

Employer Data Exchange (EDX) Overview

System requirements

The recommended minimum computer desktop and network configuration for EDX is:

- Internet Explorer 5.5 or higher
- Internet connection: 56k or higher
- Firewall/router port 443 enabled for HTTPS communication

Overview

EDX is a Web-based, self-service system used to report payroll and employment information to PERS on a payroll cycle basis. Using EDX, you will be able to:

- submit, review, and correct the status of Wage and Contribution Reports that include employee wage, contribution, and/or demographic information;
- review employer contribution remittance statements and account balances;
- view and update employer contact information;
- access employee information; and
- maintain your Web accounts.

Advantages of this easy-to-use, Web-based reporting tool include:

- Reduced paperwork—EDX allows you to either enter report information manually or upload it as part of an electronic report data file.
- Lower media costs and faster transit times—No packaging, sending, and tracking of disk, tape, or old paper forms in the mail.
- Data validation—EDX validates report data you submit and returns error messages/reports within a day of submitting (*releasing*) the report. This enables you to make timely corrections without waiting for mailed error reports.
- Encryption—Data you submit through EDX is secure using an encrypted communications link between your computer and EDX.
- Reduction in paper forms—EDX allow you to make adjustments to previously reported wage and contribution information electronically rather than using paper forms and mail.
- Statements—Automatic calculation of employer contributions each payroll cycle with the ability to provide statements for both member contributions and employer liability. Statements are readily accessible via EDX.

EDX allows you to report the following employee information:

- wages, hours of service, and contributions;
- status changes (new hire, leave, name, SSN, address, termination, and death); and
- contact information.

EDX user roles: Web administrator and payroll specialist

There are two key reporting roles in EDX:

- **Web administrator**—The Web administrator activates, inactivates, and resets passwords. In addition, he or she has the authority to unlock accounts and update account profile information. Every employer will have a Web administrator. For details see Section 2, “Web Administrator Roles.”
- **Payroll specialist**—A payroll specialist sets up his or her own accounts using EDX. The Web administrator can assign up to 15 individuals to serve as payroll specialists. Most employers will have at least one payroll specialist who uses EDX for payroll cycle reporting. For details see Section 3, “Payroll Specialist Roles.”

While the Web administrator can also serve as a payroll specialist, the payroll specialist and Web administrator should be different people to separate the functions of payroll reporting from security administration.

Additional reporting roles

Though the Web administrator and payroll specialist(s) serve in the key reporting roles, your employer must also designate the following reporting roles to specific personnel if they exist in your organization.

- **Reporting official**—Typically the head of the agency.
- **Personnel**—Typically the PERS contact in the human resources department.
- **Payroll**—Typically the PERS contact in the payroll department.
- **Other**— Anyone an employer chooses to grant EDX access. An employer might choose this role for an individual it wants to have limited EDX access.

If you use a third-party administrator (TPA) to create your reporting information file, you should work with your TPA to understand your role(s) in the reporting process.

Logging on to EDX

- 1 Access EDX by going to <http://oregon.gov/PERS/EMP/index.shtml>.
- 2 Click on the **Log in here** link (indicated by the arrow) to display the *Welcome to PERS Self-Service* screen.

EDX Status and Log In

Current EDX status*:
UP

EDX is functioning normally.

*EDX status is monitored and updated from 8 a.m. - 5 p.m., Monday - Friday. EDX online is normally available 6 a.m. - 6 p.m., Monday - Friday, and 6 a.m. Saturday - 6 a.m. Sunday. Sundays are reserved for network maintenance, and EDX availability cannot be guaranteed.

[Click here to report an EDX problem.](#)

EDX Logon
[Log in here.](#)

EDX Reporting

Employer Resources

Employer Training & Education
[EDX Class Schedule and Registration](#)
[EDX Self-Paced Education](#)
[Outreach Presentation Schedule & Registration](#)
[Employer Quick Info Help File](#)
[Employer Manual](#)

FAQs
[Membership Kit](#)
[More...](#)

Employer Announcements
[#48 Negative Earnings/Prior-Year Invoicing \(2/16/09\)](#)
[#47 Invalid Social Security Numbers \(2/2/09\)](#)
[Announcement Archives](#)

Actuarial Services
[Employer Rates \(effective 7-1-09\)](#)
[more...](#)

- 3 Click on the **Log In** link (indicated by the arrow) to view the *PERS Log In* screen.

