Contents

SECTION 1

CPERS INTRODUCTION

The CPERS Team

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What is CPERS & How is it different from PERS?

CPERS
Liaisons & Data

What is CPERS?
- ❑ A DAS shared service included in the payroll assessment
- ❑ The liaison between state agencies and PERS
- ❑ Responsible for statewide PERS reporting

CPERS Customers
- ❑ Agency HR & Payroll
- ❑ PERS

CPERS supports agencies by:
- ❑ Managing the reporting of personnel and payroll data to the PERS system
- ❑ Maintaining accurate PERS accounts over the life of the employee's state career

CPERS supports PERS by:
- ❑ Reconciling accounts and obtaining information from agencies as needed

PERS
Benefit Accounts

What is PERS?
- Is a state agency responsible for administering the PERS program, and retirement benefits

PERS Customers
- ❑ PERS Members (Employee's)
- ❑ Other PERS employers (non-state)
- ❑ CPERS

PERS supports agencies by:
- ❑ Provides status checks at time of hire

Who to Contact

CPERS

Agency HR & Payroll questions or actions related to:
- ❑ Subjectivity of Settlement agreements
- ❑ Qualifying for police and fire
- ❑ Sick leave reporting
- ❑ Retiree work hour limitations
- ❑ New PERS legislation
- ❑ PERS disability claims & last day of paid leave
- ❑ Corrections to a PERS Contribution Start Date
- ❑ Corrections to previously reported termination or hire dates
- ❑ Retro pay corrections
- ❑ Reporting LWOP segments to PERS

PERS

Employee questions related to:
- ❑ Retiring
- ❑ Retirement calculations, benefit amounts, and purchases, etc.
- ❑ Retirement estimates
- ❑ Data verification
- ❑ Benefit payment options (withdrawal, disability, death, retirement)
- ❑ Vesting
- ❑ Withdrawal of additional police and fire units
- ❑ Apply for PERS Disability

Agency HR & Payroll Partner Actions:
- ❑ To obtain a status check (Agency HR)

CPERS Key Functions

PERS & Agency Support

Reporting
- Monthly CPERS File Management
- LWOP Reporting

IAP Voluntary Contributions Reconciling

Invoicing
- Annual Invoicing
- USERRA Reporting & Invoicing

Legislation & Projects

Section 1 Summary (TLDR)

- CPERS Team: when in doubt, send an email to: Central.PERSServicesTeam@das.oregon.gov
- The difference between PERS & CPERS is:
  - PERS administers retirement benefits and supports employees with applying for benefits
  - CPERS is a shared service and the first stop for agency assistance with PERS reporting and questions

Questions?

SECTION 2
CPERS KEY FUNCTIONS

PERS reporting begins with the Status Check

1. Agency HR or Payroll requests a status check from PERS

- The [status check](#) can be completed by authorized HR or Payroll contact

2. PERS provides the "PERS Status" of the employee:

- New wait time or existing member
- Retiree with or without hour limitations
- IAP Voluntary Contribution enrollment
- This must be shared with payroll

3. Agency enters the contribution start date (CSD) in the status check date field and selects the correct PERS Class Plan Code in Workday.

PERS reporting begins with the Status Check

4. Agency Payroll sets up the IAP VC deduction if enrolled.

5. The PERS Class Plan code is sent on the CPERS monthly file along with the new hire and sets up the employee's PERS account.

- Tells PERS the position class (general service, police & fire, judge, legislator, retiree, etc.)
- Sets wait time and contribution start date in the PERS system for new members
- Sets the PERS employer contribution rate

Questions?

10 Minute Break

CPERS File

Workday Data

Agency HR Data
- ❑ New Hires
- ❑ Terminations
- ❑ Address & Name Changes

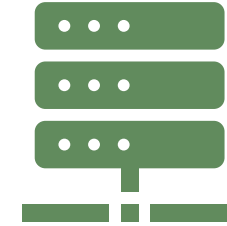**Agency Payroll Records**
- ❑ Monthly wages, hours, and PERS Contributions

CPERS File

Integration file runs
- ❑ Programming logic
- ❑ File loaded into EDX
- ❑ CPERS reviews & corrects suspended records
- ❑ Records post

PERS

Posted records are transmitted to PERS
- ❑ Viewable by PERS
- ❑ Viewable by employee in their OMS & IAP accounts

