

Introduction

Purpose

This guide provides a tutorial and reference to help you use the Employer Data Exchange (EDX) system to report payroll and demographics information to PERS. It does not provide information on when and what to report. Refer to the Employer Quick Info help file on the PERS Employer website for that information.

Background

To best implement Oregon Revised Statute Chapter 238A (ORS 238A), passed by the Oregon Legislature on August 29, 2003, PERS now collects public employee wage and contribution data on a payroll cycle basis.

As of January 1, 2004, PERS started administering three benefit programs:

- the *old* PERS plan and
- two *new* Oregon Public Service Retirement Plan (OPSRP) programs—the Pension Program and the Individual Account Program (IAP).

As a result, significant changes occurred in (1) the method and time frame that PERS requires you to report employee information and (2) the specific content of that information.

Although the old and new retirement programs apply to members in different ways, the new EDX system allows you to report all employee wages, contributions, and demographics using the same format. You must report an employee's entire payroll to PERS regardless of which retirement program applies to that individual employee.

Content

This guide describes how to maintain employer Web accounts; create payroll specialist accounts; create, submit, and correct reports; view and understand remittance statement details; export report details to Excel; and view member salary certification details. Step-by-step directions and computer screen illustrations are provided to help you learn and use EDX.

If you use a third-party administrator (TPA) or the Oregon State Payroll System (OSPS) to report payroll information, you may need only portions (or none) of this guide depending on how you generate, submit, or correct reports. You should consult with your TPA or OSPS representative to understand the impact of ORS 238A on your reporting processes and systems.

Contacting PERS

If you have questions, contact:

- Membership and Employer Relations Section (MERS) Employer Service Center toll free at 888-320-7377 (option 2) or 503-603-7788, or
- e-mail us at pers.edx.support@state.or.us.

Reference information

The following resources provide additional detailed information about payroll cycle reporting and the reporting format, respectively. They are located on the PERS Employer website at <http://oregon.gov/PERS/EMP/index.shtml>.

- Employer Quick Info help file—Details what employee information employers need to submit to PERS and when, the two report types employers use to submit the information, the penalties PERS will assess for late reporting and payment, and examples of different employee reporting scenarios.
- *EDX File Format and Development Guide for the Version 2 File Structure*—Details the format and content of the payroll cycle reporting information.

Answers to Frequently Asked Questions (FAQs) are also posted on the PERS Employer website.