

- 2020 year-end reconciliation continues
- Important 2021 changes
- Annual OPSRP loss-of-membership (LOM) status applied in January
- Time to check mailing addresses for member annual statements
- PERS website updates
- EDX tip of the month: How to find out why EDX is offline

2020 year-end reconciliation continues

In January, we start the second phase of year-end reconciliation, which is the final push to get all records corrected and posted before the official close of the 2020 calendar year.

Finding and fixing suspended records: quick steps

1. Select Work on Reports from EDX main menu.
2. Select Work with Unposted Reports.
3. Find reports marked Suspended.
4. Select View Report.
5. Select edit to access the Edit Retirement Detail Reports screen.
6. Under Option 3 - Employees with Errors, click select under the Select Record column. Note the Error Message for Member in red.
7. Fix the erroneous information or formatting and click Save.

Earnings crediting/invoicing

Contributions invoiced through March 5, 2021, and paid when due, will be credited with earnings from the PERS Trust for calendar year 2020. If contributions are not paid when due, earnings for 2020 will be invoiced to the employer.

For assistance

Contact your [ESC representative](#).

Important 2021 changes

Every January, PERS adjusts subject salary limits and requirements in accordance with the Consumer Price Index for the West Region. This ensures that our numbers keep pace with inflation and cost of living.

2020

Salary Limit:
\$195,000/year

Member Redirect
salary requirement: \$2,500/month

2021

Salary Limit: \$197,730/year

Member Redirect
salary requirement: \$2,535/month

Stay up to date!

COVID-19

- [PERS updates on novel coronavirus \(COVID-19\)](#)
- [Frequently asked questions about paid leave during the COVID-19 pandemic](#)
- [Loss of work during the COVID-19 pandemic \(FAQs for members\)](#)

Senate Bill 1049

- [Information for PERS employers](#)
- [Information for members](#)
- [SB 1049 GovDelivery emails signup](#)

Employer rate relief programs

- [Employer rate relief programs webpage](#)

Other topics

- [Choose what GovDelivery emails you'd like to receive](#)

Continued

PERS EMPLOYER NEWSLETTER January 2021

2021 Salary Limit increase

The 2020 limit of \$195,000/year is increasing in 2021, effective January 1, 2021.

2021 salary limit

- \$197,730/year.
- Prorated salary for a partial year: Go to the [Partial-Year Salary Limits webpage](#).

PERS subject salary is used to determine:

- Member Individual Account Program (IAP) contributions.
- Employer contributions paid to PERS.
- The final average salary (FAS) used in calculating retirement benefits under formula methods.

About Salary Limit

The SB 1049 Salary Limit, effective January 1, 2020, limits the annual subject salary amount that PERS can use to calculate an employee's PERS benefits — it does not impact the amount of salary the employee actually receives from the employer in their paycheck.

Note that if you employ a member (including a rehired retiree) for less than 12 months in a calendar year, the member's subject salary may be limited based upon a "partial year" limit. The [Partial Year Salary Limits webpage](#) includes a number of examples to help employers correctly report subject salary.

For assistance

If you have questions or need help, contact your [ESC representative](#).

2021 Member Redirect threshold increase

The 2020 Member (IAP) Redirect monthly salary threshold of \$2,500 is increasing in 2021, effective January 1, 2021.

2021 salary threshold

- \$2,535/month.

About Member Redirect

In 2021, members must earn more than \$2,535 in a month in order for the PERS system to automatically redirect a portion of their 6%-of-salary IAP deduction into their Employee Pension Stability Account (EPSA). The funds in each member's EPSA will be used to help pay for their future pension benefits.

The percentage that is redirected depends on the member's pension plan.

[Tier One/Tier Two members](#) (hired before August 29, 2003)

- 2.5% of the employee's salary goes into their EPSA.
- The remaining 3.5% of salary goes into their existing IAP account.

[OPSRP members](#) (hired after August 28, 2003)

- 0.75% of the employee's salary goes into their EPSA.
- The remaining 5.25% of salary goes into the member's existing IAP account.

Continued

Voluntary contributions

In 2021, members still have the option to make additional, after-tax contributions of 2.5% (Tier One/Tier Two) or 0.75% (OPSRP) into their IAP, allowing their IAP monthly contribution to equal 6%.

For assistance

- Read the step-by-step guide [How to Manage an Employee's Voluntary Contribution](#).
- Read the [Frequently Asked Questions on Voluntary Contributions for Employers](#).
- Contact your [ESC representative](#).

Annual OPSRP loss-of-membership (LOM) status applied in January

On January 15, 2021, PERS will run an EDX report that searches for all OPSRP members who qualify for LOM status as of December 31, 2020.

OPSRP pension program members who are **not vested*** and who have had **five** consecutive calendar years with **fewer than 600 hours** of service may go into OPSRP LOM status. This means that the member:

- Forfeits all retirement credit accrued prior to the LOM date of December 31.
- Terminates their OPSRP pension program membership.
- If employed by a participating public employer after that date, must serve a new six-month waiting time to reestablish membership.
- Retains their Individual Account Program (IAP) account (IAP accounts are not affected by OPSRP LOM status).

Recommended action

If you have an employee still working for you in 2021 whose membership will be going into loss of membership status, contact your [ESC account representative](#) or submit a Demographic Correction Request (DCR) in EDX. Upon your request, PERS will manually add a January 1, 2021, employment start date to continue the employment with the same qualifying or non-qualifying hire intent originally posted on the pre-2021 employment segment.

You do not need to request removal of the termination or report a New Hire record in EDX. If the employee is employed in a qualifying position for 2021, we will add a new contribution start date (CSD).

