

Payroll Specialist Roles

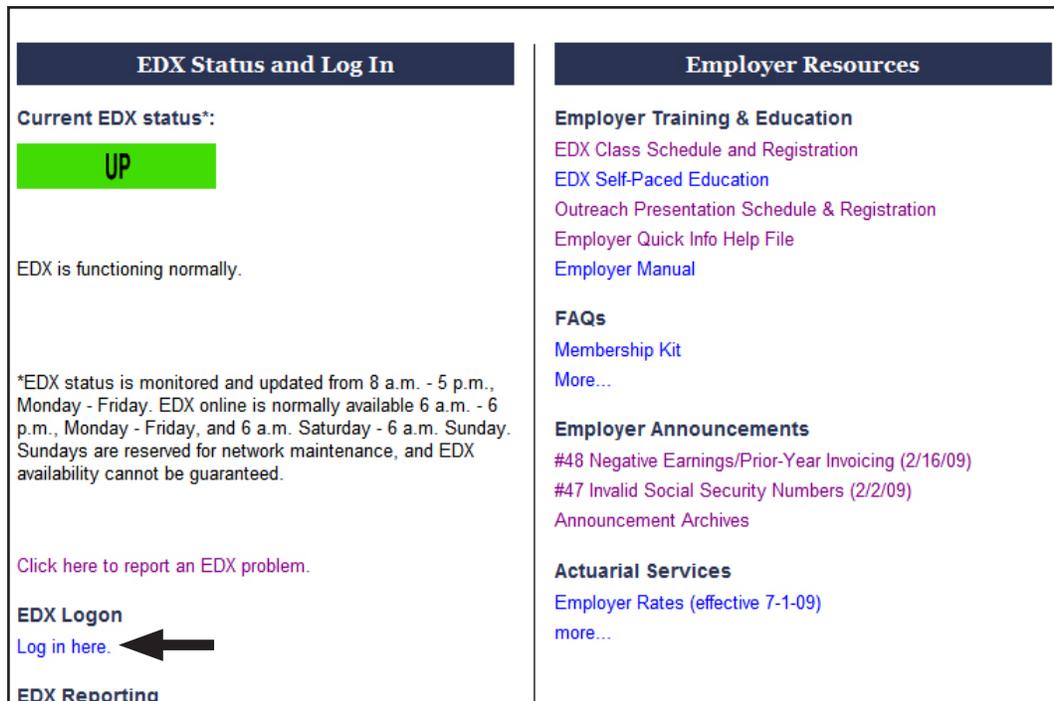
Obtaining a user ID and password

You can create a payroll specialist account in EDX without special authorization. During that process, you supply your own account information, including a user ID and password. Your Web administrator will then need to activate your account before you can log in and use the system.

Creating a payroll specialist account

Accessing the Employer Payroll Account Creation page

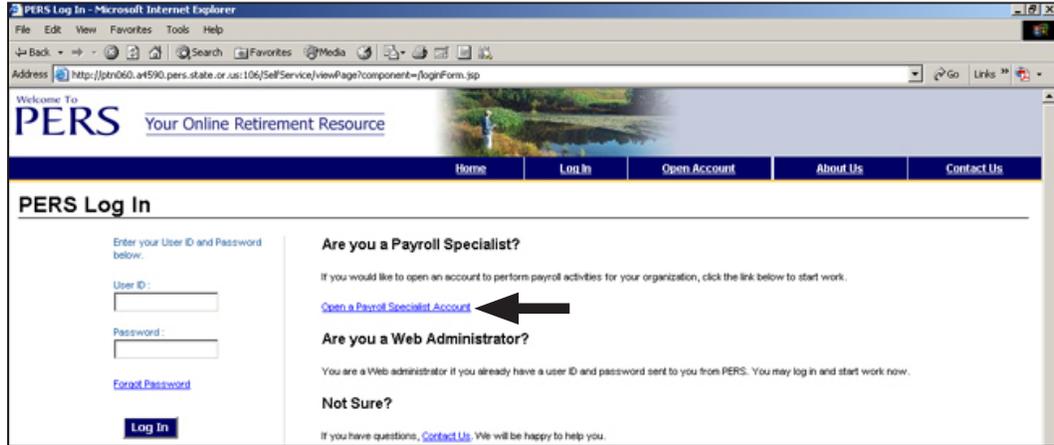
- 1 Go to the PERS Employer website at <http://oregon.gov/PERS/EMP/index.shtml>.
- 2 Click on the **Log in here** link (highlighted by the arrow).



- 3 Click on the **Open Account** link (indicated by the arrow) to display the *PERS Log In Page* screen.



- Click on the **Open a Payroll Specialist Account** link (indicated by the arrow) to display the *Employer Payroll Account Creation* screen.



Entering new personal profile information

The following steps outline the procedure to set up a payroll specialist account for yourself. Your Web administrator must then grant you access rights before you can access EDX as a payroll specialist.

