

NEW EMPLOYEES

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INTRODUCTION

This document describes the generic steps for setting up an employee who is new to state service in OSPA.

SCOPE / APPLICABILITY

It applies to all agencies that use OSPA. The process may vary by bargaining agreement, employment status, dependents, etc.

If you are processing an employee transferring from another state agency, see the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Transfers.

RESPONSIBILITIES

Several organizational units play a role in processing a new employee, they include:

Entity	Responsibility
Hiring Manager	<ul style="list-style-type: none"> • Hires employee and establishes employment terms • Communicates hire and terms to Agency Human Resources • If employee is a foreign national (alien), notifies HR. See Income Tax below, Foreign Nationals (Aliens) section. • If employee has an out-of-state duty station, notifies HR. See Income Tax below, Out-of-State Duty Station section
New Employee	<ul style="list-style-type: none"> • Submits forms as needed. See Background Information below, Supporting Documentation / Forms section. • Self-enrolls for PEBB benefits

Entity	Responsibility
Agency Human Resources	<ul style="list-style-type: none"> • Determines PERS status and notes on Personnel Action if contributions should begin immediately • Enters employment information in the PPDB • If employee has an out-of-state duty station, notifies agency payroll. See Income Tax below, Out-of-State Duty Station section. • If employee indicates in Section 1 of the USCIS I-9 that s/he is “an alien authorized to work until _____”, notifies agency payroll office. See Income Tax below, Foreign Nationals (Aliens) section. • Sends PA to agency payroll office
Agency Payroll Office	<ul style="list-style-type: none"> • Ensures benefit data is entered in PEBB “dot” benefits (PDB) and interfaces to OSPA • Confirms accuracy of data entered in PPDB and interfaced to OSPA by reviewing the P030 Job Status Data screen in OSPA or the PBED screen in the PPDB • Makes entries in OSPA. See General Process section below. • If employee indicates in Section 1 of the USCIS I-9 that s/he is “an alien authorized to work until _____”, asks employee to complete OSPA Form 99.01 Determination of Foreign National’s Residency and verifies documentation. See Income Tax below, Foreign Nationals (Aliens) section. • If the employee is a nonresident alien who is subject to income tax withholding, makes tax adjustments on the P010 screen. See Income Tax below, Foreign Nationals (Aliens) section. • If the employee claims exemption from income tax withholding or claims more than 10 withholding allowances, notifies PSS. See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Income Taxes. • If the employee has an out-of-state duty station, contacts PSS. See Income Tax below, Out-of-State Duty Station section.

Entity	Responsibility
Fleet and Parking Services, Enterprise Asset Management, Department of Administrative Services (DAS), state.parking@oregon.gov	<ul style="list-style-type: none"> Designates deduction and plan code if employee signs-up for state-owned parking
Applicable Union for Represented Employees	<ul style="list-style-type: none"> Notifies agency payroll of employee’s choice of union membership Approves nonreligious charity if employee exercises right of non-association. See Union Dues section below.
Payroll System Support (PSS), Oregon Statewide Payroll Services (OSPS), Financial Business Systems (FBS), Enterprise Goods and Services (EGS), Department of Administrative Services (DAS), OSPS.Help@oregon.gov	<ul style="list-style-type: none"> Submits tax reports and payments to applicable governmental entities Coordinates preparation for annual IRS Form W-2 and other applicable forms Forwards IRS Form W-4 to the Oregon Department of Revenue (DOR) if the employee claims exemption from withholding or more than 10 withholding allowances. See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Income Taxes.

SYSTEMS / APPLICATIONS

The following state computer systems and applications share payroll data and play a role in payroll and benefit processing:

System / Application	Functionality
Position and Personnel Database (the PPDB)	<ul style="list-style-type: none"> • Sends new hire information to: <ul style="list-style-type: none"> ▪ OSPA when saved ▪ PDB nightly ▪ EDX/jClarety after payroll run 2 final
PEBB “dot” benefits (PDB)	<ul style="list-style-type: none"> • Interfaces the employee’s enrollments for PEBB benefits to OSPA every two minutes • Notifies the insurance companies of the employee’s insurance selections on the Friday after entry in PDB
Oregon Statewide Payroll Application (OSPA)	<ul style="list-style-type: none"> • After each final payroll run sends payments to vendors • After run 2 final sends: <ul style="list-style-type: none"> ▪ Hours worked and the OSPA P070 screen entries to PDB ▪ Subject hours and salary and contributions to PERS EDX/jClarety
Leave Accrual and Reporting System (LARS)	<ul style="list-style-type: none"> • Generally, the first night after each run 2 final, updates accrued leave for all eligible employees. Personal Business Leave sections below and the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Leave Accrual and Reporting.
Oregon Savings Growth Plan (OSGP)	<ul style="list-style-type: none"> • Sends employee’s enrollment in deferred compensation to the P070 screen in OSPA for each preliminary run 2. See Oregon Savings Growth Plan section below.
PERS EDX/jClarety	<ul style="list-style-type: none"> • Maintains record of employee membership, subject wages and hours, and contributions to PERS. See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Public Employee Retirement System.

