OREGON PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

24

Running **Reports**

Employer Reporting Guide

How to run EDX reports: Inactive Employment, Eligibility, Year-to-Date Wage and Contribution, Status Check, and IAP Voluntary Contribution.

Employer Service Center

Contents

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Introduction

EDX can run five types of reports, which are explained in detail in this guide.

Report name	Information it provides
Inactive Employment	Employees for whom you haven't reported wages in at least the last three months.
Eligibility	Employees whose eligibility to earn PERS benefits may have changed.
Year-to-Date Wage and Contribution	Employee wages and contributions paid on those wages for a calendar year.
Status Check	PERS-membership background and voluntary-contribution status of new employees. A voluntary contribution is an election an employee can make in Online Member Services (OMS) to make up the amount being redirected from their Individual Account Program (IAP) account to their Employee Pension Stability Account (EPSA) because of the Member Redirect program.
IAP Voluntary Contribution	Employees who have opted to make contributions to their IAP account to make up for the amount redirected to their EPSA.

Learn more

Member redirect

Employee Pension Stability Account (EPSA)

Voluntary contributions

Inactive Employment report

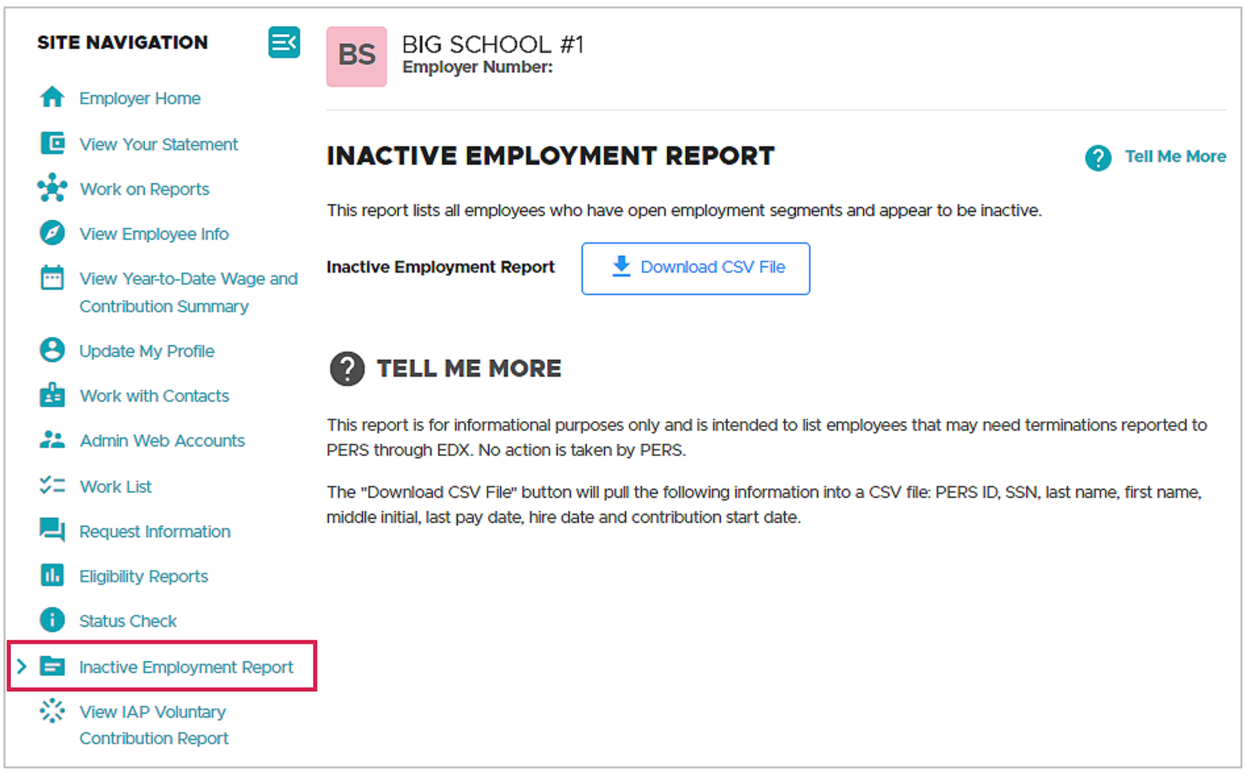
About the report

Do you have employees who are no longer actively working for you and have not been terminated in EDX yet? If you are not sure of the answer to this question, run an Inactive Employment Report to identify employees who have had no wages reported within the last 90 days (i.e., inactive).