Welcome to PERS Self-Service - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

Address http://ptr060.44590.pers.state.or.us:106/SelfService/viewPage?component=home.jsp&dialog_id=DSstate_44 Go Links

Welcome To **PERS** Your Online Retirement Resource

Home **Log In** Open Account About Us Contact Us

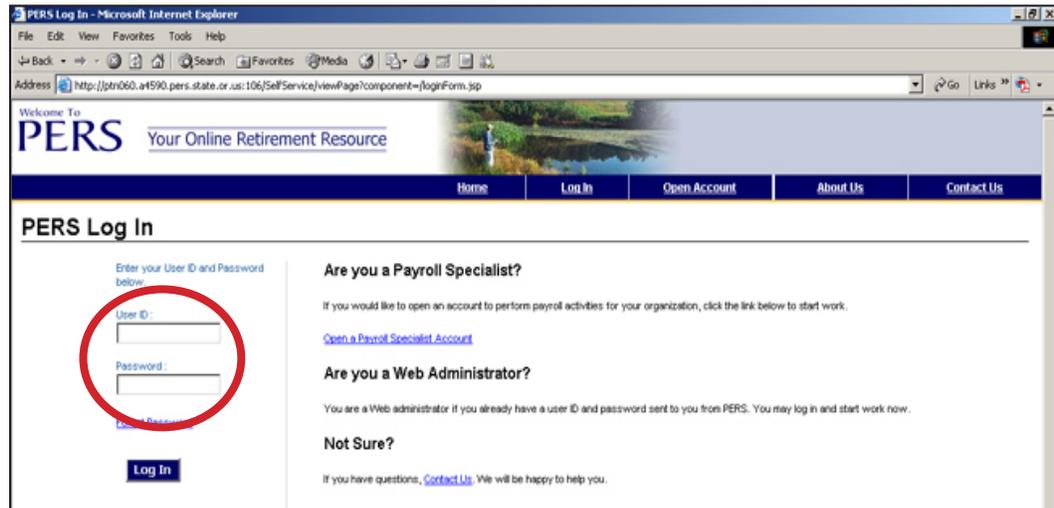
Welcome to PERS Self-Service!

This Web site provides online capabilities to:

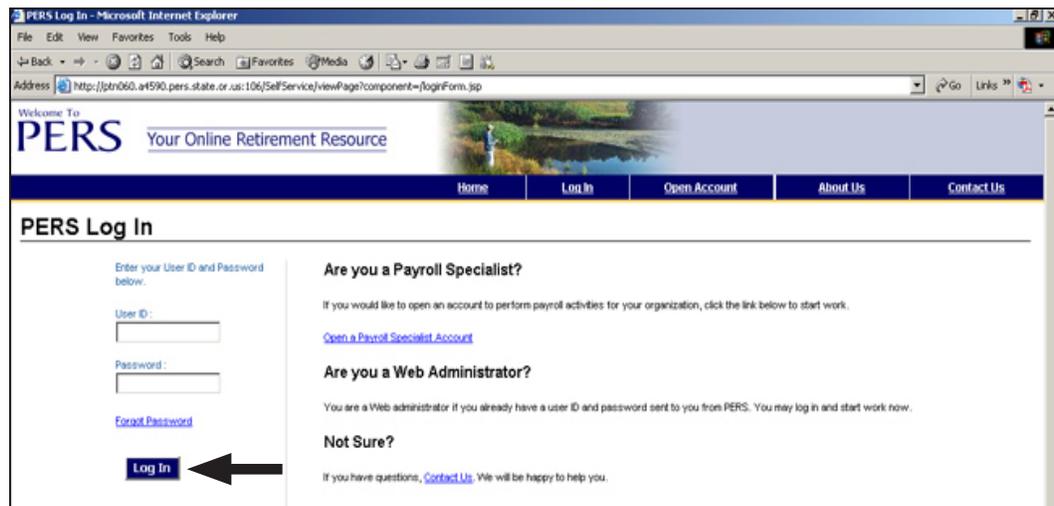
- Access your account information
- Perform activities related to your account
- Update your contact information
- Link directly to the PERS web site to view Member Handbooks, FAQ's, Forms and other information
- View the most recent messages from PERS

If you have questions not answered on this web site or questions about how to use this web site, please [CONTACT US](#).

- 4 Type your user ID and password into the **User ID** and **Password** boxes, respectively. (The boxes are shown circled.)



- 5 Click the **Log In** button (indicated by the arrow) to access the *Employer Home Page* screen.



Login Error appears if you enter an incorrect password and/or user ID. Three unsuccessful attempts to log on to EDX will lock the account, at which time you will need to contact your Web administrator. See “Unlocking a payroll specialist account” on page 24 for the steps required to unlock an account.

Login Error

Please verify the user id and password you entered are correct.

