

## Viewing Employee Information

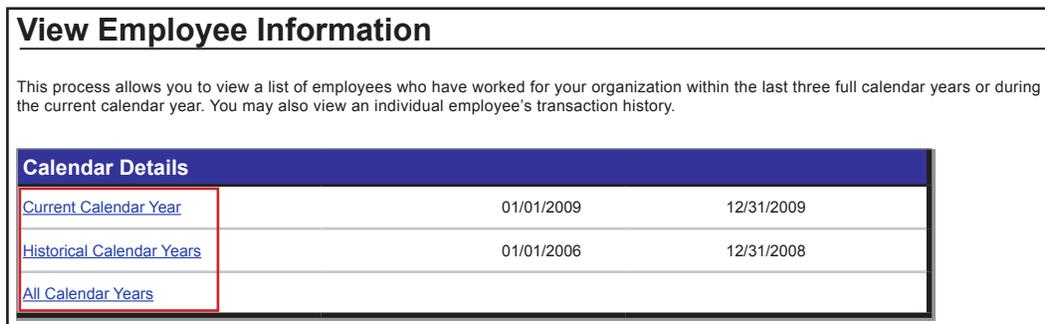
## Viewing employee address details

This function allows you to view an employee’s most recent permanent address on file at PERS. EDX will only allow employers to update current employee addresses, not retiree addresses. If the employee’s address in EDX is different than the address you have on record, you will need to update the address in EDX by submitting a demographic (DTL1) record with the employee’s current address. For information on how to submit a DTL1 record to update an employee’s address, refer to the Employer Quick Info help file.

- 1 Log on to EDX following the instructions outlined in “Logging on to EDX” on pages 6-8.
- 2 Click on the **View Employee Info** link (indicated by the arrow) to display the *View Employee Information* screen.



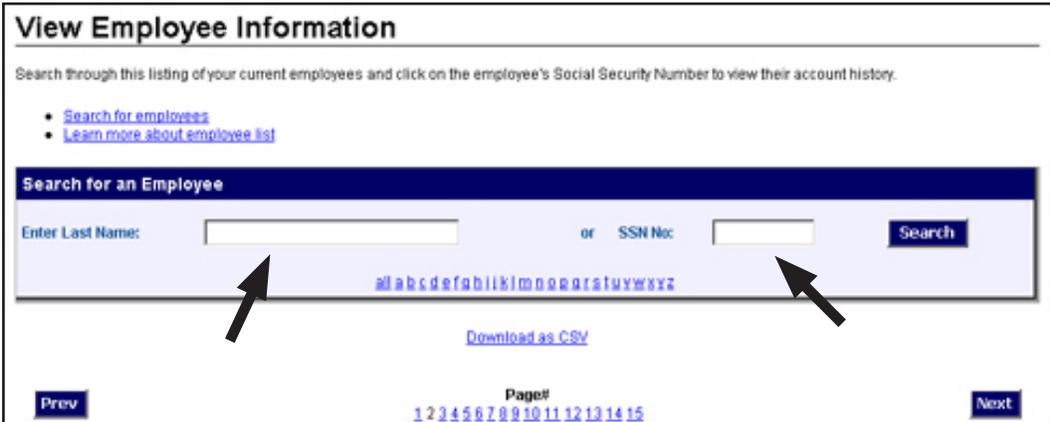
- 3 Click on either the **Current Fiscal Year**, **Historical Fiscal Years**, or **All Calendar Years** link (highlighted by the box). The *View Employee Information* screen displays a list of all employees in your organization. Click on the **Historical Calendar Years** link to view the most recent addresses of those employees who worked for your organization during the past three full calendar years.



4 Search for an employee using one of the following three methods that works best for you:

**Search by last name or SSN**

(1) Type the employee’s last name or SSN in the **Enter Last Name** or **SSN No** text boxes (indicated by the arrows) respectively.



(2) Click the **Search** button to display a list of employees matching your search criteria. If necessary, page through the list using the **Next** and **Prev** buttons.



