

Employer Announcement #67 EDX Release 6.0

Summary of EDX Release 6.0:

Installation of EDX Release 6.0 was accomplished the week of June 20-24, 2011. Release 6.0 changed how employers report the qualifying or non-qualifying status of a position, but made no changes to the eligibility rules used to determine qualifying or non-qualifying status. The appearance of many EDX screens was changed to effect reporting of retirement data verification.

The change in reporting qualifying or non-qualifying position status ensures accurate data prospectively, but requires the clean up of data already reported. We will be making changes to the data already reported based on the wage type records employers reported. Employers will be contacted if we have any questions. Further information on this topic will be forthcoming in the very near future.

EDX also received a new Internet address (aka URL), so the EDX address you saved as an Internet "favorite" will not work after Release 6.0 is installed. For your first post-installation EDX access you must begin at the PERS employer web page, www.oregon.gov/pers/emp/index.shtml, then click the "Login here" link under the "EDX Login" heading about half way down the page in the "EDX Status and Login" column. Once you've logged onto EDX this way, you can save the new URL as an Internet "favorite."

Detail on EDX Release 6.0 content can be found in these sections of the announcement:

1) New reporting validations effective with Release 6.0 installation, pg. 1-3.

Changes in reporting position qualifying/non-qualifying intent.
Changes in reporting waiting time wages.
Changes in establishing Contribution Start Dates (CSDs).
Employer actions if a non-qualifying year becomes qualifying.
The effect of changes on previously reported qualifying/non-qualifying intent.

2) New EDX features, pg 3-5.

Changes to the View Employee Info link.
Notification of Demographic Request Changes when received and completed by PERS.
Viewing records in "valid" status.
Select a default employer number from a selection of employers.
"Copy Forward" method of adding records to reports allows a pay date field to be specified and now includes DTL2-02 records in the copy.

1) New reporting validations effective with Release 6.0 installation.

An individual's PERS employment history is defined as a series of employment segments. An active employment segment is created when an individual is hired by a PERS-participating employer. The employer's hire intent is expressed as qualifying or non-qualifying by use of status code 01 or 15 in the DTL1 for the new hire. Under Release 6.0 a qualifying or non-qualifying position will be created within that active employment segment. While the employer's hire intent for the segment will not change, the qualifying/non-qualifying status of a position within that segment may change according to hours of service each year.

Creation of a qualifying or non-qualifying position will result in the restriction of the type of DTL2 wage code that will post to either position type. Wage code 02 (Regular/Non-qualifying) will post only to non-qualifying positions, while wage code 01 (Regular Wages), 04 (Retroactive Pay), 05 (Positive Adjustment) and 08 (Contributions No Service Credit), and wage code 06 (Negative Adjustment) will post only to qualifying positions. DTL2-14 (Negative Adjustment/No Contributions) will post to both qualifying and non-qualifying positions.

This restriction applies to ALL DTL2 records submitted after the DTL1 posts, and reverses PERS' previous instruction that DTL2 records posted during the waiting period be wage code 01, regardless of hire intent. After EDX Release 6.0 becomes operational, waiting time DTL2 records for qualifying positions with

qualifying hire intent must be wage code 01, and waiting time DTL2 records for non-qualifying positions must be wage code 02.

The creation of Contribution Start Dates (CSDs) will be changed. After Release 6.0 becomes operational, CSDs will be created only for qualifying positions, expressed by use of status code 01 in the DTL1 for an individual hired into the position. This applies only to positions created after Release 6.0 becomes operational; CSDs established for non-qualifying positions prior to Release 6.0 installation will remain on the system until removed by PERS staff. Should a non-qualifying position become qualifying for a given year, either by a change in employment status resulting in a hire intent change or as a result of the employee working 600 or more hours in that year, a CSD will need to be added. Employers should contact PERS staff to make the correction. The employer may terminate a member's non-qualifying job segment and re-hire in a qualifying job segment to cause a CSD to be created; however, if hours for the year total 600 or more, the CSD may still require retroactive correction.

These examples apply the new validations:

Q1) An employer is about to report a new hire the employer considers non-qualifying, but who will become qualifying upon reporting due to concurrent employment in the example year. The hiring employer knows about the individual's concurrent employment. Should the employment be reported as qualifying (DTL1-01) or non-qualifying (DTL1-15)?

A1) Qualifying/Non-qualifying reporting should always be made on the expectation of work hours with the reporting employer alone (Would the individual work 600 hours in any calendar year while working only for me, as the employer?)

The most preferable option would be reporting the new hire with a DTL1-15, which would declare the employer's hire intent for the position as non-qualifying and create a non-qualifying position. This record would be followed with a Demographic Change Request (DCR) to the employer's ESC account representative requesting a position change to Active Service. (NOTE: This position change WOULD NOT change the employer's non-qualifying hire intent for this employment segment.) This method will produce the best audit trail of the action taken.

The second option would be reporting a DTL1-01, since the employer knows the individual will be qualifying upon hire due to concurrent employment. This is the most expedient option, since it allows the posting of DTL2-01 records without further action, but is less preferable since it produces an audit trail that leaves out essential steps. In the future it would be difficult to determine the employer's hire intent for the position based on this set of actions. A DCR would still be necessary to request accurate reporting of hire intent.

