



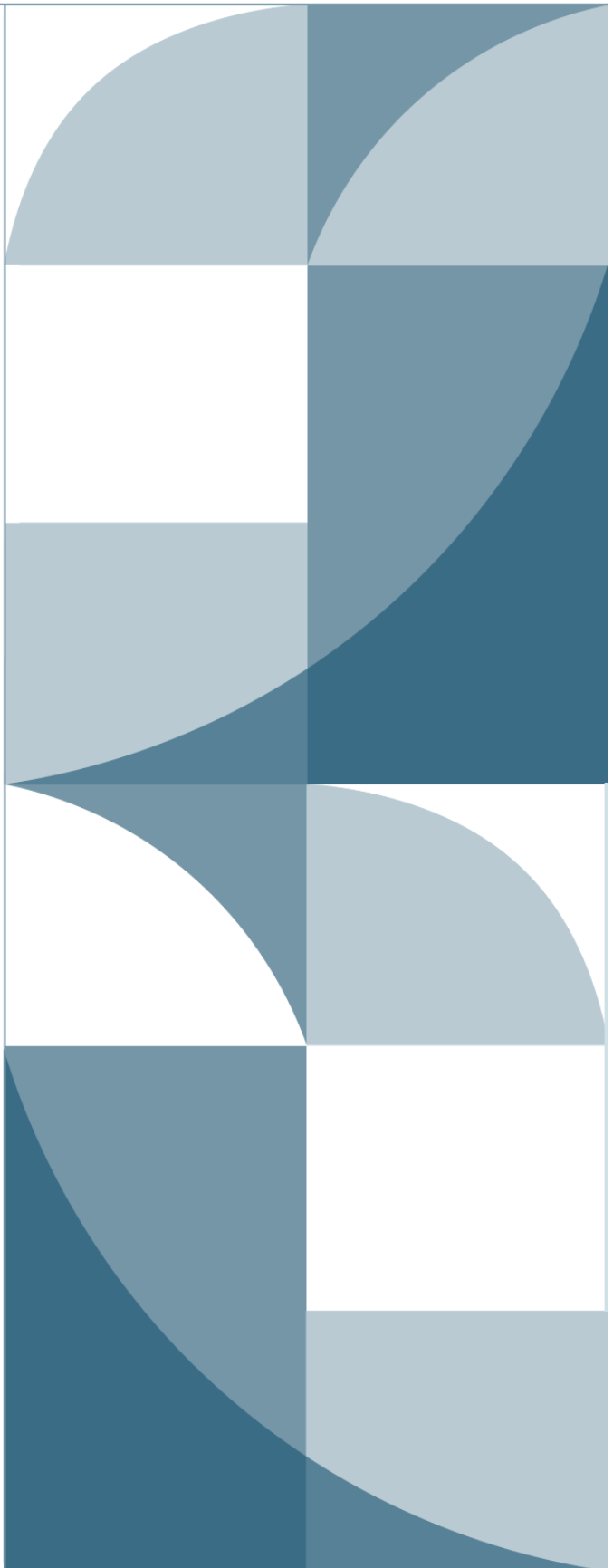
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Changing Demographic Information

Employer Reporting Guide

This guide explains how to change information in an employer's or employee's account, such as address, name, Social Security number, job type, and qualification status. Also explains how inactive members, retirees, and nonmembers can change their information.

**Employer
Service
Center**



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Introduction

It is crucial that the information in your employees' PERS accounts is up to date and accurate at all times. Your employees' future retirement benefits, and the benefits given to their beneficiaries or alternate payees, depend on it.

Your employee, your organization, and PERS are each responsible for making specific types of information and status changes. This guide explains which party is responsible for which changes and how they go about making those changes.

Changing employer account information

Organization information

Name or address change

If your organization changes its physical address, mailing address (e.g., PO box), or name, your agency head needs to report the change to PERS in writing on your organization's letterhead. Contact your Employer Service Center (ESC) representative for assistance.

Organization merger

When a PERS-participating organization merges with another organization, ESC assists with the merger. First, provide ESC with board meeting minutes or a board resolution.