**Filter by first letter of last name**

- Select the first letter (indicated by the arrow) of the employee’s last name to narrow the list down to only those individuals whose last names begin with the selected letter. If necessary, page through the list using the **Next** and **Prev** buttons.



### Page through entire list

- Page through the entire list using the **Prev** and **Next** buttons. **Note:** The **Prev** button does not appear until you initially click the **Next** button.

**View Employee Information**

Search through this listing of your current employees and click on the employee's Social Security Number to view their account history.

- [Search for employees](#)
- [Learn more about employee list](#)

**Search for an Employee**

Enter Last Name:  or SSN No:  **Search**

[a|b|c|d|e|f|g|h|i|j|k|m|n|o|p|q|r|s|t|u|v|w|x|y|z](#)

[Download as CSV](#)

**Prev** Page# **Next**  
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15

| SSN | Last Name | First Name | Plan | Contribution Start Date | Position Type |
|-----|-----------|------------|------|-------------------------|---------------|
|-----|-----------|------------|------|-------------------------|---------------|

- Click on the **SSN** link (highlighted by the box) next to the employee's last name to view the individual's posted record information; the *Employee Transaction Details* screen appears, showing either the current year or historical details for the selected employee.

**View Employee Information**

Search through this listing of your current employees and click on the employee's Social Security Number to view their account history.

- [Search for employees](#)
- [Learn more about employee list](#)

**Search for an Employee**

Enter Last Name:  or SSN No:  **Search**

[a|b|c|d|e|f|g|h|i|j|k|m|n|o|p|q|r|s|t|u|v|w|x|y|z](#)

[Download as CSV](#)

**Prev** Page# **Next**  
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15

| SSN                       | Last Name   | First Name | Plan        | Contribution Start Date | Position Type  |
|---------------------------|-------------|------------|-------------|-------------------------|----------------|
| <a href="#">389258147</a> | Black       | Angela     | PERS Tier 2 | 07/01/2003              | Active Service |
| <a href="#">147258368</a> | Bliss       | Darrell    | OPSRPPNS    | 08/01/2006              | Active Service |
| <a href="#">741852963</a> | Bowen       | Gail       | OPSRPPNS    | 06/01/2004              | Active Service |
| <a href="#">963852741</a> | Boxlightner | Darian     | OPSRPPNS    | 08/01/2007              | Active Service |

**Note:** If you selected **Historical Calendar Years** in step 3, the *Employee Address Details* screen will display permanent addresses of employees prior to the current calendar year.

### Employee Address Details

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This page displays the employee's current address on file.

- [View Transaction History for this employee](#)
- [View Employment History for this employee](#)

**Address Details For: Angela Black 001001001**

**Address Start Date:** 02/28/2006

185 NE Lotus Dr  
Bend, OR 97701 -0000

### Tell Me More

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- The start date for this address is the date the address became effective for this employee. Employers can only update an address for an employee who is currently in their employ. If a member is retired, the system will not store any address submitted by an Employer as it is the member's responsibility to keep their address current with PERS.
- If the address displayed does not match the address you have on file and this employee has concurrent employment, please check with the employee to be sure you have their correct address.
- In order to update an employee's address, submit a DTL 1-00 (No Change in Status) with the new address information. A status date is not required on this type of record because EDX will assign the report date on which the record is submitted as the start date for the address.

## Viewing transaction history

EDX provides the ability to view an employee's transaction history for an employer.

- 1 Follow the steps outlined in the previous topic to view the *Employee Address Details* screen.
- 2 Click on the **View Transaction History for this employee** link (indicated by the arrow) to view the *Employee Transaction Details* screen.

### Employee Address Details

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This page displays the employee's current address on file.

- [View Transaction History for this employee](#) 
- [View Employment History for this employee](#)

**Address Details For: Angela Black 001001001**

**Address Start Date:** 02/28/2006

185 NE Lotus Dr  
Bend, OR 97701 -0000

The *Employee Transaction Details* screen shows the retirement plan in which the member is enrolled. The screen also lists the employee and employer contributions made to the plan during the current calendar year, over the past three full calendar years, or over all calendar years depending on whether your selected **Current Calendar Year**, **Historical Calendar Years**, or **All Calendar Years** in step 3 of “Viewing Employee Address Details” on page 116. The list shows the most recent transaction first.

