OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM

EMPLOYER NEWS

APRIL 2023

1 **Two new online resources available now**

2 **Choose your PERS email topics**

3 **How to fill out a Certification of Individual Contract (CIC) form**

5 **EDX tip: Reporting wages during employee's six-month wait time**

Red Fox

Two new online resources available now

Check out these new employer reporting guides added to the Employer Manuals webpage.

Guide 14 *Disability Benefits*

This guide describes the PERS disability benefits available to Tier One/Tier Two members and Oregon Public Service Retirement Plan (OPSRP) members. Each section breaks down information for Human Resources representatives, employer reporters, and your employees.

Guide 19 *Completing Work List Requests*

This guide explains how to complete requests sent to you on your EDX Work List, such as Disability Employment Status, Employer Data Verification, IAP Voluntary Contribution, and Last Day of Paid Leave.

Coming soon

- *Reporting a Leave.*
- *Family & Medical Leave.*
- *Submitting a Demographic Correction Request.*

Choose your PERS email topics

If you are not receiving member emails from PERS, you may not be on our emailing list.

Our emailing list is contained in our email delivery service, GovDelivery. The list is exclusive to PERS and is never shared nor sold.

By subscribing to specific topics in GovDelivery, you can choose your topics of interest, specify how often you would like to receive emails, and change your topics of interest any time.

You can also sign up to receive the PERS' member newsletter *Perspectives* plus announcements about topics such as:

- **Seminars** and learning opportunities, like PERS Expo.
- **Legislative actions** that may affect your benefits.
- **PERS Board** meetings and decisions.
- **PERS Health Insurance Program (PHIP)** and other retirement benefits.

Sign up
To sign up, go to the GovDelivery Email Updates page. Choose Email or SMS/Text Message. Enter your email address or cell phone number and click **Submit**.

If you are a new subscriber, the system will ask you to enter a password and specify your delivery preferences.

Select your topics
Topics are separated by PERS plans and programs. Click the plus sign to expand a topic. Check the box of each one you're interested in. Click **Submit**.

For example, Oregon Public Service Retirement Plan (OPSRP) members can click the OPSRP topic to subscribe to the *Perspectives* newsletter and other updates.
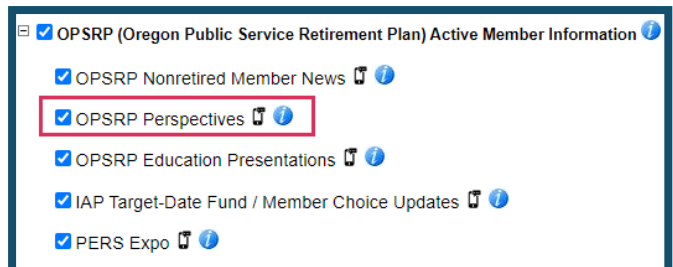
Update your information
If you are already a subscriber, you can go directly to Subscriber Preferences (after logging in). Here you can:

- View your list of topics on the Subscriptions tab.
- Update your contact information on the Preferences tab.
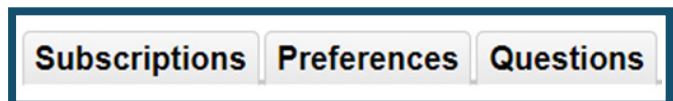
Note: The Questions tab is for employers to answer questions about their organization.

Employers: If you are not receiving employer-specific emails from PERS, check your subscriptions to ensure you are subscribed to Employer News/Employer Announcements.

How to fill out a Certification of Individual Contract (CIC) form

If an employee at your school who is working under a personal contract applies for retirement, PERS may need more information about the employee's contract to process their retirement benefits. In this case, PERS will email you a Certification of Individual Contract (CIC) form from PERS.CIC@pers.oregon.gov.

This article explains what you need to know to fill out this form correctly.