The next steps depend on if the merger is an acquisition in which one organization's identity remains or if it is a consolidation that results in a new entity. This situation may require a new coverage agreement. Email copies of documents to ESC at PERS.EDX.Support@pers.oregon.gov.

Web administrator information

Go to [employer reporting guide 3, Reporter Roles and EDX Access](#), Part 1 — The Web Administrator for instructions on:

- Changing your email address or password (section "Updating Your Account Information").
- Making changes to the EDX Contact List (section "Managing the Contacts List").
- Activating, unlocking, and inactivating employer reporter accounts (section "Managing Employer Reporter Accounts").

Employer reporter information

Go to [employer reporting guide 3, Reporter Roles and EDX Access](#), Part 2 — The Employer Reporter, section "Updating Your Account Information," for instructions on:

- Changing your email address or password.
- Changing your expired password.
- Adding an employer to your list.

The screenshot shows a web form titled "UPDATE MY ACCOUNT PROFILE". Below the title is a subtitle: "This page will allow you to update your Web account information." and a note: "* - Indicates required fields." The form contains several input fields: "User ID" (a light blue field), "Password*" (a white field with a "Password Requirements" link below it), "Confirm Password*" (a white field), "First Name" (a light blue field), "Middle Initial" (a light blue field), "Last Name" (a light blue field), "Email*" (a white field), "Confirm Email*" (a white field), and "Employer Numbers*" (a white field containing the text "04260,02880").

Changing employee demographic information

While a PERS member is actively employed by their PERS-participating employer, changes to their demographic information go through their employer, as explained in this section.

Exception: To change a member's date of birth because of a clerical error, you must submit a DCR to request that ESC make this change. The EDX system will not allow you to make this change via a Detail 1 record.

PERS members who no longer work for a PERS-participating employer request changes by submitting an [Information Change Request form \(PDF\)](#) to PERS.

Name

When an employee changes any part of their name (e.g., they get married or divorced or legally change their name for any reason), you need to change their name in their PERS account.

1. Create a new or edit an existing Demographics and Adjustment report.
2. Create a new Detail 1 Member Demographics record for this employee.
3. Fill in the required fields as shown in [employer quick-reference guide Detail 1 Member Demographics Fields](#), section "Reporting an Employee Name Change."
4. Save the record.

DETAIL 1 - MEMBER DEMOGRAPHICS:	
SSN	<input type="text" value="*****"/>
Status Code	00 - No Change in Status ▼
Status Date	06/06/2025 (MM/DD/YYYY)
Last Day Service	<input type="text"/> (MM/DD/YYYY)
Old SSN	<input type="text"/>
First Name	JUNE
Last Name	FLOWERS
Middle Name	<input type="text"/>
Name Change Indicator	Y

Address

To change an employee's mailing address, submit a Detail 1 record as follows.

1. Create a new or edit an existing Demographics and Adjustment report.
2. Create a new Detail 1 Member Demographics record for this employee.
3. Fill in the required fields as shown in [employer quick-reference guide Detail 1 Member Demographics Fields](#), section "Reporting an Employee Change of Address."
4. Save the record.

Gender

Changing gender to male or female

If the employer reporter makes a mistake choosing the gender on an employee's new hire record, they need to submit a DCR to ask PERS to change it.

Follow the instructions in [employer guide 20, *Creating a DCR*](#), section "How to Create a DCR." In the Comments box, ask PERS staff to change the employee's gender to male or female. Explain that this is to correct a clerical error.

Changing gender to nonbinary/other

For employees who do not identify as strictly female or male, follow this process to change their gender.

1. When completing the Detail 1 record to hire them, select Female or Male in the Gender field. It's a required field, so you must select one of these options to get the record to post.
2. Once the record posts, create a Demographic Correction Request (DCR) for that employee. For DCR instructions, read [employer reporting guide 20, *Creating a DCR*](#).
3. In the Employer Comments box, ask PERS staff change the employee's gender to nonbinary/other.