GENERAL PROCESS

The generic steps for setting up an employee who is new to state service in OSPA follow. The process may vary by bargaining agreement, employment status, dependents, etc.

PREREQUISITES

Agency Payroll cannot enter employee data in OSPA until Human Resources has entered the new hire information in the PPDB and the data is available in OSPA.

Each employee must have a work schedule on the P020 Work Schedule Data screen before OSPA will generate a timesheet or a payment for the employee.

Each employee must have income tax withholding information on the P010 Withholding / Retirement Info screen. If the payroll office does not enter withholding information, OSPA will default to single with zero tax withholding allowances. See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Income Taxes.

PROCESS

Action	More
<p>1. Confirm the data from the PPDB on the P030 Job Status Data screen, including:</p> <ul style="list-style-type: none"> ▪ JOB STAT START/STOP – START = hire date, STOP = 999999 ▪ PT-FT CD/PCT – is employee part-time or full-time? ▪ APPOINTMENT TYPE DT/CD ▪ EMP REPR – employee’s bargaining unit, if represented ▪ PERSONNEL TRANS CODE – see http://www.oregon.gov/das/HR/Documents/PA%20code%20descriptions.pdf for definitions ▪ BENEFIT PKG CD – see the Statewide Payroll Reference Manual, OSPA System Related Documents, Code Lists, Benefit Package Codes ▪ PERS JOB CLASS CODE – see the PERS section below ▪ WAGE BASIS CD ▪ TIMESHEET CD 	<p>See the Statewide Payroll Reference Manual, OSPA System Related Documents, Screen Guides, P030</p> <p>Note: Limited duration or seasonal employees may have a future STOP date (rather than 999999) for the job segment.</p>
<p>2. Enter the new employee’s work schedule on the P020 Work Schedule Data screen, including:</p> <ul style="list-style-type: none"> ▪ START DATE ▪ WS CODE – See the Statewide Payroll Reference Manual, OSPA System Related Documents, Code Lists, Work Schedule Codes ▪ SHIFT START – 24-hour clock, HHMM, defaults to 0800 ▪ SHIFT CODE – 1 = day, 2 = evening, 3 = night, defaults to 1 	<p>See the Statewide Payroll Reference Manual, OSPA System Related Documents, Screen Guides, P020</p>

Action	More
<p>3. Make applicable entries on the P010 Withholding / Retirement Info screen, including:</p> <ul style="list-style-type: none"> ▪ TAX DATA FOLLOW-UP FLAG – change to N after entering withholding information ▪ FINAL CHECK ISSUED and FINAL CHECK PERIOD ENDING – change to 000000 if dates are present (indicates a re-hire) ▪ RETIREMENT START DATE – enter date if employee is new to public service and not yet a member of Tier 1, Tier 2 or OPSRP. See the PERS section below. ▪ FEDERAL / STATE WITHHOLDING – must have a W-4 from the employee. See Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Income Taxes. ▪ RTMT SYST – See the PERS section below ▪ RTMT STAT – See the PERS section below ▪ RTMT ACCT – PERS Tier 1 or Tier 2 only, optional field ▪ FICA SUBJ – Y ▪ SAIF SUBJ – Y ▪ UNEM SUBJ – Y ▪ WAIVERS – if the employee declines PEBB benefits. See PEBB Benefits below, Decline Benefits section 	<p>See the Statewide Payroll Reference Manual, OSPA System Related Documents, Screen Guides, P010</p> <p>If the employee has worked for another state agency or public employer, PERS contributions may begin immediately. See the PERS section below.</p> <p>NOTE: some positions or individuals may not be subject to FICA, SAIF or UNEM. See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Income Taxes for FICA information. Follow your agency's practices for SAIF and unemployment.</p>