How to fill out section B

Question 1:

> **Section B: Employer certification**
> Was the employee listed above:
> - on an individual contract for less than 12 months?   Yes ☐   No ☐
> - entitled to sick leave accrual of less than 96 hours per year for the period certified?   Yes ☐   No ☐

The key question on the form is the first bullet in section B. To answer that question correctly, ask yourself three questions about the employee. If you answer yes to any one of these, then check No for the first bullet.

1. Are they in a classified, non-teaching position?   ☐ yes   ☐ no
2. Did they work for 12 months (i.e., actually worked, not just paid)? If they did not work during the summer, answer no.   ☐ yes   ☐ no
3. Is their contract part of a collective bargaining agreement (i.e., union-negotiated)?   ☐ yes   ☐ no

Question 2:

> **Section B: Employer certification**
> Was the employee listed above:
> - on an individual contract for less than 12 months?   Yes ☐   No ☐
> - entitled to sick leave accrual of less than 96 hours per year for the period certified?   Yes ☐   No ☐

Did you check **Yes** for the first question in section B? If so, check **Yes**.

Did you check **No** for the first question in section B? If so, answer **either Yes or No**, based on the employee's records. If you don't know the answer, leave it blank and PERS Intake & Review will email you (from PERS.Intake.And.Review@pers.oregon.gov) if they need an answer to this question.

Next, electronically sign the form and fill in the date on which you completed the form. Save the form and return it to PERS by e-mailing it to PERS.CIC@pers.oregon.gov or faxing to 503-431-8293.

If you need help filling out the form, email PERS.CIC@pers.oregon.gov.

Section pre-filled by PERS.

If you check **Yes** in section B, fill in Salary and Term of contract fields.
- Salary: Enter gross salary from last full school year.
- Term of contract: Enter contract in hours.

If you check **No** below, leave Salary and Term blank.

If you answer yes to any of these questions, check **No** for the first bullet:
1. Are they in a classified, non-teaching position?
2. Did they work for 12 months, including summer?
3. Was contract part of a collective bargaining agreement?

Sign electronically, fill remaining fields, and email to PERS.CIC@pers.oregon.gov.

Certification of Individual Contract

Employee Social Security number
| * | * | * | * | * | | | |

PERS number
pre-filled

Date
pre-filled

Employer number
pre-filled

This form must be completed and returned to PERS before we can calculate retirement benefits.

Section A: Employee information

If an employee was on an individual contract, indicate below the salary for the last full school year of employment and the term of the contract in hours. **Note:** An individual contract is a personal contract between the school and an employee. A collective bargaining agreement is **not** an individual contract.

Employee name
pre-filled

Salary	Term of contract (in hours)*	Retirement date
provide if Yes below	provide if Yes below	pre-filled

*Hours per contract day multiplied by the number of days in the contract.

Section B: Employer certification

Was the employee listed above:
- on an individual contract for less than 12 months?   Yes ❑   No ❑
- entitled to sick leave accural of less than 96 hours per year for the period certified?   Yes ❑   No ❑

I certify the above information is correct.

_____   _____
Signature of certifying employer (do not print)   Date

_____   _____
Name of certifying employer (please print)   Phone number

Tips

✓ **Make sure your contact information is up to date.**

PERS will email the form to the contact we have on record for your school. This is usually the person assigned the role of employer reporter #1. If no one is assigned that role, we will send it to your web administrator. It is important to keep this role current to avoid delaying the employee's retirement process.

✓ **The contract referred to on this form only applies to an individual contract between an employee and the school.**

It does not apply to a collective bargaining agreement negotiated by a union, which is a group contract.

EDX tip: Reporting wages during employee's six-month wait time

When you hire an employee who is new to PERS, you report their wages beginning with their first paid day on the job. For their first six months, they must successfully complete a "wait time" before they become a PERS member and begin earning benefits. Even though they are not yet a PERS member during wait time, you still report their wages to PERS, as explained below.

Reporting wages during wait time

Report their wages as subject salary as you normally would, except for the following:

- Do not report 6% Individual Account Program (IAP) contributions. New employees do not begin contributing to their IAP until after their wait time is over, called their "contribution start date" (CSD).

