OREGON PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

15

Reporting a **Termination or Death**

Employer Reporting Guide

This guide explains how to inform PERS that an employee has left your employment or died.

Employer Service Center

Contents

Revised January 2023

Introduction

This chapter lists the steps required to report an employee who will no longer be working for you, whether they quit, got laid off, were terminated, or died.

Reporting a termination

To report an employee termination, create a new Demographics and Adjustment Report (or edit an existing one) and add a Detail 1 Member Demographics record with a status code of 02.

Fill in a Detail 1 record

Fill in the required fields, as shown in the example below.

SSN: Already filled.

Status Code: Use 02 – Terminated.

Status Date: The date the work status change became effective.

Last Day Service: The last date the employee worked or was on paid leave.

Name: Already filled.

Name Change Indicator: Required. N is the default.

Address 1: In all caps. If address includes a unit, apartment, or condo number, enter it in this field. Use a PO box instead of a street address if one is available.

Address 2: Optional. Do not enter a unit, apartment, or condo number in this field.

Address 3: Optional. Do not enter a unit, apartment, or condo number in this field.

City, State, Zip - 1: All caps. Choose the state from the pull-down list.

Zip - 2: Optional for the four extra digits of a zip code.

DETAIL 1 - MEMBER DEMOGRAPHICS:

SSN	*********
Status Code	02 - Terminated
Status Date	11/15/2022 (MM/DD/YYYY)
Last Day Service	11/14/2022 (MM/DD/YYYY)
Old SSN	
First Name	JANE
Last Name	DOE
Middle Name	
Name Change Indicator	N
Address - 1	123 4TH STREET
Address - 2	
Address - 3	
City	JOSEPH
State	OREGON
Zip - 1	97846
Zip - 2	

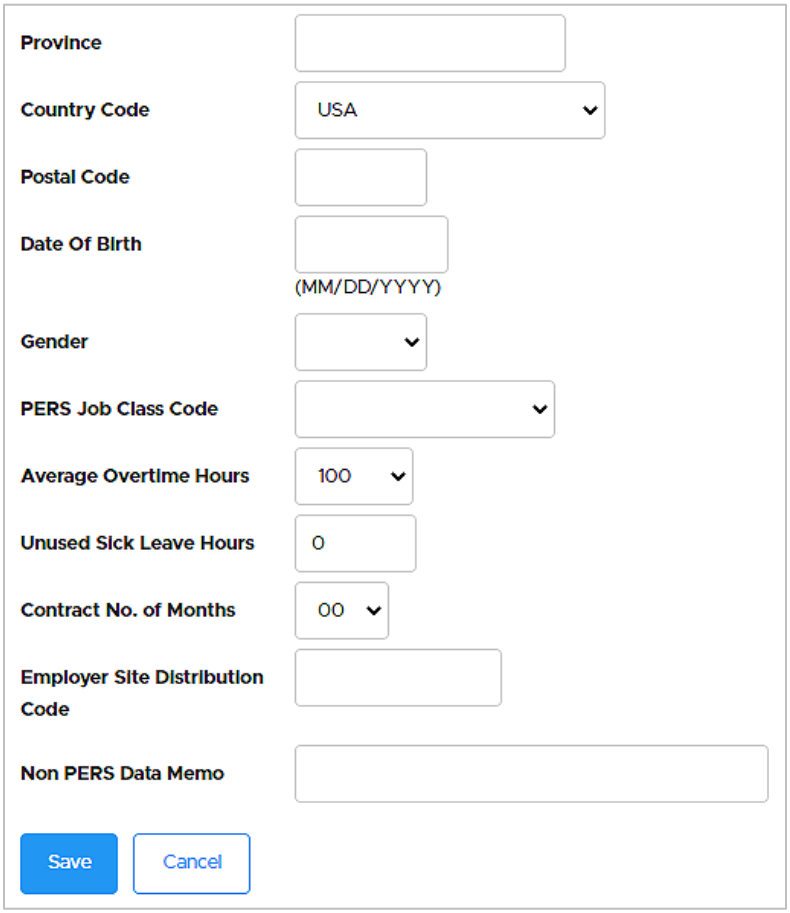
Continued

Province: For foreign address, where Country Code is other than "USA."

Country Code: USA is the default. Click to view the pull-down list, if needed.

Postal Code: For foreign address.