CPERS File Schedule

Schedule
- ❑ The file is monthly
- ❑ Monthly schedule is posted on the [CPERS website](#)
- ❑ The file runs on pay day

Timeframe
- ❑ The file runs after the month has completed
- ❑ There can be a 1- 2 month delay for data to report from Workday to PERS

Assistance
- ❑ If employees are questioning a delay beyond two months, please contact CPERS

Pay Period	Pay Date	HR Data *WD **DTL1** file date parameters	PR Data *WD **DTL2** file date parameters	CPERS WD File creation date (1PM of run 2 pay date)	PERS retrieves CPERS file and loads it in EDX (mid-day,)	CPERS file is now viewable in EDX
December 2023	**1/2/2024** 1/12/2024	12/1/2023-1/12/2024 entry dates with Dec effective dates	12/16/2023 - 1/12/2024 pay dates	1/12/2024	1/16/2024	1/17/2024

Why CPERS Contacts Agencies

Why we contact Agency HR

- ❑ Employment date discrepancies
- ❑ Obtain copies of the employee's medical file for PERS
- ❑ PERS data verification (employment dates)
- ❑ Data errors:
  - Incorrect PERS Class Plan Code (PERS instead of OPSRP)
  - Incorrect Social security number
  - Suspended records on the CPERS File

Why we contact Agency Payroll:

- ❑ Salary, hours, or pay date discrepancies
- ❑ Retroactive payments (retros or settlements)
- ❑ Data verification (salary & hours)
- ❑ Data errors:
  - Pay input errors or questions
  - Unclear comments
  - Contribution errors
  - Late termination payments
  - Suspended records on the CPERS file

Section 2 Summary (TLDR)

- Complete the status check, set the employee up accurately in Workday, and enroll the IAP VC

- The CPERS file runs monthly, for the prior month pay period. The schedule can be found on the CPERS website https://www.oregon.gov/das/Financial/Payroll/Pages/cpers.aspx

- Respond timely to requests from CPERS so that the data can be fixed & posted to employee accounts as quickly as possible

Questions?

SECTION 3
REFERENCE

Workday, OSPS & CPERS Roles

Workday

**System Administration
"The System"**

Responsible for:
- ❑ Design, operation and maintenance of the Workday system
- ❑ System updates related to changes in state and federal laws, legislation, policy, CBA's, and business processes
- ❑ Manage CAB & the system release process
- ❑ Payroll processing
- ❑ System training & Knowledge article (KA) maintenance

OSPS

**Agency Support
"The How"**

Responsible for:
- ❑ Supports agencies using the WD system to complete payroll processes
- ❑ Assists agencies with understanding and utilizing KAs
- ❑ Tax & W2 reporting
- ❑ Collaborates with WD on case management and KA's
- ❑ Workday case management solvers

CPERS

**PERS Account
Management**

Responsible for:
- ❑ Data flow from Workday to PERS
- ❑ CPERS file integration owner
- ❑ Reconcile PERS accounts and request agency adjustments
- ❑ Invoice agencies for PERS related expenses
- ❑ Collaborate with WD and OSPS on PERS related resources
- ❑ Provide consultation to WD on system changes that impact PERS reporting

Workday, OSPS & CPERS Roles

Workday System Processing + Accurate Agency Input + CPERS reporting = Accurate PERS accounts
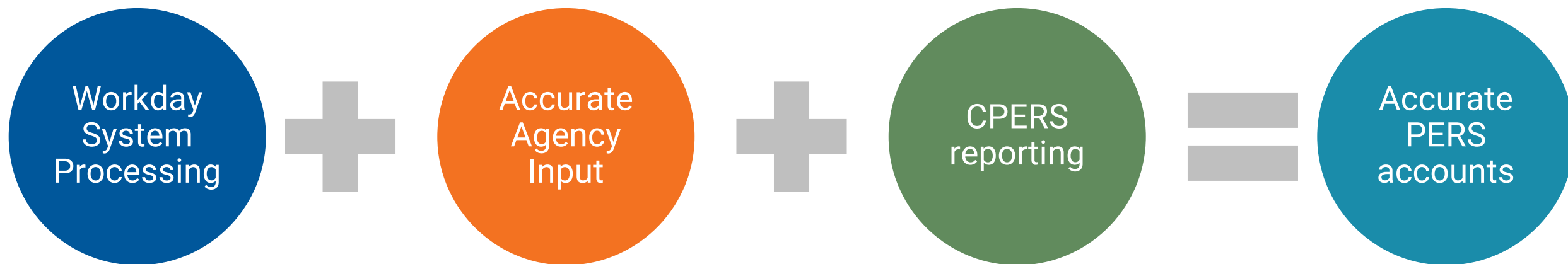
CPERS Resources