### Employee Transaction Details

This page displays a transaction history for a specific employee for the period from **01/01/2007 to 12/31/2007** starting with the most recent posted transaction.

- [View Address Details for this employee.](#)
- [View Employment History for this employee.](#)

**Transaction Details For:**

Plan: OPSRPPNS

Contribution Start Date: 12/01/2004

Total Hours Worked Since Jan 1, 2007 : 186.51

Concurrent Employments: No

| Pay Date   | Subject Salary | Job Class Code       | MPAT    | MPPT    | EPPT      | Avg OT Hours |
|------------|----------------|----------------------|---------|---------|-----------|--------------|
| 01/31/2007 | \$ 2,589.98    | 01 - General Service | \$ 0.00 | \$ 0.00 | \$ 155.40 | 0            |

## Viewing employment history

EDX provides the ability to view an employee’s work history for an organization. The work history is broken down by job segments.

- 1 Follow the steps outlined in “Viewing Employee Address Details” on pages 116–119 to view the *Employee Address Details* screen.
- 2 Click on the **View Employment History for the employee** link (indicated by the arrow) to view the *Employee Employment History Details* screen.

### Employee Address Details

This page displays the employee’s current address on file.

- [View Transaction History for this employee](#)
- [View Employment History for this employee](#)

**Address Details For: Jenny Jones 999887777**

Address Start Date: 02/28/2005

The *Employee Employment History Details* screen shows the current calendar year employment history, employment history over the last three full calendar years, or employment history over all calendar years depending on whether you selected **Current Calendar Year**, **Historical Calendar Years**, or **All Calendar Years** in step 3 of “Viewing employee address details” on page 116.

- Click on a number in the Job Segment column to expand the employment history details. In the illustration below, clicking on the number 1 displays expanded employment history in a new row just below number 1.

| Employee Employment History Details  |                          |             |            |                  |                 |                   |                 |                |          |                  |                        |
|--|--------------------------|-------------|------------|------------------|-----------------|-------------------|-----------------|----------------|----------|------------------|------------------------|
| This page displays the employee's employment history with this employer, starting with the most recent employment.   |                          |             |            |                  |                 |                   |                 |                |          |                  |                        |
| <ul style="list-style-type: none"> <li><a href="#">View Address Details for this employee.</a></li> <li><a href="#">View Transaction History for this employee.</a></li> </ul> |                          |             |            |                  |                 |                   |                 |                |          |                  |                        |
| Employment Details For: Jenny Jones 999887777  |                          |             |            |                  |                 |                   |                 |                |          |                  |                        |
| Job Segment  | Confirm                  | Hire Intent | Start Date | Last Day Service | Term / End Date | Unused Sick Leave | Job Class       | Position Type  | Plan     | Average OT Hours | Contract No. of Months |
| <u>1</u>   | <input type="checkbox"/> | NQ          | 01/24/2009 |                  |                 |                   | General Service | Active Service | OPSRPPNS | 0                |                        |
| <u>2</u>   | <input type="checkbox"/> | NQ          | 01/09/2008 | 03/31/2008       | 03/31/2008      | 0.000             |                 |                |          |                  |                        |

- Click on the **View Employee Info** link (indicated by the arrow) in the left navigation bar to view information about another employee.

| Site Navigation   |
|---|
| <b>Employer Home</b>  |
| <a href="#">View Your Statement</a>                             |
| <a href="#">Work on Reports</a>                                 |
| <a href="#">View Employee Info</a> ←                            |
| <a href="#">View Year-to-Date Wage and Contribution Summary</a> |
| <a href="#">Update My Profile</a>                               |
| <a href="#">Work List</a>                                       |
| <a href="#">Eligibility Reports</a>                             |
| <a href="#">Status Check</a>                                    |
| <a href="#">Inactive Employment Report</a>                      |