Note: The report does not show PERS retirees who have returned to work and kept their retired status.

Running the report

1 Select **Inactive Employment Report** from the Site Navigation list.



2 Click the **Download CSV File** button. This will pull the following information about any inactive employees into a comma separated values (CSV) file:

- PERS ID.
- Social Security Number.
- Last name, first name, middle initial.
- Last pay date.
- Hire date.
- Contribution start date.

3 Once it downloads, click **Open** to open the report in Excel or **Save** to save the Excel spreadsheet to a destination you choose. In Excel, you can manipulate and save the data.

4 If any employee on the list is no longer actively working for you, submit a Detail 1 record with a 02 - Termination wage code to end the open employment segment.

Eligibility report

About the report

An Eligibility report lists employees whose eligibility for PERS benefits may be changed because they have worked more or fewer hours than expected. If you employ part-time employees, it is a good idea to run both types of eligibility reports toward the end of each calendar year.

Two types of eligibility reports

The **Members Approaching Qualifying Hours** report shows members who:

- Have 550 or more hours with all employers in the specified year.
- Have two or more Detail 2 wage code 02 non-qualifying records or three or more records with no contributions.
- Are not retired in the specified year.

The **Members With Contributions Who May Not Qualify** report shows members who:

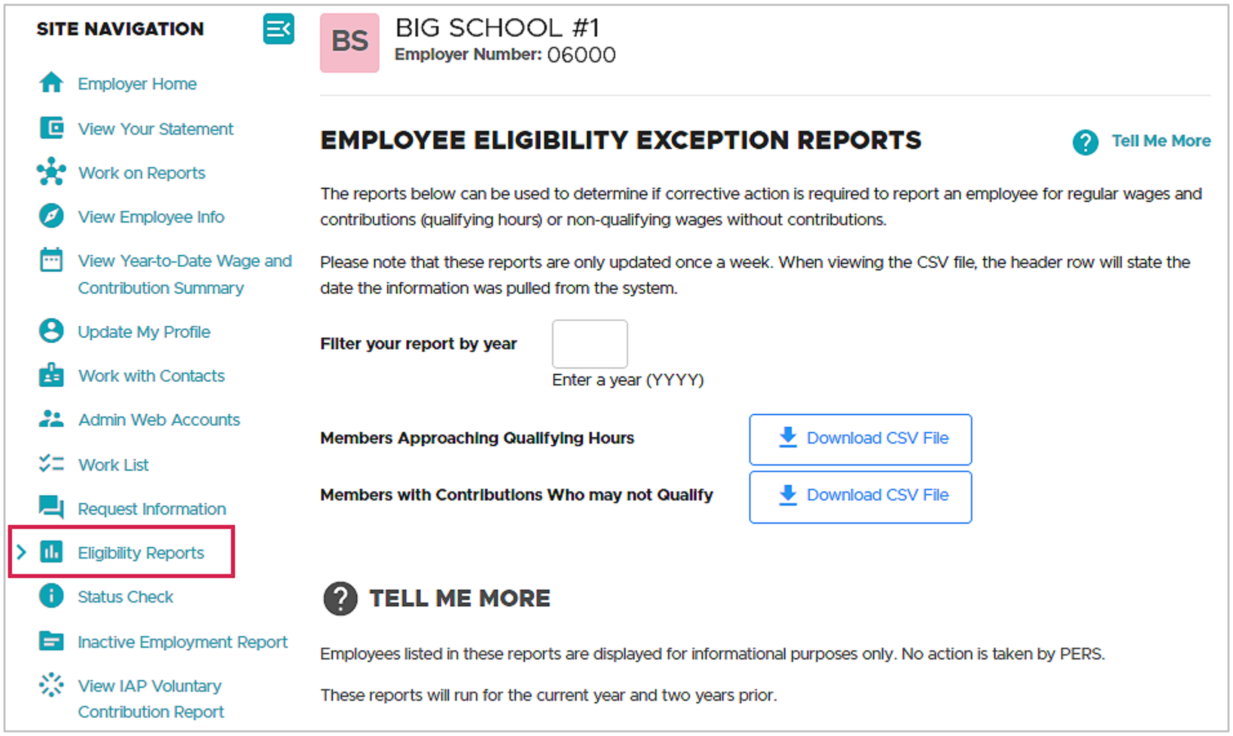
- Have fewer than 600 hours with all employers in the specified year.
- Have contributions reported in the specified year.
- Are not retired in the specified year.

