OREGON PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

EDX Site Navigation Menu Items

Employer Reporting
Quick-Reference Guide

This guide explains the 14 functions on the EDX main menu and what you can accomplish with each one.

Employer Service Center

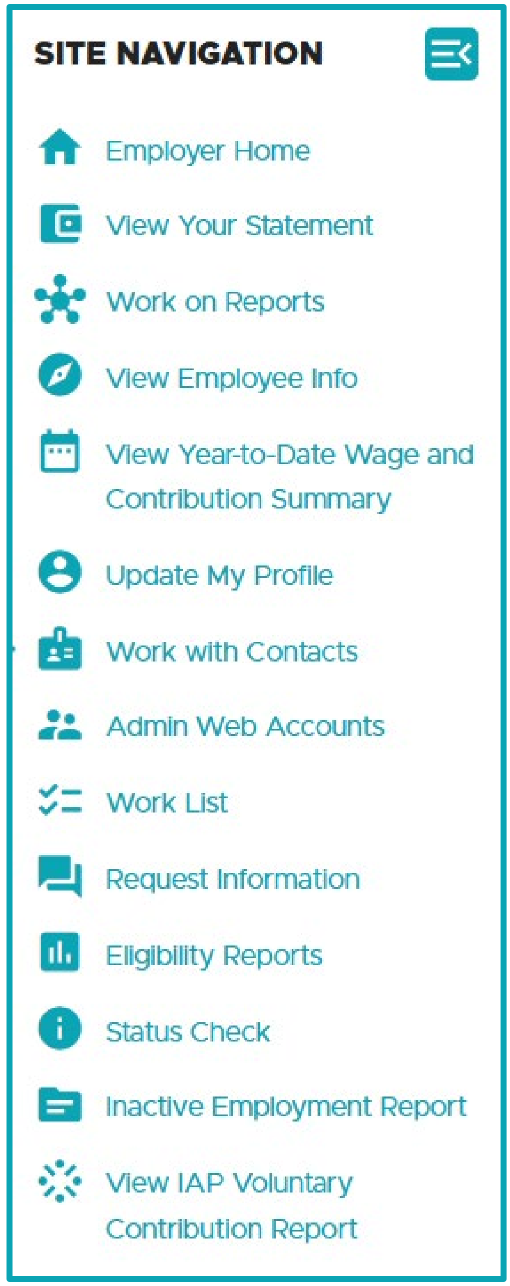
Introduction

The Employer Data Exchange (EDX) Site Navigation main menu provides 14 functions.

This guide defines those functions and what they enable you to do.

Note that two of the functions are only available to web administrators: Work with Contacts and Admin Web Accounts.

To learn how to report in EDX, register for training on the Employer Training webpage. For instructions on using the individual functions, go to the linked resources included with each definition.



Menu items

Site Navigation menu item	What it allows you to do
Employer Home	It indicates which employer account is currently selected and provides an overview of the selected account. If you are responsible for reporting for more than one employer, you can select another employer from the Switch Employer drop down menu.
View Your Statement	View your organization's: ▪ Current employer statement. ▪ Past employer statements. ▪ Current unbilled activity since the last statement. ▪ Past Wage and Contribution Reports. ▪ Breakdown of current contribution rates by category. For instructions on navigating and understanding your statement, read employer guide 26, *Understanding Your Statement*.
Work on Reports	▪ Create a new Regular or Demographics and Adjustment report. ▪ Work on unposted reports. ▪ View posted reports. ▪ View posted IAP Voluntary Contributions reports. Instructions for using this function are in employer guide 4, *Creating a Report*.
View Employee Info	Search for an employee to find information including: ▪ Social Security number and PERS ID number. ▪ Contribution start date (CSD). This is an employee's first day of PERS membership after they complete their six-month wait time. ▪ Address details. ▪ Salary details. ▪ IAP voluntary contribution election dates. ▪ Date of birth. ▪ Employment history details. ▪ Demographic Correction Requests (DCR). ▪ Salary breakdown. Learn more about voluntary contributions on the How to Manage an Employee's Voluntary Contribution webpage. Learn more about DCRs in employer guide 20, *Creating a Demographic Correction Request (DCR)*.

Site Navigation menu item	What it allows you to do
View Year-to-Date Wage and Contribution Summary	View your organization's year-to-date wage and contribution data. The report shows data that you have reported to PERS for each employee during the calendar year. For instructions on creating this summary, go to employer guide 24, *Running Reports*, section "Year-to-Date Wage and Contribution Summary Report."
Update My Profile	Update your EDX account information. You can update your e-mail address, change your password, and add employers to your account. Web administrator instructions for using this function are in employer guide 3, *Reporter Roles and EDX Access*, Part 1 — The Web Administrator, "Getting Started," "Updating Your Account Information." Employer reporter instructions for using this function are in Part 2 — The Employer Reporter, "Getting Started," "Updating Your Account Information."
Work with Contacts	Only web administrators see this menu item. It allows you to add, view, edit, or delete the profile of a contact in your organization, such as a web administrator, employer reporter, or reporting official. This function does not give web administrators and employer reporters EDX access; it only adds people to a contact list. By the same token, deleting them from the contact list does not inactivate their EDX access. For instructions, read employer guide 3, *Reporter Roles and EDX Access*, "Managing EDX Access" section.
Admin Web Accounts	Only web administrators see this menu item. It allows you to activate, inactivate, and reset passwords for the web accounts in your organization. Also allows you to unlock coworkers' web accounts and update their web account contact type and account profile information. For instructions on using this function, read employer guide 3, *Reporter Roles and EDX Access*, "Managing EDX Access" section, "Managing Employer Reporter Accounts" subsection.
Work List	View a list of employees about whom PERS needs more information. Click on the SSN of an employee to read a message from PERS about an action you need to take or information you need to provide, such as their termination date, last day of paid leave, or new voluntary contribution election. For instructions, read employer guide 19, *Completing Work List Requests*.

Site Navigation menu item	What it allows you to do
Request Information	Request information about your account. Instructions for using this function are in employer guide 25, *Sending an Encrypted Message to PERS*.
Eligibility Reports	Run two kinds of reports to check if any employees are at risk of a change to their membership qualification that calendar year: ▪ **Members Approaching Qualifying Hours:** Employees with a non-qualifying wage code (or three or more qualifying wage codes without contributions) whose net hours exceed 550. These employees may meet the minimum of 600 hours to be eligible for a PERS qualified status. ▪ **Members With Contributions Who May Not Qualify:** Employees who have been reported with a qualifying wage code with contributions, but whose total hours are less than the minimum 600 toward year-end. These employees may not meet the minimum qualifying hours and may no longer be eligible for a qualified status. For instructions on running these reports, go to employer guide 24, *Running Reports*, section "Eligibility Report."
Status Check	Search for an employee to check their contribution status (i.e., whether they qualify for PERS benefits, which determines whether your organization owes contributions on their wages). Also states if they are requiring a wait time. For instructions on doing a status check in EDX, go to employer guide 24, *Running Reports*, section "Status Check Report." For a more thorough status check, contact your ESC rep.
Inactive Employment Report	Create a report listing all employees who have open employment segments, but no wages have been reported for them for 90 days. These employees may need a Detail 1 demographic record submitted to terminate and close the employment segment. For instructions on running this report, go to employer guide 24, *Running Reports*, section "Inactive Employment Report."
View IAP Voluntary Contribution Report	Create a report of all your employees who have elected to make IAP voluntary contributions. Learn more on the How to Manage an Employee's Voluntary Contribution webpage and in employer guide 24, *Running Reports*, section "IAP Voluntary Contribution report."

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