To see this process demonstrated, watch the video "[Reporting a New Employee.](#)"

Social Security number

Clerical error

To correct a clerical error in an employee's Social Security number (e.g., someone entered it wrong on the Detail 1 new-hire record), submit a DCR and ask ESC to make the correction (see the instructions on the next page).

A Detail 1 record allows you to correct an employee's Social Security number (see image at right), as explained in [quick-reference guide *Detail 1 Member Demographics Fields*](#), section "Correcting an Employee's Social Security Number (SSN)."

However, if you change it yourself and make a mistake, you could inadvertently create a second account for the employee.

DETAIL 1 - MEMBER DEMOGRAPHICS:	
SSN	111223333
Status Code	00 - No Change In Status
Status Date	06/06/2025 (MM/DD/YYYY)
Last Day Service	 (MM/DD/YYYY)
Old SSN	111223334

Two accounts under two Social Security numbers

If you discover that an employee has two PERS accounts under different SSNs, do not submit a Detail 1 record to correct the SSN. Instead, inform your Employer Service Center representative of the error by submitting a DCR.

Instructions

Create a DCR by choosing one of the methods in [employer reporting guide 20, *Creating a Demographic Correction Request*](#), section “How to Create a DCR.”

The only field you need to fill in is the Employer Comments field, in which you will explain that you have discovered two accounts under two different SSNs for the same employee.

Indicate which SSN is correct and which is incorrect and what document you used to confirm this. If you do not know which is correct, then say so. PERS staff will do additional research for confirmation.

Click **Save**.

Examples

Here are two sample scenarios that could cause an employee to have two accounts:

1. An employer reporter submits a new-hire record with an error in the SSN. Another employer reporter submits a new-hire record for that same employee with the correct SSN. They both begin submitting wages to the account they created.
2. An employer makes an error in the SSN when filling out the new-hire record. Later, when they enter the SSN to create a wage record for the employee, they get the error message,

“The SSN entered is not found to have a record of open employment with this employer.”

So, they submit another new-hire record assuming that a Detail 1 record had not been submitted with the correct SSN.

If you discover an employee who has two accounts with very similar SSNs, alert ESC as soon as you discover the error. They will need to merge the two accounts under the correct SSN and make any necessary retroactive corrections.

Changing employee qualification status

From qualifying to non-qualifying

The way you handle this status change depends on if:

- It is caused by a planned adjustment in job responsibilities, meaning the change is proactive. Read “Changing Status Proactively (Going Forward)” below.
- It is caused by the employee not having enough hours to meet the 600-hour requirement, meaning the change is retroactive. Read “Changing Status Retroactively (Going Backward)” below.

Checking employee annual hours

It is good practice to check the hours of your part-time qualifying employees toward the end of the calendar year. If they are at risk of not reaching the 600 hours required to maintain their qualifying status, EDX will not warn you.

To check their hours, run an Eligibility Report called Members Approaching Qualifying Hours. Instructions are in [employer reporting guide 24, *Running Reports*](#), “Eligibility Report” section.

Changing status proactively (going forward)

If a qualifying employee’s job requirements change and the job will now require fewer than 600 hours/calendar year (e.g., an employee is changing to a part-time schedule), you need to **terminate** the employee and **rehire** them with the new qualification status.

Follow the instructions in [employer guide 9, *Reporting Wages for a Qualifying Employee*](#), section “Qualification Status Changes,” subsection “When Qualifying Position Changes to Non-Qualifying Going Forward.”

Changing status retroactively (going backward)

If a qualifying employee does not reach 600 hours in a calendar year, that requires a status change that only PERS can make. To request the change, submit a DCR as explained in [employer guide 9, *Reporting Wages for a Qualifying Employee*](#), section “Qualification Status Changes,” subsection “When Qualifying Employee Does not Reach 600 Hours/Year.”

From non-qualifying to active service

If an employee in a non-qualifying position works up to or over 600 hours in a calendar year, they become eligible to earn PERS benefits for that year. Their position type in the PERS system needs to change and then their wages need to be reported as qualifying.