This report lists all employees who have not reached their hours as of that date. It does not adjust for employees who have only worked a portion of their year and, although they have not yet met their minimum hours, are still eligible for contributions.

To understand what to do for qualifying employees who did not reach 600 hours because they were hired partway through the year, read the Determining Qualification for a Partial Year quick-reference guide.

Running the report

1 Begin by selecting Eligibility Reports from the Site Navigation.



2 Enter the current year in the **Filter your report by year** box.

3 Choose **Download CSV File** for the report type you want:

- The Members Approaching Qualifying Hours report.
- The Members With Contributions Who May Not Qualify report.
- Or both reports.

4 If any of the employees in these reports need their position type changed to active service or non-qualifying service based on hours worked in the calendar year, submit a DCR asking PERS to make this change. For instructions, refer to employer guide 20, *Creating a Demographic Correction Request (DCR).*

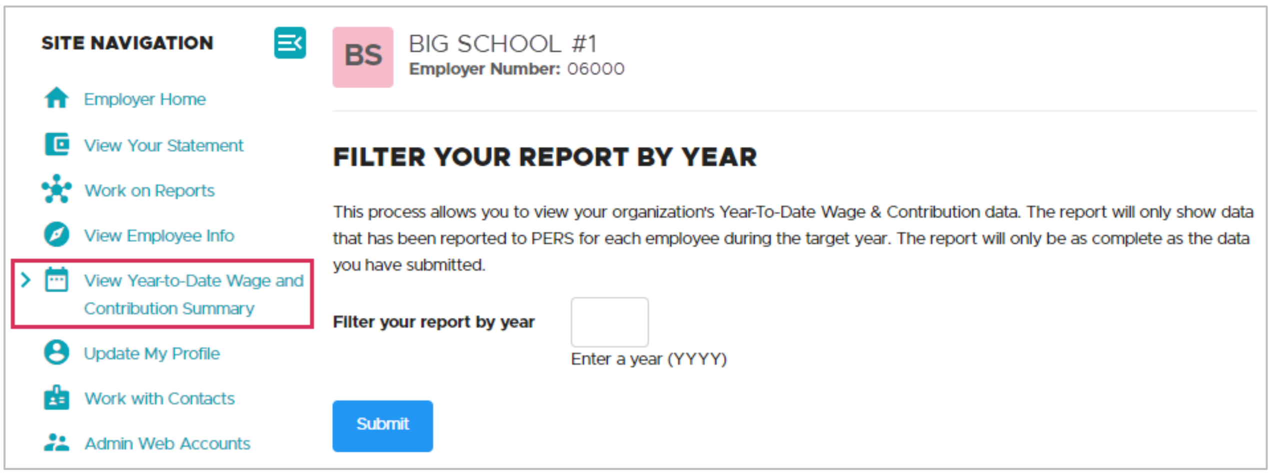
Year-to-Date Wage and Contribution Summary report

About the report

The Year-to-Date Wage and Contribution Summary report shows wage and contribution data for all your employees for a particular year.