Action	More
<p>4. If eligible, confirm that the employee has self-enrolled or enter the employee’s PEBB insurance selections in PDB.</p> <ul style="list-style-type: none"> ▪ If the employee has not declined PEBB benefits, ensure the employee has the following core (or required) PEBB insurances on the P070 Payroll Deductions screen: <ul style="list-style-type: none"> ○ Medical (or has opted out) ○ Vision (if PPO medical plan) ○ Dental (or has opted out) ○ Basic life (unless YJ benefit package) ▪ If the employee participates in the Health Engagement Model, make sure the employee has an entry on the P050 Gross Pay Adjustments screen with PAY TYP HEM. 	<p>See PEBB Benefits section below</p> <p>See the Statewide Payroll Reference Manual, OSPA System Related Documents, Code Lists, Deduction Codes and Screen Guides, PTD1 and PTD2. Also see Payroll Processes Using OSPA, PEBB Benefits.</p>
<p>5. Enter additional voluntary deductions on the P070 screen.</p> <ul style="list-style-type: none"> ▪ If the employee is in a represented position, ensure that you have received a notice from the union of the employee’s membership choice. If you have not received notice before the end of the employee’s first month of employment, enter a fair share deduction for the applicable union. OSPA will look-up the amounts from the PTD2 screen or programming. Some unions also have a second “issues” deduction. See Union Dues section below. ▪ If the employee has applied for parking in a state-owned lot, DAS Parking and Fleet Services will give you the deduction and plan code. OSPA will look-up the amounts from the PTD2 screen. ▪ If the employee elects to participate in the Oregon Savings Growth Plan, the deduction(s) will load during preliminary payroll run 2 from an electronic file from ING, the OSGP third-party administrator. See the Oregon Savings Growth Plan section below and the Statewide Payroll Reference Manual, OSPA System Related Documents, Interfaces, OSGP. ▪ The employee may have up to nine direct deposit deductions. See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Direct Deposit. 	<p>See the Statewide Payroll Reference Manual, OSPA System Related Documents, Code Lists, Deduction Codes and Screen Guides, PTD1 and PTD2.</p>

Action	More
<p>6. Make any additional entries unique to the employee, such as:</p> <ul style="list-style-type: none"> ▪ If the employee opts out of medical or medical and dental insurance, make an IR entry on the P050 Gross Pay Adjustments screen. See PEBB Benefits below, Opt Out section and the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, PEBB Benefits. ▪ If the employee has domestic partner insurance and has not claimed the partner and/or the partner’s children as tax dependents, make applicable DPT, DPS and DPN entries on the P050 screen. See PEBB Benefits below, Domestic Partner Insurance section and the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, PEBB Benefits. ▪ If the employee declines all PEBB benefits, make entries on the P010 screen. See PEBB Benefits below, Decline Benefits section and the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, PEBB Benefits. ▪ If the employee will be using On-line Daily Time, enter the employee on the PSEC Time Entry Access Tbl screen. See the Statewide Payroll Reference Manual, OSPA System Related Documents, Screen Guides, PSEC. 	

INCOME TAX

See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Income Taxes for more information on the topics in this section and the following:

- Different withholding allowances for federal and state taxes
- Employees who claim exemption from withholding or more than 10 withholding allowances
- Invalid W-4’s
- IRS Lock-in or DOR Determination Letters

FOREIGN NATIONALS (ALIENS)

For tax purposes, an alien is an individual who is not a U.S. citizen. The IRS classifies aliens as either nonresident or resident. Generally, the U.S. taxes resident aliens based upon their worldwide income, the same as U.S. citizens. The U.S. taxes nonresident aliens based upon their income from sources within the U.S. only and on certain income connected with the conduct of a trade or business in the U.S.

OSPS Form 99.01 Determination of Foreign National's Residency guides the agency and employee who is not a lawful permanent resident through the substantial presence test to determine if the employee is a resident or a nonresident alien. If the employee claims exemption from withholding because of a tax treaty, s/he will also need to complete IRS Form 8233 Exemption from Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual or IRS Form W-9 Request for Taxpayer Identification Number and Certification.

If the employee is exempt from income or FICA tax withholding, notify Payroll System Support (PSS). If the employee is a nonresident alien and not exempt from income tax withholding, you will need to adjust the withholding information on the P010 screen to increase the employee's withholding. See the IRS Publication 15 (Circular E) Employer's Tax Guide.

