

**From:** PERS-Employer Info Services  
**To:** PERS Employers  
**Date:** 1/8/2008 9:33 AM  
**Subject:** PERS: Employer monthly update.

Dear PERS Employer,

**The topics in the employer January 2008 update are:**

- 1) 2007 annual reconciliation.**
- 2) Status of selected OARs (Oregon Administrative Rules).**
- 3) 2008 PERS holiday office closure schedule**
- 4) New EDX self-paced tutorials on the employer website.**
- 5) 2008 EDX training dates.**

**1) 2007 annual reconciliation.**

The 2007 annual reconciliation process began Wednesday, 2 January 2008 and will end Friday, 29 February 2008.

We suggest that you concentrate on these points:

1. Suspended DTL-2 records from 2007 with contributions.
2. Missing contributions for qualifying members in 2007.
3. Removing contributions for non-qualifying employees.
4. Incorrect use of the Non-Subject Salary field or "02 - Non Qualifying" wage code (such as during waiting time).
  - a. Is the salary in the correct field?
  - b. Did the person work qualifying hours?
  - c. Refer to the Payment Categories matrix on the PERS Employer website for clarification.
5. Retirees that may have exceeded the hours limit in 2007.
6. Contribution start dates (are they accurate?).

Are there tools which can help with the process? YES! The "Year-to-Date Wage and Contribution Summary" screen will show posted hours worked with you, and with every other PERS employer for whom a member may work. The "Employee Eligibility Exception Reports", will show posted and unposted hours worked with you, and with every other PERS employer. There are two types of exception reports, "Members Approaching Qualifying Hours" and "Members with Contributions Who may not Qualify", and both can be found through the "Eligibility Reports" tab on your EDX home page web site navigation area. The "Members Approaching Qualifying Hours" report will contain employee's names when those employees have approximately 550 hours of employment in 2007.

Your PERS Employer Service Center account representative is also available to help with record and report correction. The Employer Service Center may be reached at 888-320-7377 (toll free), 8:30 a.m.-12:30 p.m., Monday-Friday, or by e-mail at: [Pers.edx.support@state.or.us](mailto:Pers.edx.support@state.or.us)

**2) OAR (Oregon Administrative Rules)**

Eligibility rules (OAR 459-010-0003, 459-010-0014, 459-010-0035 and 459-013-0110) were adopted at the 11/16/07 PERS Board meeting and were effective 11/23/07. These rules form the basis for the "Eligibility" portion of the Spring '07 and Fall '07 Employer Outreach presentation.

Break in Service rules (OAR 459-011-0050, 459-070-0001, 459-075-0010 and 459-075-0150) were adopted at the 11/16/07 PERS Board meeting and were effective 11/23/07. These rules were modified to implement HB2285, which removed the "break in service" concept retroactive to 1/1/04 and changed the basis for accrual of retirement credit by members of the OPSRP Pension program.

Reemployed retiree rules (OAR 459-017-0060) modified to reflect additional exceptions to the 1039 hr/calendar year Ch. 238 Tier1/Tier2 retiree work limit, and extend access by Ch.238 Tier1/Tier2 "early retirees" to some of the new exceptions, as listed in HB2585. These rules were adopted at the 11/16/07 PERS Board meeting.

The comment period for proposed OARs affecting Staff Determinations and Appeals Processes (OAR 459-001-0030, -0035 and -0040) has been extended to 2/22/08 with expected adoption at the 3/28/08 PERS Board meeting.

The comment period for proposed OARs affecting Review of Staff Actions and Determinations Regarding Employers (OAR 459-001-0032) has been extended to 2/22/08 with expected adoption at the 3/28/08 PERS Board meeting.

The comment period for proposed OARs affecting Employer Contributions for Prior Periods (OAR 459-009-0130) has been extended to 2/22/08 with expected adoption at the 3/28/08 PERS Board meeting.

The entire list of proposed and recently adopted OARs may be found through the PERS employer website, [www.oregon.gov/pers/emp/index.shtml](http://www.oregon.gov/pers/emp/index.shtml), by clicking on the "About Us" link in the homepage navigation area, then clicking on the applicable link under the "Administrative Rules" heading on the "About Us" page.

**3) 2008 PERS Holidays**, during which the PERS office is closed, may be found under "Office Closure Schedule" link available through the "General Information" link on the PERS employer website. The holiday schedule determines days in any month which are not considered PERS "business days". The PERS "business day" is used to establish employer reporting dates and determine member "waiting time".

**4) EDX Self-paced tutorials.** Self-paced tutorials on many PERS subjects can be found through the "EDX self-paced Education" link under the "Employer Education and Training" heading on the PERS employer website. The tutorials will provide topical review to those familiar with the tutorial subject, and initial instruction for those unfamiliar with the subject. The "Positive Adjustments" and "Negative Adjustments" tutorials have recently been modified to include adjustment examples, and the "Negative Adjustments" tutorial now includes an explanation and example of a negative adjustment effect upon an employer's "side account". A tutorial on creation of EDX reports, with examples, has also been added.

**5) 2008 EDX Training dates** . EDX training dates for the first half of 2008 have been posted on the employer website, and are available through the "EDX Class Schedule and Registration" link under the "Employer Education and Training" heading on the PERS Employer website. Two classes are available to employers: 1) EDX Basics, suitable for employers new to EDX reporting or with less than six months' experience with EDX, and 2) EDX Intermediate Reporting Topics, reviewing employer reporting topics which have proved problematic for employers in the past. Included in the Intermediate class are the most common EDX errors for 2006, and suggested fixes for these errors. All classes are held at the PERS Headquarters computer lab in Tigard, and registration for all classes is exclusively online.

Best regards,

PERS Employer OCE Team

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