Unused Sick Leave Hours: Required. Enter zero into this field for OPSRP members and those who do not participate in the PERS unused sick-leave program. For Tier One and Tier Two members, read Employer Reporting Guide 16, "Calculating Unused Sick Leave."



Explanations of fields

Required	Screen field name	Notes
*	SSN	No dashes. Double check that this is accurate.
*	Status Code	Use 02 for employees terminated, retired, or laid off. Use 10 when reporting an employee's death.
*	Status Date	Date the work status change became effective.
*	Last Day Service	The last date the employee actually worked or was on paid leave (e.g., if the employee was on leave from 1/8/23–1/15/23, you would enter "01/7/2023"). The date can be the same as the Status Date but cannot be later than the Status Date.
*	First Name	Fills in automatically.
*	Last Name	Fills in automatically.
*	Name Change Indicator	"N" is the default.
*	Address – 1	If the address includes a unit, apartment, or condo number, type the number in this field. Use a PO Box instead of a street address if one is available.
	Address – 2	Optional—may be needed for some addresses. Do not enter a unit or apartment number in this field.
	Address – 3	Optional—may be needed for some addresses. Do not enter a unit or apartment number in this field.
*	City	All caps.
*	State	Choose from pull-down list.
*	Zip - 1	The five-digit zip code.
	Zip - 2	Optional.
	Province	Use when Country Code is other than "USA."
*	Country Code	USA is the default.
	Postal Code	Use when Country Code is other than "USA."
*	Unused Sick Leave Hours	Type "0" into this field if employer does not participate in the unused sick leave program or is a member of the OPSRP PERS plan.

Reporting an employee death

In the case of an employee death, you must create a Detail 1 record — using status 10 - Deceased — to report his or her death.

When an employee dies, the employee's family and employer must follow a few important steps to report the death to PERS Member Services. PERS will update the employee's account, and the PERS Death Benefits section will begin calculating beneficiary benefits, if applicable.

For information on OPSRP member death benefits, read the OPSRP Member Death webpage.

For information on Tier One/Tier Two death benefits, read the Tier One/Tier Two Member Death webpage.

Note: Normally, an employer is only involved in the death of a current employee, not a former employee. However, if a former employee dies and PERS discovers that you never reported that employee's termination, PERS will reach out to have you report the termination date. The employment segment must be closed before benefits can be processed.

Inform PERS Member Services

1. As soon as possible, the employee's death should be reported to PERS by either the employee's family, a representative of the employee's family, or the employer. (A family member or representative can call PERS Member Services at 888-320-7377.)
2. The family member or rep will need to provide Member Services with a photocopy of the death certificate and contact information for next of kin.
3. The family member or rep should call the member's employer (e.g., their manager or HR representative) to inform them of their employee's death.
4. The member's employer contacts their PERS account representative to inform them of the death. If the member's employer is the first party to report the employee's death, they will need to provide contact information for next of kin so they can complete step 2 above.
5. The member's employer goes into EDX and reports the employee's final wages.
6. The member's employer then reports the death through a Detail 1 record (instructions below). This also closes out the employment segment.

Fill in a Detail 1 record

To report an employee's death, create a new Demographics and Adjustment Report (or edit an existing one) and add a Detail 1 Member Demographics record with a status code of 10 - Deceased.

This record does double duty by posting a death status on the account and terminating the open employment segment.

Fill in the **required** fields, as shown in the example below.

SSN: Already filled.

Status Code: Choose 10 – Deceased.

Status Date: Date of death.

Last Day of Service: Their last day on the job.

First Name: Already filled.

Last Name: Already filled.

Address: In all caps, per USPS standard.

Continued

DETAIL 1 - MEMBER DEMOGRAPHICS:

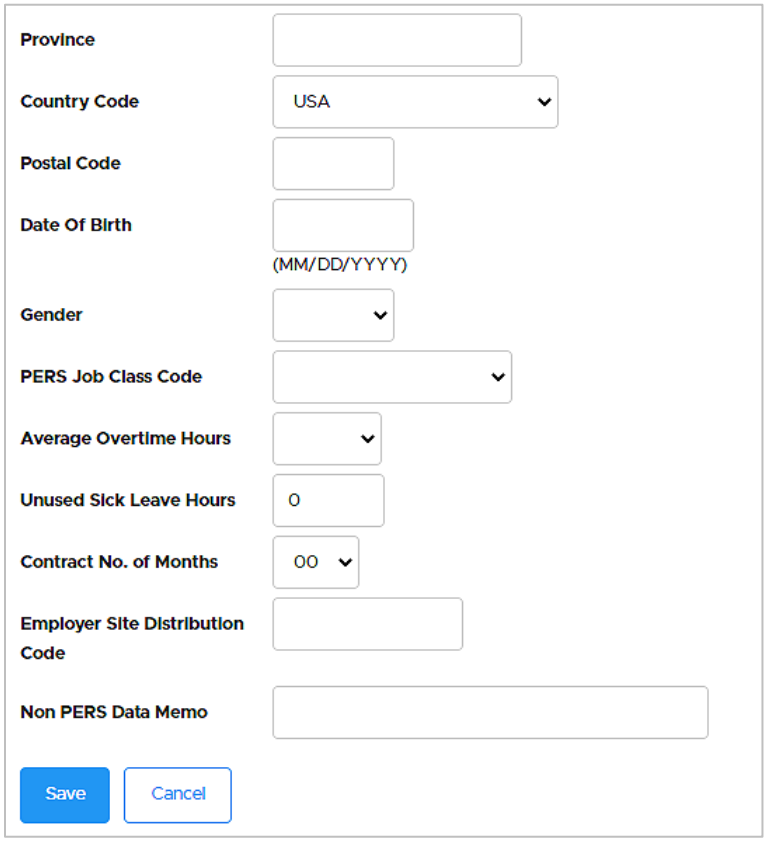
SSN	*********
Status Code	10 - Deceased
Status Date	11/15/2022 (MM/DD/YYYY)
Last Day Service	11/14/2022 (MM/DD/YYYY)
Old SSN	
First Name	JANE
Last Name	DOE
Middle Name	
Name Change Indicator	N
Address - 1	123 4TH STREET
Address - 2	
Address - 3	
City	JOSEPH
State	OREGON
Zip - 1	97846
Zip - 2	

Province: For foreign address, where Country Code is other than "USA."

Country Code: USA is the default. Click to view the pull-down list, if needed.

Postal Code: For foreign address.

Unused Sick Leave Hours: Required. Enter zero into this field for OPSRP members and those who do not participate in the PERS unused sick-leave program. For Tier One and Tier Two members, read employer reporting guide 16, "Calculating Unused Sick Leave."



Calculate unused sick leave hours

If an employer participates in the PERS Unused Sick Leave program, accumulated unused sick leave hours for a Tier One or Tier Two employee are reported when the employee terminates employment or dies. For instructions, read the employer instruction chapter 26, "Calculating Unused Sick Leave Hours at Termination."

If your organization does not participate in the Unused Sick Leave program or if you are reporting an OPSRP member, enter "0."

Legislation affecting death benefits

SB 111A (2021) increased the death-benefit payout for surviving spouses of a certain group of PERS members.

Previously, if a member died after their earliest retirement age but before they actually retired, a surviving spouse would receive 50% of the actuarially adjusted amount of their death benefit.

SB 111A increased the amount to 100% of the actuarial equivalent of the benefit.

This change affects optional death benefits for Tier One/Tier Two members, as well as death benefits for OPSRP members.

For details, read SB 111A section 10 (Tier One/Tier Two) and section 11 (OPSRP).

Learn more

The PERS website provides more details about the death process, including steps to follow when a retiree dies:

Tier One and Tier Two members

OPSRP members

Submitting final wage reports

When you learn that an employee has terminated or died, you need to complete the following two steps to ensure that PERS has the correct information to process retirement benefits, if applicable.