OUT-OF-STATE DUTY STATION

If you become aware that an employee has an out-of-state duty station, contact Payroll System Support immediately. If the state of Oregon as the employer is required to withhold taxes for another state, PSS will register the state of Oregon as an employer in that state, enter a deduction code on the PTD1 Payroll Deduction Table screen and calculate the amount to withhold, based upon the current salary. You will need to make an entry on the P070 screen each month for the withholding. PSS will file the required reports and make the required payments to the other state.

Clues that may indicate an out-of-state duty station include:

- Employee's home address listed on the PBED screen in the PPDB or on the employee's W-4
- Employee's work phone listed on the PBED, PBET, or PBEV screen in the PPDB

OREGON SAVINGS GROWTH PLAN (OSGP)

Do not make Oregon Savings Growth Plan (deferred compensation) entries on the P070 screen unless directed to do so by an OSGP staff member. The OSGP third-party vendor (currently ING) will send an electronic file to OSPA. The application will load deduction entries on the P070 screen during preliminary run 2. They will be effective for the next pay period. Typically, employee requests take effect at least one pay period after the request. For example, a participant making an entry at ING's web site in January would generally see the change in March.

Typically, OSGP will only contact payroll to make P070 entries for unusual circumstances, such as:

- Participation in the Max-Plus or Catch-up programs
- A final check

See the Statewide Payroll Reference Manual, OSPA System Related Documents, Interfaces, OSGP for additional information

PEBB BENEFITS

Unless directed to do so by a PEBB staff member, do not make on-going PEBB benefit entries on the P070 screen. Instead, the employee will self-enroll in PDB or an agency staff member will enter the employee's insurance enrollment in PDB, which will interface the deduction information to OSPA. Effective January 1, 2011, the employee will have 30 days to enroll.

Normally, a non-job share employee must have at least 80 regular paid hours in a month to qualify for PEBB benefits for the next month. In the employee's first month, the employee is eligible for PEBB benefits, regardless of the number of regular paid hours. OSPA uses the RECOG SVC DT on the P030 screen to identify new employees in their first month.

See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, PEBB Benefits for additional information on any of the topics in this section.

DECLINE PEBB BENEFITS

OAR 101-020-0018 allows employees to decline the right to the employer contribution and enrollment in all of the PEBB benefit plans. If the employee declines PEBB benefits, make entries on the P010 screen.

DOMESTIC PARTNER INSURANCE

Under federal and state income and FICA tax law, health insurance benefits provided by an employer to an employee and the employee's spouse or eligible dependents are not taxable to the employee. The employee may submit a PEBB Domestic Partner Certification for Dependent Tax Status to claim the employee's domestic partner and/or the partner's children as tax dependent(s). If the employee does not, the market or imputed value of the benefit for the domestic partner and/or the DP's eligible children is taxable income to the employee.

Agency payroll makes a DPT (Domestic Partner Taxable) entry on the P050 Gross Pay Adjustments screen when an employee has medical and/or dental insurance coverage for a domestic partner and/or the DP's children and they are not tax dependents. This makes the imputed value of the premium taxable income and increases the employee's federal and state income, and FICA (social security and Medicare) taxes and withholding.

If a job share or part-time employee has part-time medical insurance and out-of-pocket costs for the domestic partner insurance, the agency may also make a negative DPN (Domestic Partner non-Taxable) entry on the P050 screen. This reduces the employee's taxable income by the out-of-pocket costs.

Employees may pay surcharges if the covered domestic partner:

- Could have obtained insurance through another employer plan
- Reported the use of tobacco

A positive DPS entry on the P050 screen records the imputed value of the surcharges for the domestic partner and increases the employee's reported federal and state income, social security and Medicare subject wages and withholding.

HEATH ENGAGEMENT MODEL

Employees receive health insurance with a lower deductible if they participate in the Health Engagement Model (HEM). In addition, the employee and/or spouse or domestic partner receive an additional \$17.50 per month for HEM participation. For these employees, PDB makes an entry on the P050 screen with PAY TYP HEM. It increases the employee's taxable wages.

OPT OUT OF PEBB BENEFITS

OAR 101-020-0015 allows an employee who has health insurance coverage through another employer sponsored group medical plan to opt out of PEBB medical or medical and dental insurance. The employee who opts out may receive cash in lieu of coverage. See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, PEBB Benefits.

PERS

In partnership with PERS and agency Human Resources, agency payroll determines if, and when, the state will begin contributing to PERS on behalf of a new employee. Payroll then makes the required entries in the RTMT SYST and RTMT STAT fields on the P010 Withholding / Retirement Info screen.