Q2) An employer hires an individual into a non-qualifying position. What wage code should be used for the DTL2 records during the employee's waiting time?

A2) Wage code 02 should be used for all DTL2 records submitted for non-qualifying positions, even during the waiting time. After Release 6.0, wage code 02 records will post ONLY to non-qualifying positions.

Q3) Will a Contribution Start Date (CSD) be created for this non-qualifying position?

A3) No. After Release 6.0 installation, CSDs will not be generated for non-qualifying positions upon initial hire. However, non-qualifying positions posted before Release 6.0 were assigned CSDs, and those CSDs will remain even after Release 6.0 installation until and unless removed by PERS staff.

Q4) What happens to the CSD when an employer hires an individual into a qualifying position, but the individual terminates before completing the waiting time and becoming an active member? (Note: The acronym TBE is used to identify this type of situation. TBE means Terminated Before Eligible.)

A4) If the individual terminates before establishing membership, a previously created CSD will be removed by the system. If the individual is later re-hired into another qualifying position, a CSD for the subsequent position will be created.

Q5) An individual is hired into a non-qualifying position, but through concurrent employment the individual exceeds 600 hours during the calendar year.

Q5-1) Will DTL2-02 records suspend when the 600-hour mark is reached?

A5-1) **Yes**.

Q5-2) Should the employer submit a DCR to its ESC account representative to change the position to qualifying?

A5-2) **Yes**. PERS staff will change the position to qualifying upon the employer's DCR request, and will insert a CSD if the employee is a new hire with no previous PERS employment history. PERS staff may also make the correction without a DCR based on audit findings or during MACR and will then coordinate corrective action with the employer.

Q5-3) When the position is changed to qualifying, will the employer need to "back out" the wage code 02 records and resubmit them as wage code 01?

A5-3) **No**. The employer will submit a DCR to request that the position type be changed. When a PERS staff member makes this change, the system will automatically reverse the wage code 02 records and re-post them as wage code 01. In this example, the employer will receive an invoice for contributions due for the now-qualifying period. Similarly, if a position originally reported as qualifying is changed to non-qualifying, the system will automatically reverse and re-post the associated records and credit the employer for the contributions. After Release 6.0, the employer should only need to back out records if data (such as hours or salary) was reported incorrectly.

Q6) Should employers take the initiative to correct retroactive position qualification status by submitting DCRs?

A6) Initially wage code 02 records will suspend due to the restriction against them posting to Active Service (qualifying) positions. PERS management is in the process of defining a project to correct previously posted positions for non-qualifying employees to allow these DTL2-02 records to continue to post. Employers should not submit DCRs if DTL2-02 records suspend because of the position validation. However, if a DTL2-02 record suspends due to the accumulation of 600 hours of service time in any year, the employer should initiate a DCR to correct the position qualification status for that year and allow records and reports to post.

Q7) Will these posting restrictions introduced with Release 6.0 affect records posted to the system in prior years?

A7) **Yes. The effect will not be immediate as it requires intervention of PERS staff.** PERS management is in the process of defining the scope and process of a project to correct previously posted records to conform to Release 6.0 posting restrictions. Records for active and inactive members may be affected, and PERS corrective efforts will address both record types. The project will engage in changing qualification status of current and past positions. While some retroactive record correction will result from these changes, the primary focus of the project will be to align the position type with the employee's qualification status previously indicated only through wage code and hire intent. PERS staff will handle the majority of corrective efforts and will verify with employers any change in qualifying status for previous positions with newly suspended records resulting from introduction of Release 6.0 record posting restrictions. This project will receive the highest of agency priorities and should begin before July 1, 2011. More information on this project will be forthcoming in the near future.

2) New EDX features.

Changes to the View Employee Info link:

Screens accessed through the View EE Info link have been changed to implement retirement data verification requirements under SB 897. Under Release 6.0, time frames for viewing employee information have been removed; employers accessing the View EE Info link will begin at the search screen.

The download as csv link, formerly in the middle of the View Employee Info page and used to download employee addresses, has moved to the top of the screen and been renamed to be more clear about the function.

Employers will receive an e-mail notice that a verification request has been entered into their work list. Employers should open the verification request and leave it open while completing the data verification process. Employers will begin the data verification process by clicking the View Employee Info link. Input a last name, SSN or PERS ID in the Search field, and click Search. If you input a last name, a list of past and present employees with this last name will appear. Continue the data verification process for a requesting member by clicking on the member's SSN link.

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SSN	PERS ID	Last Name	First Name	Contribution Start Date	Position Type
112233445	123456	JONES	JOE		Active Service
223344556	456789	JONES	SUSAN	06/01/1993	Active Service

The Employee Employment History Details screen will then appear. This screen and the Employee Salary Details screen are the screens used to review employment and salary history. The salary screen shows information annually by pay date.

Working with:

Employee Employment History Details

Please use the links below to navigate to the desired activity for this employee.