## Components of the Employee Employment History Details

The illustration below shows the *Employee Employment History Details* screen for historical calendar years. The *Employee Employment History Details* screen for the current calendar year will look identical except there is typically only one job segment listed. If you chose to view all calendar years, the *Employee Employment History Details* screen will show all job segments for an employee throughout all years of employment.

| Employee Employment History Details  |                          |             |            |                  |                 |                   |           |               |      |                  |                        |
|--|--------------------------|-------------|------------|------------------|-----------------|-------------------|-----------|---------------|------|------------------|------------------------|
| This page displays the employee's employment history with this employer, starting with the most recent employment.   |                          |             |            |                  |                 |                   |           |               |      |                  |                        |
| <ul style="list-style-type: none"> <li>• <a href="#">View Address Details for this employee.</a></li> <li>• <a href="#">View Transaction History for this employee.</a></li> </ul> |                          |             |            |                  |                 |                   |           |               |      |                  |                        |
| Employment Details For: Jenny Jones 999887777  |                          |             |            |                  |                 |                   |           |               |      |                  |                        |
| Job Segment  | Confirm                  | Hire Intent | Start Date | Last Day Service | Term / End Date | Unused Sick Leave | Job Class | Position Type | Plan | Average OT Hours | Contract No. of Months |
| 1  | <input type="checkbox"/> | NQ          | 01/24/2009 |                  |                 |                   |           |               |      |                  |                        |
| 2  | <input type="checkbox"/> | NQ          | 01/09/2008 | 03/31/2008       | 03/31/2008      | 0.000             |           |               |      |                  |                        |

### Job Segment

The Job Segment column lists unique employment periods that show when an employee started (Start Date) and ended (Term/End Date) employment at that employer. A blank Term/End Date indicates that a job segment has not terminated. If an employee worked for an employer multiple times, the Job Segment column will list each job segment successively, with the most recent job segment listed first. Click on the numbered job segment to expand the employment details.

### Hire Intent

The Hire Intent field indicates an employer's hiring intention for the employee with respect to a PERS-qualifying position. The table below describes the different codes that can appear in the column and their meaning.

#### Code Description

|     |  |
|-----|--|
| Q   | Qualifying Hire Intent—The employer expects the employee will work more than 600 hours in a calendar year.                             |
| NQ  | Non-Qualifying Hire Intent—The employer expect the employee will work fewer than 600 hours in a calendar year.                         |
| N/A | The Hire Intent—N/A (Not Applicable) if a PERS retiree is hired for employment, because retirees have already qualified for a pension. |

### Position Segment

An employment can have one or more position segments that include Last Day Service, Unused Sick Leave, PERS Job Class, Position Type, Plan, Average OT Hours, and

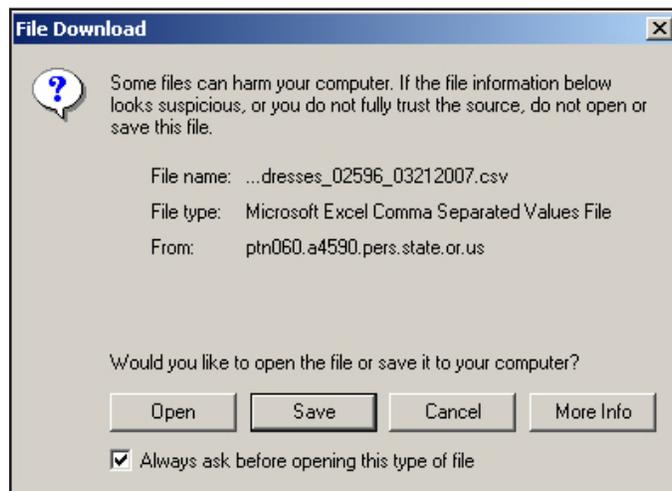
Contract No. of Months, as applicable. Each position will have a unique Start Date and End Date.

## Downloading employee information to Excel

- 1 Follow the steps outlined in “Viewing Employee Address Details” on pages 116–119 to view the *Employee Address Details* screen.
- 2 Click on the **Download as CSV** link (indicated by the arrow).



