Centralized PERS Services Team
Who are we?

- Trudy Vidal – Financial Business Systems Manager
- Linda Agee – Lead Worker & Retirement Analyst/Employer Representative
- Jannel Kropf – Retirement Services Analyst
- Cheryll Luth – Retirement Services Analyst
- Allison Absher – On Job Rotation for Reconciliation Project
- Robert Otero – Retirement Services Support
Who are our customers?

**PERS Units**
- PERS Death Unit
- PERS MAPP Team
- PERS Divorce Unit
- PERS Disability Unit
- PERS Customer Service Center
- PERS Employer Service Center
- PERS Retirement Services Section
- PERS Policy and Compliance Section
- PERS Data Verification Team
- PERS Director’s Office
- PERS Fiscal Services
- PERS Exec Team
- PERS Help Desk

**Legacy Team**
- PERS Help Desk

**DAS and Agencies**
- DAS OSPS
- DAS PPDB Group
- 85 + Agency HR Offices
- 85 + Agency Payroll Offices
- 85 + Agency Fiscal Offices
- 40,000+ State Employees
- DAS Legislative Coordination
- DAS Enterprise Technology Services
- DAS Risk Management
- DAS HR Policy Unit
- DAS Labor Relations
- Department of Justice
- OUS & Semi Independents
- Other PERS Employers

**PERS Units**
- Trudy Vidal – Financial Business Systems Manager
- Linda Agee – Retirement Analysts/ Employer Rep
- Jannel Kropf – Retirement Services Analyst
- Cheryll Luth – Retirement Services Analyst
- Allison Absher – On Job Rotation/ Recon. Project
- Robert Otero – Retirement Services Support

**PERS Employer Advisory Committee**
- PERS Legislative Advisory Committee
- PERS Board
Which Analyst Handles What Agency?

To identify which analyst, Jannel Kropf or Cheryll Luth, go to our website at . . .

http://www.oregon.gov/DAS/EGS/FBS/CPERS/Pages/teamassign.aspx

. . . and you can contact us by using our central mailbox at . . .

Central.persservicsteam@state.or.us
Where Reporting Employee Data Begins . . .

- Employee is hired by an agency
- Agency completes a status check to find out if the employee has a prior PERS account by contacting PERS and shares the data with the other team
- Agency HR enters new hire data into PPDB, with wage job class code that identifies which plan the employee goes to, based on status check into PPDB
- Agency Payroll sets up the employee with a retirement start date and contributions, if appropriate, on the OSPA P010 Screen
- After Final Run 2 Cutoff we pull the data from OSPA and PPDB to prepare our file to report to PERS to load into EDX and jClarety
State of Oregon PERS Data Flow

- Oregon State Payroll Application (OSPA)
- Employer Data Exchange (EDX)
- State of Oregon Employer PERS Reporting File
- Position Personnel Data Base (PPDB)
- Agency Payroll
- Agency HR
- jClarety

Involving:
- DAS OSPS
- DAS PPDB Group
- DAS FBS/EGS Centralized PERS Services Team
- PERS Website that Employers Use
- PERS
When does data from HR and Payroll get reported to PERS?

DAS/EGS/FBS Centralized PERS Service Team


<table>
<thead>
<tr>
<th>Payroll Period</th>
<th>Pay Dates</th>
<th>OSPS Leave Updates</th>
<th>Accrual Updates</th>
<th>EDX/jClarety Report Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 2013</td>
<td>1/1/2014</td>
<td>Fri 1/10/2014</td>
<td></td>
<td>Tues 1/14</td>
</tr>
<tr>
<td>March 2014</td>
<td>4/1/2014</td>
<td>Thurs 4/10/2014</td>
<td></td>
<td>Tues 4/15</td>
</tr>
<tr>
<td>April 2014</td>
<td>5/1/2014</td>
<td>Mon 5/12/2014</td>
<td></td>
<td>Wed 5/14</td>
</tr>
<tr>
<td>May 2014</td>
<td>5/30/2014</td>
<td>Tues 6/10/2014</td>
<td></td>
<td>Thurs 6/12</td>
</tr>
<tr>
<td>June 2014</td>
<td>7/1/2014</td>
<td>Thurs 7/10/2014</td>
<td></td>
<td>Tues 7/15</td>
</tr>
<tr>
<td>July 2014</td>
<td>8/1/2014</td>
<td>Tues 8/12/2014</td>
<td></td>
<td>Thurs 8/14</td>
</tr>
<tr>
<td>September 2014</td>
<td>10/1/2014</td>
<td>Thurs 10/9/2014</td>
<td></td>
<td>Tues 10/14</td>
</tr>
<tr>
<td>October 2014</td>
<td>10/31/2014</td>
<td>Mon 11/10/2014</td>
<td></td>
<td>Wed 11/12</td>
</tr>
<tr>
<td>November 2014</td>
<td>12/1/2014</td>
<td>Tues 12/9/2014</td>
<td></td>
<td>Thurs 12/11</td>
</tr>
</tbody>
</table>
Employee Data Flow