Please contact us at MERS.2@state.or.us or the call center at (888) 320-7377 if you have any questions.

Note: If this is your first time logging on to EDX, the *PERS Electronic Transactions Agreement* screen appears. You must click the **I Agree** button to indicate you agree with the requirements to use EDX.

Employer Home Page

After successfully logging on to EDX, you will see the *Employer Home Page* screen. This page shows the employer or organization for which you are currently reporting and provides an overview of that employer's organization information and contacts.

Balloon numbers  appearing on the sample *Employer Home Page* (shown on page 11) refer to areas on that sample page and their descriptions on pages 8–10.

- (1) The top navigation bar appears on all employer reporting screens and provides the following links:
 - SS Home—Displays *Welcome to PERS*.
 - Logoff—Logs you off EDX.
 - About Us—Displays information about PERS.
 - Contact Us—Provides PERS contact information.

- (2) The left navigation bar (Site Navigation) appears on all employer reporting screens and displays the links that allow you to perform activities for the selected employer:
 - Employer Home—Displays the *Employer Home Page* screen, which contains employer information, contacts, PERS messages, and allows selection of a different employer if you work with multiple employers.
 - View Your Statement—Displays the employer's contribution remittance statement and account balance.
 - Work on Reports—Displays the list of existing reports. On this page you can create a new report, edit an existing report, view the Reject/Edit Report, view report totals, and view report details.
 - Work with Contacts—Displays a page that allows you to view, edit, and delete EDX contact profiles. This link is visible only to Web administrators.
 - View Employee Info—Provides online viewing of an employee's current and historical fiscal year transactions reported for the organization.
 - View Year-to-Date Wage and Contribution Summary—Displays wage and contribution details for all members or a member within the agency.
 - Update My Profile—Displays a page that allows you to update your account profile information.
 - Admin Web Accounts—Displays a page that allows you to activate, deactivate, and reset passwords for the EDX user accounts in the organization. This link is visible only to Web administrators.

- Work List—Displays online forms that you complete to report employee job segments, unused sick leave, last day of paid leave, salary certification for service or disabled retirees, or to correct a demographic record.
 - Eligibility Reports—Displays a report to let you know if corrective action is required to report regular wages and contributions (qualifying hours) or non-qualifying wages without contributions for an employee.
 - Status Check—Displays an employee’s contribution status, which you can use to determine if PERS is expecting contributions for the employee.
 - Inactive Employment Report—Displays employees with open job segments who appear inactive.
- (3) The work space portion contains information and links to sections within the page, including:
- Warning Message—Displays a message telling you how many days remain before your current password expires. It also instructs you on how to change your password.
 - Choose Your Employer—Displays the Employer Selection list for users authorized to report for more than one employer. It also displays messages from PERS.
 - View Employer Information—Displays employer organization information.
 - View Your Contacts—Displays the employer’s contact information.
 - Tell Me More—Provides a brief description of the page contents.
- (4) Employer Selection displays the employers you have access to work with. Most users will only see one employer, which will already be selected. The name of the employer currently selected appears in the same row as the  icon and directly below the top navigation bar.
- Click on the **select** link next to the desired employer to view information or perform work pertaining to the employer.
- (5) Messages From PERS appears below the Employer Selection section. PERS displays messages of importance or interest to all employers.
- (6) Employer Information displays information about the selected employer, including:
- employer name,
 - employer number,
 - address,
 - reporting frequency,
 - phone,

- status, and
 - status date.
- (7) Your Contacts displays the contact type, name, and phone number of each contact an employer has created or authorized to report payroll data in EDX.
- (8) Tell Me More displays additional page specific information when applicable.

Welcome To **PERS** Your Online Retirement Resource

Home Log Off About Us **Contact Us**

Working with : BEND METRO PARK & RECREATION DIST

Employer Home Page

This is your employer home page. If you are responsible for reporting for more than one employer, you can choose another employer by clicking the **select** link. The one marked with **↻** is your default employer and you can work with that employer now.