- 3 When the **File Download** dialog box appears, click the **Open** button to display the employee addresses in Excel, or click the **Save** button to save the file for later use.



If you clicked the **Open** button, Excel opens and displays the employee addresses.

**Note:** Excel drops any leading zeros from the Social Security numbers listed in the Member SSN column.

|    | A          | B         | C          | D         | E                  | F                       | G              | H          | I         | J     | K           | L       | M          | N       |
|----|------------|-----------|------------|-----------|--------------------|-------------------------|----------------|------------|-----------|-------|-------------|---------|------------|---------|
|    | Member SSN | Last Name | First Name | Plan      | Address Start Date | Address Li              | Address Line 2 | Address Li | City      | State | Zip         | Country | Foreign Pr | Foreign |
| 1  | 12345678   | Acosta    | Rachel     | OPSRPPN   | 3/31/2006          | 57 NE Dragnet Ln        |                |            | Bend      | OR    | 97701-0001  | U S A   |            |         |
| 2  | 369258147  | Adams     | Timothy    | OPSRPPN   | 4/30/2006          | 206 Baja Ct.            |                |            | Bend      | OR    | 97701-0001  | U S A   |            |         |
| 3  | 987654321  | Albers    | Mary       | PERS Tier | 10/31/2005         | PO Box 33               |                |            | Bend      | OR    | 97708-0001  | U S A   |            |         |
| 4  | 147258369  | Baker     | Gary       | OPSRPPN   | 1/23/2007          | 601 Comanche Rd         |                |            | Bend      | OR    | 97702 U S A |         |            |         |
| 5  | 11223333   | Barber    | Wendy      | OPSRPPN   | 11/13/2006         | 18277 W. Cascade Circle |                |            | Bend      | OR    | 97702 U S A |         |            |         |
| 6  | 232323232  | Bass      | William    | OPSRPPN   | 8/31/2006          | 1324 Mt. Bachelor Loop  |                |            | Bend      | OR    | 97707 U S A |         |            |         |
| 7  | 888776666  | Bartmann  | Claire     | OPSRPPN   | 1/23/2007          | 2023 SE Dimple St.      |                | Manion     | VA        |       | 24354 U S A |         |            |         |
| 8  | 503603764  | Beckter   | Cassie     | OPSRPPN   | 2/26/2005          | 8900 N. Fir Grove Dr.   |                |            | Bend      | OR    | 97701-0001  | U S A   |            |         |
| 9  | 541241321  | Black     | Jennifer   | OPSRPPN   | 5/31/2004          | 130 SW Tempest Dr       |                |            | Bend      | OR    | 97702-0001  | U S A   |            |         |
| 10 | 666666666  | Booth     | David      | PERS Tier | 8/29/2004          | 455 S. Patriot Way      |                |            | Bend      | OR    | 97707 U S A |         |            |         |
| 11 | 121212121  | Bowman    | Jennifer   | OPSRPPN   | 10/4/2005          | 13280 Navajo Rd         |                |            | HILLSBORO | OR    | 97123 U S A |         |            |         |

## Viewing Employee Eligibility Exception Reports

The *Employee Eligibility Exception Reports* screen allows you to determine if corrective action is required to report regular wages and contributions (qualifying hours) or non-qualifying wages without contributions for an employee. **Note:** These reports are only updated once a week. When viewing the .csv file, the header row will state the date EDX pulled the information from the system.

- 1 Log on to the *Employer Home Page* screen following the steps outlined in “Logging on to EDX” on pages 6–8.
- 2 Click on the **Eligibility Reports** link (indicated by the arrow) to access the *Employee Eligibility Exception Reports* screen.

**Site Navigation**

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**Employer Home**

- [View Your Statement](#)
- [Work on Reports](#)
- [View Employee Info](#)
- [View Year-to-Date Wage and Contribution Summary](#)
- [Update My Profile](#)
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- [Eligibility Reports](#) ←
- [Status Check](#)
- [Inactive Employment Report](#)

- 3 In the **Filter Your Report by Year** dialog box, type the year in the **Enter year (YYYY)** text box you want the report to reflect. **Note:** Reports are only generated for the current year and two years prior.