- [View Address Details for this employee.](#)
- [View Salary Details for this employee.](#)
- [Create Demographic Correction Request \(DCR\).](#)
- [Create Salary Breakdown Request.](#)

Employment Details For: Joe Jones, SSN: 000000000, PERS ID: 111111

Date of Birth: 01/01/1940

Contribution Start Date: 01/01/1970

Hire Intent	Start Date	Last Day Service	Term / End Date	Gross Unused Sick Leave	Transferred Unused Sick Leave	Job Class	Position Type	Plan	Average OT Hours	Contract No. of Months	Verify	Verified Date	User ID
N/A	11/30/2004		11/30/2004	0.000	0.000								
	11/30/2004		11/30/2004			General Service	Active Service	PERS Tier 1	0		<input type="checkbox"/>		
Q	08/22/1960	12/31/1998	12/31/1998	2770.000	0.000								
	08/22/1960		12/31/1998			General Service	Active Service	PERS Tier 1	0		<input checked="" type="checkbox"/>	06/25/2010	AAABBB
	08/22/1950		12/31/1955			General Service	Active Service	PERS Tier 1	0		<input checked="" type="checkbox"/>	06/24/2010	AAABBB

[Verify All](#) [Save](#) [Cancel](#)

Working with: CROOK COUNTY, 02044

Employee Salary Details

Please use the links below to navigate to the desired activity for this employee.

- [View Employment History for this employee.](#)
- [View Address Details for this employee.](#)
- [Create Demographic Correction Request \(DCR\).](#)
- [Create Salary Breakdown Request.](#)

Salary Details For: John Doe, SSN: 000000000, PERS ID: 546345

Date of Birth: 01/01/1940

Contribution Start Date: 01/01/1970

Current Membership							
Plan	Calendar Year	Subject Salary	LSP	LSVP	Gross Salary	Verify	Verified Date
PERS	2000	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input checked="" type="checkbox"/>	01/20/2009
PERS	2001	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input checked="" type="checkbox"/>	01/20/2009
PERS	2002	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	
PERS	2003	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	
PERS	2004	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	
PERS	2005	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	

[Verify All](#) [Save](#) [Cancel](#)

Closed Membership							
Plan	Calendar Year	Subject Salary	LSP	LSVP	Gross Salary	Verify	Verified Date
PERS	1970	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	
PERS	1971	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	
PERS	1972	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	
PERS	1973	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	
PERS	1974	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	
PERS	1975	\$10,000.00	\$0.00	\$0.00	\$10,000.00	<input type="checkbox"/>	

[Tell Me More](#)

Notification of Demographic Correction Request receipt and completion:

After installation of Release 6.0, employers will receive notifications when an employer-generated DCR is received by PERS, when the changes requested in the DCR are complete

Viewing records in "valid" status:

Under Release 6.0, records in valid status can be found through the "edit" function for any Regular or Demographics and Adjustment suspended report. After clicking "edit" for the report in question, scroll down to Option 3- Unposted Records, and records in "valid" status will be visible.

Option 3 - Unposted Records

Click on a record to make changes to the record. The following page will provide you with a list of errors found during the last nightly validation batch run for each employee record in this list.

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1 2 3 4 5 6 7 8

Select Record	SSN	Employee Name	Reported Wage Code	Status	Record Type
select	(deleted for security purposes)	(deleted for security purposes)	Regular wages	Suspended	DTL2
select			Retired / No Contributions	Suspended	DTL2
select			Retired / No Contributions	Valid	DTL2
select			Regular wages	Suspended	DTL2
select			Regular wages	Suspended	DTL2
select			Regular wages	Suspended	DTL2
select			Positive Adjustment	Suspended	DTL2
select			Positive Adjustment	Valid	DTL2
select			Regular wages	Valid	DTL2
select			Regular wages	Suspended	DTL2

Select a default employer number from a selection of employers:

Under Release 6.0, individuals having access to a number of employer accounts can select a default account.

Working with : COOS COUNTY, 02018

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 **2** 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	Default ER
	02018	COOS COUNTY	Active	Active	
select	02880	OR HEALTH AND SCIENCES UNIVERSITY	Active	Active	
select	02121	PORTLAND, CITY OF	Active	Active	
select	03965	UNION CNTY SCH DIST #1	Active	Active	

Save Default ER

Copy forward method of adding records to report adds a pay date field:

The copy forward option for adding records to reports will now include a Pay Date field that can be applied to the report so employers will not have to change pay dates manually on all records. If the copy forward method is chosen, the Pay Date field will appear when the “Next” button is clicked. If the Pay Date field is left blank, the field will default to the report date. DTL2 records with wage codes 01, 02, 07 and 08 will now copy forward.

Report Creation Form

Report Date : (MM/DD/YYYY)

Report Type :

Please choose a method for populating your report.

☐ I would like to upload a payroll file to populate this report.

☒ I would like to copy member records from the most current posted report to this report.

Pay Date : (MM/DD/YYYY)

☐ I would like to create an empty report and add member records manually.

Next

Please contact your ESC account representative if you have any questions about Release 6.0 features described in this announcement.

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.