Checking employee annual hours

There are three ways you can find out if an employee in a non-qualifying position has reached 600 hours. For complete instructions, read [employer guide 10, Reporting Wages for a Non-Qualifying Employee](#), section “Changing From Non-Qualifying to Qualifying Status.”

1. Run an Eligibility Report.
2. Run a Year-to-Date Wage and Contribution Summary Report.
3. Receive an error message on your wage record in EDX:

S – Employee has 600 or more hours of service reported in the plan year; wage code '02 – Regular/Non-Qualifying' may not be used.

Changing status to active service

Because this particular change is retroactive, only PERS staff can make it. The change will be effective back to their hire date or the beginning of the year, whichever is later.

To request the change:

1. Submit a DCR requesting to have the employee's position type changed from nonqualifying to active service for that calendar year.
2. Once the status is changed, begin reporting the employee's wages as 01 – Regular Wages instead of 02 – Regular/Non-Qualifying. The employee must have completed their wait time (i.e., have six months of service in that qualifying year) before you start including IAP contributions of 6% of subject salary on their wage records.

For more information about this process, read [employer guide 10, Reporting Wages for a Non-Qualifying Employee](#), section “Changing From Non-Qualifying to Qualifying Status,” subsection “When an Employee Reaches 600 Hours Working for One Employer” or “When an Employee Reaches 600 Hours Working for Multiple Employers” (with multiple employers, all employers need to report the employee's status change).

Changing employee employment status

Termination, retirement, or death

When your employee is leaving your organization to take another job, retire, or because of death, you need to do the following steps in order:

1. **Submit the employee's final wages and hours.**

Instructions for reporting the wages and hours on a Detail 2 Wage and Service record are in [employer guide 5, Creating a Record](#).

Remember that if they take paid time off for any of their final days, report that time as regular time. If they take a lump sum payout, report it as explained in the [September 2024 Employer News "EDX Tip: How to Report Lump Sums"](#) (see image below).

2. **Submit the employee's 02 Terminated or 10 Deceased record** as explained in [employer guide 15, Reporting a Termination or Death](#).

The Detail 1 termination record includes a portion of the employee's unused sick leave hours if they are a Tier One or Tier Two employee (for OPSRP you can enter 0). This number requires a calculation explained in [employer reporting guide 17, Calculating Unused Sick Leave Hours at Termination or Retirement](#).

3. **In case of death, you may have extra responsibilities**, which are explained in [employer guide 15, Reporting a Termination or Death](#), section "Reporting an Employee Death."

Lump sum payoff

Lump-sum payments that an employee can receive include accrued compensatory time and other accrued leave.

How to report

Whether these payments are subject or nonsubject salary depends on the type of payment and if it's being paid to a Tier One, Tier Two, or OPSRP member.

Tier One: A lump sum payoff is subject salary. It is included in FAS.

Tier Two: Same as Tier One.

OPSRP: A lump sum payoff is nonsubject salary. It is **not** included in FAS.

Where to report

In the Lump Sum Payoff field of a Detail 2 record. If member is receiving more than one lump-sum payment (not vacation pay), the payments can be combined.

Reported Wage Code	01 - Regular wages
Subject Salary (Regular)	
Subject Salary (Overtime)	
Non-Subject Salary	
Lump Sum Payoff	
Lump Sum Vacation Payoff	

Lump sum vacation payoff

Vacation leave includes any type of accrued personal time off (PTO) that the employer identifies as vacation leave.

How to report

Whether a lump sum vacation payoff is subject or nonsubject salary depends on if it's being paid to a Tier One, Tier Two, or OPSRP member.

Tier One: A lump sum vacation payoff is subject salary. It is included in FAS.

Tier Two: A lump sum vacation payoff is subject salary. It is **not** included in FAS.

OPSRP: A lump sum vacation payoff is **not** subject salary. It is **not** included in FAS.

Where to report

There is a separate field on a Detail 2 Wage and Service record to report a lump-sum vacation payoff.