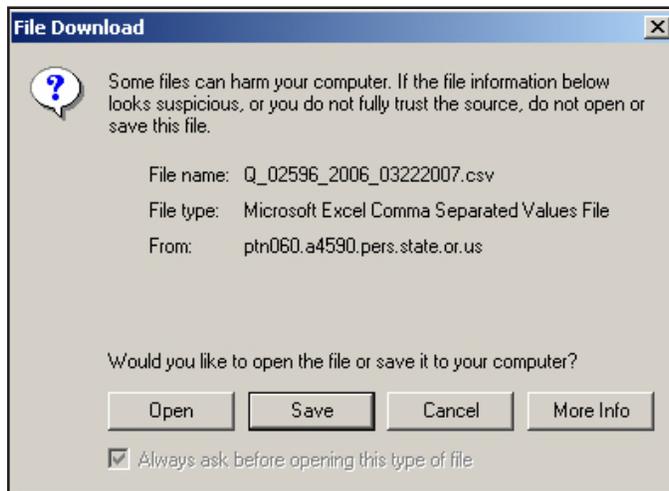
- 4 Click on a **Download CSV File** button (shown circled).

There are two different .csv files you can download to Excel:

**Members Approaching Qualifying Hours** lists employees who during the selected year have been reported using a non-qualifying wage code or three or more qualifying wage codes without contributions. Under either condition, the employees' net hours exceed 550. Employees listed in this report may likely meet the minimum of 600 hours to be eligible for a PERS-qualified position.

**Members with Contributions Who may not Qualify** lists employees who have reported contributions during the selected year but their total hours are fewer than the minimum 600 hours. Employees listed in this report will likely not meet the minimum qualifying hours and therefore are not eligible for a PERS-qualified position. **Important:** This report is not useful for the current year unless you run it after the mid-year time frame.

- When the **File Download** dialog box appears, click the **Open** button. **Note:** For some versions of Internet Explorer, the **File Download** dialog box may appear a second time.



Click the **Open** button again. After a few seconds, Excel opens and displays a list of employees (1) approaching qualifying hours or (2) with less than 600 hours of service in a calendar year but with reported contributions.

**Note:** The date the information was pulled from the system is shown circled.

|   | A   | B         | C          | D                    | E                      | F                       | G                   | H   |
|---|---|-----------|------------|----------------------|------------------------|-------------------------|---------------------|-----|
| 1 | Members Approaching Qualifying Hours Report |           |            | Employee             |                        | Data as of 02/23/2007   |                     |     |
| 2 | SSN   | Last Name | First Name | Posted Hours This ER | Unposted Hours This ER | Unposted Other ER Hours | Unposted Other ER H |     |
| 3 |   | 333221111 | Chandler   | David                | 593.5                  | 0                       | 0                   | 0   |
| 4 |   | 868595859 | Cox        | Dwayne               | 260.5                  | 0                       | 1234                | 0   |
| 5 |   | 541541541 | Gore       | Pamela               | 328.75                 | 0                       | 0                   | 324 |
| 6 |   | 367241689 | Harper     | Ainsley              | 657.5                  | 0                       | 0                   | 0   |
| 7 |   | 222002222 | Lewis      | Alison               | 864.05                 | 0                       | 0                   | 0   |
| 8 |   | 753357142 | Moore      | Anne                 | 351.5                  | 0                       | 624                 | 0   |
| 9 |   |           |            |                      |                        |                         |                     |     |

- Click on the **Return to the Eligibility Exceptions Reports page** link (indicated by the arrow) if you want to download another report.

### Employee Eligibility Exception Reports

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Please wait for download to complete. Once the download is complete, click on the following link to return to the Eligibility Exception Report page.

[Return to the Eligibility Exception Reports page](#)

## Checking a member's contribution status

The *Status Check Member Search* screen allows you to view an employee's contribution status to determine if PERS is expecting contributions for the employee or if you should contact PERS to discuss the employee's contribution status.