New Hires and Terminations → Wages → EDX

EDX → Posted Records → Invoicing from PERS System → Reconciliation

EDX → Suspended Records
Most Common Reasons for Suspended Records

HR or Payroll:
- Status check not completed by agency for all employees regardless of whether they are a new hire, rehire, transfer-in, retiree, etc.

HR:
- Incorrect wage job class code entered into PPDB – this drives how the wages are reported and the PERS job class, ie general service, police and fire, judge, etc.
- Late entry of hire and termination personnel actions
Most Common Reasons for Suspended Records (cont. . . )

Payroll:

- Retirement start date not entered or entered with incorrect date on the OSPA P010 screen
- The E357-020 Employees Eligible for Participation in Retirement Report from OSPS is not worked timely
- Contributions are not started timely on the OSPA P010 screen when employee is eligible upon hire with run 1 or 1\textsuperscript{st} payment to employee
- The wrong codes are used when entering the W-4 and retirement data on the OSPA P010 screen
- Late adjustment entries after an employee has already terminated. Will not post to account if after 31 days past termination date.
Additional Items We Facilitate

- Employee name change
- Date of birth correction
- Address correction
- SSN correction
- Employee possibly not in correct PERS membership
- Employee possibly not in correct PERS job class (police and fire vs. general services, judge, legislator, etc.)
- Contribution start date correction
- Missing employment segments
- Missing wages (LWOP) and/or contributions
- Process to purchase additional police and fire units and deduction amounts – 9 agencies
- Employee had deductions for police and fire units after age 65 – needs refund
- Prior Year Adjustments, W-2 Corrections
- Maximum salary limitation (currently at $250,000) on contributions, manually move wages to non-subject
- USERRA reporting
As an Employee Prepares for Retirement, Our Unit . . .

Works with PERS and agency contacts on the following processes:

- Eligibility Studies – Requires salary breakdowns
- Data Verifications – Started July 1, 2011, complete review of State employee records. Employers have 30 days to verify.
- Estimate Preparation
- Disability Benefits – 90 day waiting period
- Death Benefits
- Retirement Benefits
- USERRA Rights and Benefits
- Classification Studies
- Seasonal Purchases
Our unit also handles these PERS related items:

- Legislative Tracking and Public Commenting on PERS Administrative Rules
- Arbitrations/Settlements/Grievances
- Initiate, advise and/or comment on policy; and attend related user groups
- Re-employsments for Retirees who go over allowable hours
- Appeals
- Invoicing
- Agency Trainings/Meetings/Visits
- Attend PERS Trainings and User Testing
- PERS Employer Advisory Committee
- PERS Board Meetings
- File Programming changes to be in line with PERS, PPDB and OSPA programming
- Various clean-up projects such as Young vs Oregon cases, Break in Service, Student Workers, School Employees, Pro-Tem Judges, etc.
Example of Questions Where Employees Contact PERS Directly

- Employee questions on retirement process
- Retirement calculations, benefit amounts, etc.
- Retirement estimates
- Retirement insurances (medical and dental) and RHIPA (subsidy)
- Data verification process
- Benefit payment options (withdrawal, disability, death, retirement)
- Vesting and Membership
- Loss of Membership
- Withdrawal of additional police and fire units
- Retirement service credit
- How does leave without pay (LWOP) affect retirement benefits

PERS Customer Service Call Center can be reached at 1-888-320-7377
Thank You !!!