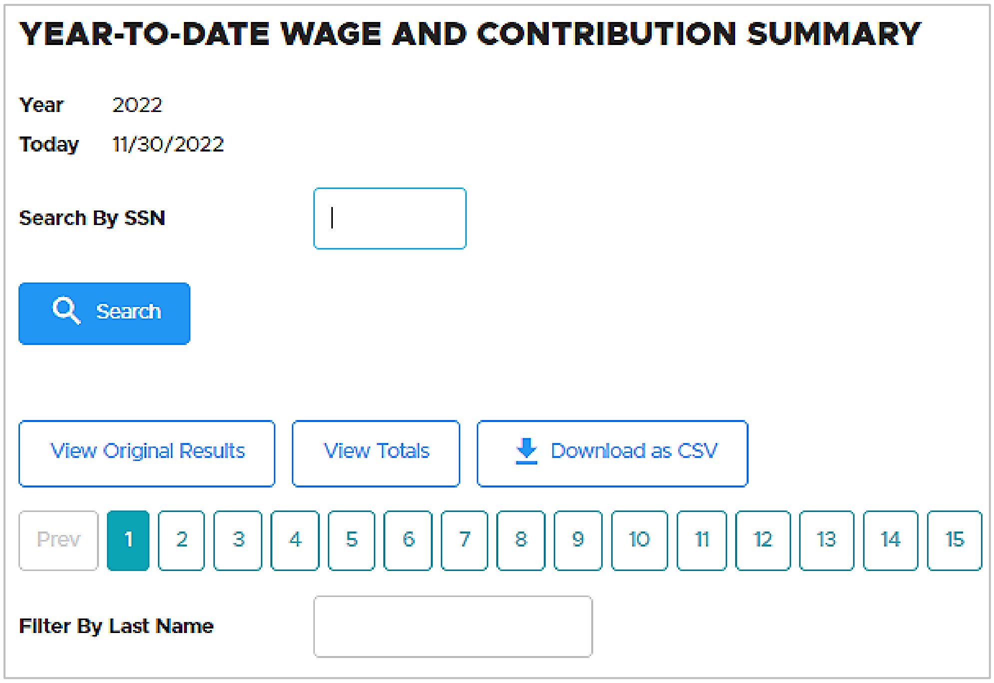
Running the report

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 Year-to-Date Wage and Contribution Summary report lists all Detail 2 wage records, regardless of whether they have posted.



On this screen, you can:

- Search for an employee by entering their Social Security number (SSN) (no dashes) in the **Search By SSN** box and clicking **Search**.
- Search for an employee by name by entering their last name in the **Filter By Last Name** box and then clicking outside the box.
- View total hours, salary, and more by clicking **View Totals**.
- Download to an Excel file by clicking **Download as CSV**.
- Return to the summary screen by clicking **View Original Results**.
- Sort data by any of the header columns.

Continued

- Scroll down to see employees listed in order of SSN. Click on an employee's SSN to see their detailed information.

  Suspended records and valid errors are referred to on the report as "Not Posted" (abbreviated as Not Pstd).

  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.

[illegible]	[illegible]	[illegible]	10/17/2016	05/01/2017	Posted	508.56	0.00
[illegible]	[illegible]	[illegible]	11/01/1996	05/01/1997	Posted	1,192.01	0.00
					Not Pstd	184.00	N/A
					Member Subtotal:	1,376.01	0.00
[illegible]	[illegible]	[illegible]	08/15/2013	03/01/2007	Posted	945.02	0.00
[illegible]	[illegible]	[illegible]	08/15/2016	03/01/2016	Posted	1,024.53	0.00
[illegible]	[illegible]	[illegible]	08/15/2022	03/01/2023	Posted	244.01	0.00
[illegible]	[illegible]	[illegible]	09/08/2020	04/01/2021	Not Pstd	24.00	296.50

3. Once you find the employee you need to work with, click their SSN to open the person detail screen. This screen lists their posted and unposted records for that year. It's a wide screen, so you may need to scroll to the right to see all columns.
4. To correct and repost an unposted record, make a note of the report date. In the **Work on Reports** function, find that unposted report date and edit the record.

YEAR-TO-DATE WAGE AND CONTRIBUTION PERSON DETAIL

Return to Summary

Year	2022
Today	11/30/2022
SSN	[illegible]
Member Name	[illegible]
Contribution Start Date	05/01/1997

Download as CSV

POSTED RECORDS

Report Date	Pay Date	Wage Code	Transaction Type	Work Period Begin Date	Work Period End Date	Hours Reg	Hours OT	Subj Sal Reg	Subj Sal OT	Non Subject Salary	Lump Sum Payoff	Lump Sum Vac Payoff	Gross Salary	MPAT	MPPT	EPPT	Unit Contributions	Optional ER IAP	IAP Vol Contribs
01/31/2022	01/20/2022	01	Regular wages			168.00	0.00	$10,926.40	$0.00	$0.00	$0.00	$0.00	$10,926.40	$0.00	$655.58	$0.00	$0.00	$0.00	$0.00
02/28/2022	02/18/2022	01	Regular wages			160.00	0.00	$10,926.40	$0.00	$0.00	$0.00	$0.00	$10,926.40	$0.00	$655.58	$0.00	$0.00	$0.00	$0.00

UNPOSTED RECORDS

Report Date	Pay Date	Wage Code	Transaction Type	Work Period Begin Date	Work Period End Date	Hours Reg	Hours OT	Subj Sal Reg	Subj Sal OT	Non Subject Salary	Lump Sum Payoff	Lump Sum Vac Payoff	Gross Salary	MPAT	MPPT	EPPT	Unit Contributions	Optional ER IAP	IAP Vol Contribs
08/31/2022	08/19/2022	01	Regular wages			184.00	0.00	$14,462.58	$0.00	$0.00	$0.00	$2,716.68	$14,462.58	$0.00	$867.75	$0.00	$0.00	$0.00	$0.00

Status Check report

About the report

Before reporting a new-hire to PERS, you need to do a status check. This check provides important information that ensures you set up your new employee correctly in EDX.