- 1 Log on to the *Employer Home Page* screen following the instructions outlined in "Logging on to EDX" on pages 6–8.
- 2 Click on the **Status Check** link (indicated by the arrow) to access the *Status Check Member Search* screen.



- 3 Type in either the employee's last name in the **Enter Last Name** text box or the Social Security number in the **SSN No** text box, and then click the **Search** button.

The image shows a search form titled "Search for a Member" with a dark blue header. Below the header, there are two input fields: "Enter Last Name:" followed by a text box, and "or SSN No:" followed by another text box. To the right of the second text box is a blue button labeled "Search".

**Note:** Searching by Social Security number is the preferred method if you want to pull up information on a specific individual. Searching by last name produces a list of all members with that last name.

The *Status Check Member Search* screen displays the search results (highlighted by the box) below the **Search for a Member** dialog box. **Note:** If you conducted a search based on last name, the list can span several pages. Click on a page number to advance from page to page.

**Status Check Member Search**

Search for a member to display their member contribution status.

**Search for a Member**

Enter Last Name:  or SSN No:  **Search**

Page# 1

| SSN       | Last Name | First Name | Plan    | Contribution Status      |
|-----------|-----------|------------|---------|--------------------------|
| *****4000 | Miller    |            | OPSRPDB | Expecting contributions. |

The Plan column identifies the retirement plan in which the employee is enrolled. The Contribution Status column lets you know if PERS is expecting contributions for that employee.

## Employees with open job segments

The *Inactive Employment Report* screen lists employees with open job segments who appear inactive. An open job segment will appear inactive when no wages have been reported for an employee in the last three calendar months, possibly due to a termination that was not reported. Use the following steps to help you determine if any open job segments exist.

- 1 Click on the **Inactive Employment Report** link (indicated by the arrow) to display *Inactive Employment Report*.

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[Inactive Employment Report](#)

- 2 Click the **Download CSV File** button.
- 3 In the **File Download** dialog box that appears, click either on the **Open** button to open the report in Excel or the **Save** button to save the Excel spreadsheet to a destination you choose. If you chose to click on the **Open** button, an Excel spreadsheet similar to the one shown below appears. At this point, you can use Excel to manipulate and save the data.

|    | A       | B                                 | C         | D          | E            | F           | G         | H            | I          | J | K |
|----|---------|-----------------------------------|-----------|------------|--------------|-------------|-----------|--------------|------------|---|---|
| 1  |         | Inactive Employment Report        |           |            | Report Date: | 4/7/2009    |           |              |            |   |   |
| 2  | ER#     | ER Name:                          |           |            |              |             |           |              |            |   |   |
| 3  | 2596    | BEND METRO PARK & RECREATION DIST |           |            |              |             |           |              |            |   |   |
| 4  | PERS ID | SSN                               | Last Name | First Name | MI           | Last Pay Da | Hire Date | Contribution | Start Date |   |   |
| 5  | 155032  | 909080808                         | Jones     | Barry      |              | null        | 5/27/2008 | 12/1/2008    |            |   |   |
| 6  | 469026  | 765432189                         | Kurtz     | Kimberly   | M            | null        | 4/30/2008 | 7/1/2004     |            |   |   |
| 7  | 252525  | 811865560                         | Wolfe     | Jan        |              | null        | 6/26/2007 | 1/1/2008     |            |   |   |
| 8  | 900050  | 541582479                         | Smart     | Jean       | F            | null        | 12/2/2008 | 7/1/2009     |            |   |   |
| 9  | 101050  | 8653210                           | Harper    | Valerie    |              | null        | 1/9/2008  | 8/1/2008     |            |   |   |
| 10 | 666333  | 101958201                         | Train     | Mary       | C            | null        | 3/31/2008 | 10/1/2008    |            |   |   |

**Note:** The pound symbol (#) will appear in the spreadsheet if the cell is too small to display the value. You will need to resize the column. “Null” in the Last Pay Date and/or Contribution Start Date columns means the fields are blank.