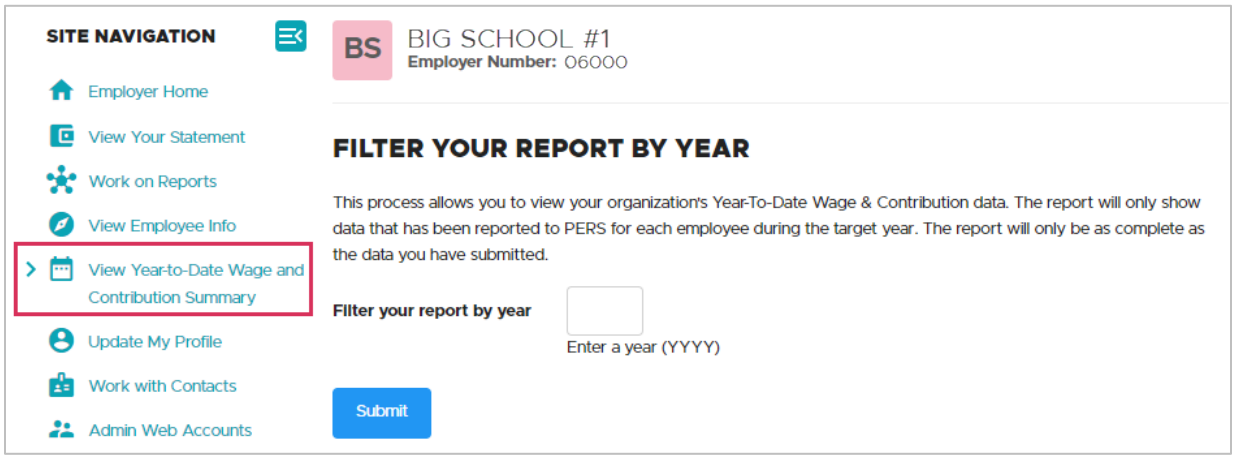
Report their final wages

Read employer reporting guide 9, "Reporting for a Full-Time Employee" or 10, "Reporting for a Part-Time Employee" for instructions on submitting wages.

Find and correct any unposted records

Run a Year-to-Date Wage and Contribution Summary report to find out if the employee has any unposted records. If they do, correct those records and resave.