The following list gives general guidelines for starting contributions. Agency payroll needs to research a particular employee prior to making entries on the P010 screen. If the PERS JOB CLASS CODE on the P030 Job Status Data screen is:

- **1, 2, 4, 5, 6, 7, 8, 9, H, P, T, U, Y, or Z**, start contributions effective with the first paycheck
- **B, D, M, N, O, R, or X**, the employee will not be eligible for PERS contributions or is a State Legislator who has opted out. Make sure that the RTMT SYST and RTMT STAT fields on the P010 screen both have N.
- **G, F, E, L or S**, determine whether the employee has worked six full calendar months with a public employer or is currently dormant with PERS
 - If so, start contributions effective with the first paycheck
 - If not, determine the first month the employee will be eligible for contributions and enter the RETIREMENT START DATE on the P010 screen. (See the PERS Employer Manual, http://oregon.gov/PERS/EMP/docs/er_general_information/employer_manual.pdf or the PERS Contribution Start Date Worksheet, <http://www.oregon.gov/DAS/Financial/Payroll/Pages/cpersdates.aspx>)

- **3 or C**, the employee is a state Legislator who has chosen to have the 6% PERS employee contribution deposited to a deferred compensation account. Legislators must make an election within 30 days of taking office.

The RTMT SYST on the P010 screen should match the PERS JOB CLASS CODE on the P030 screen. When it is time to start PERS contributions, use the PERS Wage Job Class Code Worksheet on the DAS Enterprise Human Resource Services, HR Operations and Systems web site

(<http://www.oregon.gov/DAS/Financial/Payroll/Pages/cpersjobclass.aspx>) to determine the P010 RTMT SYST.

CAUTION: If there is a value other than N in the RTMT SYST field, OSPA will make employer contributions on behalf of the employee. If the RTMT SYST field is N, OSPA will not make an employee contribution, even if the RTMT STAT value is D or E.

If the employee's PERS status is not evident from the PPDB, contact the employee or PERS.

Notify your HR office if the code used in the PPDB is not correct.

See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Public Employees Retirement System

PERSONAL BUSINESS LEAVE

Eligible employees receive a set number of personal business hours each fiscal year. For existing employees, at the end of the fiscal year, LARS zeroes out the balance from that fiscal year and gives employees a new balance for the new fiscal year. The employee cannot carry the balance into the next year and PB does not have a cash value. Bargaining agreements and statewide policy determine the eligible employees and the number of hours.

During the monthly leave accrual process, LARS looks for new employees entered in the PPDB since the last leave accrual. If the employee will be eligible to take PB before the end of the fiscal year, LARS will give the new employee the PB balance the employee would have received at the beginning of the fiscal year. The controls in OSPA will prevent the employee from using the PB during the WAIT period on the PTB1 Benefit Package Tbl screen.

Part-time and job share employees receive a pro-rated amount of personal business. Monitor new employees to make sure LARS pro-rated the beginning balance correctly. If needed, make adjustments on the P435 Employee Leave Detail screen.

See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Leave Accrual and Reporting.

UNION DUES

Under ORS 243.66 employees may exercise the right of non-association because of religious tenet or church teaching. With the agreement of the applicable union, the employee will pay the amount equivalent to monthly union dues to a nonreligious charity.

BACKGROUND INFORMATION

AUTHORITY / REFERENCES

U.S. Internal Revenue Service (IRS), <http://www.irs.gov/>

- IRS Publication 15 (Circular E) Employer's Tax Guide
- Form W-4 Employee's Withholding Allowance Certificate
- Form W-9 Request for Taxpayer Identification Number and Certification
- Form 8233 Exemption from Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual

Oregon Revised Statutes (ORS), https://www.oregonlegislature.gov/bills_laws/Pages/ORS.aspx

- Chapters 237, 238 and 238A Public Employees Retirement System
- Chapter 243 Public Employee Rights and Benefits
- Chapter 292 Salary and Expenses of State Officers and Employees
- Chapter 652 Wage and Hour

Oregon Administrative Rules (OAR), <http://arcweb.sos.state.or.us/pages/rules/access/numerically.html>

- Chapter 101 – Public Employee Benefit Board
- Chapter 459 – Public Employees Retirement System

Chief Human Resources Office, Department of Administrative Services,
<http://www.oregon.gov/das/HR/Pages/Index.aspx>

- State HR Policies, <http://www.oregon.gov/DAS/Pages/policieshr.aspx>
- Collective Bargaining agreements, <http://www.oregon.gov/DAS/HR/Pages/LRU.aspx>