Two options for the report

You have two options for doing a status check:

- An automated status check in EDX, described in this section.
- A live status check with an ESC representative.

This chart compares the information you can gain from each type of status check. The EDX status check does not give the whole picture. This is why ESC recommends you request a live status check every time you hire a new employee.

Information needed to report a new employee to PERS	EDX automated status check	ESC live status check
Is individual a PERS member?	✓	✓
Do they need to serve a wait time?	✓	✓
Is employee participating in voluntary contributions?	✓	✓
Are they currently qualifying or non-qualifying?*		✓
Do they work for other employers?		✓
Are they a PERS retiree?		✓
If they are a retiree, do they have an annual hour limit?**		✓

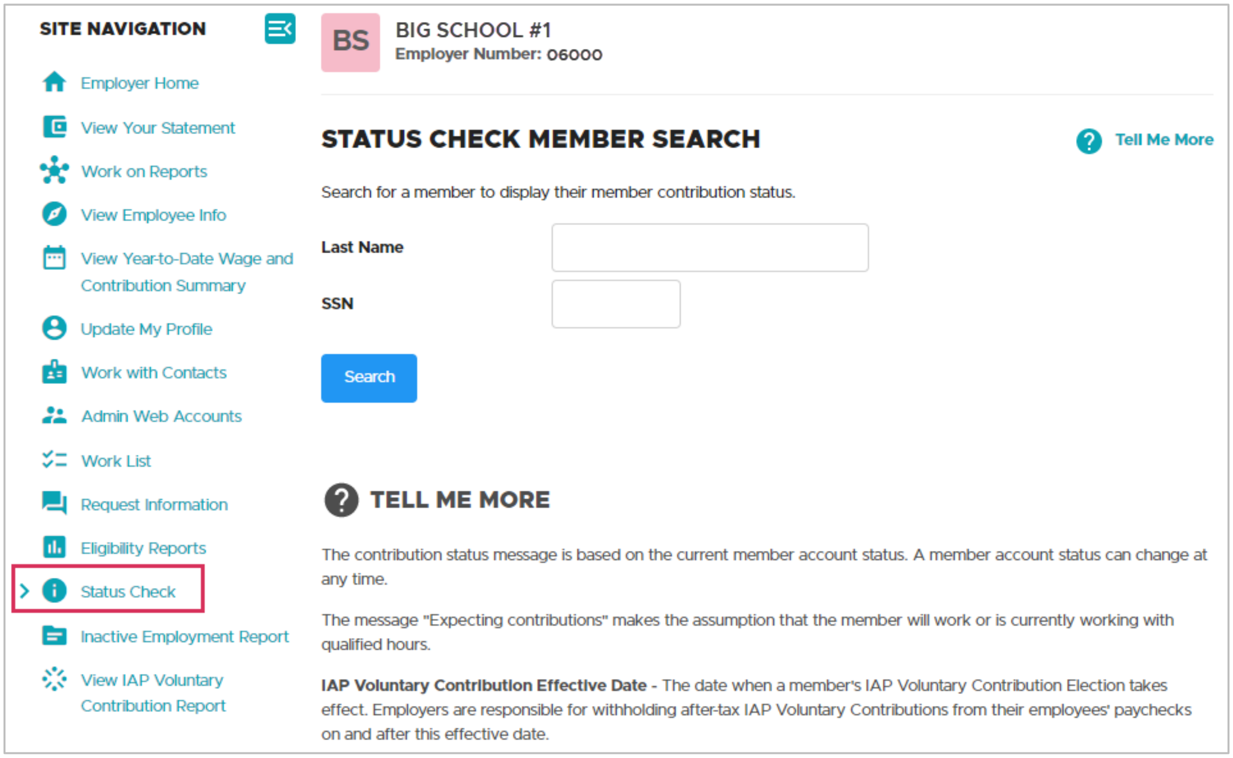
*Qualifying means they are a PERS member who qualifies to earn PERS benefits by working at least 600 hours a year for a PERS-participating employer. If you are hiring an employee who already has a qualifying status, they have either just left a qualifying position or they work more than one job. Non-qualifying means they work fewer than 600 hours a year.

