

## **Employer Data Exchange (EDX) Test Environment** **(May 18, 2006)**

The EDX test environment provides hands-on user training and allows you to submit test report files to validate content and format. Report files submitted via the test system will only be processed against test employee records and will not affect actual employee data.

### **Test Environment Overview**

To allow you to begin testing now, PERS has made the EDX test environment available from 6 a.m. to 6 p.m., Monday through Friday, holidays excepted. This test environment will enable you to logon to EDX, set up your user accounts, create Web-based reports, submit your reports, correct errors, validate your reports, post your reports, and view your remittance statements.

The EDX test environment will be preloaded with test data using your PERS employer and member demographic data. Testing against this data will not affect actual employer or employee data.

**Caution! The EDX test and production environments are very similar. Be sure you are in the correct environment for what you want to do.**

### **EDX Test Procedures**

When you begin Web-based reporting you will use one of three reporting methods:

1. File upload method – where you are able to produce an electronic file, known as a “.dat” file, that contains your wage, service, and demographic information. You upload this file to PERS using EDX.
2. “Copy forward” method – where you copy the last 100% posted report, and make corrections/modifications necessary for the current reporting period. The copy forward feature allows employers to copy the previous wage and contribution data to a new report to help minimize data entry. If data differs from the reported copy, each record will need to be edited.
3. Data entry method – where you manually enter wage, service, and demographic data using EDX DTL1 and DTL2 screens. This method is available to employers with fewer than 150 employees.

**The EDX test and production systems function in the same manner. If you are familiar with the production EDX system, you may wish skip any or all sections of the following review. These procedures are for those who may be new to the EDX system.**

The test procedures you use depend on which of these methods you use for reporting. The test procedures in this section have been grouped into three tables:

1. Test procedures applicable to all employers. These are common procedures that should be exercised by all employers.
2. Test procedures for File Upload report submission.
3. Test procedures for Data Entry report submission. Employers who use the Data Entry method should exercise these test procedures.

If there are multiple users testing your reporting, it is important that they coordinate and properly sequence the testing procedures to achieve expected results.

The [EDX User Guide](#) provides easy-to-use procedures for logging on to EDX, setting up user accounts, creating Web-based reports, submitting reports, correcting errors, and viewing statements.

It describes the specific wage, contribution, and demographic data content and format you must use when creating report records.

You may bypass steps A1 - A16 if you wish. These steps are presented as an optional review.

<b>Step</b>	<b>Procedure Description</b>	<b>Refer to EDX User Guide</b>
A1	Create a Payroll Specialist account. Request the Web Administrator activate your account.	Managing Web Accounts – Payroll Specialist – Creating An Account
A2	After the Web Administrator activates your account, you will receive an e-mail. Proceed to logon to EDX.	Getting Started with EDX – Accessing EDX, Logging into the Web Site
A3	Update your user profile with a new password, and modify any of your profile information as required.	Managing Web Accounts – Payroll Specialist – Updating Your Profile
A4	View employee information. This allows you to view and determine the employees you want to use for testing in the steps below.	Other Features Available on EDX – Viewing Employee Information
A5	Create an empty report with no member records for a given pay date.	Payroll Cycle Reporting — Create Your Report – Creating a Report
A6	Add records to the report as described by test procedures A7 through A10.	Payroll Cycle Reporting — Create Your Report – Adding Records to a Report; Data Reporting Requirements
A7	Enter a demographic record for new employee.	Data Reporting Requirements – Detail 1 – Member Demographic Record – New Employee Required Data
A8	Enter a demographic record for re-hire of a previous employee.	Data Reporting Requirements – Detail 1 – Member Demographic Record – New Employee Required Data
A9	Enter demographic records for Leave Without Pay. Try various leave types: family, military, career development, etc.	Data Reporting Requirements – Detail 1 – Member Demographic Record Screen Fields, Employee Termination Required Data
A10	Enter a demographic record for employee termination.	Data Reporting Requirements – Detail 1 – Employee Termination Required Data
A11	Release the report for PERS validation, which runs overnight.	Payroll Cycle Reporting — Submit Report – Releasing a Report
A12	Logoff EDX.	Getting Started with EDX – Logging Off
A13	Monitor your e-mail for notification that your report has been posted. Logon to EDX after receiving this notification.	Getting Started with EDX – Accessing EDX, Logging into the Web Site
A14	View the posted report totals.	Payroll Cycle Reporting — Submit Report – Viewing Report Totals
A15	View your remittance statement. Balance the statement totals against your totals for all records submitted.	Payroll Cycle Reporting — Receive Statement
A16	Logoff EDX.	Getting Started with EDX – Logging Off

Employers who UPLOAD FILES may wish to review the following test procedures (F1 - F9).