- [Choose Your Employer](#)
- [View Employer Information](#)
- [View Your Contacts](#)
- [Tell Me More](#)

Employer Selection

Selected	Employer Code	Employer Name	Web Acct Status	Org Status
↻	02596	BEND METRO PARK & RECREATION DIST	Active	Active
select	02633	CASCADE LOCKS, PORT OF	Active	Active
select	01246	HUMAN SERVICES, DEPARTMENT OF	Active	Active
select	03735	MARION CNTY SCH DIST #24J	Active	Active
select	01061	PUBLIC EMPLOYEES RETIREMENT SYSTEM	Active	Active
select	02240	WILSONVILLE, CITY OF	Active	Active

Messages From PERS

NOW AVAILABLE! Online registration for the all-new Spring '09 Employer Outreach presentation at dates, times and sites throughout the state. Register through the "Presentation Schedule & Registration" link on the employer website. www.oregon.gov/pers/emp/index.shtml

Employer Information

Employer Name : BEND METRO PARK & RECREATION DIST
 Employer Number : 02596
 Address : 200 PACIFIC PARK LANE
 BEND, OR 97701
 Reporting Frequency : Monthly
 Phone :
 Status : Active
 Status Date : 07/01/1976

Your Contacts

Reporting Official	Web Administrator	Phone
DON HORTON	e sunshin	(541) 389-7275
		n/a

Tell Me More

This is your account home page. It indicates which employer account is currently selected and provides an overview of the selected account. The employer currently selected is marked with **↻** symbol. To view information or perform work on another account, click the "select" link next to the desired account.

Use the links on the left-hand pane to navigate to and perform work for the selected employer. If at anytime you wish to return to your account home page, click the "Employer Home" link found on the left navigation bar.

Employer Selection

If you work with more than one employer account, you must choose which one that you would like to work with in this section. Once you select an employer, this is the account you will be working with until you choose a new one.

Messages From PERS

Here you will see messages from PERS.

Employer Information

This section provides a summary of information for the selected employer.

Your Contacts

Here you will see a list of the current contacts for the selected employer.

Useful Terminology

Employer Number - the code that identifies your organization to PERS.

Changing your password

Passwords expire after 90 days, requiring you to create a new one. Fifteen days before your password expires, a warning message (shown below) will start appearing at the top of the *Employer Home Page* screen to tell you how many days remain before your current password is invalid.

Warning Message

- Your password will expire in 1 days. To update your password: click on the 'update my profile' link, enter your password in the password field and the confirm password field, click 'next' and then click 'save account'

You can change your password anytime by updating your account profile. For instructions on updating your account, see “Updating your account profile” on pages 38–40.

When your password expires, a screen appears (as shown below) and prompts you to enter your old and new passwords. EDX also asks you to confirm your new password by retyping it.

The screenshot shows the PERS website interface. At the top, it says "Welcome To PERS Your Online Retirement Solution". There are navigation links for "SS Home", "Log Off", "About Us", and "Contact Us". A "Site Navigation" menu is on the left. The main content area has a "Your Password has Expired." message with instructions to enter old and new passwords. Below this is a "Not Sure?" section with a link to "Contact PERS". There is also a "Tell Me More" section with definitions for "User ID" and "Password".

- 1 In the **User ID** text box, type your user ID.
- 2 In the **Old Password** text box, type your old password.
- 3 In the **New 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.

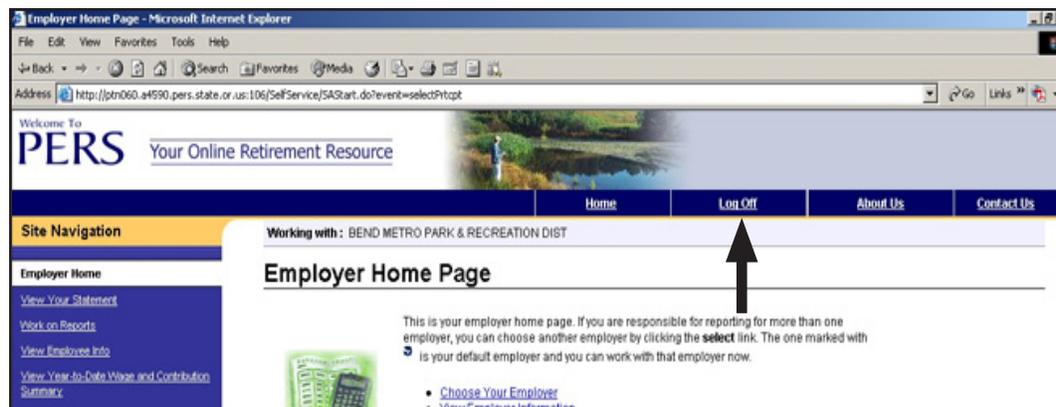
Write down the password for future reference. If you forget your password and you are a:

- Payroll specialist, contact your Web administrator.
- Web administrator, contact the Employer Service Center.

- 4 In the **Confirm New Password** text box, retype your new password.
- 5 Click the **Login** button.

Logging off of EDX

- 1 Click on the **Log Off** link (indicated by the arrow); the *Log Off* screen appears.



- 2 Click the **Yes** button to confirm logging off, or click on the **No** button if you decide not to log off of EDX.