Important: Web administrators activate payroll specialist accounts; they **do not** create payroll specialist accounts.

- Follow the steps outlined in the previous topic.

Note: The illustration below applies to the next seven steps.

- In the **User ID** text box, type a user ID.

Note: This ID cannot be claimed by another user and must be a minimum of six characters. You can use any combination of letters and/or numbers.

3 In the **Password** text box, type a password. **Important:** Passwords must be a minimum of seven characters and must contain three of the four following character types:

- Uppercase letters (A–Z)
- Lowercase letters (a–z)
- Numeric characters (0–9)
- Non-alphanumeric characters (#, @, %, etc.)

Example: **MyPassw0rd**.

The password you type must not contain three or more characters from your user account name.

Write down the password for future reference. If you forget your password, contact your Web administrator.

4 In the **Confirm Password** text box, retype your password.

5 In the **First Name**, **MI**, and **Last Name** text boxes, type your name.

6 In the **E-mail** text box, type your e-mail address.

7 In the **Confirm E-mail** text box, retype your e-mail address.

8 In the **Employer Numbers** text box, type the employer number(s) for the employer account(s) you want to access.

You must type at least one employer number. When entering multiple numbers, enter a comma between each number. Type the employer number as a five-digit number. If your number is four digits, type a leading zero. For example, if your employer number is 1111, type **01111**.



The image shows a screenshot of a web form. On the left, there is a label: ***Employer Numbers:** (e.g., 10000,20000,30000). To the right of this label is a text input field containing the number 01061. The input field has a vertical scrollbar on its right side.

- 9 Click the **Next** button to view the *Employer Payroll Account Validation* screen.

Account Information

*User ID: KerryA

*Password:
[\(Password Requirements\)](#)

*Confirm Password:

*First Name, MI: Kerry

*Last Name: Awn

*Email: awn.keri@xxx.com

*Confirm Email: awn.keri@xxx.com

*Employer Numbers: 01061
 (e.g., 10000,20000,30000)

Next

Reviewing new personal profile information

- 1 Review the accuracy of your personal account profile information and requested employers on the *Employer Payroll Account Validation* screen.

Please validate the personal information you typed.

Personal Information Summary

User ID: KerryA

Password: *****

First Name, MI: Kerry

Last Name: Awn

Email: awn.keri@xxx.com

Employer Numbers & Employer Names

Employer Number	Employer Name	Select/Unselect
01061	PUBLIC EMPLOYEES RETIREMENT SYSTEM	<input checked="" type="checkbox"/>

- 2 Click the **Save Account** button to confirm the information, or click the **Cancel** button to return to the previous page.

Employer Payroll Account Validation

Please validate the personal information you typed.

Personal Information Summary

User ID: KerryA

Password: *****

First Name, MI: Kerry

Last Name: Awn

Email: awn.keri@ooc.com

Employer Numbers & Employer Names

Employer Number	Employer Name	Select/Unselect
01061	PUBLIC EMPLOYEES RETIREMENT SYSTEM	<input checked="" type="checkbox"/>

Save Account
Cancel

When you click the **Save Account** button, a confirmation page appears that shows the new account is “Pending,” awaiting action by your Web administrator.

Employer Payroll Account Confirmation

Account information is saved. Thank you!

Note that your account is in Pending status and is awaiting activation by your employer's Web Administrator. Upon activation, you will be able to log in to the PERS Employer Reporting site.

Note: EDX will notify you by e-mail when the your Web administrator activates your account. Until then, you cannot log on to EDX. If you requested access to multiple employers, each employer’s Web administrator must activate your account before you can access their information.

Logging on to EDX for the first time

- 1 Log on to EDX following the instructions outlined on pages 6–8.
- 2 Review the *PERS Electronic Transactions Agreement*, and then click the **I Agree** button.

The screenshot shows a web browser window titled "PERS Electronic Transactions Agreement - Microsoft Internet Explorer". The address bar displays the URL: `http://ptr060.a4590.pers.state.or.us:106/SelfService/SASStart.do?event=selectPrtpct`. The page content includes a header with the PERS logo and the text "Your Online Retirement Resource". A navigation bar contains links for "Home", "Log Off", "About Us", and "Contact Us". The main heading is "PERS Electronic Transactions Agreement". Below this, there is a disclaimer: "Accessing or requesting information or transactions through this site constitutes and shall be deemed to be an acceptance of the following terms and conditions." This is followed by several paragraphs of text regarding the accuracy of information, the applicability of the agreement, and user responsibilities. The page is organized into sections: "General Terms", "Governing Laws", and "Definitions". At the bottom, there are two buttons: "I Agree" and "I Disagree".

Welcome To
PERS Your Online Retirement Resource

Home Log Off About Us Contact Us

PERS Electronic Transactions Agreement

Accessing or requesting information or transactions through this site constitutes and shall be deemed to be an acceptance of the following terms and conditions.