<b>Step</b>	<b>Procedure Description</b>	<b>Refer to EDX User Guide</b>
F1	Create a report by generating and uploading for a given report date; your next scheduled report date in the EDX production system would be a good choice.	Payroll Cycle Reporting Create Your Report – Creating a Report
F2	Release the report for PERS validation which runs overnight.	Payroll Cycle Reporting Submit Report – Releasing a Report
F3	Logoff EDX.	Getting Started with EDX – Logging Off
F4	The next day, logon to EDX and view your report(s)	Payroll Cycle Reporting Submit Report - Viewing Report Totals
F5	Correct records in error (using the EDX data edit functions) and release the report for validation again. Logoff EDX.	Payroll Cycle Reporting– Correct Errors; Payroll Cycle Reporting – Submit Report – Releasing a Report
F6	Ensure all submitted records are error free. Correct any records any error and resubmit these records for validation. Logoff EDX.	Payroll Cycle Reporting– Correct Errors
F7	After viewing your reports and remittance statement, generate a subsequent report for another report date. If using the File Upload Method, include a wage and service (W&C) adjustment record in your electronic file to adjust a W&C record reported in the previous reporting cycle.	Payroll Cycle Reporting– Create Your Report – Creating a Report; Data Reporting Requirements – Detail 2 – Positive Adjustment, Negative Adjustment
F8	Release the report.	Payroll Cycle Reporting– Submit Report – Releasing a Report
F9	Logoff EDX.	Getting Started with EDX – Logging Off

Employers using DATA ENTRY may wish to review the following test procedures (D1 - D19).

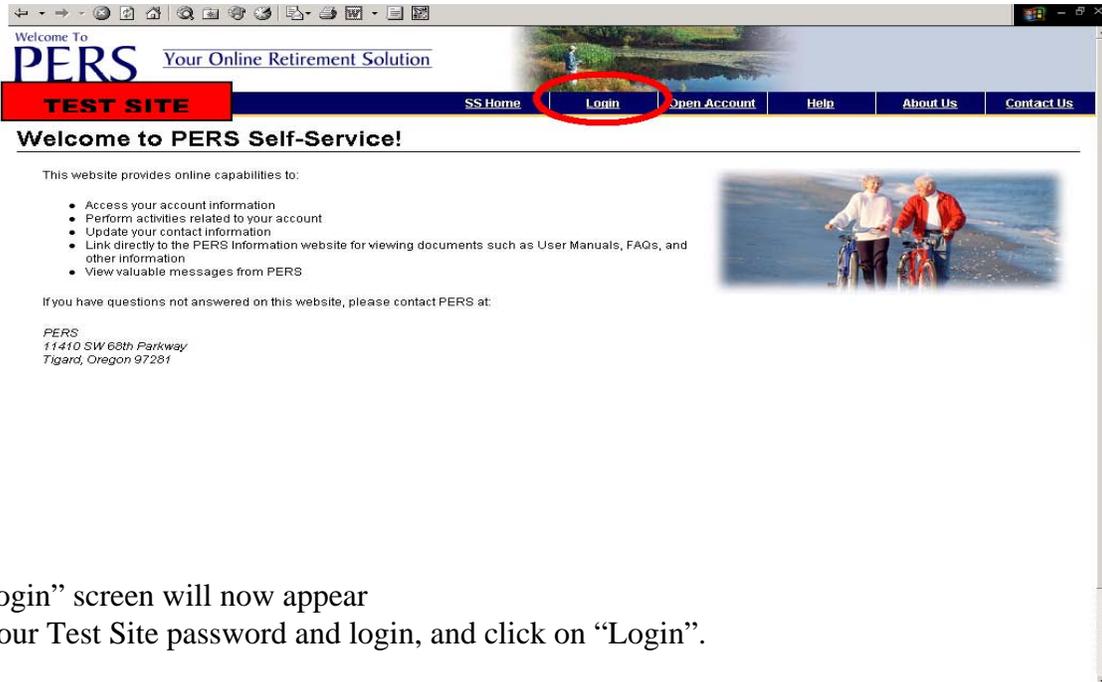
<b>Step</b>	<b>Procedure Description</b>	<b>Refer to EDX User Guide</b>
D1	Add records to the report as described by test procedures D2 through D5.	Payroll Cycle Reporting –Create Your Report – Adding Records to a Report; Data Reporting Requirements
D2	Add W&C records for existing employees: Use wage and service code 01 – regular wages.	Data Reporting Requirements – Detail 2 – Wage and Service Record Screen Fields, Existing Member Wages
D3	Enter new employee: W&C record, and demographic record	Data Reporting Requirements – Detail 2 – Wage and Service Record – New Member Wages; Data Reporting Requirements – Detail 1 – Member Demographic Record – New Employee Required Data
D4	Enter demographic record for leave of absence.	Data Reporting Requirements – Detail 1 – Member Demographic Record Screen Fields, Employee Termination Required Data