- Your organization will not be charged pension contributions on the employee's subject salary until the first full pay period after their wait time ends. So, you will not see pension charges for your new employee on your invoice during the wait time.

Reporting wages at end of wait time

You report wages during wait time as subject salary, but EDX does not charge your IAP contribution or your contribution rate during that time because it knows it is a new hire serving a wait time. Once the CSD hits, contributions are due on all qualifying wages going forward.

However, if the CSD lands during a pay period (i.e., the pay period begins before the CSD and ends after the CSD), you need to report wages differently for that wage record. This is because contributions are not due until the first *full pay period* after the CSD.

To prevent EDX from charging contributions to the entire pay period, report wages as follows:

- **For non-local government employers**, report the entire pay period containing hours worked up to and including the CSD as non-subject salary. Report subsequent pay periods as subject salary.

- **For local government employers** whose pay period crosses monthly boundaries, two records are reported. Report the pay period worked before the CSD as subject salary. Report the work period that includes the CSD as non-subject salary. Report subsequent pay periods as subject salary.

Watch for employer satisfaction survey next month

The 2023 Employer Satisfaction Survey will open May 1. The survey is your chance to tell us how we can improve the resources and services we provide.

Based on last year's feedback, PERS is working on the following improvements:

- Improving information resources available to the Employer Service Center representatives.

- Replacing the *Employer Manual*, *EDX User Guide*, and other outdated manuals with the new Employer Reporting Guides series.

- Updating and improving the ESC instructor-led training.

Example 1: Non-local government employer

Rose Thorn, a new school employee, has a pay period January 16 through February 15, paid on February 28. Her CSD is February 1.

All wages earned during this period are reported as non-subject salary. The following pay period, Rose's employer will report her wages as subject salary and include her 6% IAP contribution. Rose begins earning a PERS pension and IAP.

DETAIL 2 - WAGE AND SERVICE

SSN	********
First Name	Rose
Last Name	Thorn
Pay Date	02/28/2023 (MM/DD/YYYY)
Work Period Begin Date	(MM/DD/YYYY)
Work Period End Date	(MM/DD/YYYY)
Hours Worked (Regular)	184
Hours Worked (Overtime)	
Reported Wage Code	01 - Regular wages
Subject Salary (Regular)	
Subject Salary (Overtime)	
Non-Subject Salary	7360.00
Lump Sum Payoff	
Lump Sum Vacation Payoff	
Gross Salary	7360.00

Lump Sum Payoff	
Lump Sum Vacation Payoff	
Gross Salary	7360.00
Member Paid After-Tax Contribution (MPAT)	
Member Paid Pre-Tax Contribution (MPPT)	
Unit Contribution	
Employer Paid Pre-Tax Contribution (EPPT)	
Optional Employer IAP Percentage	0%
Optional Employer IAP Contribution	
PERS Job Class Code	
Average Overtime Hours	
Employer Site Distribution Code	
Non PERS Data Memo	

Save   Cancel

Example 2: Local government employer

A local government employer would handle this example slightly differently.

They must submit two wage records when a pay period crosses two months. They would report Rose's wages in the period before her February 1 CSD as subject salary and report her wages in the period after her CSD as non-subject salary.

For the next pay period, the employer would report Rose's wages as subject salary and include her 6% IAP contribution.

For help, contact your ESC representative.

Detail 2 wage and service record #1	
Pay Date	2/28/2023
Work Period Begin Date	01/16/2023
Work Period End Date	01/31/2023
Subject Salary	**$3,840**
Non-Subject Salary	$0
Gross Salary	$3,840
MPAT, MPPT, EPPT	$0

Detail 2 wage and service record #2	
Pay Date	2/28/2023
Work Period Begin Date	02/01/2023
Work Period End Date	02/15/2023
Subject Salary	$0
Non-Subject Salary	**$3,520**
Gross Salary	$3,520
MPAT, MPPT, EPPT	$0