**PERS retirees who return to work for a PERS-participating employer are allowed to work only up to a limited number of hours/year if they retired early and did not take a six-month break from working for any PERS employers. PERS disability retirees who reach their normal retirement age are allowed to work but are also limited. Those who retired at their normal retirement age and early retirees who took a six-month break have no limit. Learn more in employer guide 8, *Hiring a Retiree*.

Running the report

The Status Check Member Search screen allows you to view an employee’s contribution status to determine if PERS is expecting contributions for the employee or if you should contact PERS to discuss the employee’s contribution status.

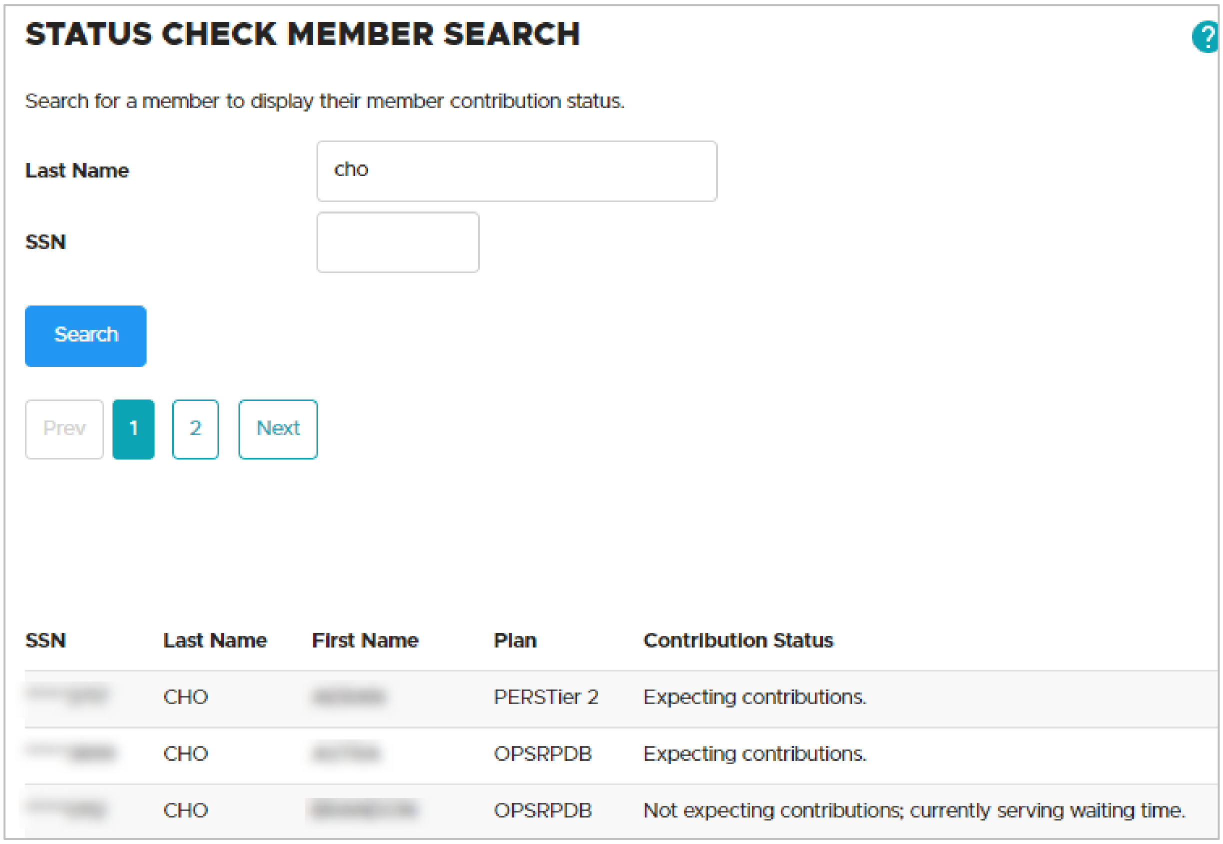
1 Select the **Status Check** function. The Status Check Member Search screen appears.



2 Enter the member's last name or Social Security number (SSN) and click **Search**.

The Status Check Member Search screen displays the contribution status for that member and the PERS program in which they are enrolled. However, if you conduct a search based on last name only, you could get a list of results possibly pages long.

Click on a page number or **Next** or **Prev** button to advance from page to page.