D5	Enter employee termination: demographic record and W&C record for last pay check	Data Reporting Requirements – Detail 1 – Employee Termination Required Data; Data Reporting Requirements – Detail 2 – Wage and Service Record
D6	Release the report for PERS validation which runs overnight.	Payroll Cycle Reporting – Process 2 – Submit Report – Releasing a Report
D7	Logoff EDX.	Getting Started with EDX – Logging Off
D8	The next day, logon to EDX, and view your report(s).	Payroll Cycle Reporting –Submit Report -Viewing Report Totals
D9	Correct records in error, and release the report for validation again. Logoff EDX.	Payroll Cycle Reporting –Correct Errors; Payroll Cycle Reporting – Submit Report – Releasing a Report
D10	Ensure all submitted records are error free. Correct any records in error and resubmit them for validation.	Payroll Cycle Reporting –Correct Errors
D11	Monitor your e-mail for notification that your report has been posted. Logon to EDX after receiving this notification.	Getting Started with EDX – Accessing EDX, Logging into the Web Site
D12	View the posted report totals.	Payroll Cycle Reporting –Submit Report – Viewing Report Totals
D13	View your statement. Balance the statement totals against your totals for all records submitted.	Payroll Cycle Reporting –Receive Statement
D14	Use the copy forward method to create a report for a pay date of your choice.	Payroll Cycle Reporting –Create Your Report – Populate the Report
D15	Add a record to report: Add a W&C adjustment record to adjust a W&C record that was reported in the previous reporting cycle	Payroll Cycle Reporting –Create Your Report – Populate the Report, Adding Records to a Report; Data Reporting Requirements – Detail 2 – Positive Adjustment, Negative Adjustment
D16	Add a new employee with contributions.	Payroll Cycle Reporting –Create Your Report – Populate the Report, Adding Records to a Report
D17	Add a new employee without contributions.	Payroll Cycle Reporting –Create Your Report – Populate the Report, Adding Records to a Report
D18	Edit one or more W&C records, changing the hours worked and salary data.	Payroll Cycle Reporting –Correct Errors – Editing Records; Data Reporting Requirements – Detail 2 – Wage and Service Record Screen Fields
D19	Release the report and logoff EDX.	Payroll Cycle Reporting –Submit Report – Releasing a Report; Getting Started with EDX – Logging Off

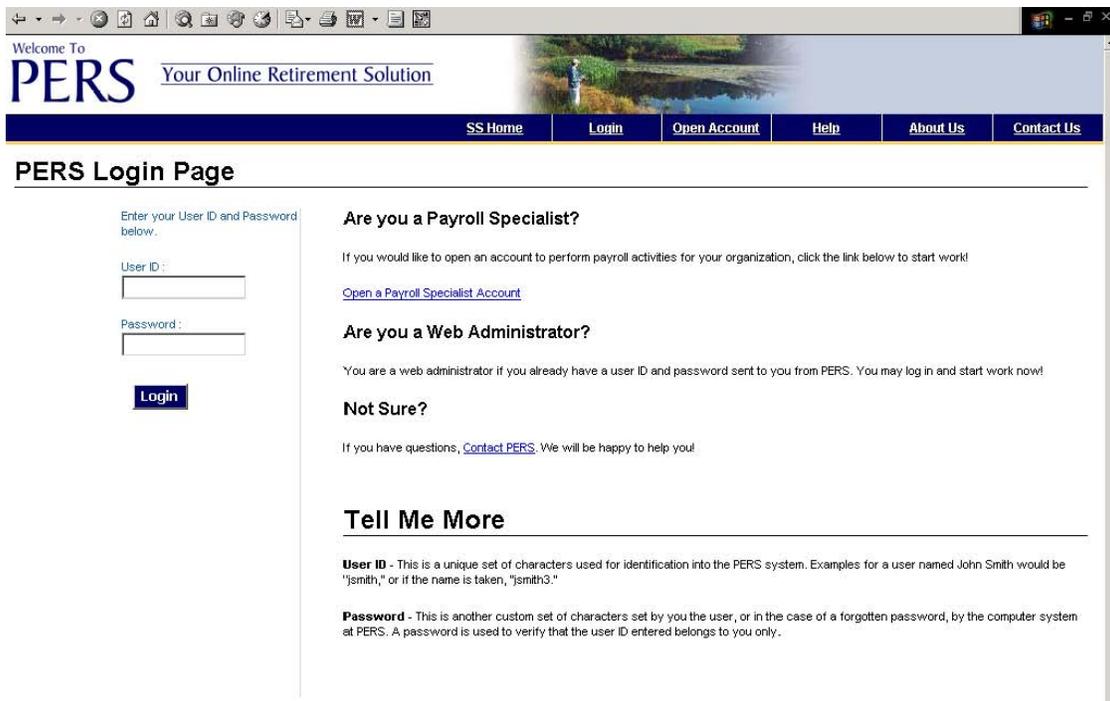
To access the EDX Test system, go to the PERS Employer website home page at <http://www.oregon.gov/PERS/EMP>.

Select the EDX test system link. When the EDX Welcome Page is displayed, as shown below, it will indicate whether you are accessing the TEST SITE.

On the top navigation bar, click the “Login” link to access the PERS Employer Reporting Login Page shown below.



The “Login” screen will now appear  
Enter your Test Site password and login, and click on “Login”.



You are now logged on and can continue working.

If you have any questions, please contact the Employer Service Center (ESC) at 888-320-7377 (toll free) or at 503-603-7788 (option 4), or e-mail us at [PERS.EDX.support@state.or.us](mailto:PERS.EDX.support@state.or.us)