The information on this website is not guaranteed to be correct or current. Any information presented on this website is subject to audit and revision without notice. No statement on this website shall be construed to be a legal statement of Public Employee Retirement System (PERS) policy.

This Agreement is applicable whenever you use PERS online services. The terms of the PERS Electronic Transactions Agreement apply to all transactions performed using PERS online services.

General Terms

The online acknowledgments or other messages that are the result of a transaction you have entered do not indicate that the transaction has been transmitted nor do they indicate that the transaction has been received, accepted or rejected by PERS. PERS will confirm that the information has been received and whether the transaction has been accepted or rejected.

You are responsible for reviewing the account statements sent to you by mail to verify the accuracy of the account information provided in the statement and to confirm the accuracy of the transactions entered through this site. You are also responsible for promptly notifying PERS of any erroneous, inaccurate or missing information contained in, or omitted from, your statements or other records on this site. You accept full responsibility for this data submitted by you.

Should errors occur or questions arise while accessing your personal or business record or performing transactions, please contact us as soon as possible at the address or phone number provided in the "Contact Us" page found on this website.

Governing Laws

Each button, web link, or hotspot constitutes an agreement between you and PERS that complies with the Uniform Electronic Transactions Act, ORS 84.001.

By clicking the "I Agree" button, you acknowledge that you have read this Agreement and accept all of the terms of this Agreement.

If you do not agree to the terms contained in this Agreement, please exit this website.

Definitions

Personal Record: The personal information and transactions related to an active member or benefit recipient in the retirement system.

Business Record: Information and transactions related to an employer, such as a school or municipality, that has elected to participate in the retirement system and to make contributions on behalf of its employees

I Agree I Disagree

Updating your account profile

Update your account profile any time you need to (1) change your password or e-mail address or (2) request the right to work with additional employers.

- 1 Log on to EDX from the *Welcome to PERS Self-Service* screen following the instructions outlined on pages 6–8.
- 2 Click on the **Update My Profile** link (indicated by the arrow) to display the *Update My Account Profile* screen.



- 3 In the **Password** text box, type your new password. **Important:** Passwords must be a minimum of seven characters and must contain three of the four following character types:
 - Uppercase letters (A–Z)
 - Lowercase letters (a–z)
 - Numeric characters (0–9)
 - Non-alphanumeric characters (#, @, %, etc.)

Example: **MyPassw0rd.**

The password you type must not contain three or more characters from your user account name.

Write down the password for future reference. If you forget your password, contact your Web administrator.

- 4 In the **Confirm Password** text box, retype the new password.

- 5 Modify your profile information, as necessary, and then click the **NEXT** button to view the *Update My Profile Validation* screen. **Note:** You cannot delete employer numbers, only add them.

Important: An asterisk (*) next to the field name denotes that the field cannot be left blank.

Update My Account Profile

This page will allow you to update your Web account information. You can update your name and e-mail address. You can change your password as well as request additional employers to work with.

* - Indicates required fields.

Update Profile Form

*User ID: Ferrari

*Password:

(Password Requirements)

*Confirm Password:

*First Name, MI: Irma

*Last Name: Ferrari

*Email: oo@gmail.com

*Confirm Email: oo@gmail.com

*Employer Numbers: (one minimum) 02596, 02107

NEXT

- 6 Review your profile information for accuracy. If information is incorrect, click the **Cancel** button to return to the previous page to make the necessary changes.

Update My Profile Validation

Please validate the personal information you typed.

User ID: Ferrari

Password: *****

First Name, MI: Irma,

Last Name: Ferrari

Email: oo@gmail.com

Please validate the employers you typed.

Employer Number	Employer Name	Select/UnSelect
02596	BEND METRO PARK & RECREATION DIST	<input checked="" type="checkbox"/>
02107	BEND, CITY OF	<input checked="" type="checkbox"/>

Save Account **Cancel**

- 7 Remove a listed employer from your profile by unchecking the **Select/Unselect** check box (indicated by the arrow) next to the employer.

Note: Check marks in grayed-out check boxes cannot be unchecked. Check boxes become grayed out once you save the account.

Update My Profile Validation

Please validate the personal information you typed.

User ID Ferrar
Password ****
First Name, MI Irma,
Last Name Ferrar
Email oo@gmail.com

Please validate the employers you typed.

Employer Number	Employer Name	Select/UnSelect
02596	BEND METRO PARK & RECREATION DIST	<input checked="" type="checkbox"/>
02107	BEND, CITY OF	<input checked="" type="checkbox"/>

Save Account Cancel

- 8 Click the **Save Account** button; the *Update My Profile Confirmation* screen appears, stating your updated account information is awaiting activation by the Web administrator.

Update My Profile Confirmation

Your account information has been updated. New employer accounts requested will be in Pending status until activated by the employer's web administrator.