Columns

Plan

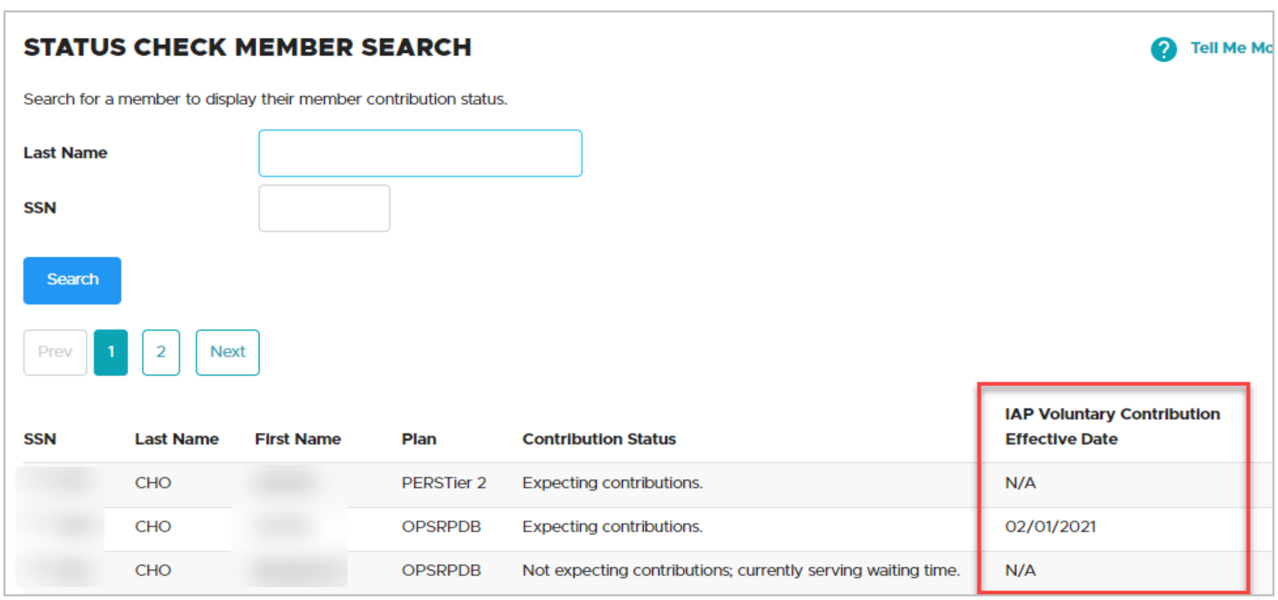
The individual's current membership: Tier One (PERSTier 1), Tier Two (PERSTier 2), or OPSRP (OPSRPDB, which stands for OPSRP Defined Benefit plan).

Contribution Status

- **Expecting contributions**: The employee is eligible for contributions if they (1) are hired into a qualifying position (i.e., a position that requires 600 or more hours per calendar year) or if they work at least 600 hours in a calendar year and (2) have served their six-month wait time.
- **Not expecting contributions**: The employee is in a non-qualifying position (i.e., one that requires fewer than 600 hours a year for all employers combined) or is not yet eligible to earn benefits.
- **Currently serving waiting time**: The employee is new and is still serving their six-month wait time. After they successfully serve that time, their status will change.
- **Must serve new waiting period**: If you don't know why the employee needs to serve a new waiting period (aka wait time), contact PERS. It could be due to loss of membership or withdrawal from membership.

IAP Voluntary Contribution Effective Date

Scroll to the right to see this column. If an employee has opted into voluntary contributions through their OMS account, the effective date will display in this column.



STATUS CHECK MEMBER SEARCH

Tell Me Mo

Search for a member to display their member contribution status.

Last Name

SSN

Search

Prev 1 2 Next

SSN	Last Name	First Name	Plan	Contribution Status	IAP Voluntary Contribution Effective Date
	CHO		PERSTier 2	Expecting contributions.	N/A
	CHO		OPSRPDB	Expecting contributions.	02/01/2021
	CHO		OPSRPDB	Not expecting contributions; currently serving waiting time.	N/A

