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Employer Announcement #30

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Paper Forms Still Required in Some Situations

EDX has dramatically reduced the amount of paper required for reporting to PERS. However, there are several important situations where paper forms are still necessary to process member benefits or determine eligibility. Paper forms that are still needed to augment your electronic reporting are listed below.

Salary Certifications

Salary Certifications are required for wages prior to 2004. Although wages and contributions have been recorded on our older member database system, RIMS, an accurate view of salary paid by month is not possible without this additional information.

For Tier Two and OPSRP members, paper Salary Certifications may also be required for 2004 and after. This is because salary for Tier Two and OPSRP members must be considered “earned when earned,” and appropriately attributed to the month in which the service it compensates was performed.

Lump Sum Vacation Pay (LSVP) must be reported on the Salary Certification form. Although EDX has a data field for lump sum payments, the field does not differentiate between LSVP and other types of lump sum payments. PERS must know the exact amount of LSVP paid so that it may be included in Final Average Salary for PERS Tier One members.

Death Benefits

The data contained on a DTL1 Demographic record is insufficient to process death benefits for a surviving spouse or other beneficiary. Because of the brief time frame within which these beneficiaries must be contacted, we often call employers to solicit additional information, such as the separation date of record for the deceased. Information given to PERS by phone, however, does not eliminate the need for the employer to submit a DTL1 Demographic termination record. The actual death benefit cannot be paid until the electronic information has been submitted as well.

Retirements (Service and Disability)

Retirements cannot be processed until you have submitted a DTL1 Demographic record separating the prospective retiree. On occasion, a paper SEP form for 2004 or 2005 *may* be requested if all DTL2 records for a retirement applicant have not yet posted in EDX. For separations before 2003, a paper SEP form will be required. ***For disability retirements, Form 459-226T Disability Leave Without Pay is required in all cases.***

We are working to minimize the amount of paper reporting required of employers. We recognize that some forms request information already submitted electronically. PERS appreciates your patience in cases where you believe you have already submitted all required information on EDX. We look forward to eventually receiving all additional information electronically from employers.