Reported Wage Code	01 - Regular wages
Subject Salary (Regular)	
Subject Salary (Overtime)	
Non-Subject Salary	
Lump Sum Payoff	
Lump Sum Vacation Payoff	

Excerpt from September 2024 *Employer News* "EDX tip: How to Report Lump Sums."

Changing employee job type

When your employee is staying with your organization but starting a new type of job, follow the applicable instructions below.

Job with a different job classification

If your employee is changing to a job with a different job classification, you need to submit a DCR, as explained in [employer reporting guide 20, *Creating a DCR*](#). Only PERS staff can change an employee's PERS job classification.

For example, Roberta works in the Records Department of the city police department. She applies for an open police officer position and gets the job. On her last day as a records clerk, the employer reporter sends a DCR to PERS requesting that ESC change Roberta's job classification from General Service to Police and Fire effective on Roberta's first day in the new position.

This change creates a new position in Roberta's work history. Her qualification status was already qualifying so the job classification is the only change made to her account.

Note: Roberta will have new benefits to learn (see [employer guide 1, *Overview of PERS*](#), Appendix section "Police and Fire Job Class"). Also, the employer will see a higher Police and Fire contribution rate charged on Roberta's wages.

Job classifications are listed and defined in the [Job Classification Codes quick-reference guide](#).

Job with a different qualification status

If an employee changes to a job with a different qualification status than their current job — that is, if their current job is qualifying and the new job is non-qualifying or vice versa — report that change in two steps: report their termination from the old job and then report their hiring to the new job.

This creates a new job segment with the new employment information.

1. Submit a Detail 1 record with a 02 Terminated status code, as explained in [employer guide 15, *Reporting a Termination or Death*](#).
2. Submit a Detail 1 record with either a 01 Qualifying New Hire or 15 Non-Qualifying Hire status code, as explained in [guide 7, *Reporting a New Employee*](#).
3. Begin reporting wages in line with the new qualification; that is, 01 Regular Wages or 02 Regular/Non-Qualifying.

Job type change caused by working over or under 600 hours

If a qualifying employee does not reach 60 hours in a calendar year, or if a non-qualifying employee surpasses 600 hours in a calendar year, you need to submit a DCR requesting that ESC change your employee's position. Instructions are in section "[Changing Employee Qualification Status](#)" in this guide.

Changes active members can request for themselves

When a PERS member is employed by a PERS-participating employer, all changes to their job status, job type, and demographic information go through their employer. It is important that your employees inform you every time their address, name, email, or phone number changes so their PERS account is accurate.

However, there are a few changes that active members can make themselves or request through PERS. You can share the links below with your employees, as needed.

Choose or change a preretirement beneficiary

When a member gets married, adds to their family, has a death in the family, or gets divorced, they may need to change their preretirement beneficiary.

A preretirement beneficiary is someone who would receive all or a portion of the member's PERS benefits if the member dies before retirement. Find complete information and links to forms on the employers' [Designating a Preretirement Beneficiary webpage](#) and on the members' [All About Beneficiaries webpage](#).

Tier One and Tier Two members: By law, these members have a few options for their pension and IAP preretirement beneficiaries.

Oregon Public Service Retirement Plan (OPSRP) members: By law, these members may only choose a beneficiary for their IAP account. The beneficiary for their pension may only be their spouse.

Change the fund in which their IAP is invested

Each September, members who have not retired from their Individual Account Program (IAP) can participate in the Member Choice Program, which allows them to pick a different target-date fund (TDF) for their IAP account. Learn more about target date funds on the members' [IAP Target-Date Funds webpage](#).

For instructions, direct your employees to the [How to Make an IAP Target-Date Fund Election Online webpage](#).

Inform PERS of divorce

Establishing the PERS benefit settlement in a divorce decree can involve intricate alterations to a member's PERS account. To understand the divorce process, fees, and required actions, PERS members should visit the members' [Divorce webpage](#).

Apply for PERS disability benefits

PERS offers disability benefits to members who become too sick or injured to work.