IAP Voluntary Contribution report

About voluntary contributions

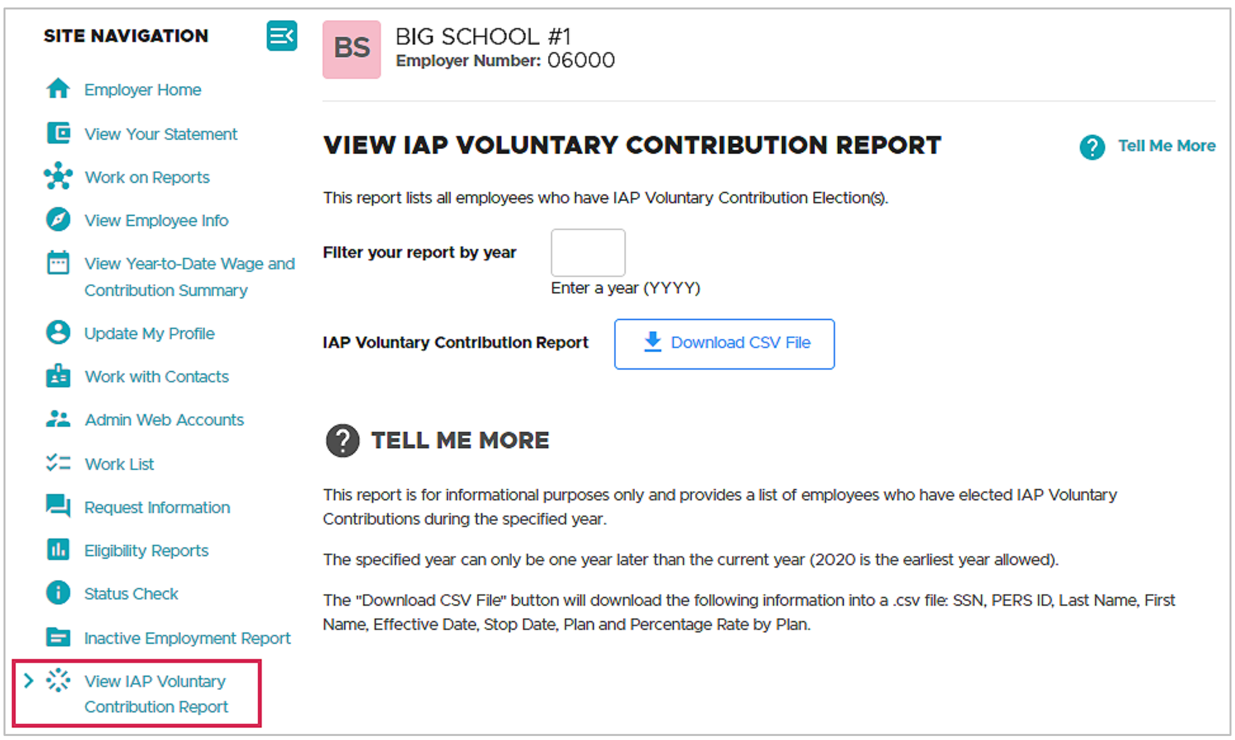
The voluntary contribution option is part of the Member Redirect program. Member redirect takes a percentage of an employee's 6% Individual Account Program (IAP) contribution and redirects it into the employee's Employee Pension Stability Account (EPSA). The money deposited and earned in this account will be used to help pay for the employee's pension when they retire. The program helps reduce employer costs by offsetting a portion of their contribution rate.

To sign up for voluntary contributions, employees can follow the instructions on the How to Elect and Update IAP Voluntary Contributions Online webpage.

To learn the steps to take after an employee elects to begin (or stop) voluntary contributions, read the How to Manage an Employee's Voluntary Contribution webpage.

Running the report

To find out which employees have opted to make voluntary contributions, choose View IAP Voluntary Contribution Report from the main menu.



On the View IAP Voluntary Contribution Report screen, enter the search year for the report you want and click **Download CSV File**.

This produces a report of all employees who elected to start or stop voluntary contributions organized by membership plan.

ER#	Year 2021	SL3					
SSN	PERS ID	Last Name	First Name	VCED	VCSD	Plan	% by Plan
				7/1/2020		OPSRP	0.75
				7/1/2020		TIER 1	2.5
				12/1/2020	4/1/2021	TIER 2	2.5
				11/1/2020		OPSRP	0.75
				4/1/2021		OPSRP	0.75
				7/1/2020		OPSRP	0.75
				12/1/2020		OPSRP	0.75

Columns

VCED

Voluntary contribution effective date. The date their voluntary contribution began.

VCSD

Voluntary contribution stop date. The date an employee opted to stop making voluntary contributions.

Plan

The PERS plan of which the employee is a member.

% by Plan

The percentage of the employee’s 6% IAP contribution being redirected into their EPSA.