CPERS website:
https://www.oregon.gov/das/Financial/Payroll/Pages/cpers.aspx

- ❑ CPERS File Loading Schedule
- ❑ Status Check instructions
- ❑ PERS Class Plan Guide & Information
- ❑ Contribution Start Date Guide
- ❑ PERS Rates Information
- ❑ USERRA Resources
- ❑ CPERS Retro Adjustment Guide
- ❑ CPERS Annual Invoice FAQ
- ❑ IAP Voluntary Contribution Information
- ❑ Working After Retirement Information
- ❑ And so much more......
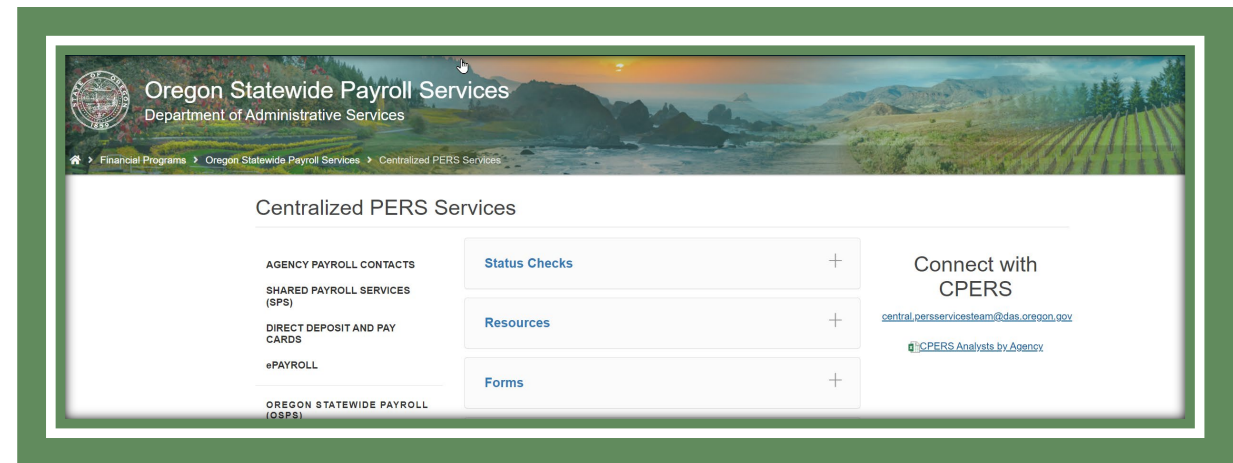
CPERS Glossary

❑ **PERS:** Public Employees Retirement System. This refers to PERS the agency and to the PERS retirement plan, which consists of Tier & and Tier 2 members.

❑ **OPSRP:** Oregon Public Service Retirement Plan that began in August of 2003.

❑ **EDX:** Employer Data Exchange. This is the system solely used by CPERS to update data sent to PERS.

❑ **USERRA:** Uniformed Services Employment and Reemployment Rights Act. a federal law that protects the employment rights of military service members and veterans.

❑ **OMS:** Online Member Services. This is the employee's portal to access their PERS account.

❑ **IAP:** Individual Account Profile. The Individual Account Program (IAP) is an account-based benefit for all Tier One/Tier Two and Oregon Public Service Retirement Plan (OPSRP) members who have worked in a qualifying position since January 1, 2004.

❑ **PERS Class Plan:** Coding in Workday that indicates the PERS Plan (PERS Tier 1, 2, or OPSRP) and classification type, General Service or Police and Fire. The PERS Class Plan also indicates if the position is PERS qualifying or not. The PERS Class Plan represents the rules that apply to a member's benefits or eligibility to participate in PERS.

❑ **Suspended Record:** A record on the CPERS file that was unable to post to the PERS system and requires review and correction by CPERS.

❑ **CSD:** PERS Contribution Start Date.

Contact Us

Contact CPERS:

Central.PERSServicesTeam@Oregon.gov

CPERS is not a part of the Workday team and does not utilize Workday Case Management

Questions?

Thank you

For feedback on this training, please contact:

Shauna.M.Tobiasson@DAS.Oregon.gov