Enterprise Human Resource Services, Department of Administrative Services:

- Personnel Transaction Codes, <http://www.oregon.gov/das/HR/Documents/PA%20Codes.pdf>
- Wage Job Class Code Crosswalk,
<http://www.oregon.gov/DAS/Financial/Payroll/Pages/cpersjobclass.aspx>

Public Employees Benefit Board:

- Information for Members, <http://www.oregon.gov/das/pebb/pages/index.aspx>
- Information for Agencies, <http://www.oregon.gov/das/pebb/pdb/Pages/index.aspx>

Public Employees Retirement System, <http://www.oregon.gov/pers/Pages/index.aspx>

Statewide Payroll Reference Manual,

<http://www.oregon.gov/DAS/Financial/Payroll/Pages/referencemanual.aspx>

Net pay / withholding calculators:

- <http://www.irs.gov/individuals/index.html?navmenu=menu1>
- <http://www.paycheckcity.com/netpaycalc/netpaycalculator.asp>

REPORTS

See the Statewide Payroll Reference Manual, OSPA System Related Documents, Report Guides for additional information on the following reports:

- XREF01 Deduction Reconciliation
- E357-020 Employees Eligible for Participation in Retirement
- E497 Employees with Non-Blank Waiver Codes
- B075A, B075B Gross Pay Adjustments
- E370-06-1 Income Tax Exemptions
- XREF51 PEBB Insurance Exceptions
- E120-052B, E122-042B, E122-042C PEBB Domestic Partner Report

SUPPORTING DOCUMENTATION / FORMS

Applicable forms include the following:

- OSPS Forms, <http://www.oregon.gov/DAS/Financial/Payroll/Pages/forms.aspx>
 - OSPS.99.19 Pay Card Form (signup or cancel)
 - OSPS.99.25 Direct Deposit Form (signup, cancel/stop or suspend)
- IRS Form W-4, <http://www.irs.gov/pub/irs-pdf/fw4.pdf>
- OSGP Forms, http://www.oregon.gov/pers/OSGP/Pages/osgp_forms.aspx
- Parking, Bus Pass, and Mass Transit forms, <http://www.oregon.gov/DAS/FleetPark/Pages/forms.aspx>
- PEBB Insurance Forms, <http://www.oregon.gov/das/pebb/pages/forms.aspx>

If an employee is a foreign national, the employee may need to submit the following. See the Statewide Payroll Reference Manual, Payroll Processes Using OSPA, Income Taxes for additional information.

- OSPA Form 99.01 Determination of Foreign National’s Residency
- IRS Form 8233 Exemption from Withholding on Compensation for Independent (and Certain Dependent) Personal Services of a Nonresident Alien Individual
- IRS Form W-9 Request for Taxpayer Identification Number and Certification

REVISION HISTORY

Date	Rev. No.	Modification
02/08/07	1.0	Original
09/12/07	1.1	Out-of-state duty station, foreign nationals
02/13/08	1.2	New PERS wage job class codes
01/15/09	1.3	PB accrual process, PEBB 2009 Plan Year changes, EICRPT title change, E497 number added to report, link updates
01/20/09	1.4	Update IRS withholding calculator link
05/21/09	1.5	Clarify P010 RTMT SYST and RTMT STAT; PB accrual the last 6 months of the fiscal year
01/28/10	1.6	Appendices to codes; Handbooks; WR#3560, LA
01/12/11	1.7	WR#2564, Legislature OSGP for PERS; WR#3671, pay PEBB benefits even if <80 hrs.; WR#3722, PEBB waiver to PEBB decline, opt out of dental and end PEBB paid basic life; change in direct deposit forms; WR#3700, end savings bonds through payroll deductions; WR#3735, end AEITC
03/15/11	1.8	WR#3760, EXREF51 title change; Income Tax Handbook
05/09/11	1.9	OSPS.99.25 replaced OSPS.99.08 and OSPS.99.10
07/25/11	1.10	Update Wage/Job Class Codes link
10/18/11	1.11	Update Secretary of State links; timing for union dues / fair share entry; PERS wage / job class codes; furloughs for 2011-13 biennium
05/17/12	1.12	WR#3859, PEBB 2012

Date	Rev. No.	Modification
12/27/12	1.13	WR#3820, screen title changes; WR#3978, 3982-3986, PEBB 2013; DAS, internet, and manual re-org
05/12/2016	1.14	Updated web links