Make sure employees are still eligible (or not) for PERS this year

As we head into fall, it’s time to check for employees whose eligibility for PERS benefits may change this year.

You can check for these employees by running two types of Eligibility Exception Reports:

- **The Members Approaching Qualifying Hours** report lists non-qualifying employees who may reach 600 hours this year with all employers and, thus, qualify for benefits.
- **The Members With Contributions Who May Not Qualify** report lists qualifying members who may not reach 600 hours with all employers this year and, thus, not qualify for benefits.

**Position type change**

A non-qualifying employee who has worked fewer than 600 hours for you this year can reach 600 hours or more if they work for other PERS employers.

If this happens, submit a DCR to request a change in position type from Non-Qualifying Service to Active Service.

If you have been paying contributions on an employee who does not qualify for benefits this year, PERS will refund you those payments. By the same token, if a non-qualifying employee ends up qualifying for benefits this year, PERS will invoice you for those contributions — both IAP and pension.

continued on page 2
If the reports reveal employees who need their position type changed to active service or non-qualifying service, submit a Demographic Change Request (DCR) asking PERS to make this change.

For instructions, read employer reporting guide 24, Running Reports, “Eligibility Report” section.

**Note about employees who don’t work the full year:** Employees who won’t have a full year of work this year (because they were hired partway through the year or left before year-end or both) can still qualify for benefits if they are in a “qualifying” position. For more information, see employer quick-reference guide, “Determining Qualification for a Partial Year.”

**TIP** Remember to check eligibility for past years, if you haven’t already. EDX allows you to run eligibility reports going back two years (i.e., 2022 and 2021).

**EMPLOYEE ELIGIBILITY EXCEPTION REPORTS**

The reports below can be used to determine if corrective action is required to report an employee for regular wages and contributions (qualifying hours) or non-qualifying wages without contributions.

Please note that these reports are only updated once a week. When viewing the CSV file, the header row will state the date the information was pulled from the system.

Filter your report by year
Enter a year (YYYY)

Members Approaching Qualifying Hours
Members with Contributions Who may not Quality

Download CSV File
Download CSV File
For employer reporters

Do you have ‘inactive’ employees?

In preparation for the end of the year, it’s time to check for inactive employees; that is, employees who are no longer working for you but have not been terminated in EDX.

To find inactive employees, run an Inactive Employment Report. This report generates a downloadable file that lists the last pay date, hire date, and contribution start date for employees who have had no wages reported in the last 90 days.

Note: The report does not include working PERS retirees.

For instructions, read employer reporting guide 24, Running Reports, “Inactive Employment Report” section.
New employer reporting guides and videos

For employer reporters and web administrators

**Unfunded Actuarial Liability (UAL) Resolution Program guide**

*Guide to Understanding Pension Obligation Bonds.* Explanation of what a pension obligation bond (POB) is, how employers can use it to help reduce their PERS net contribution rates, and risks and benefits of issuing one.

**Videos**

*“Reporting a New Employee.”* This video demonstrates how to report a new hire to PERS.

*“Responsibilities of a Web Administrator.”* This video shows the duties performed by a web administrator.

You can find these videos on the Employer Training webpage.

**Employer reporting guides**

9. *Reporting Wages for a Full-Time (Qualifying) Employee.* Instructions for reporting a full-time or "qualifying" employee's wages to PERS.


13. *Family and Medical Leave.* How and when to report family and medical leaves, options for receiving pay during a family or medical leave (including Paid Leave Oregon), and when and how to report pay.

20. *Creating a Demographic Correction Request (DCR).* Employee changes that require a DCR and instructions for creating one.
It’s time for PERS Expo

PERS Expo 2023 kicks off on October 10 at 8 a.m. Pacific. Join in for live, moderated, and on-demand content from PERS, Oregon Savings Growth Plan, the PERS Health Insurance Program, and other retirement and public-service-oriented resources. The event repeats on October 11, so you do not need to attend both days.

The PERS Expo offers checklists, videos, question-and-answer sessions, and other digital resources to help PERS members:

- **Identify the PERS plan** they’re in — Tier One, Tier Two, or OPSRP.
- Understand the two parts to their PERS retirement — the pension and the Individual Account Program (IAP), including the Employee Pension Stability Account (EPSA).
- **Explore their options for saving more for retirement with Oregon Savings Growth Plan.**
- **Learn about the PERS retirement-application process.**
- **Check out post-retirement health insurance coverage through the PERS Health Insurance Program.**
- **Learn about Medicare through the Senior Health Insurance Benefits Assistance (SHIBA) program.**

To attend the expo, go to the PERS Expo website on the 10th or 11th and sign in or register (if you haven’t already).