application-Assistance-Sessions.aspx>

Immediately return to PERS any completed Designation of Beneficiary forms received from employees

It is a member's responsibility to make sure PERS receives a Designation of Beneficiary form when a member changes a beneficiary. However, since members sometimes turn in these forms to their employer, we need your help to ensure speedy processing.

If you receive a PERS Designation of Beneficiary form, please send the completed form(s) to PERS, so that there is no delay in updating this critical information.

A valid change of beneficiary designation is not considered effective until PERS accepts the form.

Tier One/Tier Two members should complete both of the following:

- [IAP Pre-Retirement Designation of Beneficiary Packet](#); **and**
- [Tier One/Tier Two Pre-Retirement Beneficiary Designation form](#).

OPSRP members should complete:

- [IAP Pre-Retirement Designation of Beneficiary Packet](#).

If a Tier One/Tier Two member does not have a valid Tier One/Tier Two Pre-Retirement Beneficiary Designation recorded with PERS, benefits will be distributed as required by statute.

IAP benefits for all members who have no valid IAP Pre-Retirement Designation of Beneficiary recorded with PERS will be distributed as required by statute.

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There is no pre-retirement beneficiary form for an OPSRP pension benefit. An OPSRP Pension pre-retirement benefit would be paid:

- 1) only if the OPSRP member is vested in his/her pension account prior to retirement, **and**
- 2) only to a spouse or person constitutionally required to be treated as a spouse.

PERS regularly updates these forms, so please be sure you are using the latest version. Both updated employee forms and employer forms are available on the PERS website.

Employer contact information

Reminder: keep the contact list updated!

EDX stores employer contact information for all authorized users and other contacts identified for your organization.

This information has two primary purposes:

1. PERS staff members use it to telephone, mail, fax, or email employer reporting contacts.
2. EDX uses it to send email notifications.

The contact you designate as “Employer Reporting 1” will be the user who receives EDX email notifications.

Adding contact information:

The Web Administrator role has sole administrative control over EDX reporting for your organization, including maintenance and authorization of employer contacts and user accounts. Only the Web Administrator can grant login privileges to new payroll specialists in your organization. As Web Administrator, if you do not assign an Employer Reporting 1 contact, you will receive all EDX email notifications.

By adding contact information, you can develop a contact list of employees in your organization authorized to use EDX and assign a reporting role to each authorized user.

Important: Adding contact information does not create an EDX user account. Only an individual requesting EDX access can create a user account. For more information on creating a user account, see “Creating a payroll specialist account” on pages 38-42 of the [EDX User Guide](#).

Welcome To
PERS
Your Online Retirement Resource

Home Log In Contact Us

PERS Log In

Enter your User ID and Password below.

User ID:

Password:

Are you a Payroll Specialist?
If you would like to open an account for payroll activities for your organization, click the link below to start work.
[Open a Payroll Specialist Account](#)

Are you a Web Administrator?
You are a Web administrator if you already have a user ID and password sent to you from PERS. You may log in and start work now.

Not Sure?
If you have questions, [Contact Us](#). We will be happy to help you.

Tell Me More

User ID - This is a unique name that grants you access to EDX. Your User ID is typically your last name and first initial. Examples are "SmithJ" or if the name is taken "SmithJ2".

Password - This is a unique set of at least 7 characters chosen by you and used to verify your User ID.

Every Employer account must have a Web Administrator. To obtain a Web Administrator account, the Reporting Official for your agency and your designated Web Administrator must complete and sign the Web Administrator Agreement form, which is available on the PERS Employer website:

<https://www.oregon.gov/pers/Documents/Form/425-Web-Administrator-Agreement.pdf>