For Tier One and Tier Two members who are approved, the benefit is an early retirement.

For OPSRP members who are approved, the benefit is 45% of their last full month's gross salary prior to their disability as long as they remain disabled and are not working. It is not a retirement, however. When they reach retirement age, disability benefit recipients need to apply for retirement.

Complete information for employers is in [employer guide 14, *Disability Benefits*](#).

Information for members is on the [Disability webpage](#).

Apply for retirement

Employees apply for retirement by filling out a paper form and submitting it to PERS up to three months before their retirement date.

Filling out the form requires a lot of decisions. To help you guide your employees through the process, read [employer guide 16, *Reporting a Retirement*](#), Part 2 — Helping Employees Prepare for Retirement Throughout Their Careers,” subsection “Stage 7: Three Months Before Retirement.”

Employees will fill out one of these retirement applications:

- [Tier One/Tier Two Retirement Application \(PDF\)](#).
- [OPSRP Retirement Application \(PDF\)](#).

How inactive, retired, and nonmembers can request changes

When someone is no longer working for a PERS-participating employer (or never did work for a PERS employer, as in the case of a beneficiary or alternate payee), they need to make changes through the Online Member Services portal or by submitting a form to PERS.

Inactive members

Inactive members are PERS members who are vested* but are not currently working for a PERS-participating employer.

Address change

Inactive members can update their mailing address in their [Online Member Services \(OMS\) account](#) or by submitting the [Information Change Request form \(PDF\)](#).

Change of date of birth (to correct clerical error)

For this specific type of change, inactive members submit a [Date of Birth Change Request form \(PDF\)](#).

Change of all other information

The [Information Change Request form \(PDF\)](#) is how inactive, retired, and nonmembers request a change to their Social Security number (to correct clerical error), name, address, or benefit payment method (i.e., from direct deposit to paper check). It includes an option to request a 1099-R for a certain year.

Withdrawing PERS membership

This is an important decision with a lot of rules and consequences to consider. If an inactive member is considering withdrawing their IAP funds and canceling their PERS membership, direct them to the [Withdrawal Information webpage](#).

Information Change Request			
This form is for PERS retirees (including those working for a PERS employer), inactive members, disability recipients, beneficiaries, and alternate payees to submit information changes to PERS. Active members working for PERS-participating employers: submit information changes to your employer(s).			
Section A: Applicant information			
First name	MI	Last name	PERS ID
Any information provided below will be updated in the system of record.			Social Security number (SSN)*
Home phone number	Cell phone number	Personal email (with no spaces)	

Retired members

PERS retirees must inform PERS directly of any demographic changes, even if they are working for a PERS-participating employer.

Address change

Retired members can update their mailing address in their Online Member Services (OMS) account or by submitting the form linked below. [OMS login](#).

Oregon residency status change (Tier One only)

Tier One retirees need to inform PERS if they move into or out of Oregon. To do so, they submit the [Residency Status Certification form \(PDF\)](#).

Change of all other information

Retired members must inform PERS of changes to their demographic information by submitting an [Information Change Request form \(PDF\)](#).

If they are working for a PERS-participating employer, the employer reporter cannot change the retired employee's information by submitting a demographic record like they would for an active employee. If they try, the employer will get one of these error messages on the record:

F – Addresses reported on Retired members are not stored.

S – Cannot change SSN or Name because this member is retired, deceased, or their account is closed.

Beneficiaries and alternate payees

Beneficiaries and alternate payees request changes to their personal information by submitting the [Information Change Request form \(PDF\)](#) to PERS.

A beneficiary is someone who is receiving the retirement benefits of a deceased PERS member.

An alternate payee is a spouse, former spouse, or registered partner who has a right to receive all or a portion of the retirement benefits of a PERS member. In the case of a divorce, this could be a former spouse who was awarded a portion of retirement benefits in a divorce decree.

*When a member is vested in their pension, they are guaranteed to receive the pension at retirement. To vest in PERS, a member must work in a qualifying position for five years. The years do not have to be consecutive, but there cannot be a break in the years of more than five years.