1 Select **View Year-to-Date Wage and Contribution Summary** from the Site Navigation menu.

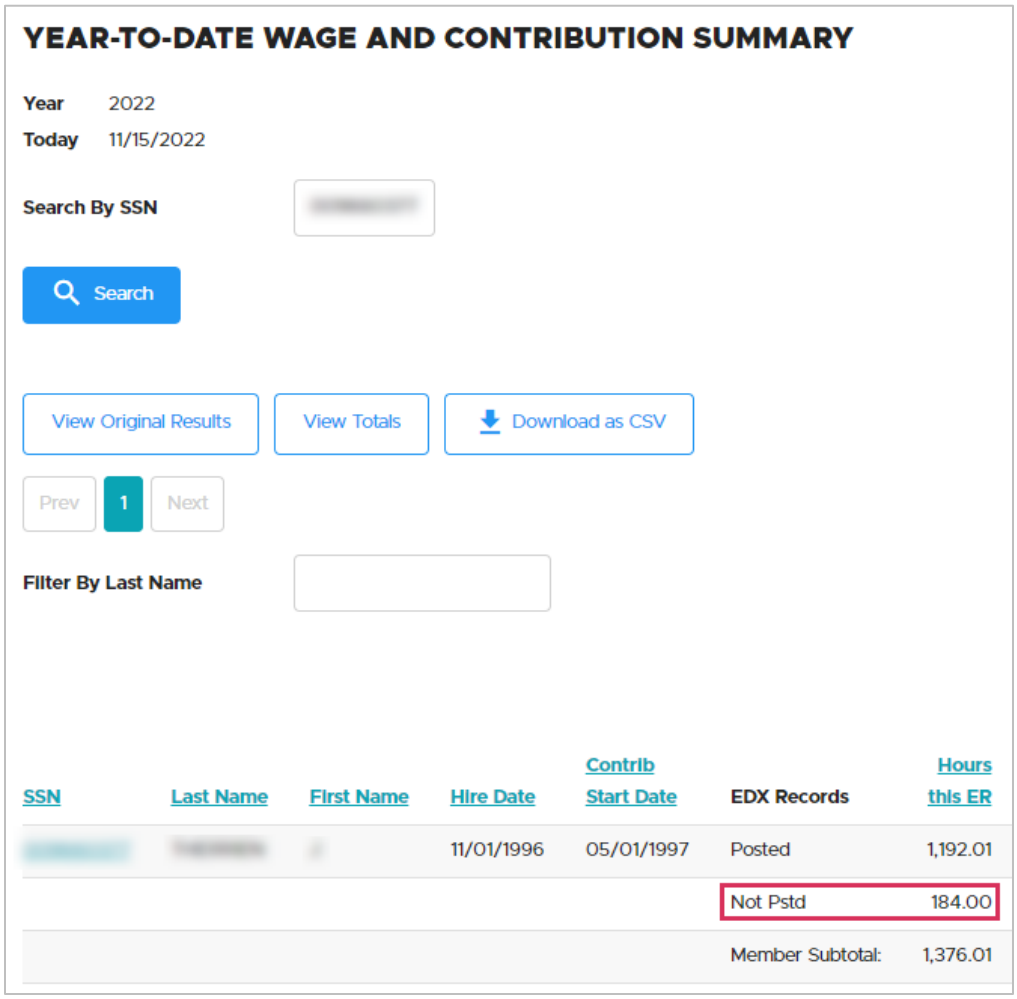


2 Enter the year for which you want information. Click **Submit**.

The report displays all Detail 2 records, regardless of whether they have posted.

3 Enter the Social Security number of the employee in the Search By SSN box and click the **Search** button.

A list of records for that employee that were submitted for that year appears. Suspended records are referred to on the report as “Not Pstd.”



EDX Records column: If there are posted records but no suspended records, only the “posted” line will display. Conversely, if there are no posted records for an employee, only the “not posted” line will appear. If there are both posted and not posted records for an employee, a third line, Member Subtotal, will display the sum of posted and not posted wage, service, and contribution data.

4 Click the employee's Social Security number. Another screen will open with more information about the suspended record. Make note of the report date.

UNPOSTED RECORDS

Report Date	Pay Date	Wage Code	Transaction Type	Work Period Begin Date	Work Period End Date	Hours Reg	Hours OT
08/31/2022	08/19/2022	01	Regular wages			184.00	0.00
					TOTAL	184.00	0.00

5 Go to **Work on Reports** and find that report date under Unposted Regular Reports or Unposted Demographics and Adjustment Reports.

WORK ON WAGE AND CONTRIBUTION REPORTS

Tell Me More

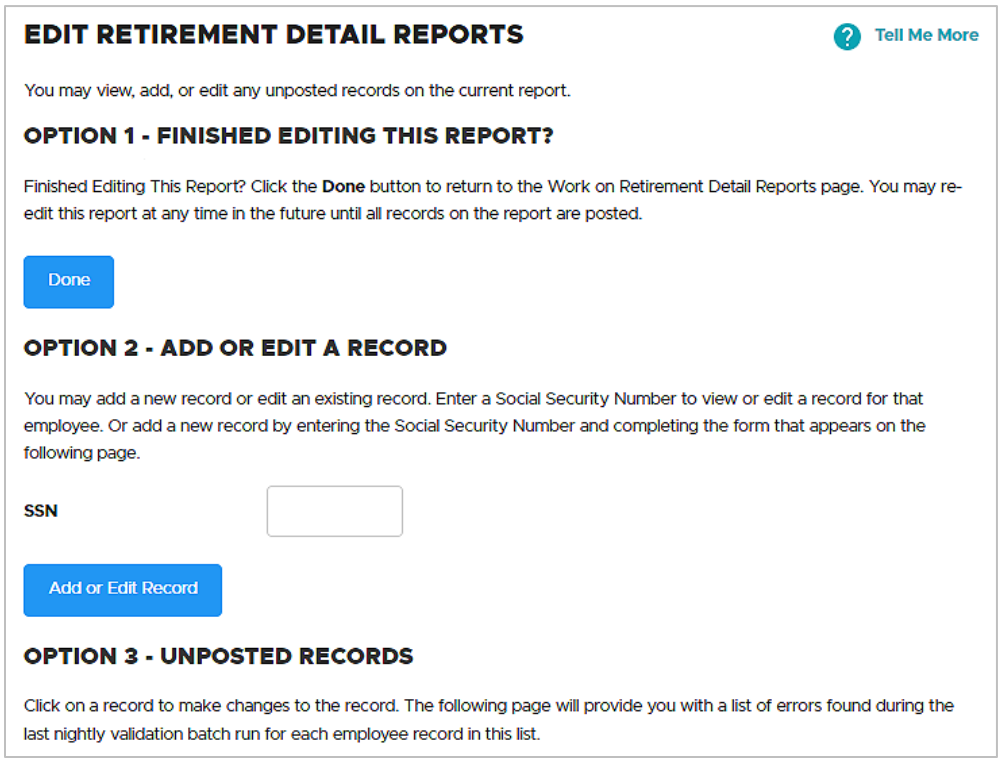
Below is a list of the latest Wage and Contribution Reports. Select an action that is available next to the report or you can also Create a New Report

