

Glossary

demographic (DTL1) record	One of two types of records submitted in periodic reports through EDX. The demographic record (also called Member Demographic Record or Detail 1 record) includes information about changes in an employee's employment status (hire, termination, begin or end leave) or in his or her personal information (name, address, SSN).
Demographics and Adjustment Report	A report containing demographic (DTL1) records, positive and/or negative adjustment records, and retroactive payment records.
Detail 1 record	See "demographic (DTL1) record."
Detail 2 record	See "wage and service (DTL2) record."
elected official	A person who is a public official holding an elective office or an appointive office with a fixed term for the state or for a political subdivision of the state. An elected official may elect to participate in PERS pursuant to ORS 238.015(6).
Employer Data Exchange (EDX) system	The Web-based program participating PERS Chapter 238 Plan, OPSRP Pension Program, and OPSRP IAP employers with qualifying positions use to report payroll and demographic information directly to PERS.
flagged record	A report record (DTL1 or DTL2) that has a flagged type of error. Flagged errors are only warnings that something reported in the record looks abnormal. Records with flagged errors should be checked for accuracy, but will post when all other records post.
jClarety	The retirement system software platform underlying EDX. jClarety and EDX were implemented to manage member wage, service, and demographic information for OPSRP.

legislator	A person appointed or elected as a member of the Oregon Legislative Assembly. A person elected as a legislator for a term beginning on or after August 29, 2003, must elect within 30 days after taking office to become a member of OPSRP, the state deferred compensation plan, or neither.
pay cycle	The period of time from one pay date to the next. The pay date is considered the last day of the pay cycle. A pay cycle may apply to a group of employees who are paid for the same period.
pay date	The date printed on the employee's check.
payroll administrator	Person or persons using EDX to report to PERS. Payroll specialists set up their own accounts via EDX.
PERS Job Class Code	The job class, for PERS purposes, under which the reported wages have been earned (e.g., General Services = 1, Police and Fire = 2, etc.). Defines the employment classification an employee holds with an employer. The job class may affect the rules that apply to a member's benefits or eligibility to participate in PERS.
posted (report or record)	A status EDX assigns to records and reports considered correct and closed to further changes. A record posts, receiving a status of "posted" once it passes the validation process. A report posts when all the records it contains post.
release	The action of identifying a new report in EDX to be picked up by the next batch validation and posting process. A released report may be "unreleased" before the batch, preventing the report from being processed.
report date	The scheduled date the employer submits wage, service, and contribution data to PERS. This date is given to a report when it is created and is specified in the header record of the report data file. It is the date associated with reporting frequency.
report due date	The date an employer must report wage, service, and contribution data to PERS. This date follows the report date by three business days.

report period	Refers to the period between report dates, which is when the activity is captured to create regular Wage and Contribution Reports. For instance, an employer reporting monthly would have a report dated 06/30/2004, with a report period of June 1–June 30.
reporting frequency	PERS assigns each employer a reporting cycle that most closely matches its pay cycle in accordance with Oregon Administrative Rule (OAR) 459-070-0100. There are four reporting frequencies associated with the assigned reporting cycles: monthly, semi-monthly, bi-weekly, and weekly.
reporting official	Individual an organization identifies as the person charged with overseeing the PERS payroll reporting process. The individual is responsible for designating the Web administrator.
third-party administrator (TPA)	Private payroll vendor (e.g., ADP) providing administrative services, such as managing accounts and paying out benefit claims. Employers who use a TPA will typically rely on them to extract/generate data files used to upload report information to EDX.
un-release	Reversing the act of signaling to EDX that a new report is ready for processing during the batch validation. A released report that has not yet been through the batch process may be unreleased, which prevents the report from being processed.
Wage and Contribution Report	Report containing Demographics and Adjustment Reports and Regular Reports. The report lists the status of each report submitted, either “posted” or “unposted.” In addition, it allows you to view the report details and edit un-posted reports.
wage and service record	One of two types of records submitted in periodic reports using EDX. The wage and service record (also called Detail 2 record) includes information about employee wages paid, hours worked, member contributions, and changes in job class. This record is also used to report retroactive payments and adjustments.

Web administrator

Person appointed by an organization's reporting official to have sole administrative control over EDX reporting for that organization, including maintenance of employer contacts and user accounts.