You may continue to report salary information for this employee in 2021, but contributions will not be due until the employee meets their new six-month waiting time.

Continued

*About vesting

Being vested means that a member cannot lose their right to their pension benefit unless they withdraw from the overall OPSRP program. To vest in their pension, a member must do one of two things:

- Work for five years in a PERS-qualifying position for at least 600 hours per year. The years do not need to be consecutive, but the member cannot have a gap in qualifying employment of more than five years.

or

- Work in a qualifying position on or after reaching normal [retirement age](#), which is 65 for general service and 60 for police officers and firefighters.

For assistance

Contact your [ESC representative](#).

Time to check mailing addresses for member annual statements

PERS is preparing member annual statements, which we will mail to all PERS members this May. To ensure all members receive theirs, we are asking members to make sure their addresses are up to date.

Members can check the accuracy of their addresses through their Online Member Services (OMS) accounts. If they need to change their addresses, they are instructed to ask you, their employers, to do so in EDX.

Any members who are not currently working for a PERS-participating employer can change their addresses themselves in OMS.

All address updates must be received by **February 26, 2021**.

Information for members

Perspectives newsletter article “2020 member annual statements coming in spring”:

- [For OPSRP members](#) (p. 2).
- [For Tier One/Tier Two members](#) (p. 2).

For assistance

Contact your [ESC representative](#).

PERS website updates

To help you better navigate our website and find the information you need more easily, we have made some updates to the PERS Employer website.

EMP homepage

Added a “What’s New” section to the bottom of the homepage to help you quickly find new information.

What’s New

- [December Employer Newsletter](#)
- [Wage codes for Work After Retirement](#)
- [2019 actuarial valuations](#)

Sign up for Alerts

GovDelivery texts/emails

PERS uses GovDelivery to send news to PERS-participating employers by email and text message. ([Learn about GovDelivery.](#))

To ensure we have the right employer contact information, [sign up on govdelivery.com](#). You can also choose your topics of interest and [review your subscriptions](#).

New UALRP Guides for Employers

Read new guides that explain your employer contribution rate, valuation, pooling, and other actuarial concepts on the [UALRP webpage](#). Check back regularly for new publications.

NEW: [Guide to Understanding Your Rate](#)

COVID-19 Reporting Guidelines

Read [frequently asked questions](#) about paid leave and employment status during the COVID-19 pandemic public health emergency. This information is not meant to be comprehensive and is subject to change.

Senate Bill 1049

Changes to Member Contributions and Amortization of Unfunded Actuarial Liability (UAL)

- Find the latest information about the implementation of Senate Bill 1049 for employers.
- Sign up for GovDelivery updates to receive email or text alerts from PERS on Senate Bill 1049.

Employer Rate Relief Programs

- Discover resources offered by the [Unfunded Actuarial Liability Resolution Program](#).
- Use PERS' [Employer Rate Projection Tool](#).
- Learn about the potential impact of establishing a new [side account](#).
- Sign up for GovDelivery emails on this topic to receive updates in the future.

- CONTACT US
- EDX
 - LOG IN
 - PASSWORD RESET
 - EDX AVAILABILITY
 - MANUALS & GUIDES
 - TROUBLESHOOTING
 - AUTOMATED DATA UPLOAD & TEST SITE
- EMPLOYER NEWS & PUBLICATIONS
- OREGON GOVERNING LAWS & RULES
- EMPLOYER TRAINING & EDUCATION
- FORMS
- RATES & BUDGETING
- EMPLOYER ADVISORY GROUP

Sidebar

Upgraded the sidebar to be expandable and include more sections. Click the + to expand a topic, then click any subject to jump to that section.

SB 1049 info

Reorganized the SB 1049 webpages to make links to related pages more visible.

Senate Bill 1049 (2019) - Information and Implementation for PERS Employers

Employer Rate Relief Programs

- > [Employer Rate Relief Programs](#)
- > [Unfunded Actuarial Liability Resolution Program webpage](#)
- > [Side Accounts webpage](#)
- > [Rate-Projection Tool](#)
- > [UALRP Educational Guides](#)

The Employer Incentive Fund, UAL Resolution Program, and amortization options for side accounts of \$10 million or more are three programs established by the Oregon Legislature to help PERS-participating employers reduce their contribution rates in the future.

On this page:

- [SB 1049 Overview](#)
- [UAL Re-amortization](#)
- [Employer Rate Relief Programs](#)
- [Work After Retirement](#)
- [Salary Limit](#)
- [Member \(IAP\) Redirect](#)
- [IAP Member Choice](#)

EDX tip of the month: How to find out why EDX is offline

Every night between 10:00 p.m. and 6:00 a.m., EDX is unavailable while it processes all the records, reports, and information that employers input during the day.

About once a month or so, EDX runs long batches or makes system updates that make it unavailable starting earlier or ending later than 10 to 6. Whenever this happens, PERS posts a status update for employers on the [EDX Availability webpage](#) and for members on the [What is OMS? webpage](#).

Once the system is available, we remove the message.

EDX Availability

EDX online is normally available 6 a.m. - 9 p.m., Monday - Friday, and 6 a.m. - 4 p.m. each Saturday.

Each Saturday, 4 p.m. - Monday, 6 a.m., is reserved for network maintenance, and EDX online CANNOT be guaranteed.

EDX online will normally be available during [scheduled holiday PERS office closures](#). An EDX batch will run the evening of the business day before and after a scheduled holiday office closure but NOT run the evening of a scheduled holiday office closure.