

Employer Announcement #104

Deadline to Make Changes to a Retiree's Account

January 2024

On January 1, 2024, House Bill (HB) 2283 established a deadline for making changes to a retiree's pre-retirement account. Retirees, PERS' staff, and now employers, too, are unable to make changes to a retiree's account after 240 days into their retirement. After 240 days, the account is locked and cannot be changed (see "Exceptions" on the next page).

About the 240-day deadline

When a PERS member retires, PERS takes all the wage and service data submitted by the retiree's employers over the retiree's career and uses it to calculate their retirement benefits. Once PERS calculates the benefits, we send the retiree a Notice of Entitlement report that lists information including their benefit amount, employment history, what calculation method was used, and their beneficiary or beneficiaries.

The retiree has 240 days from the date of the Notice of Entitlement to verify the accuracy of the information and dispute any errors. (Disputing the information does not delay the onset of retirement benefits.)

Prior to HB 2283, employers had no deadline for requesting changes to a retiree's account. For example, if an employer discovered salary that they failed to report to PERS 10 years ago, the employer could ask PERS to reopen the retiree's account to add those missing wages, requiring PERS to recalculate the retiree's pension and Individual Account Program (IAP) account.

Starting in 2024, employers can no longer request changes to a PERS account past the deadline. If an employer reporter tries to post hours and wages to a retired account in EDX, they will get the error message "S-Cannot report wage or employment information" because this member is retired or their account is closed. PERS' staff will not be able to reopen the account to correct the hour and/or wage information.

How to make changes to a retiree's account

To make changes to a recent retiree's pre-retirement account, contact your ESC representative to ensure you can still make changes. If it's past the 240-day deadline, you will not be able to make the changes unless they are required by one of the exceptions listed on the next page.

Disputing information in the Notice of Entitlement

A retiree can dispute the accuracy of the information used to calculate their benefits by filling out and emailing or mailing a Dispute of Notice of Entitlement form. The dispute must be received by PERS by the 240th day after the date of the Notice of Entitlement or the 240th day after the first retirement payment, whichever is later.

[Tier One/Tier Two dispute form](#)

[OPSRP dispute form](#)

Exceptions

After the 240-day deadline, a participating employer may not modify a member's creditable service, retirement credit, salary, employee contributions, or unused sick leave unless specifically required by one of the following:

- To comply with a judgment, administrative order, arbitration award, conciliation agreement, settlement agreement, or other legal agreement entered into after the 240-day deadline.
- To correct information related to military service.

Note: HB 2283 also gave PERS the ability to lock data for both members and employers broadly in other circumstances. PERS will not undertake this without providing both member and employer stakeholders the opportunity to review the member data. PERS will have to undertake administrative rulemaking to specify rules for data locking generally.

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