Employer Announcement #41
Certification Process for Employer Migration
to EDX File Format, Version 2 File Structure

This announcement addresses employer transition, or "migration," from the existing data file format (DTL1 and DTL2 screens) to the new data file format (DTL1 and DTL2 screens). EDX v4.1 installation occurred April 29, 2006. **PERS will begin the certification process Monday, May 8, 2006.**

Information is provided for employers who report information to PERS:

- directly through keyboard entry into DTL1 and DTL2 screens (see **Section 1**),

- using the "copy forward" method (see **Section 2**), or

- by ".dat" file as part of the employer's payroll system (see **Section 3**).

Section 1 (for employers who generate PERS reports through manual [keyboard] entry of data)
No certification process will be required. Manual (keyboard) entry employers will see the new DTL1 and DTL2 screens immediately after the installation of EDX v4.1.

EDX v4.1 installation occurred April 29, 2006, and the new DTL1 and DTL2 screens are available. Employer Announcement #39 describes the new screens.

Any reports created after EDX v4.1 installation will be done using the new DTL1 and DTL2 screens. However, the OLD (Version 1) DTL1 and DTL2 screens will appear when working on a report created before the installation of EDX v4.1.

Section 2 (for employers who use the "copy forward" method)
Those employers who use the "copy forward" method will conduct the "migration" process in the EDX production environment. Here are the steps required:

1. The employer will create a new report using the "copy forward" process. The new report will automatically be in the Version 2 ("new") file format.

2. The employer will release the report; if the report does not post 100 percent, suspensions must be resolved to allow the report to post 100 percent before continuing this process.

3. The employer will contact PERS by e-mail at: PERS-employer.info.services@state.or.us after the report posts completely.

4. Within three business days of the employer's contact, PERS staff will switch the employer from Version 1 (old) data format to Version 2 (new) data format and notify the employer.

5. The employer may then continue using the "copy forward" process with no further action required.

Section 3 (for employers who report by ".dat" file)

PERS implemented release 4.1 of the EDX employer reporting software April 30, 2006. This release introduced the Version 2 file format for employers utilizing data (.dat) files. *The EDX File Format and Development Guide for the Version 2 File Structure* was sent to employers and third-party vendors in early December.

Employers have until January 1, 2007 to convert from the current file format version to the Version 2 file format version. Use of the new Version 2 file format is mandatory January 1, 2007.

A certification process will guide employers from the "old" EDX file format to the new EDX file format. The certification process will take place in the EDX Test environment.

Steps in that process are:

1. During the installation of EDX v4.1, ALL employers were sent an EDX Test site login and a password in two separate e-mails. **Note: ALL employers received a test login and password. If you generate your PERS wage and contribution reports through manual (keyboard) entry, you will not need to go through the .dat file migration steps. You may keep the EDX Test login and password for future use, if you wish.**

2. The employer will complete work on their Version 2 data file (.dat file) and submit a report in the EDX Test environment. The employer will **notify PERS by e-mail** that the report has been successfully up-loaded and released in the EDX Test environment. The e-mail address to notify PERS is PERS-employer.info.services@state.or.us.

   The report must meet the 85 percent threshold and "post" to be considered acceptable. PERS staff will inform the employer whether the report is acceptable. The employer will be switched from Version 1 to Version 2 within EDX and instructed to use **ONLY the Version 2 file format from that time forward. An employer who has progressed to the Version 2 file format CANNOT return to Version 1, the "old" data file format.**

   If the employer used actual data in the testing process, the employer will need to re-submit the report in the EDX production environment.

3. If the report does not meet the 85 percent threshold and does not post, the report will be considered unacceptable. PERS staff will inform the employer. The employer may then repeat steps 2 and 3 until a report successfully meets the 85 percent threshold and "posts."

Additional Information

All communication between PERS and employers related to file migration will be done **by e-mail to provide PERS and employers with a testing "audit trail."** Please direct all file migration questions to: PERS-employer.info.services@state.or.us.

In compliance with the Americans with Disabilities Act, PERS will provide this document in an alternate format upon request. To request this, contact PERS at 888-320-7377 or TTY 503-603-7766.