Work with Unposted Reports
Work with Posted Reports
Work with Posted IAP Voluntary Contributions Reports

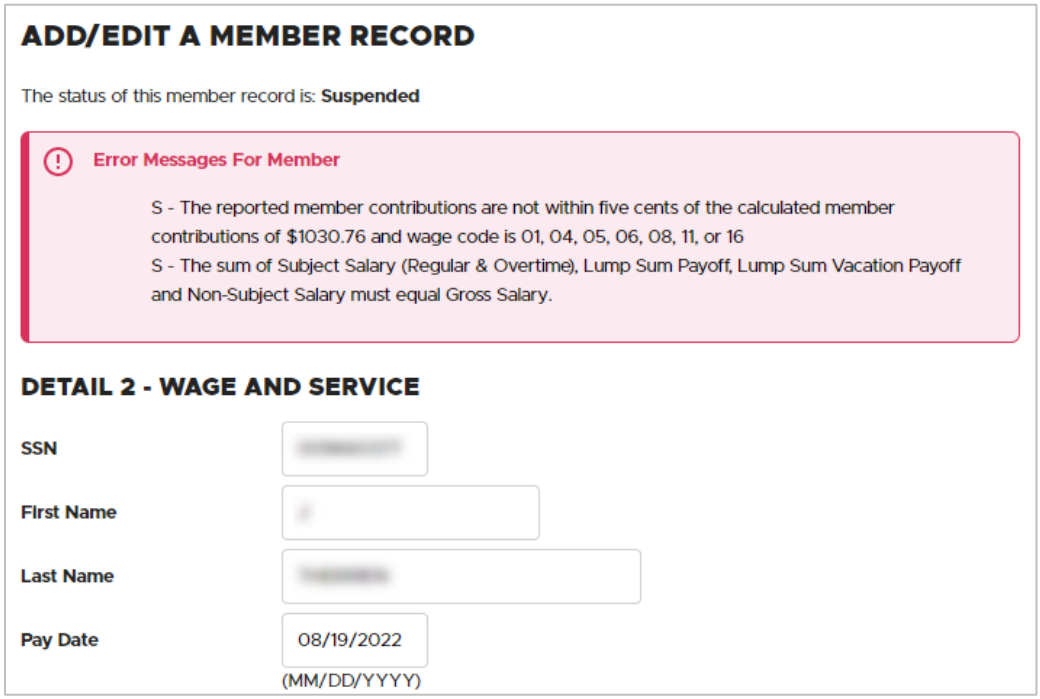
UNPOSTED REGULAR REPORTS

Status	Date Submitted	Report Date	Delete	Edit	Release / Un-Release	Reject/Edit Report	View Details	View Totals
Suspended	08/31/2022	08/31/2022	delete	edit	n/a	View Report	View Details	View Totals
Suspended	07/28/2022	07/31/2022	delete	edit	n/a	View Report	View Details	View Totals

6 On the Edit Retirement Detail Reports screen, enter the employee's SSN under Option 2 or find them in the list under Option 3 - Unposted Records.



7 Read the error message or messages. Correct the record. Click **Save**.



Adjust final wages for salary limit

Senate Bill 1049 (2019) set new limits on the subject salary that PERS uses to calculate an employee's PERS benefits for years 2020 and beyond. Employees who earn more than the monthly limit must have their subject salary adjusted before their account is closed. Adjusting their subject salary after closing their account is a complicated process that may involve the employee paying back some of their benefits.

Remember that an employee who is working for **less than 12 months** in a calendar year could be impacted by the **partial year** limit.

Note that for Tier One/Tier Two members, eligible lump-sum payments are included in these amounts.

Instructions

Any subject salary the employee earned that is over the monthly salary limit will need to be reported as non-subject salary.

Note that these limits do not impact an employee's actual paid salary; they only affect the amount of their subject salary that PERS uses to calculate their IAP contributions and pension.

Go to the Salary Limits: Information for Employer Reporters webpage for full information and instructions.

For your employees: To help your employees understand how salary limits may affect them, direct them to the SB 1049 Changes: Salary Limit webpage. Included on that page are illustrative examples to help members understand how they may or may not be affected by the limit. Note that the limit affects a small number of PERS members and that the general examples may not reflect each member's unique situation.